



Strategic value planning for libraries

Strategic value
planning

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Abstract

Purpose – Strategic plans are developed and executed by businesses in order to chart a course toward an idealized future destination for the organization. Normally, this means aspiring to become an industry leader or niche holder by increasing market share, developing customer loyalty, penetrating new markets or some other defined goal that is ultimately premised on growth in revenue attainment. Because of the competitive nature of business and the environmental changes that have occurred and continue to occur at an increasing rate, marketing has become a key functional area within most enterprises' strategic plans. Today's strategies require the development of plans that embrace customer engagement in an effort to increase revenue. As such, marketing is fast becoming a critical functional area surrounding the development and execution of a strategic plan. Examining marketing's role in strategic planning, as well as the critical thought work conducted by marketing and sales personnel as they influence organizational cultures that are friendly to implementing competitive strategy and planning activities, is useful for libraries if they wish to engage in beneficial and viable strategic planning of their own. Unfortunately, libraries as non-profit service organizations are rarely in a position to create revenue based strategies. Instead, libraries must focus on strategies that encourage value creation. Additionally, in the absence of a dedicated, full-fledged marketing group within a library, it becomes vital that such non-profit service organizations develop replacements or similar organizational analogs for integrating marketing functions while at the same time developing a marketing-like, patron-centered orientation and culture required for successful market-based strategic planning. This paper aims to investigate this issue.

Design/methodology/approach – Informed by the two authors' combined extensive experience in both the theoretical and practical applications of sales and marketing, the paper discusses the current trends in market planning, especially those aimed at utilizing the marketing function as a critical element of strategic planning and execution.

Findings – The paper finds that libraries that engage in strategic planning can incrementally improve their chances of success during the execution of that plan if they make an effort to include the marketing process throughout the development and execution of such plans. Additionally, since marketing and its implied customer orientations provide a strong conduit to an organization's understanding of customer needs and perceptions of value, library strategic planning that incorporates traditional marketing elements and tactics like environmental scans, customer value creation and promotion of unique benefits will provide the best foundation for competitive library strategic plans.

Practical implications – The authors rely on their practical and theoretical experience in marketing and planning to convey a more purposeful sense of library strategic planning that includes library marketing as a required element in order to foster strategic planning success.

Originality/value – The paper shares specific ideas regarding the purpose, role and benefits of strategic library marketing that are connected to improving the likelihood of long term strategic planning success, especially when such plans are aimed at increasing perceptions of library value.

Keywords Strategic planning, Marketing, Value creation, Strategic management, Organizational behavior, Market planning, Leadership

Paper type Viewpoint



Introduction

In competitive business environments strategic planning is undertaken as more of a norm than an exception (Ireland and Hitt, 2005). Strategy and planning are considered vitally important to managers and deemed critical exercises in order to promote organizational longevity as well as short-term business success (Olson *et al.*, 2005). Unique from long range planning, which starts from a current position and decides how the organization acquires resources in order to grow or adapt to meet its needs in the future, strategic planning begins with a leader's vision and establishes the steps and measurable goals needed to reach that destination (Cummings and Daellenbach, 2009). For business organizations, this ordinarily means envisioning a role as marketplace leader or a marked improvement in industry competitive position (Doz and Kosonen, 2008). Ultimately, strategic plans can appear as deceptively simple as outlining the steps needed to competitively increase market-share (Baghai *et al.*, 2009).

A relatively new trend in strategy and planning is the development of plans that seek to produce more value for customers so that market growth is sustainable over lengthier periods and not just the short term (Cravens *et al.*, 2009). Increased value is normally achieved by identifying the unique benefits an enterprise can deliver that are likely to produce ongoing revenue through customer loyalty and retention (Cravens *et al.*, 2009). In light of this significant focus on customers, it becomes clear that successful value-based strategic planning requires a highly competitive perspective while being dependent upon a substantial market focus in order to develop and implement such a strategy (DeSarbo *et al.*, 2006).

Recent literature in strategic planning highlights the emerging interdependence of marketing and strategic planning within an organization in order to produce more viable strategic results, especially ones that increase value. New research indicates that planned strategy, and the organizational benefits that come from it, must be aligned with identified customer needs that an organization communicates in a manner that clearly evokes and promotes a sense of unique user defined value. Additionally worth noting, in business environments, marketing and sales personnel are directly accountable for the business development goals that are integral to strategic planning success, especially as they relate to revenue and market-share. Under new planning paradigms these two groups typically achieve such goals predominantly by understanding, defining and delivering user-held notions of value (Kong, 2008). The importance of sales and marketing in value-driven strategic planning is also evident in their role as data gatherers and back channels to management, especially those related to customer needs and benefits. Simply put, sales and marketing are critical to strategic planning that increases value since they provide management with the vital information required to align strategic imperatives with the market place, environmental forces and customer needs (Shumar, 2009).

