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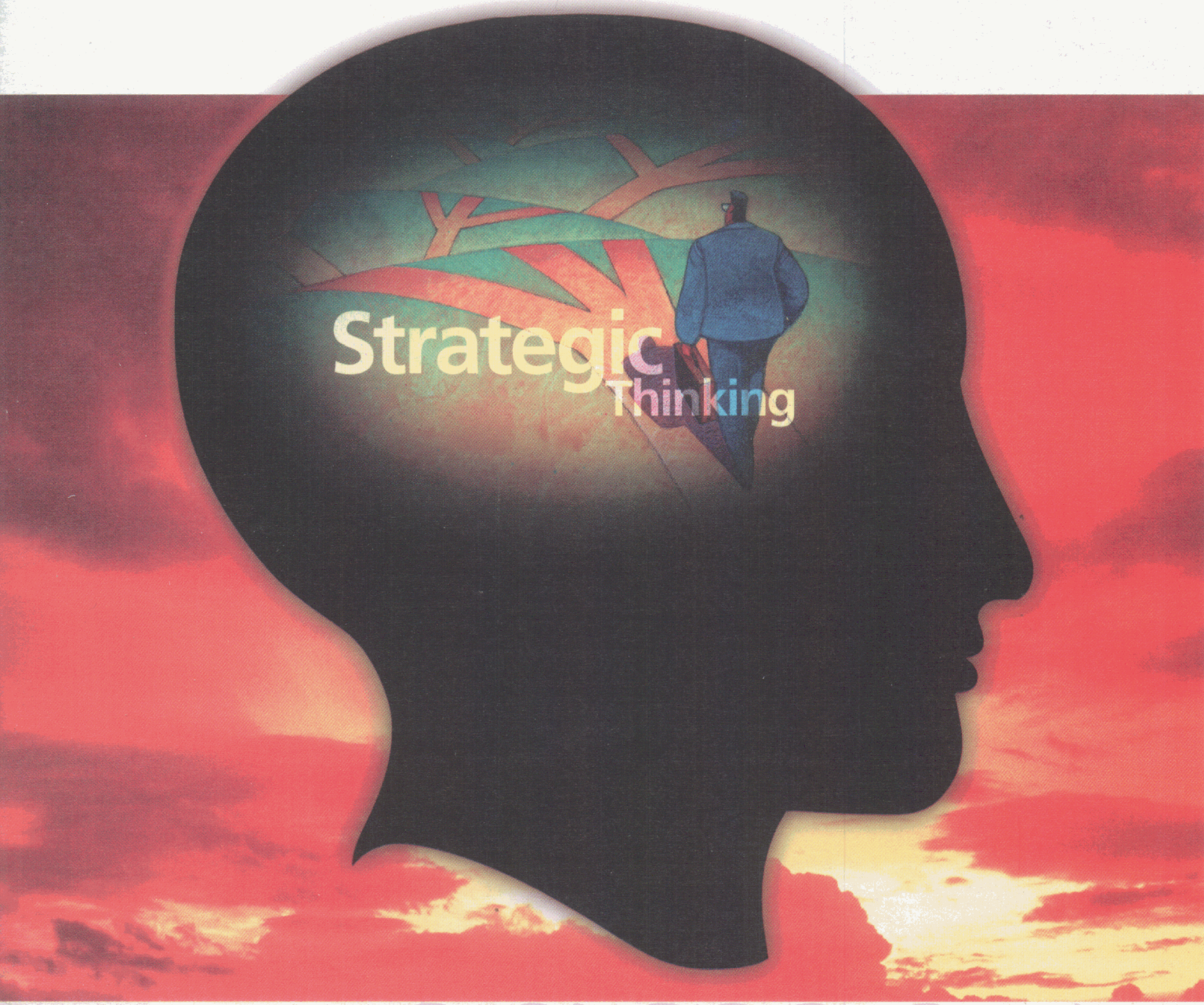

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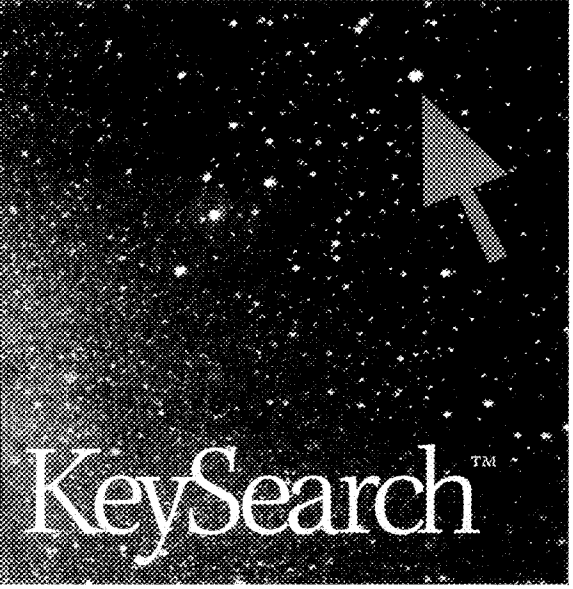

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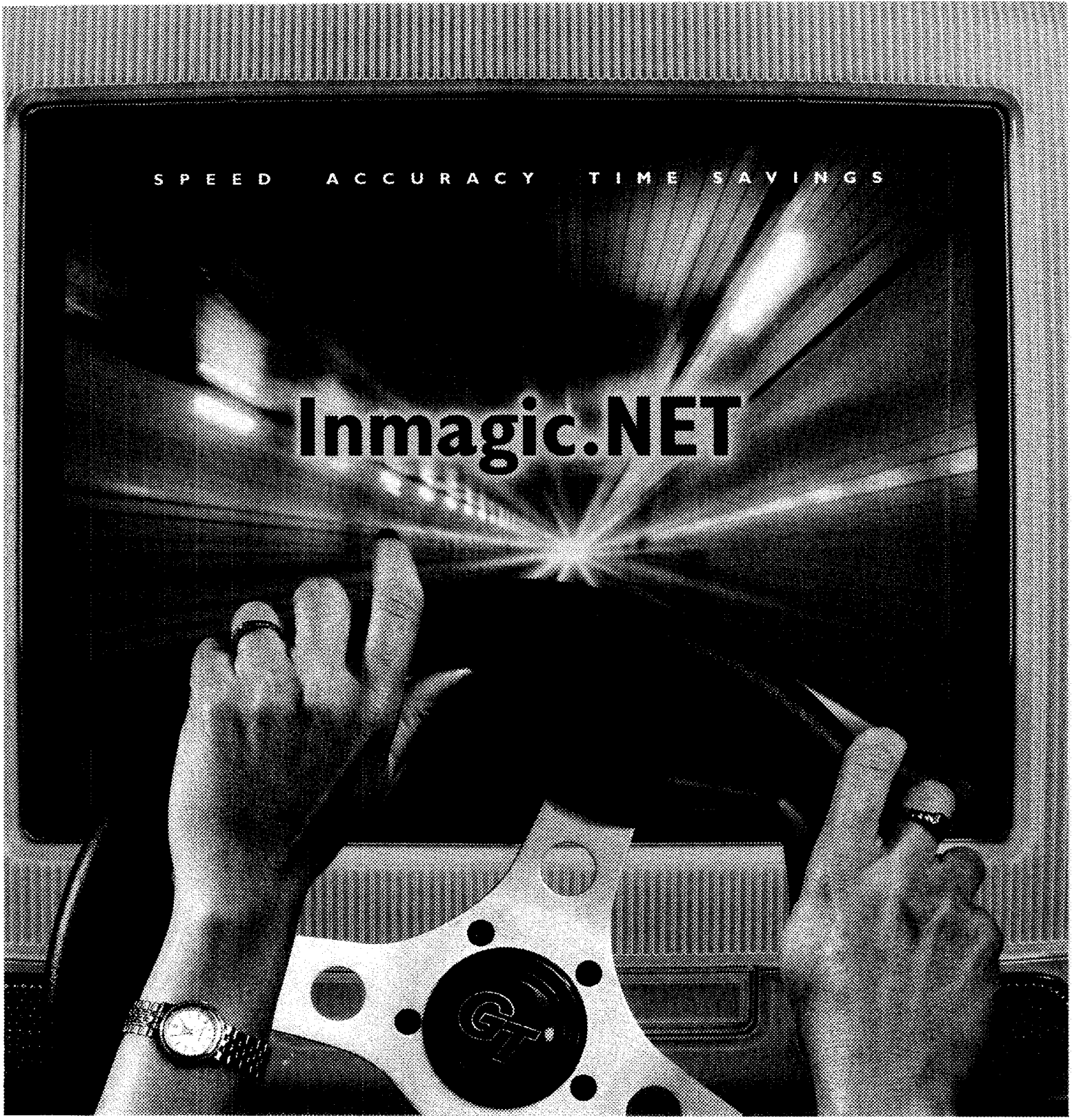

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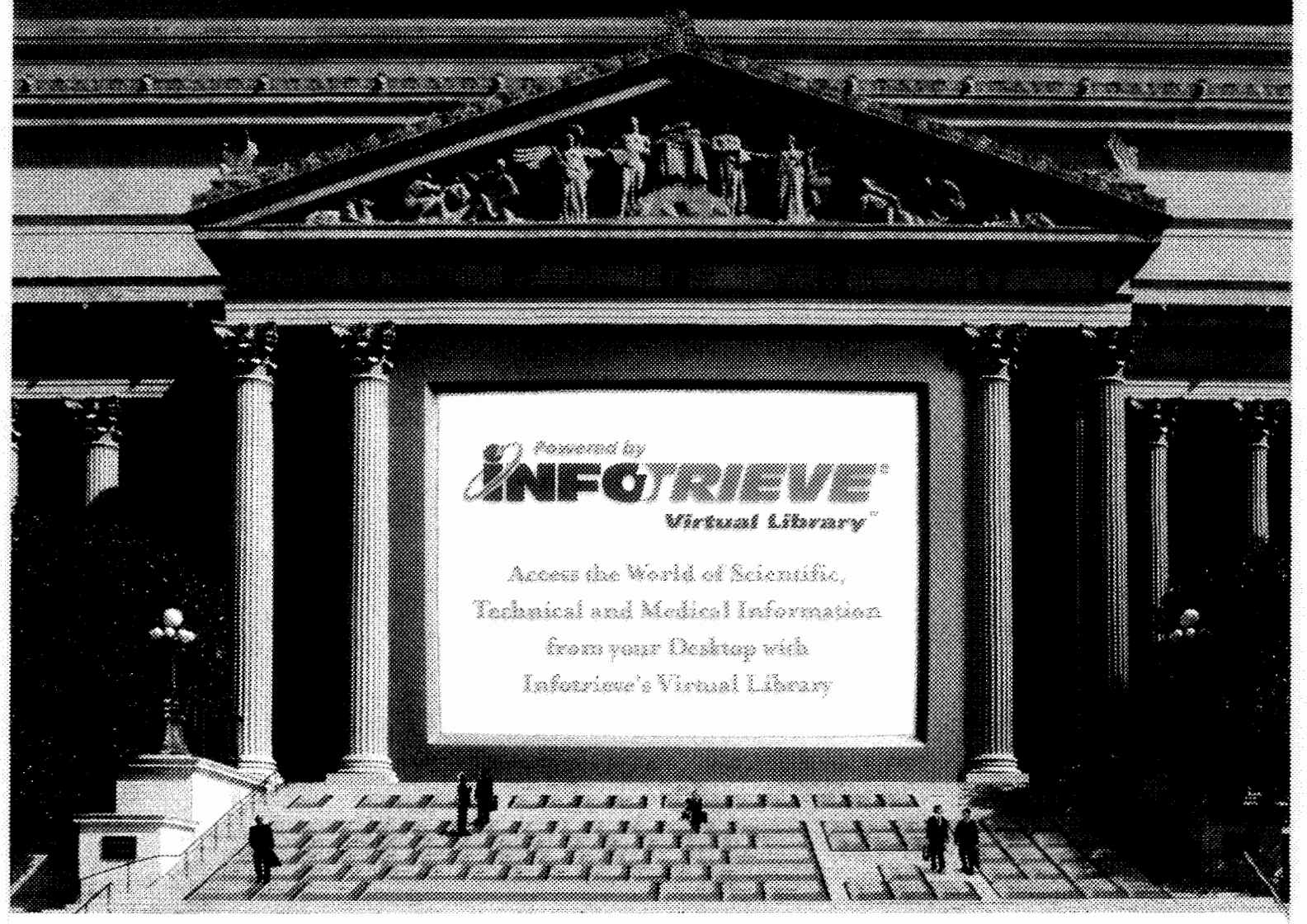

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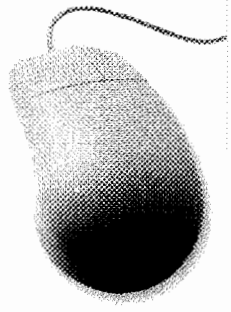

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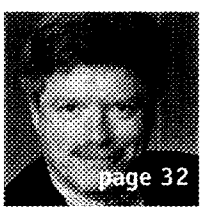

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In the old days developing strategy was the domain of the top levels of most organizations, but the Knowledge Age has changed the game by giving those all across an organization strategic thinking responsibilities. Jeff De Cagna talks about this change and how information professionals fit into the new way of developing strategy.

