



***Kansas City here we come!***  
**June 25<sup>th</sup>, 2019 ♦ Kansas City, Missouri**

## **HERO Summer Think Tank (members only)**

### **Forging a Fresh Course for Worksite Health and Well-being: Tools and Methods that can Move Organizations from an "Is State" to a "Future State."**

HERO Think Tanks are always designed with a grand purpose in mind. After all, bringing the best minds in the country together deserves a topic that will stretch us professionally and influence the direction of our field. What, then, could be more apt than coming together to chart a new course for our line of work? What's more, HERO strives to be every bit as pragmatic as we are lofty so, in this think tank, we will take a hands-on approach to examining strategic planning tools and demonstrate, together, how methods such as "Hoshin Planning" and "Blue Ocean" strategy can support your approach to your organization's health and well-being strategic planning process.

#### **Got Strategy? Why there is a shortage of new value generation in wellness... and how to fix that.**

Having a strategic plan and written objectives is considered a best practice in the design and execution of employee health and well-being initiatives. Nevertheless, studies using data from the HERO Scorecard developed in collaboration with Mercer find that strategic direction setting is woefully under-utilized. In one study led by HERO's Jessica Grossmeier, we found that 44% of companies reported that they had no written strategic plan and only 25% of companies had a multi-year strategic plan. And, just as inopportunately, of those who had a written plan, less than half (47%) felt that their strategic planning had been effective. In another HERO study of 205 organizations who responded to scorecard questions about strategic planning, of those who had no written objectives, only 6% reported significant employee health risk improvement and 22% reported slight improvement. In contrast, 21% of organizations with written objectives reported significant improvement and 49% reported slight improvement (Hunt 2017).

#### **Beyond SWOT: Strategy Tools and Boiling the Blue Ocean in Health and Well-being.**

This Summer Think Tank will begin by employing concepts from "Blue Ocean" strategy that will challenge us to consider altogether new value propositions that can advance employee, company and community well-being. If employee wellness programs were the stuff of "red ocean" thinking, that is, how to get better at what we know and do now, our questions using "blue ocean" strategy will be directed at "unlocking new demand" and making our old ways irrelevant. We will test our "future state" ideas against our "is state" by inviting experts to review the status of current best practices being used, or not, nationwide. From there we will use "Hoshin Planning" tools that enable us to look "beyond strategic vision" and begin prioritizing and determining how new ideas can be deployed via effective planning processes.

Speaking of measurable objectives, here are the learning objectives we'll aim to achieve in this highly interactive day:

- Bolster your commitment to lead the nation in taking a strategic approach to the design of your organizational health and well-being initiatives
- Gain hands-on practice that you can apply to help your teams or clients strengthen their strategic planning skills
- Influence the direction of the field by informing HERO's strategic plan

As the title of this think tank connotes, we hope for nothing less than a gathering that redefines our field and steers us in a fresh, fruitful and fun direction.

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