Medical Board of California

Strategic Planning Roadmap

Average Time to Complete Each Phase

1 Week

8 Weeks

2 Weeks

5 Weeks

2 Weeks

Preliminary Meeting & Set-up

- Preliminary meeting with client
- Introduce facilitators
- Set schedule and determine dates
- Decide roles
- Define process
- Create customized development plan for client

Environmental Scan

- Conduct stakeholder survey
- Conduct Board
 Member interviews
- Conduct staff survey
- •Conduct management focus group
- Conduct leaders and chief interviews
- •Compile and format data
- Analyze data
- Review findings with client

Planning Session

- Create facilitation plan
- Conduct Strategic Planning Session
- Review accomplishments
- Determine mission (optional)
- Discover vision (optional)
- Establish values (optional)
- Review Environmental Scan results
- Establish goals (optional) and objectives

Create & Finalize Plan

- Solid drafts plan
- Review plan with client and make adjustments
- Client approves and adopts plan
- Post plan to website

Action Planning

- Prioritize objectives
- Establish timeframes
- Determine metrics
- Assign responsibilities
- Draft action plan
- Review plan with client and make adjustments

