



NATIONAL  
RURAL HEALTH  
RESOURCE CENTER

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# National Rural Health Resource Center

## RHITND Business Planning Activity Introduction and Case Study Practice



## Activity Objective

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- Introduce a business planning tool
- Use a case study to practice using the tool



## Business Planning Template

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- Checklist of guided questions
- Good fit with a systems approach



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## Needs Assessment

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- What is the **job to be done** or **problem to solve**?
- What are their struggles in doing the job or solving the problem?
- What would they like or are expecting with a product or service solution?





## Describe Product or Service

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- What is the business product or service that will meet the needs of your members
- AND is aligned with the networks mission, vision, and strategic objectives?





## Experience & Relationship

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- What experience do you want your members to have while they are receiving or using your product or service?
- What relationship do your members expect you to establish and maintain with them when they receive or use your product or service?





## Communication & Delivery

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- What communication methods will you use with your members as they learn about, receive and use your product or service?
- What are the methods you can use to deliver your product or service?







## Key Initiatives & Infrastructure

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- What are the key initiatives (actions) and infrastructure needed to develop, implement, support and/or provide this product or service?

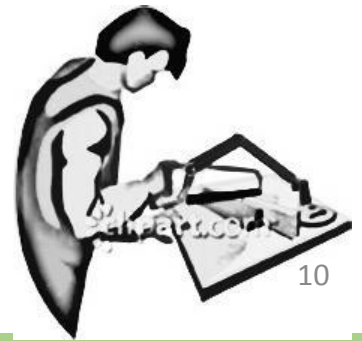




## Key Resources

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- What are the most important tools, technology, expertise, staffing, materials, and/or financial resources needed to develop, implement, support and/or provide this product or service?





## Key Partners

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- Who are the key partners that are needed to develop, implement, support and/or provide this product or service?





# Development & On-Going Costs

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- Describe and estimate costs related to the product or service.
  - Look to key initiatives, infrastructure and resources for identifying costs.
  - Estimate one-time purchases.
  - Estimate on-going costs related to recurring fees, purchases and human resources.





## Expected Income

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- Identify the type of payment for your product or service.
  - selling a physical product, fee for service, subscription fee, shared staffing.
- Estimate how much (price) and how often (frequency) your members are willing to pay.





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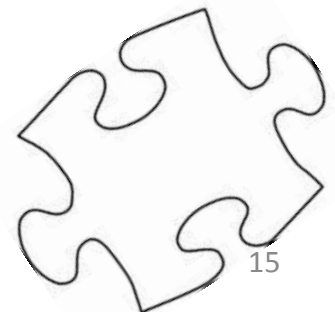
# Business Planning Case Study Practice



# Case Study: Needs Assessment

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- What is the **job to be done** or **problem to solve**?
  - *Implement new EHR systems with new software and hardware.*
  - *Struggling with meeting timelines, finding qualified HIT workforce, and resistance to change.*
  - *Expecting personal service and specialized HIT knowledge.*



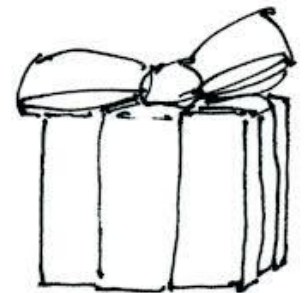


## Case Study: Network Service

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### **Shared IT workforce cooperative**

- *Double check that this service does indeed meet the needs of your members.*
- *Double check alignment with mission, vision, and strategic objectives*







## Practice: Small Groups

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- Self-select into 6 small groups
- Embrace the scenario and imagine
- Worksheet for practice
  - Shaded complete: needs assessment, description of service, financial estimates
- 50 minutes for practice: 5 components
- Small group discussion



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# RHITND TA Team

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