Libraries already face challenging environments when developing and executing strategic plans since non-profit, service organizational cultures tend to resist change (Williamson, 2008). Additionally, owing to the highly collaborative, participative environments that highlight the complexity of library organizational structure and management, the competitive, visionary leadership needed to initiate strategic planning is not necessarily sought out nor cultivated (Stephens and Russell, 2004). Also worth considering is the notion that libraries, as non-profits, cannot produce measurable strategic goals that are tied to revenue attainment or market-share growth that are further tied to compensation during the strategy's execution. Exacerbating this problem is the reality that there is little in libraries' current culture and practice that conveys value, as defined by patrons, in direct, measurable ways (Blosch, 2003).

The main premise of this paper is the assertion that libraries which choose to integrate strategic planning processes with more cohesive library marketing efforts are more likely to achieve success at the planning and implementation stages. Library strategic planning success in this context should be based upon the achievement of an organizational leader's vision that is validated by market realities in the form of user needs that employees can communicate via marketing based tactics and communications to patrons. Furthermore, since revenue is not part of the strategic planning equation for libraries, success is further predicated upon value creation that allows the library to achieve measurable, value-oriented goals as part of the plan's execution whether they are related to fundraising, succession planning or something as straightforward as increased use of the library.

In order to elaborate upon this vision of customer value-driven strategic market planning in libraries, we will first examine the background literature on planning that considers both its role and purpose in business environments. Our discussion will also review barriers to successful strategic planning both generally and in library contexts. Next, the centrality of value, as defined by customers, will be examined along with the critical roles that sales and marketing contribute within a customer-defined, value-driven strategic market planning process. The paper concludes with a contextual analysis of how libraries can incorporate marketing efforts and a sales-like infrastructure within their strategic planning process in order to increase the effectiveness of their plans by developing and executing strategic plans that increase their library's value.

Background

Strategic planning has been used by businesses for more than 40 years as a way to envision and achieve organizational goals (Faulkner and Campbell, 2003). In terms of a destination point, strategic planning primarily relies upon a leader's vision of how the business should competitively appear in the near future (Breene *et al.*, 2007). The literature is unclear regarding the precise length of time strategic plans should optimally cover; however, the most commonly accepted time period ranges from one-to-three years (Fuente-Sabaté *et al.*, 2007). Planning beyond this number of years is normally considered long range planning and is not strategic planning (Titus *et al.*, 2011).

Most strategic planning has a pronounced emphasis on gaining a competitive edge or improved market position by analyzing internal and external data to determine what is realistically achievable (Faulkner and Campbell, 2003). As a result, most strategic planning relies upon several potential internal and external analytical rubrics but the most popular are SWOT (Strengths, Weaknesses, Opportunities, Threats) for internal analysis and PEST (Political, Economic, Social, Technological) for external assessment, which taken together are known as an environmental scan (Jarratt and Stiles, 2010). A vision statement, a leader's articulation of where the plan should take the organization, is also pivotal to a strategic plan. These are normally aspirational and reflect an almost idealized, yet always attainable, version of what the organization could achieve (Kantabutra and Avery, 2010). A vision statement is reinforced by a mission statement, which in turn defines the organization's purpose and actions relative to the vision (Desmidt and Prinzie, 2008). What follows next are the specific tactics and goals, informed by the environmental scan, that permit the execution of the mission that will allow for the realization of the vision. Finally, strategic plans are sustained by the needed organizational culture, mindset and values that are specific to the mission and vision (Thomson, 2010). The values should be concrete expressions of

the requisite behaviors and mindsets that must be displayed by all organizational members in order to execute and achieve a mission based on leadership's vision.

Success in strategic planning is normally assessed by the achievement of established goals or milestones that lead to realization of the strategic vision (Franken *et al.*, 2009). Reality suggests, however, that most strategic plans are inadequate to the task of visionary change due to their failure to include achievable goals (Dye and Sibony, 2007). With that said, when measured by a standard that merely requires improvement, most strategic plans are beneficial. Additionally, some commentators have suggested that strategic planning adds value since it encourages, not only leaders but also rank and file employees, to think about the organizational purpose in new ways that result in a sense of shared purpose (Kaplan and Beinhocker, 2003).

Understanding strategic planning failure and success

General strategic planning concerns

Strategic planning success, if defined as the realization of a stated vision by a specific deadline, ultimately results in a failed effort more often than a successful one (Kaplan and Beinhocker, 2003). Despite this outcome, strategy development and planning are considered the norm and in fact, vitally important to organizational short-term competitiveness and long-term survival (London, 2002). At the heart of most strategic planning inadequacy is the pursuit of poorly defined goals that are inadequately articulated in terms of organizational or customer benefits which in the end produces less than optimal execution (Martin, 2010). Despite this seemingly Sisyphean task, organizations of all kinds continue to plan strategically and, as stated above, consider it an important activity critical to their success. In light of such widespread and repeated failure, it seems to defy obviousness with regard to where the organizational benefits of strategic planning lie. It is, therefore, worthwhile to attempt to contextualize strategic planning failure by identifying the most common reasons for those failures as well as their implications for future strategic planning.

