



## The Product

Information technology planning has become a critical management competency for health care organizations. Fulcrum Methods **Long Range Planning (LRP 2007)** method provides a structured approach to focus an organization on the potential of information technology to support and enable business, medical service and community health goals. **LRP 2007** is a powerful tool for:

- Development of an initial information technology plan coordinated with an organization's overall strategic mission and vision
- Updating an existing plan
- Aligning information technology capabilities with an organizations detailed market share, medical service, operational excellence, performance, and financial objectives
- Assessing current state capabilities with a desired future state
- Determining the expandability or expendability of in-place technology
- Reviewing alternate, realistic approaches to achieve the future state vision
- Selecting the best fit alternative in the context of the organization
- Defining initiatives to execute the information technology plan, including criteria for success and benefit expectations
- Establishing the pathway to success in terms of multi-year capital and operating budgets, implementation schedules, information technology staffing and resource plans as well as ongoing governance structures to oversee the plans execution

## The People

"John Muir Health is a very dynamic organization in a challenging market. We needed a flexible, yet proven, planning methodology. Fulcrum has provided us with that tool, and we have used it as our information technology planning resource consistently over the last decade."

**Eric Saff, CIO**  
John Muir Health

## The Power

- Flexibility to initiate first time plan, renew existing plan or complete annual updates
- Establishes multi-year vision with actionable pathway to achieve success
- Assists senior management in articulating vision and strategic objectives
- Institutes philosophy and approach to investment decisions
- Evaluates technology and vendor alternatives to achieve the planned goals
- Integrates of information technology planning into strategic planning
- Identifies technology trends and enables potential new business, new services, and operational improvements in today's market
- Enable realistic and objective priority setting, budgeting and resource decisions

## The Value

- Long-term information technology plan that commands organization-wide support
- Alignment of business, medical service and information technology needs
- System lifecycle and governance practice established
- Goals with specific success criteria, accountabilities and timeframes
- Informed management team regarding technology issues
- Continuing education with Fulcrum Methods Certification Program
- Flexible licensina structure scalable to your requirements

## The Solution: LRP 2007

### Work Plan

- Establish project structure and quality control plan
- Establish project governance
- Conduct education & exploration sessions
- Gather baseline technology / business plan information
- Review business/ technology context
- Identify potential new IT-enabled business and service markets
- Identify IT driven potential operational improvements to core business applications
- Create future state vision
- Develop IT alternatives; select best fit
- Develop information technology plan and implementation path

### Guidebook Overview

- Project Planning
- "Framework for Success"
- Analyze Business, Service, System and Technology
- Develop Information Technology Alternatives
- Document Information Technology Plan
- Project Administration and Closure

### Standard Deliverables

- Project Charter
- IT Governance Approach and Charters
- Interview (Executive, Management, Physician, Clinician, User, Consumer) Templates
- Current State Assessment Templates
  - Technology, Business Objectives, Staffing, Performance, Satisfaction
  - Comparison of current IT costs and capabilities against national benchmarks
- Future State Vision Template
  - Requirements, Capabilities, Technology
  - Business Objectives and Systems Implications Matrix
- Alternatives Identification and Analysis Template
  - Status Quo vs. Alternative Investment Analysis
  - Selection of Best Fit Alternative
- IT Management Plan Template
- Status Report Template



## Learn More:

Fulcrum Methods  
1901 Harrison Street - Suite 1590  
Oakland, Ca 94612  
(510) 286-8700  
[info@fulcrummethods.com](mailto:info@fulcrummethods.com)