

Gordon Aamot

Getting the most out of strategic planning

How libraries can create strategy ovens

“Our planning process is like a primitive tribal ritual—there’s a lot of dancing, waving of feathers, and beating of drums. No one is exactly sure why we do it, but there is almost mystical hope that something good will come out of it.”¹

Strategic planning is viewed by some with skepticism and even trepidation. It not only requires a significant amount of organizational time and energy, but the relationship between the planning process and the creation of new strategies is not always apparent. When used thoughtlessly, obsessively, or with excessive formality it can drive out precisely the kind of strategic thinking, acting, and learning it was supposed to promote.²

The reason for investing our organizational resources in strategic planning should not be just to create a plan for implementing existing strategies, but it should help us improve our strategic thinking capabilities and make better choices about the future. One of the most valuable aspects of the planning process comes from the framework it can provide for facilitating the natural emergence of new ideas by encouraging ongoing strategic conversations, creating opportunities for new voices and ideas to be heard, and developing an organizational atmosphere open to new perspectives and experimentation.

Strategic planning and strategic thinking

An under-appreciated benefit of the strategic planning process lies in its potential for help-

ing improve a library organization’s collective ability to think strategically. Strategic planning and strategic thinking are complementary in nature, but they are not synonymous.

Strategic planning is a structured process intended to help an organization determine where it is, where it wants to be, and how to get there. It requires broad-scale and effective information gathering, clarification of the mission and issues to be addressed, exploration and development of alternative strategies, and an emphasis on the future implications of present decisions.³ However, the planning process is analytical, conventional, and convergent in nature. Its formal and linear approach tends to focus an organization’s attention and actions on what it already knows. It is most effective as a tool for helping a library to align organizational resources with goals and operationalize pre-existing strategies. It has been suggested by some that *strategic planning* is an oxymoron and that *strategic programming* would be a more accurate name, since it is best suited for helping an organization program the implementation of strategies that have already been created.⁴

The nature of strategic thinking, on the other hand, is synthetic, iterative, divergent, and creative. Its purpose is to discover new, imaginative strategies that can reframe the rules of the game and envision potential futures significantly different from the present.⁵

Gordon Aamot is head of the Foster Business Library at the University of Washington-Seattle, e-mail: aamot@u.washington.edu

© 2007 Gordon Aamot

Strategic thinkers can be characterized more as learners than knowers. They ask questions and incorporate new information into decision making. They have a systems perspective and are able to see interrelationships and patterns in complex situations. They also have a mental model of the complete beginning-to-end system of value creation in their profession or industry. Strategic thinking is intent-driven and conveys a sense of direction, discovery, and destiny. It also allows for intelligent opportunism that not only furthers intended strategy, but leaves open options for the emergence of new strategies.⁶

If strategic planning is what we have and strategic thinking is what we need, what can we do about it? Strategy making cannot be institutionalized, but we can take advantage of the planning process to facilitate the emergence of new ideas and creative responses to opportunities and challenges.

Creating a strategy oven

Gary Hamel, visiting professor of strategic and international management at the London Business School and one of the business world's most influential writers on the subject, suggests five preconditions for the emergence of strategy. These include listening to *new voices*, facilitating *new conversations*, unleashing *new passions*, gaining *new perspectives*, and engaging in *new experiments*. To this we add providing new focus. Taken together, these have the potential to create, in Hamel's words, a strategy oven.⁷

How might libraries start to create their own strategy ovens? Some of Hamel's preconditions for the creation of new strategies can be developed and nurtured during the planning process. Library leaders should intentionally and deliberately leverage the process to create a framework for enabling new voices, conversations, passions, perspectives, and experiments to emerge and begin building a culture of strategic thinking in their organizations.

New voices. It is essential to incorporate new and diverse genetic material

into the strategic gene pool. Senior library managers must relinquish their monopolies and give underrepresented constituencies a larger voice, including those younger or newly hired, and from the organizational and geographical peripheries. Strategy creation should be pluralistic and participative.⁸

An open and inclusive planning process can serve as a powerful tool for facilitating developmental strategic conversations in the library and can provide a forum for dialogue that may not otherwise occur. The simple process of just talking can be a powerful enhancer of thinking capabilities. The framework of strategic planning can provide a setting where it is safe to speak one's mind and question one's own and others' assumptions.⁹

New conversations. Another important ingredient is the ability to introduce new ideas into the conversation. After all, strategy is always concerned with the search for the next great idea. Enriching the repertoire of ideas and frameworks people have to work with can enhance and enlarge strategic thinking and conversations.

To improve the odds that new insights will emerge, we need to expand conversations beyond the library and create dialogues that cut across organizational boundaries to include students, faculty, campus IT and student services staff, colleagues from peer institutions, vendors, and others.

New passions. Nothing creates excitement like unleashing the deep sense of discovery within people. Most people are not against change *per se*, but they can dig in their heels and push back when it does not offer the prospect of new opportunity. If they see that the library is serious about change for the better and there is a chance to create a new and exciting future, they will more likely invest their energy and commitment.¹⁰

An inclusive planning process can also help improve internal communication. Shared discussions can help provide a context for decision making and help people to understand why decisions are made.

Participants may find their passion for library work refreshed, their understanding of larger issues expanded, and their teamwork skills improved.¹¹

New perspectives. If it is true that a change in perspective is worth additional IQ points, we can get smarter faster by looking for new conceptual lenses through which to reconceive academic libraries and librarianship. Scanning the environment through the multiple lenses of business and nonprofit management offers just a few of the possibilities for new perspectives.

