In the Dark?
You Need a Business Plan

NAHSL 2003: Lighting the Future

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Before We Begin

How many of you have written or tried to write a business plan for a library?

How many of you primarily serve an academic institution?

How many of you primarily serve a hospital community?

How many are in another type of organization?
Premises

- Professionals with a professional job to do
- Whatever we do will require intellectual work
- Useful contributions require effort
- Change is challenging and stressful
- Without accepting these premises developing and executing a plan will be much more difficult and problematic
What we will cover

→ Why we Need a Plan
  ✷ Where we can Influence Business Operations
  ✷ What we can do to Set Expectations
  ✷ How we will Achieve Positive Outcomes
  ✷ Key Components of a Plan - Template
  ✷ Implementing and Sustaining our Influence
Why we Need a Plan -
Organizational Imperatives

Hospitals and Health Care Organizations are Businesses that are:

- Overwhelmed by Paperwork
- Overwhelmed by Patient Expectations
- Understaffed
- Overwhelmed by Quantity of Content to be filtered and digested to meet administrative and patient obligations & expectations
Why we need a plan - Departmental imperatives

- To build trust in our relevance
- To build organizational confidence in our expertise
- Without a plan we remain reactive
- To codify identified needs, gaps and non-needs - proactive
- We need structure to give our operation stability and continuity
Why we need a plan - Departmental imperatives

- We need guidelines to sustain our discipline, resolve and professional focus
- We need to justify what we do and why we do it
- We need to establish specific business outcomes that complement the overarching business mission
What we will cover

- Why we need a plan

→ Where we can Influence Business Operations

- What we can do to Set Expectations

- How we will Achieve Positive Outcomes

- Key Components of a Plan - Template

- Implementing and Sustaining our Influence
Where we can influence business operations - Organizational

Look for ways in which we can:

← **Lighten the Load** - We are part of the infrastructure
← **Streamline Processes**
← **Improve our own and clients’ Productivity**
← **Reduce Costs**
← **Anticipate** Information Needs - Timeliness
Find what needs attention - Learn where the pain is

- Engage clients in dialogue to determine impact of the need
- Survey representative constituency - individuals or a group
- Make them share where their information costs are - insert yourself in institutional happenings
- Ask specific questions, get answers, follow up for clarity - try to discover hidden costs
- Collect information about lost opportunities or costly mistakes
What we will cover

- Why we Need a Plan
- Where we can Influence Business Operations

→ What we can do to Set Expectations
- How we will Achieve Positive Outcomes
- Key Components of a Plan - Template
- Implementing and Sustaining our Influence
What we can do to set & manage expectations

We are a professional group without a strong identity among our clients

We have the opportunity to blow them away with results

Must bring the potential and the results to their attention

Start with - *Would it help if we could*...
Would it help if we could...

- Provide quick access to forms and guidelines for completing them?
- Provide desktop access to full text medical journals?
- Provide desktop access to healthcare Web sites?
- Provide access to FAQs that we have already researched?
- Offer more self-service options?
Build service goals - Suggest what clients can expect

- We can subscribe to services that will give you 24 X 7 reference access. What are your requirements?
- We can help administration establish a database of all hospital forms with index access through our search system. What are your biggest forms bottlenecks? What would speed the process?
- We have expertise in structuring unstructured information. What types of unstructured material do you have the biggest problem finding?
- We have a good sense of where the expertise resides internally. How can we help staff find the experts in a hurry?
If clients have no expectations

They won’t ask **AND** they will believe that we can’t deliver value
What we will cover

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- What we can do to Set Expectations

How we will Achieve Positive Outcomes

- Key Components of a Plan - Template
- Implementing and Sustaining our Influence
How we achieve positive outcomes

When Expectation = Results

- Define the problem & consequences
- Figure out how you are going to leverage existing resources to deliver a solution
- Describe the solution, costs to do and costs of not proceeding
- Execute the plan and track the results
- Publicize outcome
What we will cover

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- How we will Achieve Positive Outcomes

Key Components of a Plan - Template

Implementing and Sustaining our Influence
Key components of a plan - template

- All business plans have a similar format
- Variables are influenced by goals and type of organization
- Good plans allow for modifications, enhancements, and acknowledge unknowns
- Some sample plans
continued...Plans

Health Library...South Humber, UK

- Vision
- Mission Statement
- Organizational Values
- Position Statement
- Tasks
- Major Targets - Schedules
- Finance & Resources

- Summary
- Conclusion

Appendices:
- Action Plan
- Strengths, Weaknesses, Threats, Opportunities
- Analysis - Priorities
Executive Summary
- Purpose
- Mission
- Keys to Success

Organizational Summary

Products & Services

Market Analysis

Strategy & Implementation
(Marketing; staffing)

Evaluation

Managerial Summary
- Organizational structure
- Financial plan
  (Funding, capital needs, expenses)

Annual Report
Generic Business Plan for Non-Profit

continued...

Plans

- Executive Summary
  - Objectives
  - Mission
  - Key to success
- Organizational Summary
- Services
- Market Analysis

- Strategy
  - Value proposition
  - Competitive edge
  - Marketing strategy
- Management Summary (Personnel)
- Financial Plan
What we will cover

- Why we Need a Plan
- Where we can Influence Business Operations
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- How we will Achieve Positive Outcomes
- Key Components of a Plan - Template

→ Implementing and Sustaining our Influence
How do we implement?

- Stay focused on what we want to do
- Find resources that are wasted doing what does not benefit the organization [laundry lists for a month - everyone]
- Find redundancies, overlap, outmoded methods
- Stop doing wasteful stuff, find substitutes
- Find resources in other departments
- Charge-back
continued ... how do we implement

Start small - Test

Examples:

- Software or service - get evaluation option from vendor and **use it**
- Categorizing, indexing - identify a critical resource that is unsearchable (LOST)
- Expertise access - track every inquiry, resource used or loaned, acquisition topic for a month. Build a high level taxonomy with experts’ names associated - publish it.
continued ... how do we implement
Share results

- Within your group - seek feedback
- Look at costs (personnel and direct)
- Summarize benefits and problems
- Seek evaluation from those impacted
- Make adjustments
- Expand the scope
- Iterate until you get it right
- Document
- Publicize
Publicity

- Anecdotal - Talk it up
- Managerial - Submit monthly/annual reports
- News - Internal publications
- PR - Feature individual contributors
- Managerial - Acknowledge contributors publicly and in reviews
Ideas & Resources

- International Hand Library - Example of the result of a business planning process
- Rockhurst University MBA in Health Care Leadership in conjunction with DO studies
- The HIPAA affect
- SLA Competencies Guidelines (1.7)
- Prevalence of business planning in Canada and UK
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The End

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