

# Ten Practices for Health IT Strategic Planning

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By Satish Gattadahalli

Healthcare and health information technology (health IT) are undergoing transformative change at an unprecedented pace. Strategic planning has become a major discussion point among CIOs, CTOs, CMIOs, and IT Directors. Whether it is implementing enterprise-wide electronic health record (EHR) systems, working toward compliance with the “meaningful use” EHR Incentive Program, enabling patients’ involvement through PHRs, transitioning to ICD-10, establishing insurance exchanges, becoming an accountable care organization, or even deploying a medical home, healthcare executives are confronted with a confluence of high-priority initiatives.

It is imperative to view health IT strategically from an IT management perspective. Based on developing and institutionalizing health information and health IT strategic planning for large-scale integrated healthcare organizations, lessons learned can be distilled to 10 practices. Following these practices will equip the CIO, CTO, and CMIO to not only develop a Health Information and HIT Strategic Plan, but provide clarity on operationalizing the plan and managing information and IT strategically within their organization as well.

- **Find a sponsor, and obtain organizational buy-in.** The planning initiative must be supported by the broader C-suite, CIO, and CMIOs. It must be supported by key organizational and cross-functional entities.
- **Discover and collaborate with other planning partners.** It is not uncommon to determine the existence of other strategic planning entities/groups with significant maturity within the organization. Corporate, regional, and program office strategic plans are some examples. It is important to identify all stakeholders (customers, regulators, business/planning partners, field-level change agents) that are determinants of a successful strategic planning process.
- **Establish a “light weight” Strategic Planning Process and a Strategic Plan Template.** Leverage corporate templates and review industry/government examples and best practices (i.e., Malcolm Baldrige Health Care Criteria for Performance Excellence Framework—Strategy Development and Implementation). The planning process must be simple and be amenable to continuous improvement. The planning process must also include benchmarking.
- **Align with Corporate Plans for strategic intent, context, and line of sight.** Consider mission, vision, core values, business principles, strategic goals and objectives, strategic direction, strategic initiatives, and outcomes-based performance measures—all elements of a robust strategic planning framework.
- **Conduct thorough environmental scan and strategic analyses, including:**
  - Synthesizing of demographic analyses/drivers/influences
  - Identifying change drivers—business (i.e., chronic disease management, provider shortage, rural health, population health, wellness and prevention, operational efficiency, data-driven and evidence-based culture, evolving business models such as retail clinics and provider-payer integration, pay for value/outcomes), legislative/mandates (i.e., Patient Protection and Affordable Care Act, American Recovery and Reinvestment Act/HITECH/Meaningful Use, HIPAA, ICD-10), and technology (i.e., telehealth, big data analytics, clinical decision support, mobile health, social media, cloud computing, genomics, robotics, nanotechnology/nanomedicine, sensors, Open Source, and Real Time Location Systems)
  - Documenting planning assumptions—examples may include broad demographic implications, legislative/regulatory/policy challenges, broad health IT and HIM themes, healthcare cost mix/projections, macroeconomics, resource constraints and expectations, workload and capacity projections, compelling health IT/HIM opportunities, digital convergence potential, and human resources constraints and availability
  - Leveraging industry (i.e., AHIMA, HIMSS, AMIA, IOM), Health Industry Analyst Insights, and implications from health policy and interoperability standards
  - Performing competitive analyses, looking at organization strengths and weakness, opportunities and threats, Michael Porter’s Five Forces Analyses, Balanced Score Card Approaches, gap analyses, and conducting scenario planning

- Considering political, economic, social, educational, environmental trends, if any
- Capturing insights from organizational leadership and industry thought leaders
- Harnessing an organization innovation capacity
- **Communicate, communicate, and communicate.** Develop coherent strategic plan messaging using tools such as blogs and social media, newsletters, brown-bag meetings, conference presentations, collaborative tools, and FAQs. Execute outreach relentlessly.
- **Establish top-down and cross-functional business-health IT governance.** Include a chartered business-IT steering group to provide oversight, share corporate aspirations, and provide strategic direction. Also, the chartered steering committee will establish a focused workgroup. This workgroup must include broad representation from corporate, program offices, field-level stakeholders, mobilizers, and thought leaders. The work-group engages in debate and collaborates on strategic issues. The group must meet once every two months, at a minimum. Also, the Health Information and HIT Strategic Planning team should continue to engage in biweekly meetings with the sponsor.
- **Operationalize the plan.** Implementing the plan may entail the following:
  - Developing health information and health IT principles, goals, and objectives
  - Developing plan of action, milestones, and/or performance measures
  - Linking to and informing other strategic plans in the planning ecosystem
  - Driving strategic requirements and business architecture efforts
  - Assisting in budgeting, health IT portfolio management, resource alignment, and human capital planning efforts
  - Evaluating progress on a bi-annual basis
- **Be agile.** Update Health Information and health IT Strategic Plan on a quarterly basis. The core team will include a minimum of three and maximum of five players spanning strategists, thought leaders, architects, and health informaticists.
- **Establish branding and messaging.** Easy to read hand outs, brochures, and case studies generate more interest and participation, and reinforce value proposition.

These practices can assist the CIO, CTO, and CMIO strategically manage health IT and reduce risks. Such practices can also provide insight for CIOs and CMIOs to navigate a challenging macroeconomic climate and complexities in health IT portfolio and spending decisions—such as reducing operational costs, eliminating waste and duplication, better aligning business with IT, identifying strategic improvement and transformation opportunities, and achieving economies of scale. In essence, developing and institutionalizing a coherent Health Information and Health IT Strategic Plan represents a key milestone within an organizational strategic management and governance framework. The CIOs, CTOs, CMIOs, and HIM leadership must define, develop, and implement a Health Information and health IT Strategic Plan to achieve efficiencies and economies of scale of managing health IT/HIM assets more strategically.

## Online Resources

Numerous examples of digital and health IT/IM/HIE strategic plans are available on the web.

- [Federal Health Information Technology Strategic Plan FY2011-2015](#), sponsored by ONC
- [The Commonwealth of Massachusetts 2010 HIT Strategic Plan](#), sponsored by eHealth Institute/Massachusetts Technology Collaborative
- [State of Michigan Shared Services Strategic Plan](#), sponsored by Michigan Department of Community Health
- [VHA Health Information Strategic Plan](#), sponsored by US Veterans Health Administration
- [Connecticut State HIT Plan](#), sponsored by Connecticut Department of Public Health
- [MHS IM/IT Strategic Plan 2010-2015](#), sponsored by US Military Health System Information Management/Information Technology
- [Strategic and Operational Plan for Health Information Exchange \(HIE\) in the State of Indiana](#), sponsored by Indiana Health Information Technology
- [Colorado State HIE Strategic Plan](#), sponsored by Colorado Regional Health Information Organization
- [Arizona HIE Strategic Plan](#), sponsored by Arizona Governor's Office of HIE
- [Commonwealth of Virginia HIE Strategic Plan](#), sponsored by Commonwealth of VA
- [Nevada State HIT Strategy and Operational Plan](#), sponsored by State of Nevada Department of HHS/Office of HIT

- [Digital Government Strategy](#), sponsored by the White House

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