8 **To Plan, Perchance, To Think; Aye, There's The Rub**
While information professionals often plan without thinking when operating on relatively known information from the past and present and there is little uncertainty in their ability to carry out the plan, the situation can change when the unknowable, uncertain, complex, or ambiguous increases. Stuart Wells explains how librarians can use strategic planning to combat these situations.

14 **Creating Value: Building the Strategy-Focused Library**
Almost everyone, including information professionals, needs a strategic plan. Given the importance and ubiquity of information and knowledge today, strategy, and strategic plans are more—not less—important to librarians. But there is no easy way to create a strategic plan and building one takes a lot of work. Alvin L. Jacobson and JoAnne L. Sparks discuss and illustrate four points of designing and building a strategic plan.

22 **Scenario Planning: Creating Strategy For Uncertain Times**
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30 **Your Attention Please: A Conversation with Tom Davenport**
With the constant barrage of e-mail, voicemail, the scarcest resource in today's business world might be human attention. This is a belief held by Tom Davenport, director of the Accenture Institute for Strategic Change and co-author (with John Beck) of *The Attention Economy: Understanding the New Currency of Business. Information Outlook* sat down with Davenport to discuss attention spans and other subjects.

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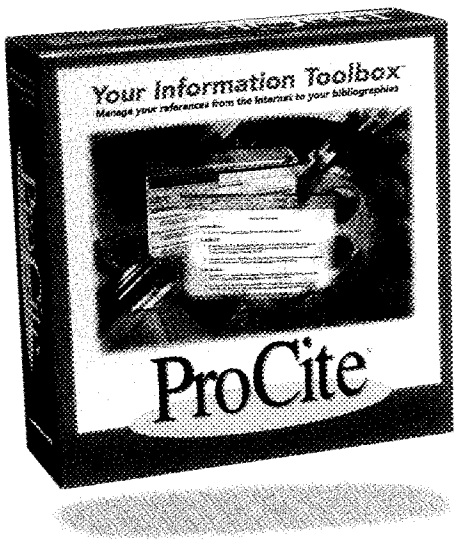

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executive outlook

Speak Up!

As Chapters begin their programming for the SLA year, think about what you want both locally and association-wide from your association. I have the opportunity to give my two cents every two months in this column, as well as to talk to you in the chapters I have the privilege of visiting. But communication must be two-way. I believe you get out of something directly in proportion to what you give to it.

What can you do for SLA? The best answer is the one given by the Footman in *Alice in Wonderland*:

"But what am I to do?" said Alice.
"Anything you like," said the Footman, and began whistling.

You need to consider what you enjoy doing, and start from there. If time is a concern, there are many activities that require less of a time commitment than the major offices. Serving on the program committee or writing for your chapter or division bulletin are just two examples.

I keep hearing from members that what they get the most out of the association is the networking. Networking is a one-to-one activity where individuals share of themselves and listen and respond to one another. You can contribute to this strength of the association by "networking" with other members! And you gain for yourself by doing it as well! With the number of units that host discussion lists, you can network virtually as well as face to face.

An extension of networking is mentoring. You can offer to be a mentor or seek a mentor to help you through many chapters and divisions. The Library Management Division has a very visible program at the Annual Conference, and the Diversity Leadership Development Program pairs mentors and mentees in their annual award program. If you don't see a program to work with, be entrepreneurial and approach someone you have identified who you think can help you.

Share your successes and innovations. There are a variety of ways to share. Begin with discussion lists and chapter networking. But don't stop there! Write your successes for chapter or division bulletins. Contribute your chapter, division, and caucus best practices to the SLA's Leadership Knowledge Center. Contribute your professional "best practices" to the SLA Knowledge Base, Smart Information Centers' Circle of Excellence. It is designed to serve as a reference tool for our members in creating an efficient and effective operating mechanism for developing and delivering products and services to their end users. Have you ever said, "Why are they doing it that way?" or "I can do it better." Share your solution here.

Communicate your issues. Buy your right to complain by giving your recommendations for improvements. Can something be done differently that would make you more effective within your organization? How can you work to help this happen?

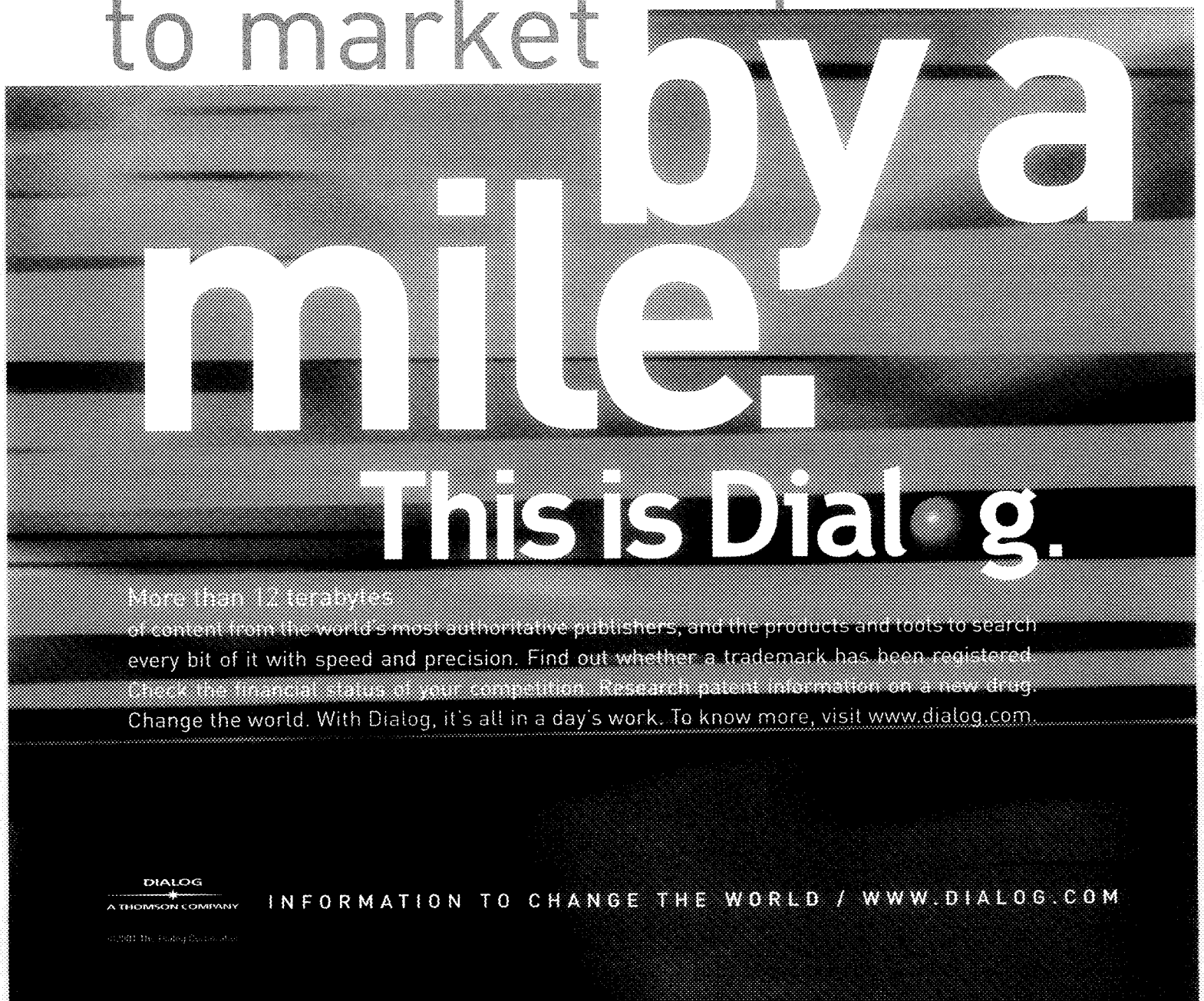
Help bring the association visibility by your actions. Articulate the value you find from the association. Tell your employer why you are a member. How do you present the knowledge you gain from the annual conference or local chapter meetings in terms of its value for your organization?

Take responsibility for your future by playing an active role. It's time for your voice to be heard. We'll be a stronger association for it.

Hope N. Tillman

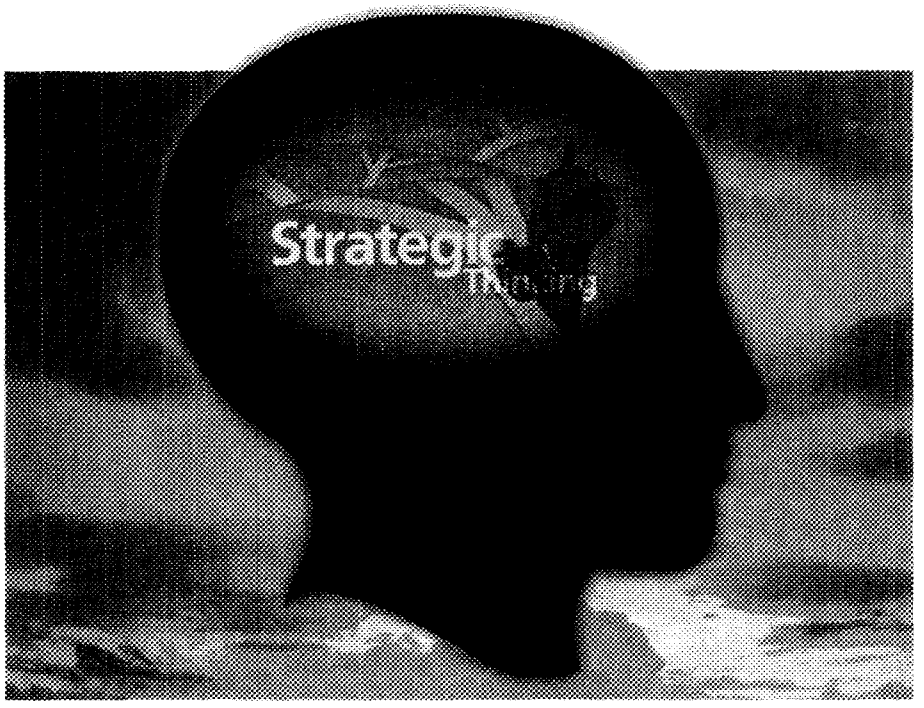
Hope N. Tillman, SLA President

This is the service that provides the information that is found by the librarian who consults with the VP who formulates the plan to launch the product that beats the competition to market by a mile.



And Strategy for All

by Jeff De Cagna, Guest Editor



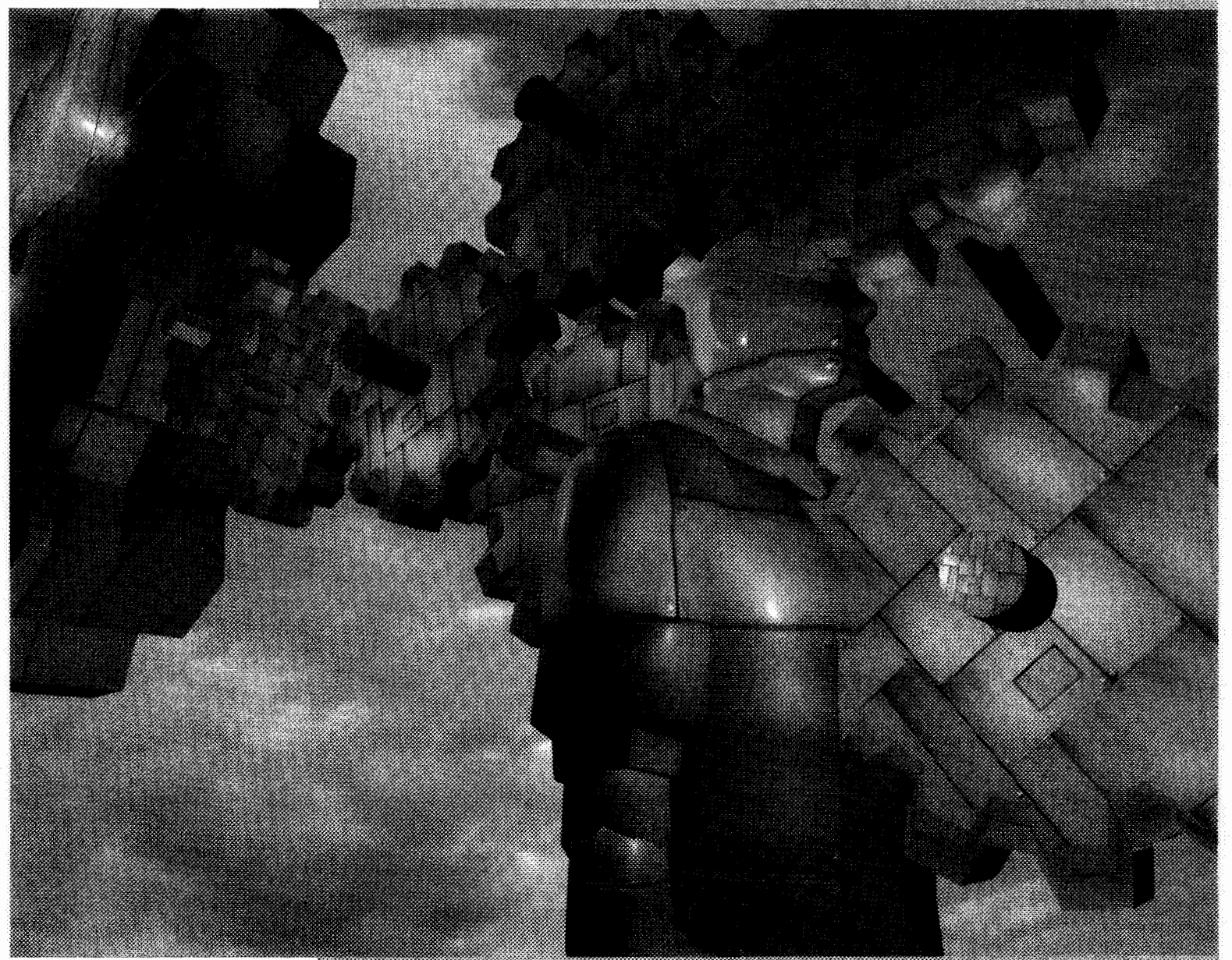
For years, the creation of organizational strategy was considered to be the exclusive province of the CEO and his or her senior team. Those top leaders were viewed as the individuals best positioned and most capable of seeing all of the organization's strengths and weaknesses, as well as its opportunities and threats. To this way of thinking, staff members below the most senior levels of the organization had only one role with respect to strategy: unquestioned on-the-ground implementation.

