

Roadmap or Roadblock: Strategic Information Planning

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Abstract:

Strategic information planning often starts hopefully with defining the grand plan. When disillusionment with the process sets in, practical and useful approaches must be found to deal with the competitive environment. Tools for gaining information on coming trends include published information – periodicals, newsletters – word of mouth, trade shows, Internet, discussion lists, weblogs, gossip. One must do one's networking well to be completely informed. Extrapolation from the perceived "currents" of information is essential. Ideas for mapping, evangelising and enlivening the process are given. It is essential to develop a step-by-step approach to making the plan happen.

Introduction

We would like to take you on the planning journey – one that we hope will give you some signposts and guides that will be of practical use when you next set out on your own.

Usually the heart sinks at the requirement for yet another strategic plan, because we know that the work has generally been done before, it will mean a lot of work with high-minded statements as an outcome, but we fear what will happen to the plan in the bustle of real life will be the same fate that befell the others in our past. Many of our plans get enfolded into other documents and rarely see the light again.

We need new directions, new ways of thinking, and the courage of our convictions to have our strategy be a realistic response to a situation.

This paper will be a guide to some aspects of strategic planning, drawing on sources from a variety of occupational areas. While we acknowledge that librarians can often do it better, there are also clues or answers to be found under unlikely-looking logs along the trail. In fact, who better to look under some of those logs on the side roads than trail-blazing librarians?

We will provide a guide to producing something a librarian can draw on in different areas of planning, which can be an adjunct to the main organisation's own strategic plan, which in itself may or may not be a practical document.

Planning

Every traveller or expedition manager knows that the journey begins before the first step, before we even pack our bags. The period of questioning, pondering, researching and imagining should not be cut short. Unfortunately, the timeframes, schedules and templates do not always allow for this “luxury”.

Key questions

- What are we trying to accomplish?
- Who must we convince?
- What is our fallback position?
- What is the next paradigm?
- What is the horizon for our vision?
- How close is the wood – or the tree?

Some of these Zen-like questions are unanswerable but are nonetheless worth contemplating. We need to give ourselves permission to go beyond the boundaries, even if we have to get back within them to deliver the official version of the plan.

Ringle and Updegrave (1998) ask what are we trying to accomplish? and list the following:

- “aligning technology with other institutional priorities;
- disseminating knowledge about technology needs and constraints;
- building alliances with key decision-makers;
- lobbying for (and obtaining) financial and other resources;
- addressing existing technology needs; and
- keeping an eye on the leading edge.“

This list doesn’t address any particular situation or problem, but provides useful groundwork and points to the areas we must know about or research before we can come up with effective strategies.

New directions

The process doesn’t always reflect the definition. In fact, recent literature in the management planning fields shows that there is disillusionment because of the unfulfilled promises of strategic planning. See, for example, Mintzberg’s *The rise and fall of strategic planning* (2000). Kenny notes that the term has become overused and meaningless and that disillusionment and burnout can cause an organisation to give up on strategy and go back to tactics. (Kenny 2003)

Ringle and Updegrave (1998) found in their study that while some technology officers found strategic planning frustrating and time-consuming, most followed the traditional model – “that is, a committee or task force gathers information, conducts interminable discussions about what the institution needs, and ultimately drafts a huge document that meets with overwhelming approval by the three people who actually have time to read it. The relevance of the document to day-to-day operations, the quality of services, and the implementation of new initiatives is often questionable, although, oddly enough, few people seem to be concerned about this.”

Roadblocks

As managers of libraries with considerable experience, we have shared our own frustrations over the corporate planning process. We have been to the planning meetings, the seminars and shared the enthusiasm for the latest theories and the disappointment when the process has become frustrating or daunting.

We have found strategic planning frustrating because of various factors, such as

- circumstances;
- the human element;
- management philosophy;
- misunderstandings.

Checkpoints have often been more hindering than helpful. For example, we have found that systems devised for an institution as a whole do not reflect library practice and procedure. Endeavouring to comply with the requirements causes frustration and, eventually, non-

compliance, because complying is just ‘too hard.’ All checkpoints need to be reconsidered and negotiated to acknowledge differences. This is akin to being culturally sensitive. We have found that even other organisations’ plans don’t gel with our experience or circumstances, so we can’t always treat them as our map.

The easy way out is to comply with the planners and just give them what they want while our own life carries on as normal or give up on the process as many other managers do. This is neither satisfactory nor satisfying.

