

Facilitation guide: Physician think tank

How to solicit actionable strategic input from physicians

Use this guide to create a space where physicians can proactively weigh in on strategic decisions, and provide targeted input to inform your organization’s strategy. We recommend timing these conversations with a quarterly or annual strategic planning process to meaningfully involve physicians in strategic input.

What is a physician think tank?

Forum held by executives to proactively involve physicians in strategic decision-making. The goal is to gather strategic level feedback from—and brainstorm with—physicians from across the organization on top priorities and challenges.

Should I hold a physician think tank?

Most organization use think tanks sparingly, typically on a quarterly or annual basis for key strategic decisions.

Consider the following questions when deciding whether or not to hold a think tank on a specific decision or initiative.

- Is this a strategic or long-term initiative/decision?
- Is this initiative/decision timely and relevant to physicians?
- Can the initiative/decision change based on physician feedback?
- Is the topic scoped enough for physicians to provide relevant feedback?

Sample topics:

- Updating annual strategic plan
- Improving patient experience scores
- Establishing criteria for choosing a new EHR system

Sample physician think tank agenda

Think tanks can range from 60 to 90 minutes. Below, we’ve included a sample agenda for a 60-minute meeting.

Steps	Approximate time required
<i>Before the meeting</i>	
Invite key stakeholders and gather facilitation materials	30 minutes
<i>During the meeting</i>	
• Introduce the exercise and your goal for the meeting	5 minutes
• Group brainstorming	40 minutes
• Report out	10 minutes
• Close the workshop	5 minutes
<i>After the meeting</i>	
Follow-up with suggested next steps	Variable

Before the meeting

Invite physicians to participate

Invite a group of no more than 40 physician leaders from across the organization to attend think tanks. Consider the following factors to ensure your group is representative of the broader medical staff:

- Employment status
- Specialty
- Site of care
- Tenure at organization
- Leadership tenure, we recommend including a mix of established and emerging leaders

As you review your list, consider inviting informal leaders who can help you sustain buy-in for the change. It's also important to consider whether participants reflect the diversity of your workforce and community.

Sample invite text:

"We'd like to invite you to provide input on our [strategic plan/initiative] during our physician think tank on [date/time].

We'll use the time to workshop a [specific questions/components of strategic plan] with physician leaders across our organization so we can incorporate your perspective before making a final decision on [strategic plan/initiative].

We look forward to the conversation."

Advertise the meeting early and often.

Aim to **schedule and advertise the meeting at least 2-3 weeks in advance**, and send follow up e-mails to individuals who will be most highly impacted by the changes you'll discuss.

Send a calendar hold with an agenda. Be sure to include:

- the purpose of the meeting,
- the specific questions you want physician input on; and
- heads up that the meeting will be highly interactive.

Make sure you have what (and who) you'll need for the session

- A facilitator
- Executive volunteers to act as scribes
- At least one hour of dedicated time—consider selecting a time that isn't too disruptive to physicians' schedule such as early morning, evenings, or over lunch
- A copy of the previous year's strategic plan
- Any relevant data for assigned topics (SWOT analysis, HCAHPS scores, quality metrics, etc.)
- Materials for group brainstorming (paper and pens, whiteboard, flipcharts, etc.)

During the meeting

Introductions:

- As they arrive, seat physicians at tables of six to eight; include one C-suite leader at each table as the scribe.
- Start the session by stating: the purpose of the meeting, participants' role, how their feedback will inform upcoming decisions, and who you will share the feedback with.

Sample scripting:

“Thank you for taking time to join us today. Our goal is to get your input on [strategic plan/initiative]. As we go through the exercise, I’d encourage you to be as candid and open as possible. All of the decisions we’ll talk about today are still in flux—and we want to ensure we account for and incorporate the physician perspective. We’ll spend most this meeting working in small groups. Each of you is sitting with an executive scribe who will take notes during the conversation. We’ll share takeaways with [insert team/title] in follow up to our meeting.”

Activity:

- Assign up to two topics or questions per table. If you have a range of initiatives you’d like input on, we recommend choosing one clinical and one non-clinical topic per group.
- Ask each group select a volunteer to report out at the end of the meeting.
- Dedicate 40 minutes to small group discussion and brainstorming.
 - Encourage participants to review and use any available data that pertains to their topic.
 - Ask them to jot down their top three takeaways or next steps.
 - Give groups a warning when they have 20 minutes left in the session.

Discussion:

- Give each table 2-3 minutes to share their top three takeaways with the group.
- Write down takeaways on a whiteboard or flipchart so the group can see the running list of ideas.
- Pause after each participant to ask for any comments, questions, or reactions from the larger group.

Closing:

- Thank participants for their feedback.
- Share 1-2 key takeaways or insights that stood out to you during the conversation, and recap how you’ll use the information you collected during the session.
- Share alternative ways that participants can get a hold of you to share feedback in follow up.
- Collect notes from the scribes.

After the meeting



E-mail a summary and next steps to participants and stakeholders within a week of the forum.



If changes are made, highlight how physician feedback from the think tank informed the decision.



Ask for feedback. Ask participants if they would attend a think tank in the future. Why or why not?