The Knowledge Age, however, is changing the rules of the game. Today, developing and implementing strategy is a shared activity up, down, and across the organization. It is a necessary shift as it becomes increasingly important for workers at all levels to have a thorough understanding of the organization's strategy in order to facilitate more independent action. With the business environment moving as fast as it is today, it is impossible for senior executives to pull the organization's strategic levers effectively from their removed positions (as if they ever really could), making the effort to achieve consistent strategic agreement essential to capitalizing on emerging market opportunities.

In this new context, information professionals can and should be important contributors to the organization's ongoing strategic work. This issue of *Information Outlook* examines issues of strategy with the information professional in mind. Professor and author Stuart Wells explains why strategic thinking is a critical capability in today's organizations. Al Jacobson and JoAnne Sparks illustrate how strategic focus can improve the effectiveness of the corporate information center. Joe Willmore explores the value of scenario planning in the process of crafting strategy. And in an interview about his new book, *The Attention Economy*, Tom Davenport explains why strategy should be seen as the challenge of properly allocating attention resources, and how information professionals can participate in fostering a more balanced approach.

We hope these articles will help you and your information professional colleagues to build your understanding of strategy, and will encourage you to become more actively involved in your organization's strategic initiatives. We hope you will share your new thinking and practices about strategy with us. Just drop us an e-mail at learning@sla.org. We look forward to hearing from you.

To Plan, Perchance, To Think; Aye, There's The Rub



By Stuart Wells

Stuart Wells, author of Choosing the Future: The Power of Strategic Thinking, is Professor of Organization and Management and San Jose State University. He can be reached at stuartwells@leadingedge.net.

While we can decide what we will do—our strategy—we cannot guarantee that the world we knew and the world we predicted when we choose a course of action will be the same when we are actually carrying out those actions.

A PLAN TO GO TO THE STORE LATER IN THE DAY TO BUY GROCERIES IS quite different from a plan that we label "'strategic." In the former case, our thought process is straightforward and, probably, rather automatic. We are determining what we would like to eat and we know where the store is located. Although we are planning for the future, the content of that plan is predetermined. We are operating on relatively known information from the past and present and there is little uncertainty in our ability to carry out the plan. The situation is fairly simple with little complexity or ambiguity. The environment is stable, there are few factors subject to change, and we can be confident that the consequences of our actions are predictable. A plan is the product of thinking. Obviously, we are thinking to derive and implement a simple plan but there is usually no attentiveness to how we are thinking. Unfortunately, these common experiences with planning reinforce our belief that we can plan without thinking. *Just do it.*

When the plan is strategic in nature, what is unknowable, uncertain, complex, or ambiguous greatly increases. Our thought process needs to be significantly different from the easy plan, and it has to be deliberate and conscious. Automatic thinking, which is thinking using pre-existing patterns, will not work. It reflects an implicit belief that the future will be similar to the past. Rather than concern ourselves with strategic planning, we ought to be more focused on the clarity of thinking required for strategy.

Two roads diverged in a wood, and I—
I took the one less traveled by, And that has made all the difference.

Robert Frost, *The Road Not Taken*

In strategy, we are trying to convert information to knowledge to a decision about a course of action in the future. We can only have information and knowledge about the past or present. The future is not known; it exists only in our minds. While we can decide what we will do—our strategy—we cannot guarantee that the world we knew and the world we predicted when we choose a course of action will be the same when we are actually carrying out those actions. Hence, even during the implementation of strategy, we cannot escape the continuing need for thinking. If the world would only remain static, unchanging, or at least reliably predictable, strategy would be as simple as going to the grocery store.

Strategic Thinking Process

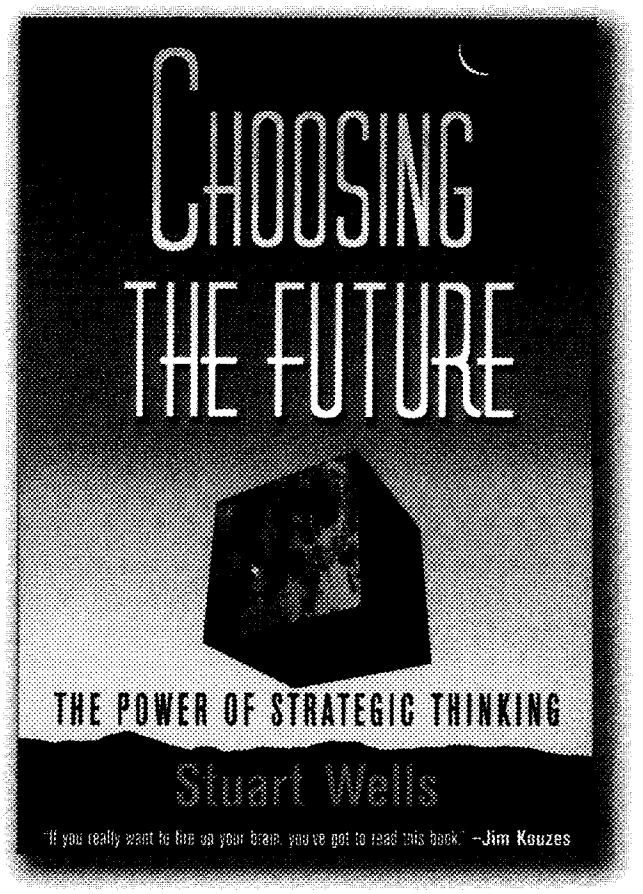
Strategic thinking, as any process, has three simple phases: input, transform, and output.

In strategic thinking, we label these process phases as perceiving, understanding, and reasoning. A thinking process should feel natural and fluid. The input phase naturally flows into the transform phase, which in turn naturally flows into the output phase. The line between perceiving and understanding or understanding and reasoning is not a wall but a highly permeable membrane. The purpose of using three phases in thinking is not to force thoughts into proper categories; it is to carry thoughts through a natural progression. It is best for the mind to grasp the entirety of the process and move among the phases rather than concentrate in lock-step fashion on one phase after the other. The purpose of the process is not to have you categorize thoughts you already have, but to organize them in a systematic fashion so that new thoughts can emerge. It should aid intelligence, not stifle it. It should enable us to confront ambiguity and complexity and be able to see a path through it.

These three phases can be summarized in three simple questions that ultimately are quite challenging to fully answer:

- What seems to be happening?
- What possibilities do we face?
- What are we going to do about it?

We are working on three phases that challenge us to rethink and add to our expertise, reconsider existing patterns of thought, see the world through different perspectives, integrate a range of complex elements, project possible futures, see areas for opportunities and threats, determine how to match our capabilities with this world, see pathways for our strategy, choose a strategy, and foresee the road, potholes, and deviations that could occur as we implement our strategic decision. This is a range of complex and integrated thought. If we do not pay attention to our thinking, we collapse under it. Rather than use our intelligence to embrace and manage the complexity, ambiguity, and uncertainty inherent in this process, we frequently avoid it and ignore the world as it is. The drive to practicality that has us trying to get things done quickly and minimize the time we spend on thinking is a remarkable detachment from reality. Ignoring what may be difficult to know is impractical and ultimately detrimental to the long-run health of the organization.



Perceiving

The thinking process phase that addresses how one builds the relevant knowledge base.

Perceiving is an expansive process. It has no limit. The question—*what seems to be happening*—is an obvious perceiving question as there is no limit to the amount of knowledge one can build about the world surrounding an organization. There are various players—customers, clients, competitors, partners, suppliers, and so forth. Each player has a perspective on the world and something they are trying to produce or create. Their decisions to act and their plans, are influenced by a variety of economic, technological, social, legal, and cultural forces. This phase of perceiving is more than gathering data; its ultimate purpose is building a knowledge base. It is not the data sitting in the computer system, but the knowledge people individually and collectively hold about the environment surrounding the firm. We begin to build a knowledge base when we use our thinking to determine whether all these data reveal patterns of thinking or behavior, and when we are able to see the world through the perspective of different players.

Patterns can lock people into existing ways of thinking and behaving. When it happens, we may fail to see how the world is changing. We are certainly not thinking "outside the box." Instead, we are in it. When our competitors are in the box, we can rejoice. When our customers or clients are in the box, we may have trouble helping them see new possibilities. When we see the world through the perspective of our competitors, we try to understand how they are thinking and how they might respond to changes in the future and our own strategic initiatives. When we see the world through the eyes of our customers or clients, we understand what they are trying to do. We know how our product or service enables them to move forward by providing the value they are seeking. We need to see the product or service through their eyes. This requires deliberate thought or we will simply see our efforts through our own eyes. We will be back in the box.

In the perceiving phase, we look in depth at the pieces of a puzzle—the various forces and players and put all that together into a few focused pictures that give us alternative and meaningful views of the future. We develop scenarios that are complete pictures of what the world could look like.

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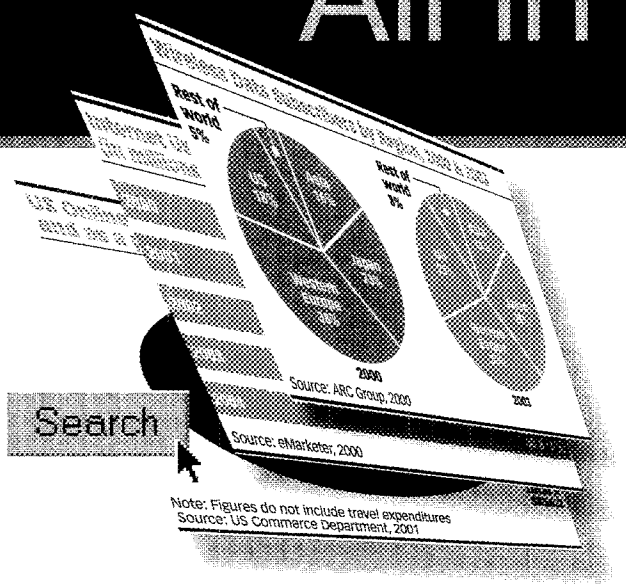

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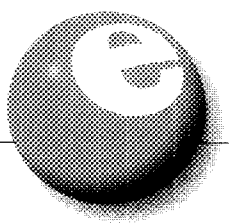

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Understanding

The thinking process phase that addresses how one determines the significance or use of the knowledge base.

The understanding phase has much more focus. With the question—*what possibilities do we face*—we begin a serious effort to pay attention to some things and take the risk of ignoring other things. The scenarios from the perceiving phase are our knowledge-based projections of the future reflecting possible decisions and behavior of players as forces influence them. Having several distinctive scenarios indicates the degree of uncertainty we have about the future. Each of these futures contains the seeds and the potential blossoming of opportunities. We match these opportunities with the organization's existing and possible strengths. This matching determines the possibilities available; the organization simply cannot take every opportunity, even when its competitors are positioned to capitalize on some of the same possibilities. It is useful to determine the most advantageous possibilities for grasping and influencing the evolving nature of the environment. Furthermore, we are looking at the interplay of threats posed by the environment with the weaknesses or vulnerability of the organization.

Reasoning

The thinking process phase that addresses useful conclusions or decisions to assure complete thinking so it is not simply contemplation of an issue but leads to some form of action.

The reasoning phase with the question—*what are we going to do about it*—should seem like a natural progression of thought initiated by identifying strategic possibilities. We have the challenging need to make a decision from all the possibilities. It means following one path and putting the rest aside. It is similar to going to a restaurant with many good choices but you can only eat one meal. We cast aside the other possibilities and we choose our future. To be more precise, we choose what we are going to do. The consequences of that action, and whether or not we can continue on that path, are still subject to changes in the environment. We look at this situation and typically conclude that we need to become proactive rather than reactive, and engage in contingency planning. I would say that we are doing something quite different. We need to shrink our response time to changes in forces or player decisions and actions. The assumptions we made as we looked at player perspectives, derived patterns, and formed scenarios could no longer be true. We try to identify triggers, some type of data or observable phenomenon that could alert us that our assumption is no longer valid and the strategic path may need altering.

Whatever path we follow, whichever way we engage with the cycle of strategic thinking and its phases, we are choosing the future. Our decisions become part of the future that emerges.