Surveys of managers regarding strategic planning effectiveness normally indicate a wide gulf between expectations in terms of plan benefits and actual produced benefits. A global study by the HR Institute and the American Management Association in 2006 (American Marketing Association, 2007) uncovered the primary drivers or specific failure modes that undermine execution of strategic plans. They are:

- poor employee engagement;
- poor communication;
- lack of clarity in terms of goals and expected outcomes;
- inadequate leadership development within organizations;
- speed and adaptability when refinements are required;
- slow decision-making;
- resource inadequacy;
- little attention to customer needs; and
- non-alignment across functional areas.

According to one commentator, the survey's findings point to the need to develop a new strategic planning focus. Specifically, the focus must center on creating a foundational customer orientation predicated upon aligned internal and external

realities while being agile and open to change during strategic planning execution (Lippitt, 2007).

One of the greatest barriers to successful strategic planning lies in the areas of goal setting and measurement. Inexplicably, most organizations fail to create achievable, measurable goals let alone communicate them (Franken *et al.*, 2009). Additionally, making the task of goal setting even more complex, is the reality that more and more commentators are suggesting that the deliverables of the most beneficial strategic plans must represent mutually agreed upon benefits to all stakeholders, both internal and external (Breene *et al.*, 2007). More specifically, in order to engage in successful strategic planning, the organization and its customers must be on the same page in terms of the expected results and predicted benefits, otherwise the planned goals, even if achieved, will produce little in the way of sustainable benefit to the organization.

Beyond goals and milestones, many strategic plans falter at the execution stage. Successful strategic plan execution requires adaptability, strong levels of change tolerance and leadership to promote those values (Doz and Kosonen, 2008). Blind adherence to plans as they were originally laid out oftentimes becomes a significant barrier to executing strategic plans. Thus, failure to execute strategic plans can additionally be grounded in a misplaced focus on the strategic planning process as opposed to the strategy itself (Carroll and Mui, 2008). Without the willingness to adapt plans during execution, virtually any strategic plan is destined to perform inadequately or fail. Since most strategic plans take place over sustained periods of time, planning without adaptation is the strategic equivalent of painting oneself into a corner.

Library strategic planning concerns

The literature on strategic planning in libraries is limited (Matthews, 2005). While libraries have been engaged in such planning and have shared their strategic planning experiences for more than a decade, there is substantial evidence to support the assertion that much of what is considered library strategic planning is not necessarily strategic but instead would best be considered a reactive form of long range resource allocation planning. Such an assessment is grounded in the length of the planning period, oftentimes closer to decades than years, the absence of a leader-defined vision, and finally the lack of objectives based upon competitive environmental analysis. It could be argued that libraries need a reorientation towards planning as a visionary, strategically competitive enterprise as opposed to one that is merely preoccupied with future resource acquisition and allocation.

In light of the above, libraries encounter all of the barriers or primary failure drivers of optimal strategic plan execution that businesses face, oftentimes in stronger degrees of intensity. There are also very real questions regarding the purpose and benefits of strategic planning for non-profits generally and libraries particularly. As previously suggested, in corporate or business environments, strategic planning is undertaken for a very real and obvious purpose that is ultimately related to revenue and competition. In non-profit environments generally and libraries specifically, the purpose, goals or outcomes of strategic planning are not so singularly derived; instead they are normally premised upon the vague desire to achieve a greater level of organizational effectiveness (Papadimitriou, 2007).

One of the most significant hindrances to precision in strategic planning goals faced by libraries is the difficulty in connecting patron attitudes, needs and desires to library services. Library customers are a hugely diverse group and that diversity is made all the more incomprehensible in an increasingly fractured and dynamic information

seeking landscape that allows researchers a complex array of choices (Fletcher, 2006). Libraries confront enormous competition in the information industry, which provokes an ever-widening competitiveness gap between them and other user-mediated information sources that are available around the clock and updated instantaneously. Strategically, libraries need to consider what precisely it is that they do well or better than the competition and which of those things are most valued by customers. The market research implications here are staggering even without considering the lack of expertise and resources implied by the absence of dedicated marketing professionals.

Simply put, one of marketing's greatest contributions to an organization is its ability to provide critical feedback and information about customers in an organized and systematic way while communicating their competitive strengths. Marketing is the primary aggregator of vital customer data related to the use and adoption of services and/or products. Without the marketing process, there is a vacuum related to customer needs, value drivers of an organization's product and/or service offerings. Marketing, as a functional area, is tasked with gathering market research data, conducting product/service testing, communicating directly with the customer via advertising and personal selling, customer service interactions, and needed consumer intercepts in order to retain or add customers (Burns and Warren, 2008). Each of these marketing activities produces valuable and critical information needed for strategic planning in today's economy. Regardless of whether the goal is to develop a business further within an existing market by deepening the loyalties of existing customers or to enter new markets to gain additional customers, these marketing processes are vital to the strategic planning success since combined they represent the required evidence needed to support strategic decisions.

