



Strategic Foundations Session

June 7-8, 2016

***CUSTOMER & STAKEHOLDER
NEEDS***

BSI – Customer and Stakeholder Needs

EXPLANATION:

Customer and Stakeholder populations identified via small and large group exercises.

DEFINITIONS PER BSI:

Customer: Direct beneficiary of organization's products or services. Often segmented into Primary and Secondary customers.

Stakeholder: Anyone who has a vested interest in the outcome of the organization. Customers are part of the larger stakeholder group.

Customers & Needs

| Customer | Needs |
|---|--|
| Community | <ul style="list-style-type: none"> ▪ Community Engagement and Volunteerism ▪ Employment ▪ Economic support of local businesses ▪ Economic Development ▪ Healthcare ▪ Research ▪ Education |
| Patients | <ul style="list-style-type: none"> ▪ Patient and family-centered quality and efficient health care ▪ Innovative and integrated healthcare system ▪ A life-course approach to health and disease prevention and management ▪ Cutting-edge technology, equipment, and facilities for provision of care ▪ Full range of inpatient and ambulatory health services ▪ Access to clinical trials |
| Learners (students, residents, and fellows) | <ul style="list-style-type: none"> ▪ Quality, relevant, and affordable education ▪ ‘Beyond the Books’ opportunities (e.g. student organizations, leadership development, etc.) ▪ Support services (e.g. tutoring, health services, counseling, etc.) ▪ Safe, secure, and current/well-maintained campus ▪ Diverse, inclusive, and welcoming environment ▪ Education Service ▪ Professional Development ▪ Mentoring |
| Alumni | <ul style="list-style-type: none"> ▪ Positive institutional reputation ▪ Historical collections and access ▪ Networking opportunities |

Customers & Needs

| Customer | Needs |
|---|--|
| Providers & referring physicians & Other health system & non-affiliated providers & community hospitals | <ul style="list-style-type: none"> ▪ Access ▪ Best care ▪ Referrals ▪ Outstanding service ▪ Prompt service ▪ Affiliations ▪ Tertiary care ▪ Quaternary care ▪ Respect ▪ Availability |
| Insurance Companies | <ul style="list-style-type: none"> ▪ Inexpensive |
| State and federal government | <ul style="list-style-type: none"> ▪ ROI ▪ Compliance |
| Research Funders & Grant sponsors | <ul style="list-style-type: none"> ▪ ROI ▪ Transparency ▪ Integrity |
| Start Ups / Industry Partners / Accelerator clients | <ul style="list-style-type: none"> ▪ \$ & resources ▪ Expertise ▪ Space ▪ Access |
| Donors | <ul style="list-style-type: none"> ▪ Worthy causes for donation ▪ Concise and consistent vision ▪ Clear and consistent understanding of needs |



Stakeholders & Needs

| Stakeholder | Needs |
|-----------------------------------|--|
| SUNY and Research Foundation | <ul style="list-style-type: none"> ▪ Strong educational, research and health care services/programs ▪ Reputational responsibility ▪ Responsible management ▪ Compliance and alignment |
| New York State | <ul style="list-style-type: none"> ▪ Compliance with all laws/regulations/guidelines ▪ High-quality and accessible health care and safety-net services ▪ Employment opportunities for citizens ▪ Highly-educated graduates ▪ Research and innovations ▪ Economic development |
| Federal Government | <ul style="list-style-type: none"> ▪ Compliance with all laws/regulations/guidelines ▪ Return on Investment (ROI) |
| Elected Officials | <ul style="list-style-type: none"> ▪ Clear explanation of requested support and outcomes ▪ Focused legislative agenda with benefits to citizenry ▪ Transparency ▪ Opportunity to connect with Upstate |
| Accrediting & Regulatory Agencies | <ul style="list-style-type: none"> ▪ Compliance with all laws/regulations/guidelines/standards ▪ Timely response to inquiries, audits, and complaints |
| Unions | <ul style="list-style-type: none"> ▪ Effective partnerships ▪ Adherence to collective bargaining agreements |
| Donors | <ul style="list-style-type: none"> ▪ Confidence that Foundation and institution is following wishes ▪ Knowledge of how gift helps Upstate |

Stakeholders & Needs

| Stakeholder | Needs |
|------------------------------------|---|
| Faculty | <ul style="list-style-type: none"> ▪ Influence direction and decisions ▪ Administrative transparency ▪ Autonomy ▪ Diverse and inclusive environment ▪ Shared Governance ▪ Meaningful work and supportive environment ▪ Opportunity for development and advancement |
| Undergraduate Institution Partners | <ul style="list-style-type: none"> ▪ Clear and consistent communication of academic requirements of students transitioning ▪ Further educational opportunities for their graduating students |
| Employers | <ul style="list-style-type: none"> ▪ Confidence in the education of our students ▪ Clear and direct communication of the qualifications of our graduates |
| Volunteers | <ul style="list-style-type: none"> ▪ Satisfying volunteer opportunities that capitalize on skills and interests ▪ Confidence that Upstate is a worthy designation for their time and talents |
| Academic Medical Centers Community | <ul style="list-style-type: none"> ▪ Contributor to quality and best practice in education, research and healthcare |
| Business Partners | <ul style="list-style-type: none"> ▪ Opportunities to do business ▪ Understanding of our processes; ▪ Productive partnerships ▪ Well-managed business arrangements ▪ Services and payments |

Stakeholders & Needs

| Stakeholder | Needs |
|-----------------------|---|
| Employees | <ul style="list-style-type: none"> ▪ Stable and satisfying employment ▪ Safe, welcoming, diverse and inclusive environment ▪ Competitive pay and benefits ▪ State-of-the art and/or well-maintained facilities and equipment ▪ Clear vision and leadership support ▪ Clear expectations and recognition |
| Researchers | <ul style="list-style-type: none"> ▪ Space ▪ Modern Equipment ▪ Training ▪ Technology ▪ Support (Financial, Leadership, Academic, etc.) |
| Council/Board Members | <ul style="list-style-type: none"> ▪ Share expertise ▪ Networking ▪ Appreciation/recognition ▪ Progress reports ▪ Stable list of priorities ▪ Treated like 'Upstate Family' |
| Clinical Sites | <ul style="list-style-type: none"> ▪ Qualified trainees ▪ Support, mentoring and training ▪ Understood and manageable processes and requirements ▪ Remote access to Library resources |

Stakeholders & Needs

| Stakeholder | Needs |
|-----------------------------------|--|
| Vendors | <ul style="list-style-type: none"> ▪ Ease of Process |
| Research Funders | |
| Other hospitals & care facilities | |
| General public/taxpayers | |
| Economic Development Community | <ul style="list-style-type: none"> ▪ Innovation |
| Newsmedia | <ul style="list-style-type: none"> ▪ Expertise ▪ Local news |
| Attorney General | <ul style="list-style-type: none"> ▪ Funding ▪ Risk Management |
| Payors | <ul style="list-style-type: none"> ▪ Quality and value of health care |
| MedBest | <ul style="list-style-type: none"> ▪ Employment |