

How InsightFormation can Support Public Health Department Strategic Planning & Implementation

Bill Barberg, President & Founder, InsightFormation, Inc.

Qualifications

InsightFormation has deep expertise and experience in both strategic planning and strategy management (for strategy implementation), having worked with a wide range of clients. Public Health clients accredited by PHAB include the state of Delaware's Department of Public Health, a large county public health department (County of San Diego) and public health departments in mid-sized counties (Humboldt County, CA and Cobb & Douglas Public Health, GA, Portsmouth, VA, and St. Clair County, IL). InsightFormation has also helped with strategic planning for large corporations (including Carlson Hotels Worldwide, a global division of Toshiba, Prime Therapeutics, and a national real estate company), healthcare systems (St. Mary's Duluth Health System, The Children's Hospital in Denver), and the IT Services Group in an Academic Medical Centers (University of Utah Health Care IT). In addition to working with these organizations, InsightFormation's team has worked on strategic planning for statewide collective impact efforts to address alcohol, tobacco and drug use (Wyoming), statewide efforts to reduce suicide, (Wyoming), reducing incarceration and recidivism (Arkansas) and improving the foster care system (Arkansas). InsightFormation was also influential in shaping the strategy and performance management system of the Ministry of Works (MoW) in Bahrain.

InsightFormation's President & Founder, Bill Barberg, has been consulting on developing and implementing strategic plans for both government and business since 2002. He has delivered a wide range of workshops and training programs including 2-day workshops on Balanced Scorecard (BSC) for Government done in both Washington, D.C. and the Kingdom of Brunei. The 2-Day Workshop on Balanced Scorecard for Government included modules on aligning Quality Improvement with strategy and practical steps for human capital management. The respect he has earned among strategic planning professionals led to him presenting four times at the national meeting of the Association for Strategic Planning.

Accolades from Leading Professionals in the Field

David Norton, a co-creator of the Balanced Scorecard methodology (along with Robert Kaplan), stated in an article about the Bahrain MoW's induction into the BSC Hall of Fame that their approach [significantly influenced by consulting provided by InsightFormation] was "as good as anything we've seen."

Bernard Marr and James Creelman are among the world's top experts in government strategy management, measurement and using scorecards. Bernard Marr has written best-selling books such as "Managing and Delivering Performance" as well as over 200 high-profile reports and articles on managing organizational performance. He was the lead author of "Strategic Performance Management in Government and Public Sector Organizations – A Global Survey," the largest and most comprehensive survey on government performance management ever done. James Creelman was called "the foremost chronicler of the Balanced Scorecard movement" by Kaplan and Norton, and he has written more extensively on the Balanced Scorecard than any other

author. Creelman also played a key role in a year-long evaluation of software product to support strategic and performance management for the Ministry of Works (MoW) in Bahrain.

In 2011, Marr and Creelman released *“More with Less, Maximizing Value in the Public Sector”* which emphasizes the best practices of strategic planning, strategy management and integrating process improvement (Quality Improvement) with strategy implementation. In that book, the authors referred to Bill Barberg, InsightFormation’s President and the lead designer of InsightVision, as *“one of the select few global thought leaders we interviewed while researching this book.”* (p. 126). They quote Mr. Barberg in six different sections of their book. Mr. Barberg developed a study guide for this book to help government leaders gain insights from key sections of this book without needing to read it cover-to-cover. That guide will be used in this project.

In a 2012 LinkedIn recommendation, Mr. Creelman said **(Emphasis added):** *“When I co-authored the book ‘More with Less: Maximizing Value in the Public Sector’ (Palgrave Macmillan, 2011) I chose [to interview] Bill because his knowledge of the do’s and don’ts of building scorecards is as good as anyone in the world, and some of his innovations (especially around creating space for partner collaborations) are simply unrivalled. His insights and innovations strongly present within his organization’s Balanced Scorecard software solution. Bill is quoted extensively in my book and I regularly use his insights in my own work and presentations. In my 17 years of conducting best practice research in the Balanced Scorecard, I can think of no one who has inspired me more - and who speaks so much sense! Without hesitation I recommend Bill as a consultant to any organization that is progressing along a scorecard journey.”*

James Creelman featured another InsightFormation client, the North Colorado Health Alliance, in his most recent book, *“Agile Strategy Management in the Digital Era.”* (2018). It is the longest case study in the book.