The lack of professional marketing departments including sales professionals in libraries represents a substantial barrier to strategic planning success for a number of reasons. Marketing, and sales by extension, provides a crucial direct conduit for customer perceptions, including their needs and wants. The absence of such a channel means that leaders in libraries are missing vital data regarding their customers. Marketing and sales interpret, understand and act upon customer behaviors while oftentimes translating those behaviors into viable strategies related to the reception of products or services in the marketplace. In doing so, they communicate in ways with customers that directly enhance their perceptions of value. Given the new and highly engaged customer and the need to embrace multiple touch points with customers, all organizations, not just libraries, need to understand and incorporate marketing processes into strategic planning. The absence of revenue targets for libraries makes it especially worthwhile to consider the importance of customer value creation as a primary driver for developing strategic goals and outcomes. However, with the limited knowledge surrounding strategic planning in libraries and the relatively new importance of integrating customer value creation in strategic planning, a discussion of the strategic planning process and the incorporation of customer value creation into the process has merit. In effect, marketing towards value could represent the solution to the problem regarding lack of defined goals and outcomes of strategic planning for libraries.

Strategic planning that creates and enhances user defined value

General overview

Various strategic planning models currently exist but they usually share a number of components including the crafting of vision and mission statements, defining goals, assessing existing internal and external environments, formulating strategy, execution

of the plan, and finally evaluating the results of the strategic plan. For businesses, each of these steps involves a clear understanding of what the company expects to achieve in relation to market growth, with common goals such as increases in numbers of customers, more revenue from existing customers, market-share improvement, and ultimately, revenue attainment. Absent revenue related goals, many companies, especially start-ups for example, focus on value creation as the force that drives their planning (Holcomb *et al.*, 2009). While establishing or increasing value with a new or existing customer group is a viable way to frame the strategic planning process, it does represent challenges related to defining, targeting and measuring something as amorphous and imprecise as “value” especially when that concept is applied to intangibles like services (Sánchez-Fernández *et al.*, 2009).

With the above in mind, it is our assertion that a value driven strategic planning process is an ongoing cycle that includes the following steps:

- (1) Environmental scan (internal and external assessment of strengths, weaknesses, opportunities, threats and political, economic, societal, technological factors; customer research and market research gathering).
- (2) Leadership established vision (premised upon unique value to patrons).
- (3) Define mission (that demonstrates commitment to patron value required to realize the strategic vision).
- (4) Determine organizational values and cultural shifts needed.
- (5) Establish tactics and milestones (goals) with timeline.
- (6) Execute (measure and adapt as needed).

(Revisit Steps (1), (4)-(6) periodically in order to ensure to alignment between vision, mission and value propositions (Hume, 2011)).

It is important that organizations consider the centrality of understanding their competitive place in the market as well as the role they play in their customers’ or potential customers’ lives via environmental scanning. The data collected by environmental scanning provides the foundation for any value-driven strategic plan. In sum this information provides evidentiary support for the vision, mission, goals and tactics. Without rigorous data gathering and analysis, strategic planning has no focus or cohesion and is unlikely to produce meaningful benefits.

Next is the vision. The leadership-defined vision is a central moment in creating strategy since it defines the destination or fruit of planning. In strategies that promote value, there must be recognition that such vision embraces a clear understanding and inclusion of customer-defined value. Otherwise an organization’s strategy runs the risk of irrelevancy. Vision statements involve a forward-looking idea of organizational success originating from the executive management individual or team. More specifically, leadership at the highest level offers its view of what their organization should do and at what level in an effort to improve the organization’s market position and importance to customers. Libraries can take a similar approach by establishing a vision that focuses on the importance of information to patrons that places it in the context of other resources available to that patron (Holt, 2007). Regardless of the established vision and value definition settled upon, it must be measurable, quantifiable and attainable. When that quantifiable, measurable, and attainable is agreed upon, the vision becomes a broad statement of what that organization’s future will indeed look like if it is to achieve its highest level of value to its users (Pralhad

and Ramaswamy, 2004). Organizational strategic vision premised upon value, not merely revenue, represents a strong foundation for successful strategic planning since it aligns internal and external stakeholder interests.

Once a vision of value, as it relates to targeted users, has been established by leadership, it becomes incumbent upon the entire organization to agree upon what the mission will be in order to achieve that value in the eyes of customers. The mission is further defined by actual strategy that will execute it based upon an environmental scan that allows for differentiation and identification of the tactics and specific objectives and goal expectations of the strategy. A successfully articulated mission statement should inspire and inflame passions both internally and externally by highlighting the desired activities and attributes of personnel within the organization as well as the organization itself (Abrahams, 1999). Unfortunately, this is rarely the result of mission statements because, according to a recent study, they are suspiciously similar to one another across industries and organizations (Verma, 2009). In another study of intent and influence of mission statements, Verma uncovered that mission statements can be powerful influencers for decision-making across an organization if they specifically enunciate the principles and behaviors needed in defined areas (Verma, 2009).