Roadmaps

Competitive strategy

A competitive strategy sharpens your focus and gives your plans the advantage. Again the thinking is important, and the ability to think laterally, using ideas from unlikely sources, needs to be developed and trained. We advocate having a healthy curiosity in whatever is going on around us, keeping up with the gossip as well as the official information.

We need to see the possibilities inherent in emerging technology, even if it is not currently suitable for a library purpose. What could we use a tablet PC for? With further development, would it be better than a PDA for stocktaking for instance? What could we do with DVD-R? What are the pitfalls of wireless technology? What’s on the horizon that we currently can’t afford, but what might be useful or even necessary?

Our proposals will take time to develop and by then the technology may be more affordable, more immediately useful, more accessible or stable than while we are mulling over possibilities.

Planning of itself can kill the creative, which we believe is why so many of us find the process tedious, joyless and unprofitable. It is important to re-vitalise our creativity and try to preserve it within the deathly grasp of the bureaucratic template.

Another obstacle to overcome is the overlaying of the planning process onto our already overloaded lives. Being busy people at the best of times, complying with others’ requests for input into something that isn’t our own initiative can be tiring and end up by being not done well.

Strategic mapping

We agree with William Easum that a new way of approaching the strategic process is essential.

“In a crack in history strategic mapping rather than strategic thinking or strategic planning is the way to the future. Strategic mappers ... (chart) courses where no (one) has been before... Their maps are simple and are added to and enhanced by those who come after them... Strategic mapping is learning to anticipate the random changing needs of the next generation... done by teams of people who are lost in the wilderness.” (Easum, 2002?)

Easum lists seven mapping steps that can lead to the intersections of the future. These can be paraphrased as follows (our comments in parentheses):

1. **Let go of the past and the present and suspend all judgment.** (As with mindmapping or brainstorming, the ideas are important, not the rationalising.)
2. **Find a group of people like yourself who will admit that very little works like it used to.** (Like-minded people are not always obvious – differing experiences create synergy.)
3. **Establish the meta rules, e.g.**
 - It is okay to change, break, or eliminate some rules.
 - The fewer rules and policies we have the better.
 - Err on the side of giving permission to innovate.
 - It is better to innovate, make mistakes, and apologise than it is to safe-guard the status quo.
4. **Develop a set of clues to the future.**
5. **Ask the right questions.** (Read, network, listen and pay attention in four minutes of focused attention and really hear what is being talked about.)
6. **Begin mapping your way to the future.** (Better, cheaper, faster)
7. **Avoid allowing the process to become too detailed and drawn out.** (Set the parameters, which should not be set in concrete. Impose a time limit –good enough is OK.)

Those at the intersection to the future are learning to:

- Reach those who are unsure how to access information
- Stop trying to prop up traditions that no longer work
- Develop confident users from non-users
- Break our stereotypes of behaviour or people
- Practice our craft in a different way to meet the needs of our users
- Form alliances with unusual partners.
- Understand and use electronic media;
- Not see gender when we see a person. (adapted from Easum, 2002?)

Strategic Mapping is not . . .

- Strategic Planning
- An extrapolation of past
- Forecasting the future
- About future decisions
- Method of eliminating risks
- Brainstorming (adapted from Easum, 2002?)

Strategic mapping enables an agile response to a rapidly changing future.

Strategic Planning Methodology

Create the thought or intent, and the energy follows.

Jekowski (2003) outlines a methodology that includes:

- Using problem solving skills. Develop and hone these skills on a daily basis.
- Information gathering – everything from everywhere. Discernment is required, but you also need a voracious interest in all sorts of unlikely topics and areas of knowledge.
- Strategic mapping/scenario planning. Use your imagination at this stage.
- Gaining support from senior management (what do you do when they don't really understand the issues?) Find out how managers absorb information – present your proposals in a way they can easily understand or like to have which is not necessarily the way you like; dripfeed information incrementally; make sure others in their circle understand your points; network; talk, but not too much; make presentations fun, not too serious.
- Gathering the team – useful members are found in unlikely places.

Conclusion

The journey never really comes to an end. There will be many wayside stops as well as roadblocks and misleading signposts. According to the adage, it is better to travel hopefully – being aware of our surroundings as well as what is on the horizon. There will be many guides available to help you keep on the path you set for yourself.

The aim of any strategic planning exercise is to progress your plan, while not becoming bogged down in detail or letting the process drain you of all fun and creativity. Keep your sense of perspective at all times and make sure you celebrate your successes.

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