

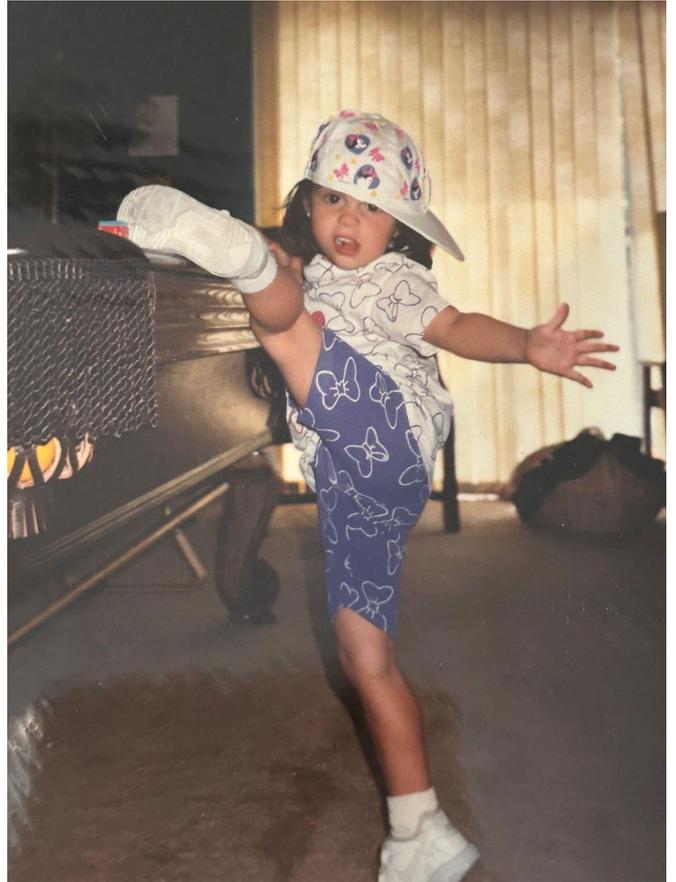


2026 Spring Conference

General Session: Leadership - Advancing - Strategic Planning



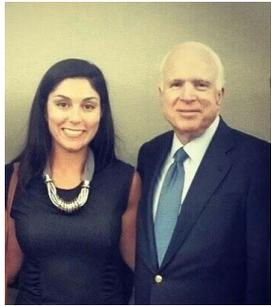
This is who is
teaching you
about strategic
planning...



Hi, I'm Caroline!

Strategy + Growth Expert | Former Chief Strategy Officer | Political Campaigns Veteran | Global Thought Leader on Shared Value Partnerships | Founder, EventDox

Mom. Partner. Tennis player. World traveler. Thalassophile. CHS native.



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Agenda

- 1 What keeps us up at night?
- 2 Industry trends
- 3 Strategy simplified
- 4 Reflection exercise
- 5 Practical tips and takeaways
- 6 Q+A



What's one word for how you're showing up today?



 **CDB Strategy**
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What keeps you up at night?

Can we keep the clinic staffed?

Costs keep rising faster than revenue.

Are we getting paid for this?

How do we handle more patients?

What happens if payment models change?

Healthcare on the brink: navigating the challenges of an aging society in the United States

The health care workforce crisis is already here



Burnout and Suicide Threaten America's Health Care Workers. They Deserve Better.

Healthcare workers walk out: Geisinger nurses strike for better pay and safety

DOGE sets its sights on Medicare and Medicaid

Nearly half of rural hospitals in the red, 432 vulnerable to closure, report finds

AI's Transformative Power In Healthcare Diagnostics

Luigi Mangione due back in NY court on charges of killing health insurance CEO

Healthcare Providers Face Stiffer Cyber Rules Even as They Cry for Help

More than 170 million people in the U.S. had their medical and personal data breached in 2024

It's not all bad...

Health care roles consistently show up on lists of “most rewarding” careers for a reason!

- Personal calling
- Fulfilling work
- Social status and respect
- Dependable earning potential
- Job security
- Community impact
- Universal need / we are all patients



Trends that impact us



Alternative sites of care

Telehealth
Virtual care
Hospital at home
Decentralization
Ambulatory
Pharmacy
ASCs/FSEDs
Flexible Space



Demand Surge

Aging populations
Regional population growth
Capacity constraints



Patient Expectation

Seamless
Instant
Convenient
Digital
Efficient (no wait)
Modern / clean
Access



Payor Shifts

Lower cost of care
Federal programs



Workforce Challenges

Shortages
Wellbeing
Flexible work



Financial instability

Scale
Consolidation
Budget cuts
More with less
Federal changes

What is strategic planning?