Mission statements also play an important role in customer value setting especially when that uniqueness is connected to customer needs or desires. The mission statement becomes an articulation of the special value the organization alone can deliver to its customers (Desmidt and Prinzie, 2008). Mission statements, when based upon market and customer intelligence provided via the marketing processes, can provide an organization with a strong competitive advantage that succinctly places them above competitors or potential alternatives to their service/product offerings.

An important element that supports the execution stage is an articulated and defined set of organizational values that in turn establish a culture that individual contributors and leaders will adhere to and exhibit, in order to execute the mission. Such values should reflect the challenges implicit to strategic plan execution and include things like agility, innovation, change acceptance, risk taking but also leave room for specific cultural values that are considered critical to the organization itself (Shimizu and Hitt, 2004). For non-profit service organizations, which include libraries, some form of excellence in service, customer focus, or other similarly patron-directed organizational values and commitments are necessary. In fact, some articulated form of customer orientation is indispensable in order to execute a mission premised upon user value when considering non-profit organizations (Hume, 2011).

Next, the step that most people think of as strategic planning, the establishment of tactics and milestones or periodic goals coupled with their mechanisms for measurement, is the second to last step in a strategic planning process that seeks to establish customer value. Obviously, this is a critical portion of the planning process and depends upon participation at all levels as the organization attempts to develop tactics that will build customer value by combining what it knows about itself, its place in a broader industry and its customer's perception of that value into a set of achievable strategic goals. Making tactical decisions related to goal setting is a critical pre-execution moment. In fact, this part of the process has much to do with deterring eventual success of the strategic plan. Goals need to be aligned with the vision by supporting the specific and most likely activities that can increase customer value perceptions (Kaplan and Norton, 2007). Spending time on this step in order to define attainable or realizable results that are aligned with vision and value creation is time well invested and can play an enormous role in successful execution of a strategic plan.

The final step, execution, is fraught with its own set of perils. Successful execution depends upon open communication and continuous shared purpose and buy-in that is rarely top-down or directive (Martin, 2010). Strategic planning must be an ongoing, cyclical process that is based upon a culture of customer focused interaction that results in value creation, internal assessment and market planning that involves all organizational levels in the effort to reach a visionary aspiration. All three of these endeavors are highly dependent upon clear and frequent communication, both internal and external. In business environments such communication is the responsibility of marketing. Therefore, in order to ensure a high potential of success, there is a vital need for appreciating strategic planning's strong dependency upon marketing processes. In many ways, the execution stage of strategic planning that increases customer value perceptions is marketing (Comstock *et al.*, 2010).

Another issue to consider is adaptability. To increase the likelihood of successful execution, there must be an ongoing effort to assess progress and measure effectiveness along with a willingness to adjust plans as needs arise or as problems present themselves. By taking a more holistic, cyclical approach to strategic planning that incorporates customer value creation, interestingly, each strategic planning step has a strong element of traditional market planning that utilizes the marketing process extensively.

Re-imagining library strategic planning, marketing's evolution and value inclusion

Libraries have, in the last two decades or so, eagerly embraced marketing as a means of promoting their services. The effort to date has been mostly ad hoc. Typical library marketing activities include such things as satisfaction surveys, advertising, promotional programs and brand creation. What's missing are the important market assessment and analytical activities that inform strategic marketing. These include formal market research, consumer behavior research, market planning, new product/service development processes and personal selling.

Important to note is that all of the above marketing activities are needed in order to engage in meaningful customer engagement and relationship development. These are critical outcomes for marketing especially in services marketing. Personal selling, in particular, permits business the opportunity to engage with customers to determine wants, needs, likes and dislikes while uncovering vital information that can provide insight into everything from product development, customer service expectations, competitive intelligence, to emerging consumer and community trends. Environmental scanning and research are other activities that are critical to marketing since they promote a deeper understanding of the forces that promote or hinder competitiveness. They do, however, require substantial skills and experience that typically exceed those of the accidental marketers that are the norm for library marketing. The absence of sales and marketing professionals in library environments represents a serious limitation to any efforts centered around the idea of value-driven strategic planning.

In addition to the obvious absence of sales and selling in library operations, there is ample evidence that marketing is simply not a top priority for the profession. Few if any required courses in marketing are part of the MLS degree. Additionally, there are but a rare number of positions within libraries overall that are dedicated to shaping market performance and market-share acquisition. Taken together these are clear indicators of the limited role marketing plays in the profession. At best, marketing in libraries is typically attacked with fervor and enthusiasm but rarely rises above an ad hoc approach

practiced by those interested or working in customer facing positions. With that said, there are some recent developments that indicate the potential for significant change. Specifically, many libraries, particularly academic ones, are creating positions dedicated to the user/patron experience. Such positions hint towards a more sophisticated execution of library marketing that views patrons as customers while placing importance on targeted communications and the timing of specific services for delivery (Mathews, 2009).