A Final Thought on Thinking

We have followed a particular sequence of thinking going from perceiving to understanding to reasoning. Thinking is not sequential; it is cyclical. It is different from a physical process that must proceed in an order and is not reversible. We have only been thinking; we have not yet done anything. We have not begun to implement the strategy. Frequently, through our expertise in our industry, we have ideas about what we want to do. We are already starting with the reasoning phase and then move to the other phases to learn about the environment to test the strategic idea, determine what opportunities would need to exist to be conducive to this idea, and verify whether we have the appropriate strengths and capabilities to make the idea work. We could start in the understanding phase by focusing on core competencies—those few things that the organization does consistently well through the collective capability of its personnel. Moving to the other two phases, the organization could then see what it needs to do to best leverage those competencies in the current and future environment. Whatever path we follow, whichever way we engage with the cycle of strategic thinking and its phases, we are choosing the future. Our decisions become part of the future that emerges. We can lead or influence the evolution that inevitably happens in most industries and professions.

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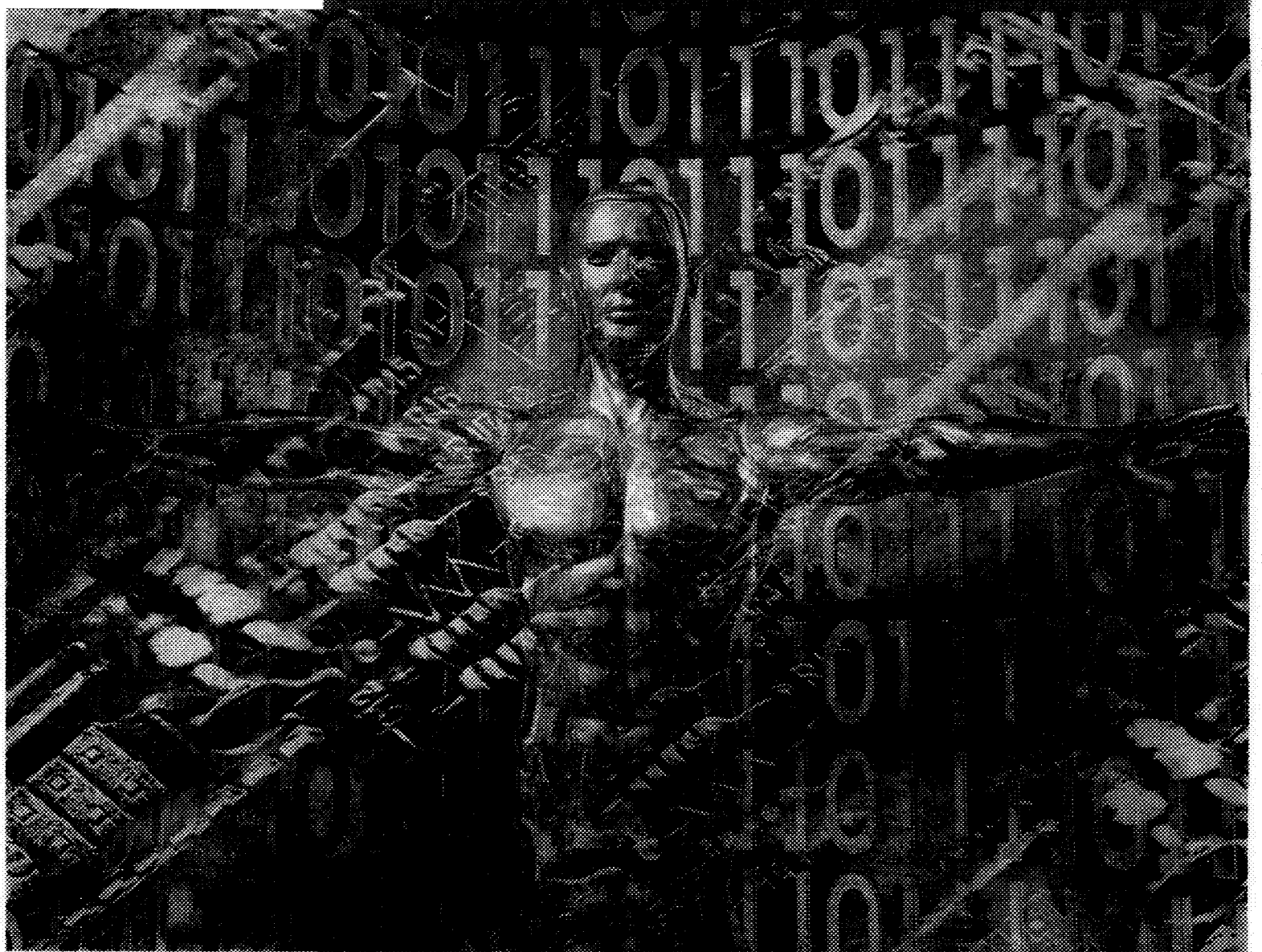
Creating Value: Building the Strategy-Focused Library



By Alvin L. Jacobson, and JoAnne L. Sparks

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There is no magic wand to wave that will instantly produce a strategic plan. Instead, it takes a lot of hard work.

MENTION "STRATEGY" OR "STRATEGIC PLAN" TO YOUR SENIOR MANAGER and you will be guaranteed an immediate reaction. Most "good" managers are supposed to have a strategy, or at the very least to have thought about one. So it makes sense that the subject should be engaging. Yet, beyond this opening line, where do you think the dialogue is likely to go? Ask the next question such as "What elements belong in a good strategic plan?" or "How do I get started doing it?" or "What do I do with it when I'm done?" and you will most assuredly be greeted by one of those killer enigmatic smiles.

Fortunately, or perhaps unfortunately, information professionals are not immune to the challenge of thinking strategically. Given the importance and ubiquity of information and knowledge today, strategy, and strategic plans are more—not less—important to librarians. Caught between the proverbial "rock and a hard place," where should you go and what should you do?

There is no magic wand to wave that will instantly produce a strategic plan. Instead, it takes a lot of hard work. Moreover, and much to the chagrin of the planning side of the process, the most difficulty work begins *after*, not before, the plan is completed. Getting direct and indirect reports, customers, and suppliers on board with the plan is a long, arduous process, particularly where significant change is involved.

For most of us starting out, the question is "where and how to begin?" The specifics will vary from company to company and situation to situation, but we believe there are four essential elements in the process:

1. Determine the central value proposition and objectives of the plan.
2. Conduct an opportunity assessment of existing services, projects, technologies, and skill sets against the value proposition.
3. Build strategic maps that visually show how you plan to get from where you are today to where you want to be tomorrow.
4. Design and implement a measurement system that will monitor ongoing performance to plan and enable "mid-stream" corrections.

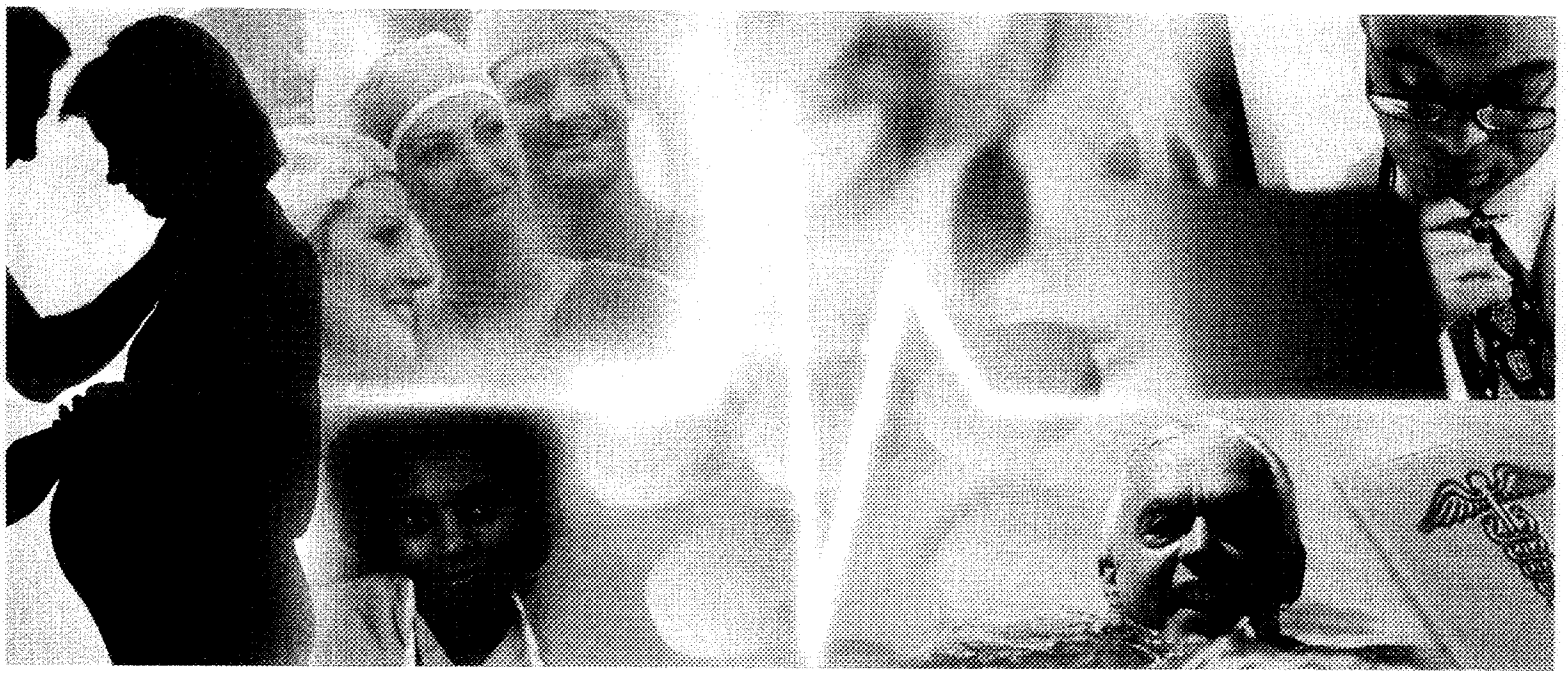
This article discusses and illustrates these four points using our recent and extensive experience of designing and building a strategic plan for the Knowledge Integration Resources group at Bristol-Myers Squibb (BMS).[1] To enhance the practical "take-aways" of this piece, our discussion is specifically focused on the tools or techniques we found especially helpful during this process.

Step # 1: Define the Value Proposition

Arguably the most critical and difficult first step in developing a strategic plan is to clearly state what it is that the library can and must do to add value to the broader organization. The operative term in that sentence is, of course, "the broader organization." Usually, the special library or information centers exist within a larger for-profit or not-for-profit organization. Not unlike accounting or human resources, it is a support or resource center whose purpose is to enhance, facilitate, and encourage the achievement of the goals and objectives of the larger entity. Therefore, the process and steps involved in identifying the value proposition must begin and end with a clear understanding of where the organization is going.

On the surface, defining the value proposition from the standpoint of the larger organization sounds straightforward. Yet, our experience is that it is anything but straightforward or intuitive. Invite the manager or staff of most special libraries to respond to the question, "what can we do to enhance the value of our services?" and the typical response you will get is "... ask the customer."[2] The response seems to flow naturally from the deep service mentality of librarians and their view of the purpose of libraries themselves.

Developing a value proposition from the standpoint of the firm, however, requires a much more pro-active involvement in understanding where the firm is going, what are the principal drivers making this happen, and how does information services relate to that plan. It is about strategically aligning the library and information services with the organizational setting in which they are embedded.



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Why is this different from simply asking what the end-user wants? Because in many instances the customer or potential customer may not have a good sense of where the firm is headed strategically. Certainly your customers are and will be familiar with what they need today, and they will likely suggest how some things may be different tomorrow. But this is not the target you should shoot for with a strategic plan; the aim should be in the future, and it should be about how best to align the products, services, and resource base of the library with the strategic goals and objectives of the corporation.[3]

If you are to identify the strategic direction of the firm, the obvious thing to do is to ask senior management. This is exactly what we did at BMS and their response was clear and unequivocal.

Within the R&D setting of the firm, management had two major strategic objectives:

1. Enhance the speed and quality of decision-making.
2. Facilitate the creation, management, and leveraging of intellectual capital.

In addition to the senior management interviews, we also conducted a series of end-user focus groups as well as individual and group interview sessions with KIR staff members. The results strongly supported the general sentiments of management, albeit at a much more detailed level. One "new" strategic objective did emerge from these discussions—the need to build and extend the KIR franchise to serve a broader net of end-users within and outside of the BMS R&D environment. Accordingly, we added a third strategic value proposition:

3. Build and extend the KIR franchise.

Step #2: Opportunity Assessment

Everything that happens after identifying the value proposition should be about creating a "strategy-focused organization (SFO)."[4] The SFO is a way of thinking, managing, and behaving in such a way as to align and channel the maximum effort towards the achievement of the agreed strategic objectives.

The process begins by classifying current products, services, and resources around each of the strategic objectives. In addition to understanding how the current portfolio of products, services, skill-sets, and technologies stack up, this effort helps you to identify "gaps" that need to be addressed going forward. For managers, it provides a familiar anchor point and connection between what they are doing today and where they want to go tomorrow.

In the case of BMS, this assessment was conducted in a group setting. Each member of the KIR core management team was assigned to one of three groups, with each group representing one of the three strategic objectives. Each group was provided a statement of its objective, and then asked the following questions:

1. What current initiatives, services, and projects contribute directly to the achievement of your objective?
2. What goals do you have for your objective one and five years out?
3. What specific and measurable objectives do you want to set for the next year?
4. What impact would you have on the overall objective, if you hit year one objectives?
5. What are the principal service and product drivers underlying achievement of the overall objective?
6. What resources are needed to achieve next year's objectives?
7. What are risks and implementation issues associated with meeting plan objectives?