It also creates an opportunity to share information widely that can be critical to the development of a broader perspective—for example, an environmental scan summarizing key social and economic forces, new technologies, new competitors, and trends in higher education. This kind of focused information sharing, as part of a strategic conversation, can help create a shared context among staff and give coherence and depth to information that might otherwise seem fragmented or irrelevant to one's own role.¹²

New experiments. Strategic thinking is an iterative, learning process. A library can increase its rate of learning by launching purposeful, low-risk experiments designed to test new ideas. For example, a reference department might experiment with free instant messaging software to learn about synchronous virtual reference service before (or instead of) investing in commercial software.

New focus. The pressures of daily work tend to cause us to concentrate on the urgent rather than take time to contemplate the important. Even planning's most relentless critics allow that, used with care, formalizing strategic discussions can help focus attention, stimulate debate, keep track of issues, promote interaction, and facilitate consensus.¹³

Finally, it is important to keep in mind that even the most carefully tended strategy oven will burn more than it bakes—including leadership credibility and staff goodwill—unless there is also a commitment on

the part of the organization to more than just solicit new ideas and strategies, but to do something constructive with them. It is essential to both acknowledge contributions and incorporate the most promising into future actions. To do otherwise will only confirm the skepticism of those who suspect that strategic planning is an exercise devoid of practical meaning and application.

Conclusion

Over the past few decades the practice of strategic planning has become firmly established in academic libraries and the institutions they serve. It is recognized as a useful way to help focus attention on mission, environmental trends that pose opportunities and challenges, and preferred futures, and to help align resources to achieve specific goals. However, because of its formal and cyclic nature, it tends to not be a very effective means for directly creating new strategies and coming up with new ideas.

To get the most out of our strategic planning efforts, we should recognize that one of the most important indirect benefits of the process comes from the framework it can provide for helping prepare individuals in libraries to think strategically as new opportunities arise and to make more informed choices about how to better serve our users. By reframing our assumptions about why we engage in strategic planning to include creating an organizational environment conducive to strategic thinking and the natural emergence of new strategies, the practice can take on increased value as a management tool for libraries.

Notes

1. Sarah Kaplan and Eric D. Beinhocker, "The Real Value of Strategic Planning," *MIT Sloan Management Review* 44, no. 2 (Winter 2003): 71.

2. John M. Bryson, *Strategic Planning for Public and Nonprofit Organizations: A Guide to Strengthening and Sustaining*

(continues on page 426)

the Web site has not been updated since 2003 while a Transition Committee considers its future, but the site still contains the very exhaustive and informative *NINCH Guide to Good Practice in the Digital Representation & Management of Cultural Heritage Materials* (242 pages in length) for anyone undertaking or thinking of undertaking a digitization project involving cultural objects and resources. Access: <http://www.ninch.org/>.

Steve.Museum. An art museum social tagging project. Access: <http://tagger.steve.museum/>.

Employment opportunities

AAM Job Search (American Association of Museums). Search or browse hundreds of museum jobs by category (curators, education, registrars, etc.) and/or by state/province/country. Access: <http://museumcareers.aam-us.org/search/index.cfm>.

Archivists, Curators, and Museum Technicians (Occupational Outlook Handbook). A standard reference source for persons looking for a snapshot of a particular job or industry, the Bureau of Labor Statistics *Occupational Outlook Handbook* provides a brief overview of the various positions within museums and museum-related work, the nature of the work therein, qualifications desired, typical earnings, and future demand for occupations in these areas. Access: <http://stats.bls.gov/oco/ocos065.htm>.

CultureWorks (Canadian Cultural Human Resources Council). Find museum and cultural heritage careers across Canada. Access: <http://www.cultureworks.ca/jobs/search/index.asp>.

Grants

The Getty Foundation. Access: <http://www.getty.edu/grants/>.

Institute of Museum and Library Services. Access: <http://www.imls.gov/>.

National Endowment for the Arts. Access: <http://www.arts.gov/grants/>.

• **National Endowment for the Humanities.** Access: <http://www.neh.gov/grants/>.

• **National Historical Publications and Records Commission.** Access: <http://www.archives.gov/nhprc/>.

• **National Science Foundation.** Access: <http://www.nsf.gov/funding/>.

Other resources

• **Academy of Certified Archivists.** Access: <http://www.certifiedarchivists.org>.

• **American Institute for Conservation of Historic and Artistic Works.** Access: <http://aic.stanford.edu>.

• **National Association of Government Archivists and Records Administrators.** Access: <http://www.nagara.org>.

Society of American Archivists. Access: <http://www.archivists.org/>. *ZZ*

(“Getting the most...” continued from page 420)

Organizational Achievement, 3rd ed. (San Francisco: Jossey-Bass, 2004): 15.

3. Bryson, 6-7.

4. Henry Mintzberg, Rethinking Strategic Planning Part I: Pitfalls and Fallacies, *Long Range Planning* 27 no. 3 (1994): 19.

5. Loizos Heracleous, Strategic Thinking or Strategic Planning? *Long Range Planning* 31, no. 3 (1998): 485.

6. Jeanne M. Liedtka, Strategic Thinking: Can It Be Taught? *Long Range Planning* 31, no. 1 (1998): 122-24.

7. Gary Hamel, Strategy Innovation and the Quest for Value, *Sloan Management Review* 39, no. 2 (Winter 1998): 12-13.

8. Hamel, 12.

9. Jeanne M. Liedtka, Linking Strategic Thinking With Strategic Planning, *Strategy & Leadership* 26, no. 4 (1998): 34.

10. Hamel, 13.

11. Bryson, 12.

12. Liedtka, Linking Strategic Planning, 34.

13. Henry Mintzberg, *The Rise and Fall of Strategic Planning: Reconceiving Roles for Planning, Plans, Planners* (New York: Free Press, 1994). *ZZ*