

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

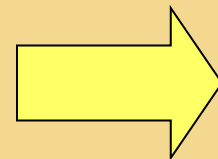
- ⌘ Where we can Influence Business Operations
- ⌘ What we can do to Set Expectations
- ⌘ How we will Achieve Positive Outcomes
- ⌘ Key Components of a Plan - Template
- ⌘ Implementing and Sustaining our Influence

Why we Need a Plan- Organizational Imperatives



Hospitals and Health Care Organizations are
Businesses that are:

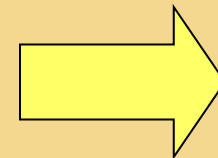
- ← Overwhelmed by Paperwork
- ← Overwhelmed by Patient Expectations
- ← Understaffed
- ← Overwhelmed by Quantity of Content to be filtered
and digested to meet administrative and patient
obligations & expectations



...continued

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



...continued

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:

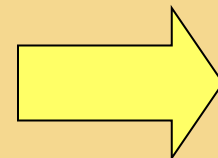
← **Lighten the Load** - We are part of the infrastructure

← **Streamline Processes**

← Improve our own and clients' **Productivity**

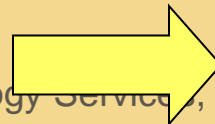
← Reduce **Costs**

← **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**

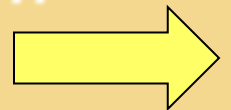
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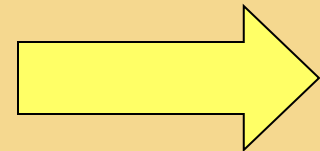
What we can do to set & manage expectations

- ⌘ 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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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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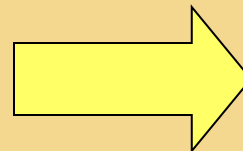
⌘ How we will Achieve Positive Outcomes

→ **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

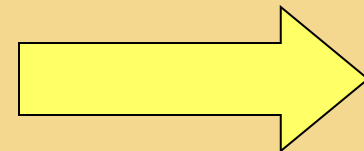


continued...Plans

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



continued...Plans

North Carolina, AHEC Digital Library...

⌘ 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

continued...Plans

Generic Business Plan for Non-Profit

⌘ Executive Summary

- ☑ Objectives
- ☑ Mission
- ☑ Key to success

⌘ Organizational Summary

⌘ Services

⌘ Market Analysis

⌘ Strategy

- ☑ Value proposition
- ☑ Competitive edge
- ☑ Marketing strategy

⌘ Management Summary (Personnel)

⌘ Financial Plan

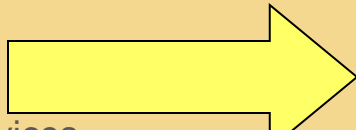
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How do we implement?



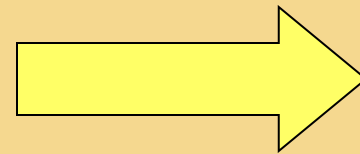
- ⌘ Stay focused on what we want to do
 - ⌘ Find resources that are wasted doing what does not benefit the organization [laundry lists for a month - everyone]
 - ⌘ Find redundancies, overlap, outmoded methods
 - ⌘ Stop doing wasteful stuff, find substitutes
 - ⌘ Find resources in other departments
 -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

continued ... how do we implement

Start small - Test

Examples:

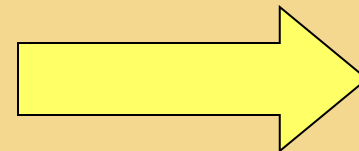
- ⌘ Software or service - get evaluation option from vendor and **use it**
- ⌘ Categorizing, indexing - identify a critical resource that is unsearchable (LOST)
- ⌘ Expertise access - track every inquiry, resource used or loaned, acquisition topic for a month. Build a high level taxonomy with experts' 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



Thank you:

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