At the conclusion of the exercise, each group reported their findings to the entire KIR management team.

In addition to showing current links and gaps to the strategic objectives, one of the real benefits of this assessment is to encourage managers to think strategically. The give and take of the discussions at BMS were revealing in this respect. Several managers began to ask, "Why are we doing this anyway, and who is really benefiting from this service?" Others correctly pointed out that there were some services and projects that really contributed to both speed and quality of decision-making and facilitated a build-up of intellectual capital. This is precisely the ongoing dialogue required to build and sustain a strategy-focused organization.

Step #3: Build the Strategy Maps

The difficulty with most strategic plans is they are hard to describe and communicate. This is unfortunate for a number of reasons, not the least of which is poor understanding contributes to poor execution, and in turn, to poor results. When you are talking about changes that are significant and long-term (like most strategic changes), it is absolutely essential that all levels of the organization understand what you are doing, how you are doing it, and what their role is in making it happen.

One of the more useful tools of Kaplan and Norton's strategy-focused organization is the concept of strategy maps.[5] Built around the concept of the balanced scorecard[6], the strategy maps offer an overall "cause and effect" visual for how strategic components are linked to one another. While maps can be customized to fit a particular situation, they follow some simple conventions:

- The map is divided into four principal functional layers; each one represents one of four key components

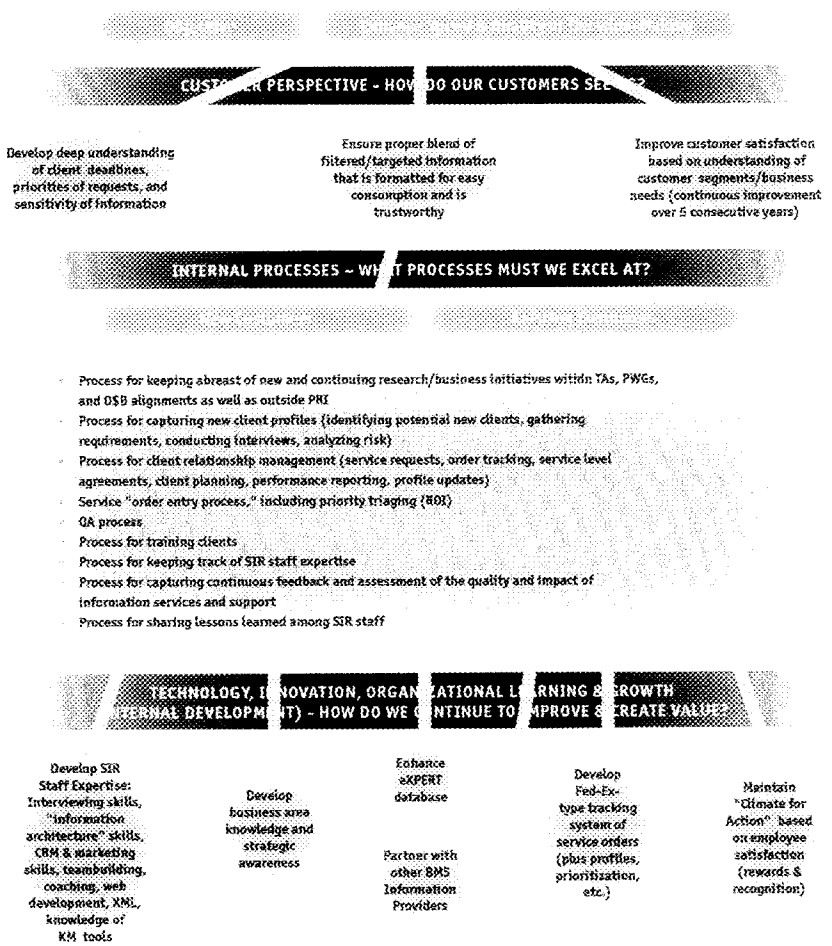
in the balanced scorecard report — financial factors, customer-related attributes (e.g., satisfaction), internal processes, and technology infrastructure and learning.

- Financial outcomes are viewed as the ultimate result of activities and outcomes associated with prior investments in technology and learning, internal processes, and customer perspectives.
- Arrows illustrate cause-and-effect relationships between actions in one layer and results in another.
- Maps can be broken down into a cascade of more detailed, underlying maps or they can be aggregated up across a number of more specific activities, functions, or business units.

The graphic below illustrates strategy mapping for the KIR group within BMS. It shows the consolidated view for all three strategic themes facilitate the creation, management, and leveraging of intellectual capital, build and extend the KIR franchise, and enhance the speed and quality of decision-making[7]. In terms of financial outcomes, we can see that enhancing speed and quality of decision making are viewed as increasing overall productivity, therefore reducing expenses, and increasing profits. The intellectual capital objective, by contrast, impacts revenues directly (e.g., revenues from patents and licensing agreements), and building and extending the KIR franchise affects both revenue growth and productivity outcomes. The customer strategic thrust is built around creating a positive experience and long-term image and relationship. The "cause-and-effect" assumption is that if this is done and done well, it will positively impact all three strategic objectives. In similar fashion, the internal processes identify what needs to happen (e.g., innovation, customer relationship management [CRM], and operational excellence) to achieve the positive customer experience and long-term relationship/image. Finally, the "learning and growth perspective" describes key human and technical resources required to service the internal processes.

The power of strategy maps is found in their ability to succinctly summarize and graphically display for executives and senior managers what the strategic plan is and how it works. In one single graphic, it is possible to lay out the plan's key objectives, priorities, measurement concepts, and how you propose to get to the end point. At BMS, this visualization was critical in gaining management support for

ILLUSTRATED STRATEGY MAP FOR ENHANCING THE SPEED AND QUALITY OF DECISION-MAKING



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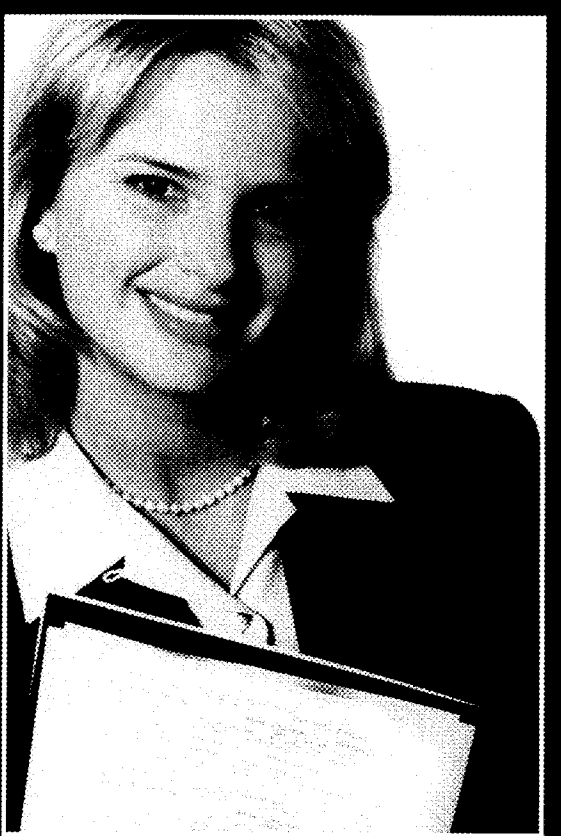

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the plan. The strategy maps also served to further promote understanding and dialogue among the KIR managers as they explored how their day-to-day work is tied to corporate revenue growth and productivity strategies.

Step # 4: Define and Implement a Measurement System

There is an old dictum that says, "if you don't measure it, you can't manage it," and strategic plans need to be managed. Senior management, as well as your own managers, need to know how you are performing according to plan—whether you are on target to hit your milestones, what has changed in the environment that may require adjustments to the plan, and what resources need to be applied and where to get things back on track. Particularly as a support unit within a larger organizational environment, you need to demonstrate how you are doing relative to your goals and objectives, and ultimately show the value you are creating for the firm. Metrics go to the heart of the question: is your work making a real difference?

Based on our work at Bristol-Myers Squibb, we suggest the following steps in designing and implementing a measurement system:

1. Measure objective or outcomes for each strategic objective (in our case, speed and quality of decision making, extend the franchise, facilitate creation of intellectual capital). Identify at least one measure. The measures can be qualitative and quantitative and often you may choose to assign more than one indicator to each objective. What is important is that the measures be outcomes or "effect" indicators (e.g., percent of priority requests completed within a four hour turnaround or number of new service users per month).
2. Measure selective inputs or drivers—selectively measure the inputs or drivers to the strategic plan. Referring to Figure 1 above, the drivers are the things you are doing from the customer, internal process, and learning and growth perspectives to make a difference in the strategic outcomes. Here again, you may choose to have multiple measures for some activities, while for others there may not be a "good" measure available. A good place to start is to review your existing measurement system and see how that fits with the strategic categories.
3. Define target points and include manager's comments for each measure that you define, try to identify a target value (e.g., 97 percent turnaround with 4 hours or 50 new users per month). There should also be space in the measurement system for managers to comment on reasons why performance may be "under" or "over" expectations.
4. Keep it simple—one of the traps that measurement systems fall into is that they quickly become too burdensome and too complex. Rather than spending valuable time keeping an onerous system going, effort should be focused on the day-to-day work that is adding real value to the company. For this reason, it is best to start with a simple measurement plan, and then add complexity as may be required.
5. Communicate the system with an effective plan describing the purposes and mechanics of the measurement system. Managers in need to be told clearly what is expected from them and what the objectives and purposes of the measurement plan are all about. It is especially important to allay natural concerns of a "gotcha" game.
6. Revise the measurement system—strategy does not exist in a vacuum but in a real working setting that is constantly changing and shifting. It is therefore important that the measurement system used to monitor the strategy is reviewed and updated to reflect these changes.

Conclusion

Directors, managers, and staff of special libraries frequently describe themselves and the library as under-valued, under-leveraged, over-worked, and even adrift in the corporate rush to "create shareholder value." Whether this is true or not, we believe the only adequate response to these concerns is for the library to develop and execute its own strategic plan, one that demonstrably shows alignment and commitment to the larger organization. Only in this way, will it be possible to demonstrate convincingly the long-term value of information and library services.

[1] The authors would like to express their gratitude and appreciation to the staff at Bristol-Myers Squibb (BMS) for allowing us to share this experience with *Information Outlook* and their readers. Particular thanks are due to Karen Lyons of BMS who reviewed an earlier draft of this article, and led the design and application of the strategy maps and balanced scorecard approach that served as the foundation for much of the work described here.

[2] As used here, "customer" refers to the end-user(s) of library and information services, not management.

[3] For similar reasons we believe traditional approaches to looking at the value of library and information services in terms of replacement, accounting, and even economic costs are somewhat flawed. Most of these frameworks tend to look at the special library as a stand-alone entity, and not part of a larger organizational environment.

[4] Robert S. Kaplan and David P. Norton, *The Strategy-Focused Organization*, Harvard Business School Publishing, 2000.

[5] Robert S. Kaplan and David P. Norton, "Having Trouble with Your Strategy? Then Map It," Harvard Business Review, September-October, 2000, pp. 167-176. An alternative but similar approach is described in Marc J. Epstein and Robert A. Westbrook, "Linking Actions to Profits in Strategic Decision Making," *MIT Sloan Management Review*, Spring, 2001, pp. 39 - 49.

[6] The balanced scorecard is a top-down strategic performance measurement system that seeks to complement the traditional focus on financial outcomes. The scorecard proposes four mutually exclusive perspectives to be considered in building a comprehensive business performance measurement system — the internal business perspective, the innovation and learning perspective, the customer perspective, and the financial perspective. Robert S. Kaplan and David P. Norton first proposed the balanced scorecard concept in a paper entitled "The Balanced Scorecard —Measures that Drive Performance," *Harvard Business Review*, February, 1992.

[7] Individual maps for each of the three strategic objectives taken separately were also prepared.

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Scenario Planning: Creating Strategy for Uncertain Times

by Joe Willmore

Joe Willmore is President of the Willmore Consulting Group, based in Annandale, Virginia. He can be reached at Willmore@juno.com.

So how do we ensure our perception is sharp enough, focused enough to make the right choices for the future?

THESE ARE VERY UNCERTAIN AND TURBULENT TIMES FOR ORGANIZATIONS.

We continue to see a wave of industry consolidations and mergers. The explosion in technology and computing power has implications for how we define organizations, community, and participation besides raising opportunities for the Web as an advertising, information, and communication conduit. The increasing globalization of commerce and organizations has changed our marketplace and who potential customers and competitors are. Many public sector fields, such as power and utilities, face deregulation. The amount of data is exploding exponentially. In short, the amount and rate of change is increasing. Our world is changing rapidly and it has never been more important to foster organizational learning than it is today.

For special libraries, these times offer unique and challenging opportunities. Information is vital. Organizations increasingly seek to capture and manage knowledge effectively. Yet efforts to capture and manage knowledge have often resulted in nothing more than data warehouses with chaotic structures, and outdated data driven more by technology than by business goals. Special libraries find themselves confronted with harder tasks—managing more information, evaluating relevance, dealing with "shelf-life" as data becomes obsolete quicker—while also potentially being able to offer more value to their clients who require more and better information. Through it all is the issue of perception. How do we know which information is most relevant? How do we know which options matter most? How do we avoid costly mistakes? Given limitations in time, money, attention, and other resources, where do we focus? Special libraries must make choices about where to focus and what to serve in ways that then help their client organizations focus correctly. These choices are shaped by our perception. So how do we ensure our perception is sharp enough, focused enough to make the right choices for the future?