In light of the above observations, and perhaps because of them, libraries often pursue long-term resource allocation plans as opposed to competitive strategic plans. While not negating the benefits of that approach, the fact remains that libraries are increasingly under pressure from state and local governments to approach their organizational needs from a budget perspective. With chronically shrinking budgets, libraries are in need of ways to justify not only their budget, but their mere existence. The answer to budgetary pressures of any kind is value creation. When value creation has been firmly established, it becomes clear exactly what the budget axe will remove and the extent of the impact. Strategic planning that conveys value to users in their terms while supported by marketing in order to maximize planned benefits, value creation is an incredible hedge against future budget reduction as well as providing a strong foundation for developmental or fundraising activities (Germano, 2010). This is especially evident, as our economy has transitioned from a predominantly manufacturing to a service-based economy. Marketing has adapted to this trend and in doing so, provides clear analogs for a more sophisticated symbiosis of strategic planning that embraces what marketing might look like for any service-based industry, like libraries. Understanding this change could provide interesting clues for libraries and their efforts to plan strategically.

Marketing in the twenty-first century, it should be noted, has moved beyond the traditional view established in a predominantly manufacturing economy in the mid-twentieth century. It used to be viewed as a set of discrete responsibilities but has evolved into a more process oriented endeavor. The rubric for understanding traditional marketing responsibilities has been reflected in the well-known "Four P's" approach that makes marketers responsible for decisions and planning related to price, promotions, place and product. The process orientation view is better suited for marketing intangibles or services in today's fast-pasted, change laden consumer environment that exhibits rampant brand erosion due to increasingly fractured customer loyalties. As expected, an extended marketing mix, or the "Seven P's" has evolved and includes the added areas of people, process and physical evidence in acknowledgement of the employee-oriented nature of service delivery, the desire to refine service steps into a process and the need to provide customers a concrete reason to return for that service in the form of physical evidence (Palmer, 2000). Libraries, as service providers and service organizations, fall into this category and need to incorporate a Seven P's marketing process approach to their operational practices if they wish to successfully engage customers in ways that create value for them.

One of the most striking benefits of incorporating marketing processes in strategic planning, and a vital portion of the strategic planning process for any profit or non-profit organization that wishes to improve its marketplace position, is the direct conduit it represents to the customer (Shumar, 2009). Marketing processes, which include sales, provide critical feedback and information about customers in an organized and systematic way. Marketing is the primary aggregator of vital customer data related to the use and adoption of organizational services and/or products. Without the marketing process, there is a vacuum related to customer needs, values and understanding about an organization's product and/or service offerings. The

marketing process, takes a more strategic view of marketing that places intelligence gathering and planning at its center. The marketing process as it is currently understood promotes a set of steps that begin with environmental scans and research in order to understand the customer as well as what the company is capable of delivering. Subsequent steps include goal setting in alignment with and based on the data gathered as well as constant adaptation and assessment as the plan is executed.

Marketing, when viewed as a process, opens the universe of marketing and marketing activities to organizations whose success is not predicated upon revenue generation alone. In fact the marketing process view is well suited to services since it is primarily concerned with value creation by increasing customer perceptions of value. In short, the marketing process allows for a more agile and adaptable view of marketing for libraries and non-profits since it places utmost importance on the interaction of people with other people as well as with ideas or technology in order to create value. The marketing process, as a result, becomes more about value creation than revenue attainment. When today's engaged consumers are involved in defining value, successful values creation is more likely. Appreciating the connection between value creation, strategic planning and marketing, is a crucial step towards engaging in meaningful library strategic value planning.

Library strategic plans that successfully drive value

The above discussion provides support for the assertion that optimal strategic plans are ones that have the capacity to promote increased perceptions of customer value while relying upon market orientations for both strategy development and execution. Such strategic plans fully employ the marketing process in order to realize a value-laden strategic vision that is of importance to patrons. The marketing process supports strategic planning of this kind in several key ways. It is premised upon meaningful environmental scanning that promotes effective decisions related to customer needs and organizational capabilities. Additionally, marketing cultures and contributions are vital to establishing internal and external cultures that are friendly to strategic initiatives. Finally, the marketing process encompasses all customer communication and interaction that supports strategic goals. With that said, how do organizations such as libraries, compensate for the absence of dedicated sales and marketing professionals that contribute the complex thought work related to value driven strategic planning? They focus on the next best thing: Those organizational positions that are most closely aligned and interacting with customers or patrons. In other words, organizational positions that have a direct public service element should, in effect, market and sell the organization and its implicit value during the every day act of service delivery.

