Activity Objective

• Introduce a business planning tool
• Use a case study to practice using the tool
Business Planning Template

• Checklist of guided questions
• Good fit with a systems approach
Needs Assessment

• 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

• 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

• 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

• 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

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

• 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

• Who are the key partners that are needed to develop, implement, support and/or provide this product or service?
Development & On-Going Costs

• 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

• 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.
Business Planning
Case Study
Practice
Case Study: Needs Assessment

• 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

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

• 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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