In early 1973, Pierre Wack, head of Corporate Planning for Royal Dutch/Shell, was frustrated. He was frustrated because he felt that Shell (and indeed the entire world) was operating on the basis of two questionable assumptions: that the supply of oil would remain plentiful and that the price of oil would remain low. Wack developed an approach now referred to as scenario planning. Wack presented a series of short stories (or scenarios) about possible futures to senior management at Shell. In one scenario, an accident in Saudi Arabia led to the severing of an oil pipeline, which in turn, decreased production and thus supply, creating a market reaction that increased oil prices, allowing OPEC nations to pump less oil but make more money. Senior management, when confronted with the scenario, re-examined its assumptions about oil price and supply. Investigating further, they concluded that OPEC was preparing to increase oil prices. When the oil price shocks of 1973 hit, Shell was the only major Western company (or nation for that matter) that was prepared. Within two years, Shell moved from the eighth biggest oil company to the second.

Some ten years later, Wack's protégé and successor, Peter Schwartz, was in charge of Shell's planning. Faced with a multi-billion dollar decision about building a natural gas platform in the North Sea, Schwartz and his team again turned to scenario planning for guidance. Schwartz and his team noted that a key variable in this decision was the price of natural gas—a price that was artificially high because most natural gas came from the Soviet Union. Investigating this further, the scenario planners at Shell created a story entitled "the Greening of Russia"—a tale of how communism fell, democracy, and a free market economy rose up, and the price of natural gas declined because Russia was no longer a threat to the West. This scenario, crafted while the Soviets were still in Afghanistan, while the United States was building a 600 ship navy, and before Ronald Reagan delivered his "evil empire" speech, identified Mikhail Gorbachev (who was not even a member of the Soviet Politburo at the time) as a reformist who would lead Russia in these sweeping changes. When the rest of the West was shocked in 1988 by the "sudden" fall of communism, the executives at Shell were wondering why the process had taken so long.

Both of these examples are explained in much more detail in Peter Schwartz's book, *The Art of the Long View*,

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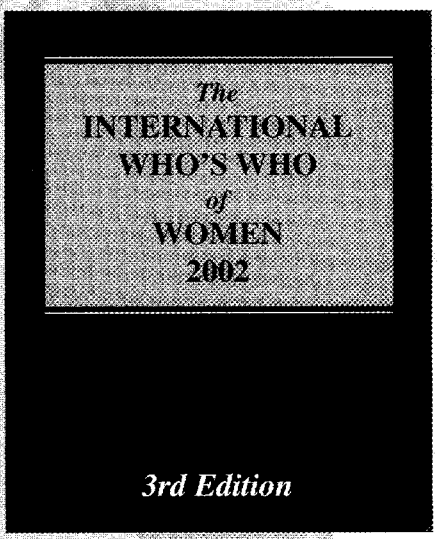

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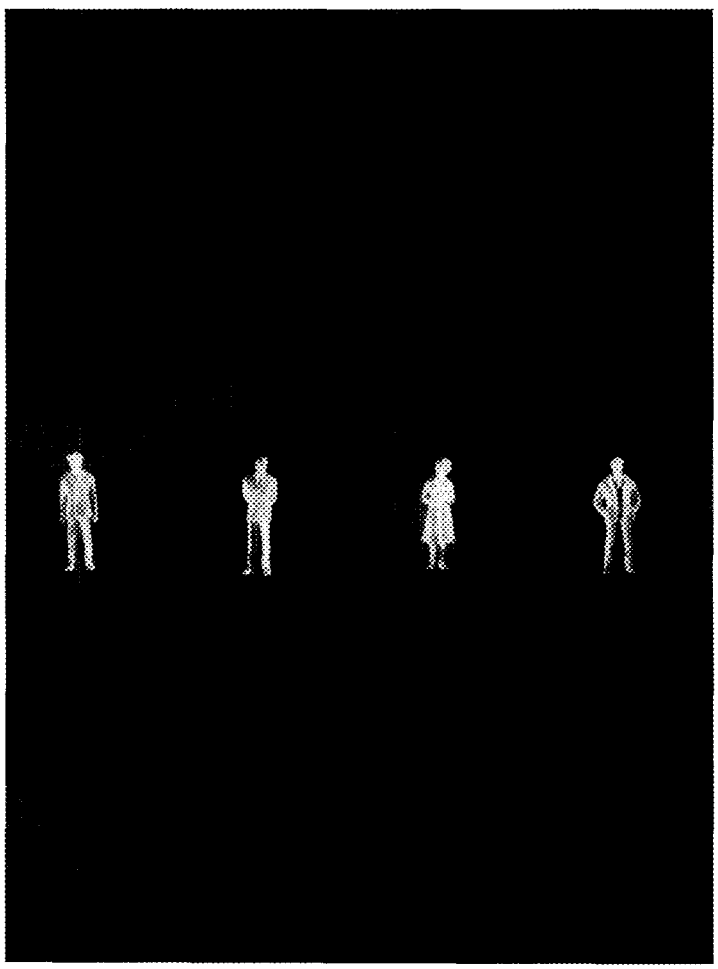
which is possibly the best introduction to the topic of scenario planning around. Scenario planning has been used by a range of organizations to help improve their perception and organizational learning. Shell alum Adam Kahane facilitated the transition from apartheid to majority rule in South Africa in 1983 through the use of scenario planning. Scenario planning has been used by investment firms to forecast the economic crash in Asia in 1998, understand development conditions in Eastern Europe in 1997, rethink military threats to the United States in the mid 1990's, and develop strategies for firms in telecommunications, government, healthcare, IT, research, media, higher education, and non-profits.

Before we look at how to develop scenarios, it is useful to understand what scenario planning is not. Scenario planning is not an attempt to predict the future. While it is tempting to view it as such and to try to write scenarios that forecast what the future will be, such efforts are doomed to fail. Our perceptions determine what we think is "reality." Any prediction of the future is shaped almost totally by our perceptions. Organizations are typically unprepared for future events because of the limitations of their perception, not a lack of effort at trying to forecast what the future might be. Thus, scenarios do not predict the future—they highlight our perceptual limitations thus allowing us to spot issues, trends, and developments that we would be otherwise unaware.



Additionally, scenario planning is not an attempt to develop possible scenarios for every potential development that might occur. Not only is this typically a waste of time, it leads to superficial analysis and we still fall victim to our perceptions. After all, if we fail to perceive something as possible, we would not develop a scenario for it. So attempting to develop scenarios for all possible developments is not only impossible, but leads to false confidence.

The scenario planning process starts with a focal point: an issue on which it is important to develop insight. The focal point is future oriented, by looking out sometime in the future. It is often phrased as a question. Typically, the focal point does not predict a result ("how can we get more funding" or "how would we get more support for this initiative"). Instead, the focal point looks at particular issues ("how will technology shape libraries" or "what will information center needs look like in the future").

Once we have a focal point, we next identify an organizational mental model that exists. A mental model is a series of deeply held beliefs, assumptions, and blindspots around a particular issue. As organizational learning theorists Peter Senge and Chris Argyris have noted, deeply held mental models prevent learning and lead to perceptual blindness. Organizations and even countries become oblivious to the obvious because of deeply held mental models. By determining what mental models exist that are relevant to the focal point, the scenario planners will be able to determine easily what beliefs and assumptions the scenarios need to challenge. It is by challenging these sacred beliefs and assumptions that organizational learning takes place. Thus, the success of the scenarios is dependent mostly on the ability to identify and then challenge the prevailing mental models that exist within the organization. There are a variety of ways to identify organizational mental models. One good hint is to look at themes that emerge in missed opportunities. Is there a particular issue or sector on which the organization seems to always "miss the boat?" Often times, outsiders, competitors, or former associates can be great resources on this issue because they now have a broader perspective than do people within the organization.

Next, the scenario planners conduct an environmental scan to determine what forces and

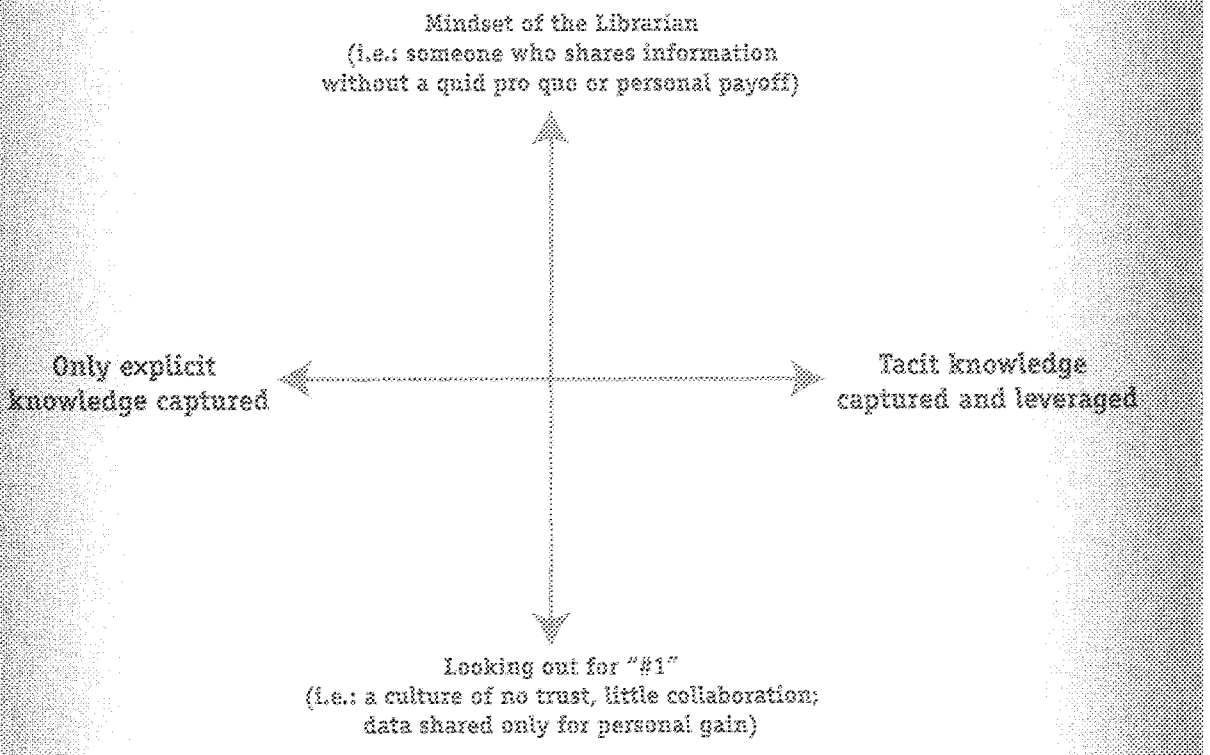
trends are likely to be relevant to this issue. Some of this information will have been gleaned already during the mental model analysis. There are a number of tools for this part of the process: SWOT analyses (strengths, weaknesses, opportunities, and threats) or SEPT studies (social, economic, political, and technological trends or forces). Once a comprehensive list has been developed, the participants in this process can either identify key themes among all the forces or vote to pick the two most important trends. The two themes or trends are then placed on a matrix (see Figure 1). The matrix is a way of testing our perspective. Variations on each theme are placed on the matrix in the form of a continuum. For instance, if one major trend affecting libraries is "increasing use of the Internet," this could be placed on a continuum as "increased digital divide" on one end and "wider public access and use of the Internet" on the other end. Once the two themes or trends have been placed on a matrix, they create the four quadrants that are used to suggest scenarios.

The next stage of the process is to flesh out each of these quadrants. Given what we already know about the organization's mental models, this element of the process is relatively easy. Generally speaking, there is an inherent tension within each scenario. As scenario

Creating the Scenario Matrix

Let's assume that the focal point for our scenario planning process is the following question: how will knowledge management efforts play out in the next ten years? Let us also assume that after much research, we discover that the two biggest factors influencing knowledge management efforts are the kinds of knowledge being captured and leveraged (and thus the kind of value it provides to the organization) and the culture within the organization (which shapes how open people are with information, how willing they are to share key learnings from mistakes, and the degree of collaboration).