Many existing public service library professionals can effectively implement value based strategic plans if their focus is reoriented towards understanding patrons in a way that considers their needs as well as the role the library plays in their overall information seeking behaviors. Additionally, such patron-facing employees must incorporate selling and marketing behaviors in their interaction with library customers in an effort to increase value as defined by the strategic plan. It cannot be simply about providing a commodified version of service that seeks to please patrons but instead is a more focused form of service delivery that satisfies needs in ways that make the library and its offerings vitally important to them. Finally, such employees should be held accountable for developing customer relationships and satisfying user experiences that promote the library's value.

True strategic plans and libraries are not mutually exclusive. In fact, they should be considered just the opposite. Ultimately, a leadership-generated, user-centric vision should establish what the organization is expected to achieve over a specified period. An effective library vision statement should include superlatives that suggest the attainment of a leadership position in terms of information acquisition, reliability, and authoritativeness as well as the highest user preference for library provided services in accordance with user needs and benefits. The mission statement needs to specify what the library will be for its patrons in order for it to realize its visionary aspiration. The development of such customer centered vision and mission requires the incorporation of selling or marketing functions into the library strategic planning which emphasizes patron needs and wants via preliminary and ongoing environmental scanning that promotes a clear understanding of patrons as well as their overall information seeking behaviors. This requires libraries to address huge questions like:

- Who is (not) using my library?
- What are they (not) using?
- What moments of truth prevent patrons from using the library again?
- What are they using instead?
- How do they get information when the library is unavailable?
- How much do they value information?
- How has the library improved patrons' lives in quantifiable ways?
- Is my library capable of providing the information patrons need?
- What do my patrons need from a library? Want?
- What or who is my competition?

These types of questions specifically require libraries to imagine themselves in the eyes of the patron and not merely in ways they assume patrons think or feel about their library. Such keen understanding is simply unattainable in the absence of marketing and sales functions aimed at aligning library business with customer needs, their perceptions and the role of competitors in their information consuming behaviors.

Thus, value driven strategic market planning requires connecting library business and operational goals to customer needs by conducting environmental scans and formal market research as well as gathering everyday customer reactions, responses and objections during customer contacts or selling events/activities. Employees working with patrons should and can conduct these varied marketing functions that involve customer interaction. It simply requires a new orientation that elevates organizational competitiveness and success to the same level as service. In other words, public services employees should do what is right for the patron as well as what is in the best interest of the organization's long-term success. This means answering questions or providing assistance in a ways that satisfy patrons while at the same time delivering that service in a way that is uniquely competitive with other forms of information retrieval.

Achieving the above may sound daunting but there are already mechanisms within typical library operations that, if modified slightly, could conceivably support such outcomes. For example, reference librarians frequently keep statistics on patron question types and volumes of questions. This basic view should extend to keeping track of the types of questions including complexity (rated on a scale), specific subject matter and purpose of need while identifying the resolution provided and assessment of the

resolution from both the point of view of the librarian as well as the patron in an effort to better understand customer needs and the library's ability to meet or even predict those needs. This is just one way of many that librarians can start gathering market intelligence as opposed to mere statistical data. It is also worth noting that in today's connected environments that feature a wide variety of social networking and geography based tools and applications, such marketing intelligence gathering can approach levels of sophistication that were previously unattainable. Simply put, social networks make customers and their impressions of service more accessible than ever before.

Also worth considering is the idea that the surveys libraries conduct could be more targeted to enable understanding patron information seeking behaviors as opposed to merely identifying what service points were visited or whether there was a level of satisfaction with the library's current services or offerings. Instead there needs to be an effort to understand what a user experienced and how it left them feeling compared to other ways in which information could potentially be acquired. In that end, reference librarians could satisfy many marketing functions in an unobtrusive way in order to gather patron interaction and reference assessment data simply by keeping logs of their activities. Over time such intelligence enables patron needs to be more accurately predicted while new services can be developed in response to needs and behavioral patterns.

Another valuable task that public services or market focused employees need to bring to the strategic planning process in libraries is data analysis that allows and informs strategic milestones and goals. The work that library marketing could execute in an effort to understand the organization's role in the broader information industry is critical to establishing achievable and appropriate revenue or productivity related goals. In a library setting that would mean linking specific library outputs like patrons helped, materials circulated or services used, to a vision via definable and measurable strategic goals that consider the overall place and role of information in the lives of patrons. It is most important that the strategic goals are realistic as well as measurable, either qualitatively or quantitatively, and directly related to the vision and mission. For example, if a particular library's stated vision was "The library will become a regionally renowned provider of must-have information for an information literate community," its mission might include elements related to service, providing information literacy instruction, development of special collections and the circulation of materials related to current events and government. Strategic goals might include the actual numbers of patrons served, possibly even differentiated between new and existing, the numbers of class attendees, and the acquisition of targeted special collection materials by topic or subject as well as the circulation of specific kinds of materials in targeted patrons. Those numbers, however, must be set in accordance with the overall market's potential as well as industry norms. They cannot simply be made up or acquired through random processes like guesswork or even historical patterns. There is an added emphasis on establishing targets for those statistical measurements and ensuring that those targets are met due to their relevance to a strategic plan that establishes a patron centered value concept. The departure from commonplace library practice should be clear: A shift from collecting data and statistics alone to one that relates data points to library strategy and patron needs while at the same time considering the library in the context of competitors or industry-wide norms.