Wayne Eckerson, author of *“Performance Dashboards”* (Wiley & Sons, 2011) acknowledged, *“Industry experts who contributed to this book include... Bill Barberg, who again provided incomparable perspective on strategy management and the Balanced Scorecard methodology.”*

[Quotes from Clients of Significant Strategy Management Engagements](#)

Jim Turnbull, CIO of the University of Utah Health Care System (and client of InsightFormation), was named by HIMSS and CHIME as the 2012 Health Care CIO of the Year. Turnbull stated: *“The philosophy of Strategy-Aligned Management [developed and taught by InsightFormation] is the foundation upon which a disciplined approach to leveraging strategy maps and balanced scorecards makes order out of chaos as we move into the future.”* In a 2012 presentation, Turnbull described both the process and value of adopting Strategy-Aligned Management practices. He shared how the use of the InsightVision software platform had become an integral part of how he managed his team and how his leadership team worked with the rest of the IT organization. He referred to it as their *“sanity retention tool.”*

Turnbull explained: *“We use InsightVision at almost every weekly IT Leadership Meeting—sometimes focusing on individual objectives, sometimes a single perspective, and sometimes a single theme. It is also used to review important aspects of our strategy at the bi-monthly*

manager's meeting, at the bi-monthly IT staff meeting, at many other presentations to IT governance committee meetings, and at other UUHC leadership meetings.”

Jim Livingston, the Associate CIO of UUHC co-presented with Bill Barberg on the adoption of the Strategy-Aligned Management techniques and software at multiple national conferences, including in May of 2013 at the Association for Strategic Planning's national meeting where the topic was “How Strategy Management Systems Improve Alignment and Execution.” In a March 2013 interview, Mr. Livingston said, “We've taken on some major initiatives that ... have actually been mind-boggling to me that we've been able to move it forward and be so successful so quickly. It's all because of that crystal-clear focus and having the ability to measure what it is that we're doing and knowing how that aligns with the organization and the overall strategy. ... A tool like this really helps keep that focus.” He went on to state: “It saves time for the whole department because it allows the whole department to focus and be more effective with what we're doing instead of going off in every direction. I mean that's the beauty of this whole thing. ... Otherwise you spend a lot of time spinning your wheels. That's where it saves you the time.” See [more from this interview here](#).

Jena Hausman, Vice President of Strategic Planning and Network of Care for The Children's Hospital (Denver) explained benefits she saw from the strategic planning process led by InsightFormation: “Our strategy is much more clearly defined, and we're making much better progress in defining, communicating, managing and measuring how we will execute that strategy.” When The Children's Hospital began to focus on strategic management tools in 2005, it was ranked 7th in U.S. News and World Report's annual ranking of children's hospitals. In 2007 rankings, they were ranked #4. “No one tool or technique can take the credit for that improvement,” said Hausmann. “But the work we did with InsightFormation, the SAM [Strategy-Aligned Management] process, and the InsightVision software helped significantly improve our approach to strategic planning and execution.”

Jay Witzel, retired President & CEO of Carlson Hotels Worldwide, stated in a letter that reflected on his experience in working with InsightFormation and InsightVision, “I would absolutely utilize this methodology today for any business that is attempting to change or refocus their strategy, or needs to manage a business merger, or if they need to reprioritize the use of scarce resources to maximize profits.” View the [full letter](#) here.

Gurleen Robert, the Director of Quality Management (and person in charge of PHAB accreditation) at Cobb & Douglas Public Health wrote the following in an unsolicited E-mail as they began rolling out their agency scorecards and strategies: “Yesterday, we had our first group of program managers showcase their scorecards to Dr. Kennedy, and it was phenomenal! Better than I could have ever dreamed! The hard work you have put into helping us craft these scorecards is really showing, and I just wanted to say thank you. We couldn't have transformed our agency scorecards and strategies without you!”