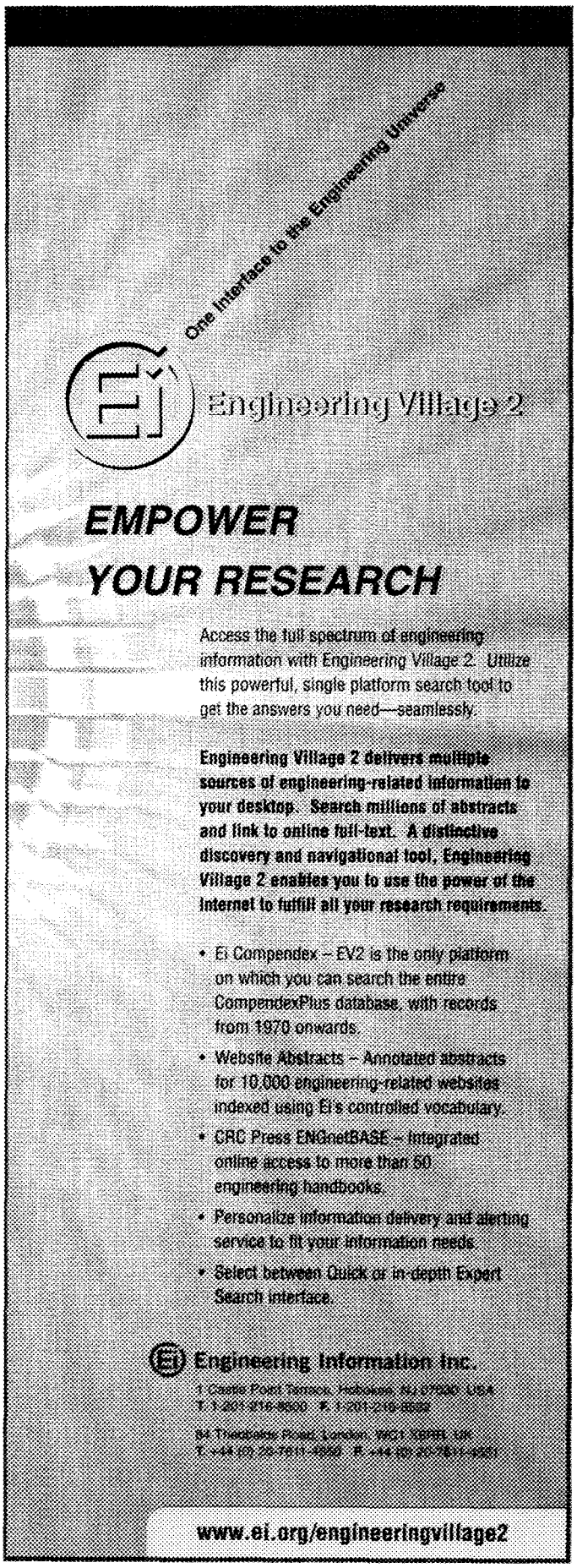
Our matrix might look something like this...



planner Kees Van Der Heijden (formerly of Shell) points out, we need to ground the scenario sufficiently in the participant's beliefs and mental models so they don't reject it out of hand—we don't want too much "stretch" or the scenario will have no credibility. But we must add elements to the scenario that challenge the prevailing thought and belief systems. Additionally, each scenario should read a little like an emotional roller coaster. No scenario should be totally positive or negative in tone. Instead, each scenario should have elements that participants view as good news and other elements of the story that are seen as bad news. Finally, each scenario should accurately depict how the system actually functions. For instance, a scenario that describes the economic crash of a country (see Figure 2) should be an accurate description of the sequence of events that would have to happen for a particular outcome to occur. This part of the process can often be a very powerful one as participants gain a richer understanding of how key systems function and why they sometimes "break down" or deliver unintended consequences.

At this point (once the scenarios have been developed and refined), there is some form of discussion and analysis. Typically, discussion themes around the scenarios can be broken down into three areas: that which is surprising to us about each scenario (which really gets into what the scenario teaches us about our perspective and mental models), what data or knowledge gaps did we discover (the areas in which we need more research), and what follow-up actions or strategic revisions do we need to make (how our plans stack up and the changes we need to make). Organizations that are serious about scenario planning will often have several stages of discussions, during which initial reactions and insights are included in subsequent conversations that examine applications and actions.

There are a number of ways that information professionals can use scenario planning. The most obvious fashion is to facilitate learning and strategic discussion within the organization. Used in this way, information professionals can help their leaders understand how they provide insight to the organization and that they don't just catalog and warehouse data. Additionally, information professionals can use scenario planning for their own internal planning efforts to check assumptions about library structure, processes and priorities, to develop insightful strategy, and to better understand their clients. Finally, scenario planning is a powerful and effective way to promote organizational learning.
And organizations that learn quickly and place a high value on learning are also likely to be very supportive and collaborative environments for libraries and information centers, and the professionals who run them.



House of Cards

This is an example of an abbreviated scenario developed for a financial services client. The client was interested in increasing its investments in Asian economies. (Some details have been removed or changed in the scenario in order for the client to give permission for publication.) You'll note that while some of the details are wrong (such as the handover of Hong Kong to the PRC), the scenario accurately describes how an economic implosion in South Korea would occur. Thus, the scenario served to provide the client with a series of red flags or warning signals so they could get out of the market before a big crash. At the time this scenario was developed, productivity in South Korea was at an all-time high. By 1998 the South Korean economy had collapsed.

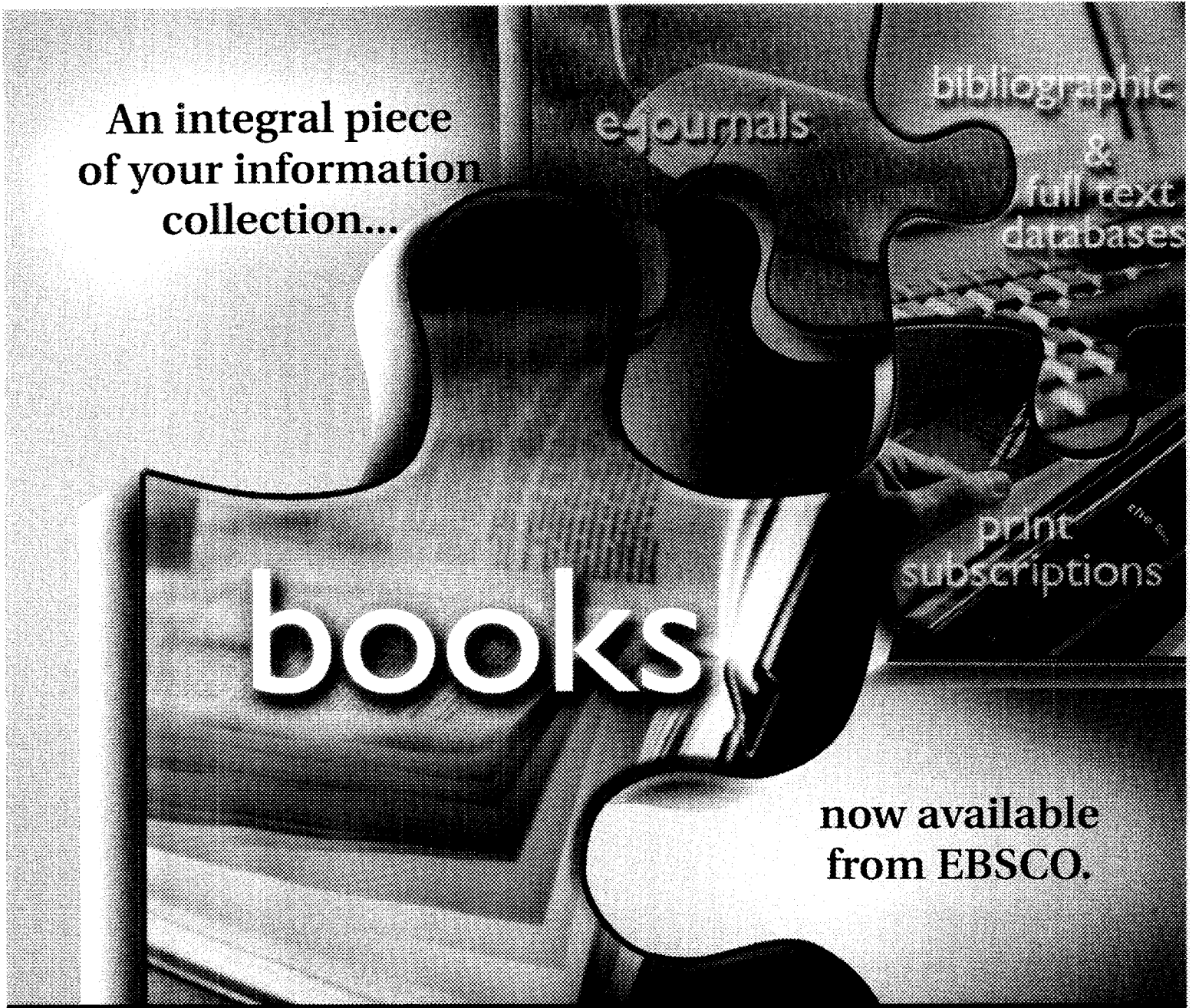
Lee Dae Sung stared blankly from the window of his corner suite on the executive floor of Daewoo corporate headquarters. As the sun set over the urban skyline that was Seoul, he reflected on what a difference two years could make: from market dominance in 1996 to bankruptcy in 1998. His future, his company, his country's economic future were all destroyed. South Korea—what had once been a surging economic giant—had been reduced to an imploding, financial black hole that sucked up capital and collateral faster than the banks and IMF could supply it. What the financial analysts and investors had referred to as the "Korean Miracle" was now an economic shell on life support. A country that had viewed world financial leadership and economic prosperity as a destiny brought about by hard work and ingenuity was now in ruin, being picked over by outsiders for bargains.

The overly cozy relationship in the country between the business and the banking industry had led to a series of stupid loans—money extended to investments that never should have been approved. But the requisite gifts and payoffs had put the banks in the back pockets of Hanbo, Kia, and all the major business groups. With the banks approving every request from the business groups, there was a building frenzy. Companies expanded too quickly and relied on too much borrowed capital for the expansion. With corporate groups financially over-extended, everyone sought to maximize production. Government, unwilling to admit there was trouble, refused to act.

But the traditional markets had become harder to mine. The US firms had become more competitive, and exports to America were dropping. The rest of Asia, which was typically a fertile market for Korean products, had seen a rise in its own production capacities. Samsung now had to compete in Thailand against Thai products and was losing ground. And the Chinese were undercutting everyone on price because of their low labor costs. Korean firms had pushed production to maximum capacity, and while sales stagnated, inventory rose. To move inventory, firms began cutting prices—first internally and then in export markets as well. As profits dropped significantly, firms were unable to service their debt.

All the Korean groups first turned to their in-house banks for additional financing. When they found Korean banks to be over-extended, they went abroad for money to stay afloat. This meant their interest rates and loan packages were at the mercy of foreign currency rates. When the Hong Kong transition to China floundered, a capital flight ensued. The Chinese officials demanded collection and Kia, which had turned to Hong Kong banks for financing on their debt, was hammered. The financial collapse of the Kia Group led to the bankruptcy of a string of commercial banks holding Kia collateral as well as Korea First Bank. Everyone was impacted. Because all the banks were over-extended and holding over-valued collateral, there was no capital available.

Desperately, the South Korean government stepped in. By devaluing the Korean won, they temporarily slowed the drop in exports. But the devaluation served to increase foreign debt and interest rates while reducing Korean access to IMF and World Bank financing. When Singapore and Bangkok firms cut prices again, the drop in sales resumed. The South Korean economy collapsed. Even healthy companies were dragged down. Foreign competitors began circling like vultures, buying capacity for mere pennies on the won. A lifetime of hard-earned economic capacity and prosperity was lost overnight.



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Your Attention Please: A Conversation with Tom Davenport

INTERVIEW

Do we have your attention?

IF YOU BELIEVE TOM DAVENPORT, DIRECTOR OF THE ACCENTURE INSTITUTE for Strategic Change and co-author (with John Beck) of *The Attention Economy: Understanding the New Currency of Business*, probably not. According to Tom, the scarcest resource in today's business world is not ideas or even talent, but human attention. And when you stop to think about, it makes sense. We're all struggling to keep up with pace of change and technological development, the never-ending flow of e-mail contacts and voicemail messages, and the challenge of anticipating what an uncertain future will bring. How much of your limited attention can you allocate to any one thing?

To explore the value of attention for knowledge workers and their organizations, *Information Outlook* decided to chat with Tom Davenport about the book and, specifically, about the relationship between attention and strategy. We think Tom's perspectives will, well, grab your attention!

Jeff De Cagna: Why did you and John decide to explore the role of attention in our lives and in organizations?

Tom Davenport: Well, having done a fair amount of work in the area of information and knowledge management, it became clear as I spoke to people in organizations about their initiatives in these areas that attention was an essential commodity that was either already in short supply or would be soon. Everybody was building repositories and creating portals, and everybody was sending out compilations of what the organization knew. These are all great activities but, to be effective, they depended on somebody paying attention to them.

It occurred to me that at some point people were, in a sense, going to run out of free attention or at least they were going to have to get much better at allocating their existing supply. The importance of attention is one of those issues that we have come to recognize over time. People talk about it a great deal, and it is composed of various threads, including information overload and attention deficit and so on. Still, nobody had really analyzed it in any detail. So we decided we would.

JD: Just so we are clear for our readers, what is the definition you are using when you talk about "attention?"

TD: We define attention as focused mental engagement on a particular piece of information, and we are interested in how both people and the organizations in which they work get attention, keep attention, allocate attention and so on.

JD: One of the points that you make in the book is that "attention management" is not the same thing as "time management." Can you say a word about the difference between the two?

TD: I think we've all had situations when we spend a lot of time on something, yet we do not give it very much attention, and other situations when we don't spend very much time on something else yet give it quite a bit of focused mental engagement in that very short period. So, clearly, the two ideas are related, and I suppose the upper boundary of your attention is the absolute amount of time that you have. In basic terms, however, attention is a combination of how much time you devote to something, as well as how many brain cells you devote to something.