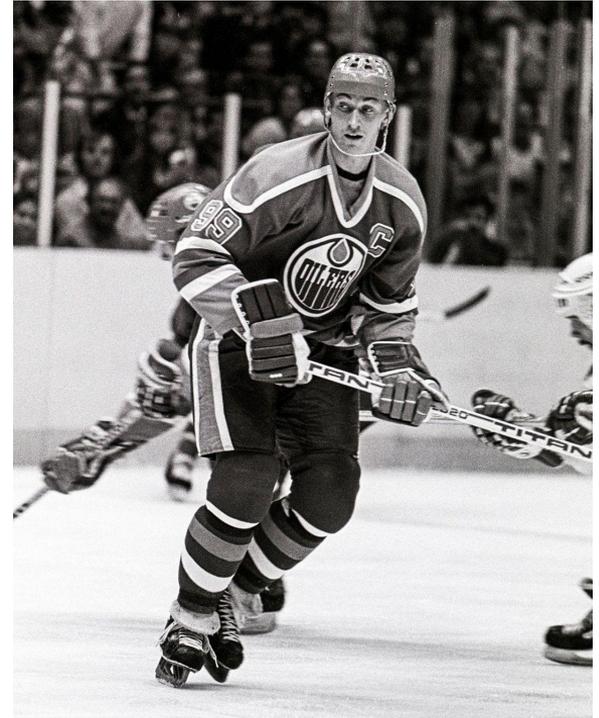
According to Harvard...

- Ongoing organizational process of using available knowledge to document a business's intended direction
- Used to prioritize efforts, effectively allocate resources, align stakeholders and employees on the organization's goals
- Ensure those goals are backed by data and sound reasoning.

What is strategic planning?

According to Wayne Gretzky...

**SKATE TO WHERE THE
PUCK IS GOING, NOT
WHERE IT HAS BEEN.**



Why strategic planning?

- **Alignment** – everyone rowing in same direction
- **Prioritization** – more efficient, focus on what's important
- **Clarity** – priorities are well defined and understood
- **Performance** – easy to know whether we're successful or not
- **Accountability** – shared vision, mission, values and goals means everyone owns it and is responsible



I feel or have been made to believe that strategy is this big, complicated thing that other people do.

Strategy Simplified

ADD Value Strategy Model™

- 1. Assess** (know thyself - strengths, struggles, stakeholders)
- 2. Define Success** (who do we want to be? what do we want to be known for?)
- 3. Develop Strategy** (what will we prioritize? how will we execute? when?)

Reflection Exercise Worksheet - A SWOT Alternative by CDB Strategy

Strengths	Struggles	Stakeholders
<p>Remember! After you complete the exercise, circle your #1 top strength, struggle and stakeholder.</p>		



Enter the top strength you jotted down.



Enter the top struggle you jotted down.



Enter the top stakeholder you jotted down.



What is one strength you would like to lean into this year?

Practical Tips + Takeaways

Another exercise to try

The Inventory Exercise

What are we doing today?

Individuals jot down 1 activity per post-it.

As a small group or team, sort into buckets: keep, rethink, stop. You can do this by sticking the individual post-its to a large flip chart labeled for each bucket.

Anything that lands on stop or rethink requires discussion and ongoing work.

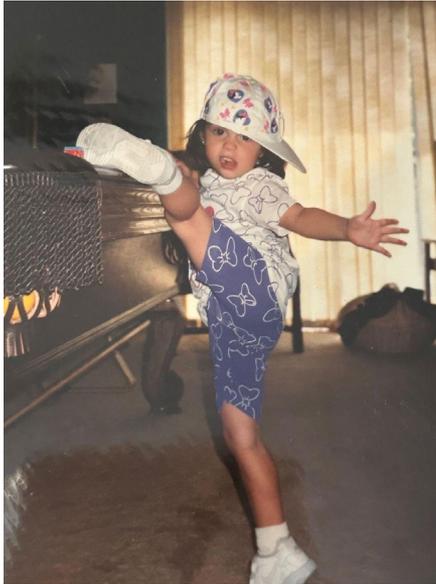
Other questions to ask

If you had to pick a word of the year for our practice, what would it be?

What would we need to change internally to look back on the next 12 months and know it was successful?

What do we need to achieve externally to look back on the next 12 months and know it was successful?

Remember little Caroline?



Caroline D

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12-10-96

My dad was sick ever since I was born because of his kidneys. When we were moving to Bufort the trucks were loaded, then we got a phone call from a doctor in Bufort, he said you have kidney failyoo. Then he said I'm sending you to Medical University of South Carolina. And so we had to move to Charlson. A doctor gave him a speshal kind of medicine called morphene. About seven days later he died. I was very very sad I cryed for two days.

I will allways remember my teachers. That I have had in the past. I will espeshaly the ones I have at Belle Hall like Mrs. Whitesides, Mrs. Warnon, Mrs. Murray, and Mrs. Mac Millan.

A reunion for the books



Your work matters.

Every relationship matters.

Every interaction is a
chance to build connection
and fuel growth.





**WE CANNOT
BECOME WHAT
WE NEED BY
REMAINING
WHAT WE ARE...**

John Maxwell

THANK YOU

Questions?

Caroline@CDBstrategy.com

www.CDBstrategy.com

Cell: 843-224-2189



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