Finally, there are vital marketing and selling facets found in every day tactical activities related to achieving stated goals. In business contexts, strategic plans are highly dependent upon sales and marketing personnel, especially those in service industries, to develop products that support those strategic plans and bring them to

customers. Strategic planning and marketing strategy become virtually intertwined at the execution stage. For library strategic planners, with no dedicated marketing and sales group to depend upon for execution, there is a clear deficit in terms of the accountability needed for active engagement and expectations of the strategic plan. The solution is that customer or patron-facing employees must become the marketing/sales people by embracing this important function of their public services role. While not suggesting that reference librarians receive compensation related goals or bonuses similar to sales and marketing professionals, there should be, nonetheless, an attempt to connect strategic goals which reference and circulation librarians have control over to events like annual performance reviews or status checks. Librarians and staff will inevitably take ownership of the strategy by being held accountable and gauging their performance upon realization of visions, mission and strategic goals. Without this critical step, library strategy becomes mere lip service and there is very little incentive for active engagement by librarians.

Ultimately, library employees need to consider which specific activities that they engage are related to developing new customers as well as promoting retention and loyalty among exiting ones. Embracing such activities is critical. Ultimately, this means rethinking what it means to be a librarian whose key capacity is providing public services. Accepting that public services library employees are directly in touch with the customer and in the best position to ascertain wants and needs is a critical first step to embracing strategic and marketing planning. Furthermore, librarians must consider that public services also requires ongoing assessment of program and service effectiveness, as they relate to meeting those specific needs and not merely as they relate to internally held assumptions of beliefs about their importance or usefulness. In short, public services librarians need to take on an almost sales-like or customer service persona in order to consistently convey value in a way that sets them apart from other competing resources available for satisfying information needs. With this type of development, libraries will be able to strategize and plan in order to meet a vision that includes heightened patron value.

In summary, it is worth noting that strategic value planning assumes a willingness to re-imagine library people, facilities and services with virtually no attachment to the past. Market research and environmental scanning could very well result in the realization that library sacred cows like distinctions between serials and periodicals or reference and circulation desks, and even collections themselves are not nearly as important to patrons as librarians might believe. As a result, market research could indicate a need to completely reconfigure the ways in which services are offered and resources are utilized so that they are in accordance with customer needs and value creation.

Conclusion

Organizations develop strategies in order to win in today's highly competitive environment. Strategic planning is therefore, by its nature, competitive and focused upon winning market share from industry competitors. In order to embrace strategic planning, libraries need a more sophisticated view of the planning process that is premised upon creating value for users and followed by execution that features clear communication announcing and supporting measured results in relation to reaching organizational goals. These goals must align with, while supporting, the strategic plan's implicit value creation objectives that place them above competing forms of information acquisition and retrieval. Whether a library's strategic planning purpose is

undertaken for diverse needs such as succession planning, talent management, fundraising, developing a collection, improving library services or increasing library relevancy, the strategic planning effort that is supported by both a market-based knowledge gathering effort as well as a cohesive sales and marketing communication plan is incrementally more likely to produce successful outcomes that are desired by and beneficial to the library organization and patron alike.

Connecting the planning process with more sophisticated library marketing efforts and infrastructure generally, along with a new personal selling-like dimension to delivery of traditional library services involving public interaction, can increase the likelihood of successful strategic planning goal achievement. Specifically, when market driven value is infused into the strategic planning processes while at the same time being bolstered by a subsequent post-planning selling effort in order to ensure that internal and external stakeholders buy into and value the strategic planning goals, there is greater likelihood of a successful outcome. Finally, marketing the plan with user-defined narratives that a library patron understands and values is vital.

In short, libraries are severely hamstringing their effort to plan strategically in the absence of market knowledge or the ability to develop a strategic plan based upon patron needs. Basing the goals and tactics needed for the strategic vision to become reality on market data and customer preferences by utilizing the marketing process as part of value centered strategic planning provides a more competitive and viable basis for strategic planning. The strategic planning process, beginning with the stated vision needs to consider trends and realities as well as aspirations that libraries may have in order to rise above the competing information resources and services for which library patrons seek and utilize. There is the added requirement for libraries to sell and market services that are consistent with that vision, not simply educate patrons regarding their availability and value. In short, absent inclusion of the marketing process and the important thought work it represents means library strategic plans are less likely to produce beneficial change capable of transforming vision into reality and providing justifications for libraries.

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