Guide to a Practice Visioning Session

*Changing the way your practice works requires time, resources and long-term commitment. You will have difficulty making progress unless you make sure everyone has a clear idea of what the future state of your practice looks like. Think of it as similar to envisioning your destination and why you are going there during a long journey.*

***Devote time to visioning***

It is very difficult to look at the big picture when you are in the weeds dealing with the everyday work of caring for patients. We suggest that you set aside some time to step back and take a hard look at the way things are working now and how you would like them to be different. Most practices will set aside a half or full day on a weekend “retreat” for an open dialogue and visioning session. Depending on the size of your practice, the group at the retreat may be a leadership team or the entire staff. Ideally, you may want to include a patient from your practice to assure that viewpoint is represented.

***Leading the current practice assessment and visioning session***

Begin the visioning session by briefly summarizing the current status of the practice, such as the market or geographic area served, size of the patient panel, relationships with other providers, work environment, satisfaction scores from staff and/or patients, and other indicators that you consider important. Then ask everyone to write down two or three characteristics that they would like to see as part of the future, improved practice. Another way to start the conversation is to ask: “What would we like our practice to be known for five years from now?”

***Use the nominal group technique during the visioning session***

The [nominal group technique](http://www.cdc.gov/healthyyouth/evaluation/pdf/brief7.pdf) (NGT) has been used for years to guide brainstorming sessions to make sure no single person dominates the conversation and so that every idea gets a fair evaluation by the group. NGT can easily be applied to your practice’s visioning session. It is important to make it clear that no idea is a bad idea or not feasible to accomplish. Premature judgement of ideas reduces innovation and creativity. Using NGT helps everyone to be engaged and feel that they have contributed to the final result. Four simple steps to use NGT include:

1. Gathering ideas from everyone without judgement or comment
2. Recording the ideas using a flip chart or sticky notes
3. Discussing the ideas to see if there is a need for clarification, grouping/splitting of ideas or to build on the original idea
4. Voting to rank or prioritize the ideas in order of importance

At the end of the visioning session it is usually obvious which ideas or characteristics have broad support from the group and which ones do not.

***Developing the goals and/or action plan***

After the visioning exercise, the results can help the team write a vision statement and serve as a foundation for developing an action plan or list of goals. Goals should be SMART: **s**pecific; **m**easureable, **a**chievable, **r**easonable and **t**ime-bound. Use the group to help flesh out the goals and determine a realistic timeline for implementing the new vision. Writing a vision statement works best with one or two people taking the lead to create a draft that can then be reviewed by the entire group.

*Source: AMA. Practice transformation series: preparing your practice for change. 2015.*