JD: Our September issue is about strategy, so let me jump into some questions on that subject. In *The Attention Economy*, you write that business strategy is most fundamentally about focusing corporate attention on some options above others. Can you expand on that?

TD: Well, I have always thought that the whole exercise of strategy was one of focusing on some things and not others. As we started to think about this book, we thought that when it comes to strategy, what is being focused is people's attention within an organization.

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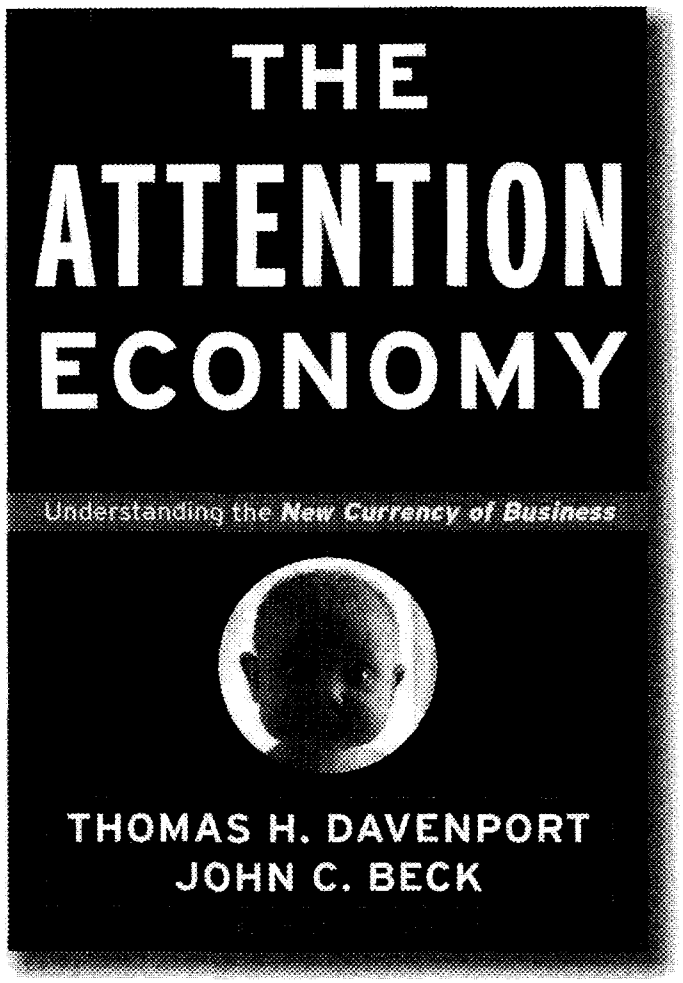
line within the organization, overcome a particular competitor, or solve a particular type of customer problem; a great many strategies say that the company will focus very heavily on its customers. All of this tells us that we have finite attention resources, and that we can't focus it on everything equally. With that in mind, let's choose the things that really matter to our success and focus our attention there. There is this kind of implicit assumption we make that if you focus people's attention on something, it will get better, it will improve. Strategy, then, is basically a set of declarations about the things on which we think it is worth focusing our organizational attention. The attention then turns into effort, action, and change, or at least one hopes it does. But I think sometimes that when strategies go awry, it is because the strategies don't involve enough choices, and organizations try to focus their attention on too many things.



JD: I think a great deal about the importance of language, and one thing I wanted to ask you about is the language choice between the terms "strategic planning" and "strategy." Do you think people in organizations are likely to pay greater attention to the idea of strategy over yet another strategic plan, with all of the negative connotations that go with that term?

TD: I think you are right that the term "strategy" suggests an ongoing process, and strategy sounds important. Strategic plan, on the other hand, suggests that the attention is to be devoted to producing a document, and we assume from past experience that those documents aren't used very effectively in many cases. Even the fact that the term "plan" implies a distinction between what we hope will happen and what actually happens is something we don't really want to believe.

So I agree that "strategy" is a more appealing term than "strategic plan" and I think it focuses our attention on an ongoing process, rather than on producing a single document or deliverable.

JD: One of the articles in this issue deals with scenario planning. Can you share how scenarios serve to focus organizational attention on strategic concerns?

TD: Scenarios are a great example of strategy as an attention-oriented exercise because they force you to exclude most aspects of the environment and focus your attention on a limited number of factors. In scenarios, you take two dimensions of your entire business environment and come up with a four-cell matrix that represents four different scenarios about the future. This is a powerful approach precisely because we are excluding various elements of the business environment that may distract us, and acknowledging that we must focus attention on only these two dimensions and their possible impact on our organization.

JD: How does an organization create a culture in which its members are capable of devoting the necessary attention to innovation, which is increasingly a critical strategic capability?

TD: Well, I think it is similar to the idea of strategy in a way because strategy is an occasion when we step out of the day-to-day processes of our business and devote some concerted attention to what we would like our business to be in the future. I think innovation is the same way. My belief is that everybody is capable of engaging in innovative thinking, but most people don't really feel like it is a legitimate effort to which they should be devoting their brain cells at any given moment.

But if you can tell your people that some fraction of their

mental energies needs to be devoted to innovation (rather than to the status quo), I think it is like turning on switch in people's brains in an effort to harness all those neurons for thinking about new stuff instead of just keeping the existing business going. I think most organizations don't really carve out attention for innovation, and when they do, it tends to be a dedicated set of people in an R&D function. I have always thought, however, that the organizations that can turn everybody's brains toward innovation are going to be more successful than those who don't.

JD: Tom, what advice can you offer to information professionals who are trying to discern how the organization is choosing to allocate its attention resources strategically?

TD: I think it's a very critical issue, and basically the kind of information proliferation that we've experienced over the past few decades has created a great need for people like information professionals who can help focus the attention of people in an organization on what really matters. Indeed, given the changes we've seen in organizations recently, I think it must be people like information professionals who look at the strategy of their organizations and then target and focus the information that is circulated throughout the firm.

If they do this, information professionals can help protect their customers' attention from stuff that is not terribly relevant. Of course, it is a pretty heavy responsibility, and it requires a close working relationship between information professionals and the senior management of the organization. Senior leaders must trust the information professional to interpret the strategy and translate that into what's really important from an information and knowledge standpoint. Historically, people have wanted unfiltered access to information, and they didn't necessarily want intermediaries telling them what information really mattered. I think, however, that as attention is in shorter supply, they will be more grateful and more in need of somebody to do that filtering and to give them the information on which it really makes sense for them to focus their attention.

JD: What are some of the attention-focusing questions you think information professionals should be asking themselves as they try to make strategic choices for their own information centers within the broader context of the organizations in which they work?

TD: You need to start out with the current state of affairs, and I think information professionals need some sense of where most of the organization's attention is going today. Then they can work with senior executives to think through what senior managers want people to be thinking about.

My belief is that everybody is capable of engaging in innovative thinking, but most people don't really feel like it is a legitimate effort to which they should be devoting their brain cells at any given moment.

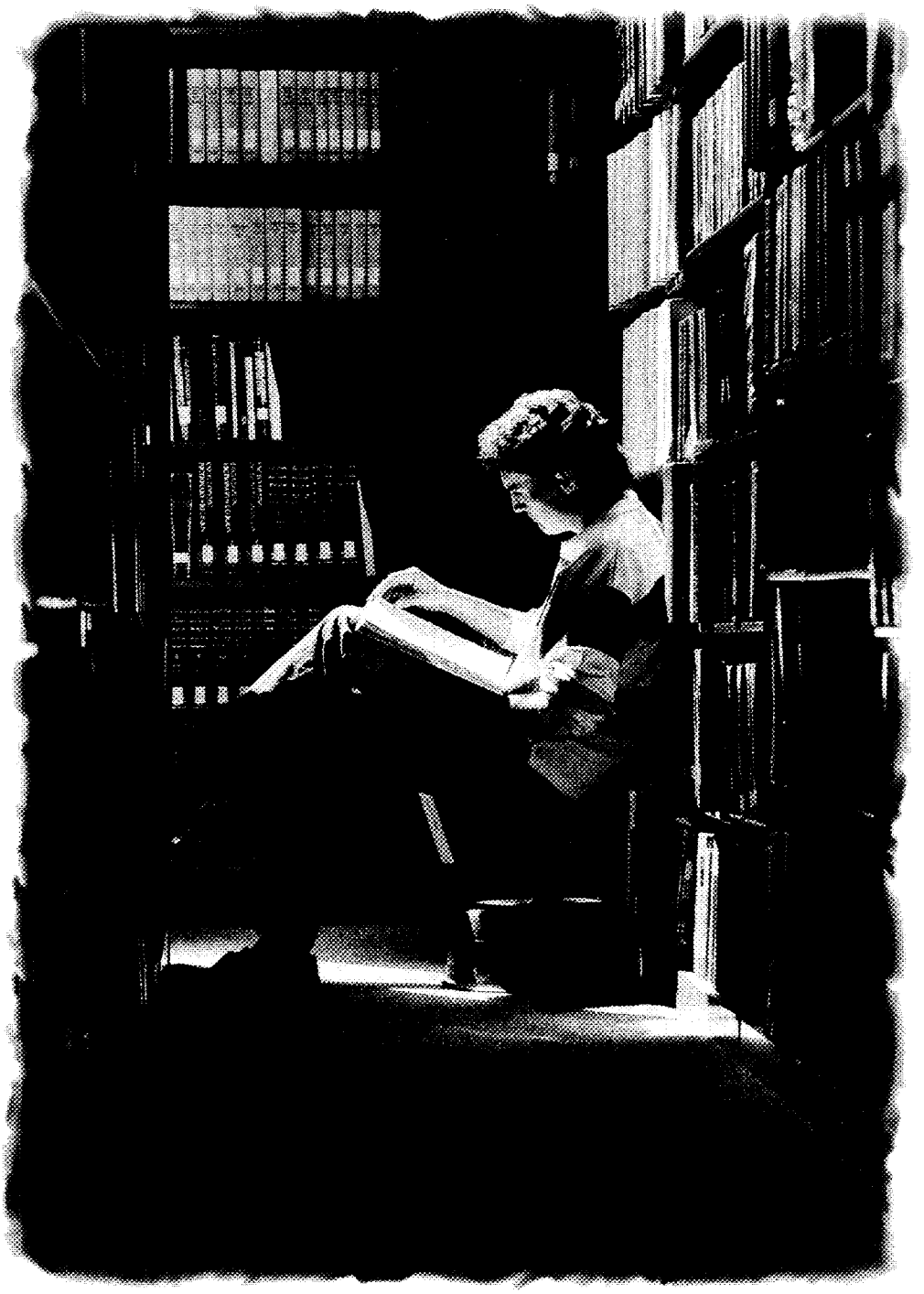
When we worked with one of our consulting teams on this, we found that most of the team's attention was going not to client-oriented innovation, but to internal coordination, i.e., how do we get organized and how do we work together to make sure we meet our commitments? But there wasn't much attention going to new ideas that could be brought to the client. Once we realized there was a problem, we made a conscious effort to improve things and, in fact, within a couple of months there was a big improvement.

So I think you need to examine the status quo. When you think about how you would like the future to be different in terms of what people should be focusing on, then you can determine what information is needed to support that direction for the organization's attention going forward.

JD: What is your candid assessment of the current state of knowledge management activities in organizations, and where do you think we are headed over the next five years?

TD: When it comes to knowledge management, I think we're at a crossroads. We've built many repositories, we have created many portals, and we have strung together many documents—electronic and otherwise—for knowledge management purposes. But I do not think we've done a very good job of integrating all of these capabilities into what knowledge workers do. Because attention is so scarce and because there is too little of it to go around, we have not had the effective use of knowledge management for which we might have hoped. People are too busy doing their regular jobs to be very effective as consumers and providers of knowledge.

From A-Z.



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So, we haven't "baked" knowledge management into today's jobs very effectively. We haven't redesigned the way work is done. We haven't made importing and exporting knowledge a natural thing to do to make people more effective. Instead, we've added knowledge management on top of all of the other things that knowledge workers do, and I think it has become a big problem. I believe that over the next couple of years, the organizations that will really succeed with knowledge management will be those that start to think very carefully about the roles of knowledge workers.

JD: What role do you think information professionals can be or should be playing when it comes to helping their individual customers manage their attention more effectively and managing the organization's broader "attention markets," as you refer to them in the book?

TD: I think that this whole area of attention must be added to the repertoire of information professionals. The classical model of the information professional involves finding out what information people want. You do your reference interviews, define the requirements for their information, and you deliver it to them in whatever form makes the most sense.

The fact is, however, that just because you wanted some information doesn't necessarily mean that you're going to be able to attend to it at all. So information professionals must become much more aggressive and attention-oriented. It is a very attention-contentious world out there and, if information professionals want to be successful, they can't just provide information. Information must be provided in a very attention-getting way, and you must think very creatively about how to do that.

For example, in the book, I talk about what some of the Accenture knowledge managers are doing. They use the information they want to communicate in the context of a story, package it up in an appealing way, and send shorter items every week as opposed to longer items every month. The whole way the information is formatted and presented needs to change dramatically if you care about this dimension of attention. If you don't care about this dimension of attention, then as far as I can tell, you might as well be out of business.

Information must be provided in a very attention-getting way, and you must think very creatively about how to do that.

JD: We like to help our readers get to know the people we interview a little bit on a personal level. This is our September issue, and since September is the month in which most people in North America go back to school, what was it that you liked best about going to school?

TD: I loved school. I wish I could go back. It is one of the reasons why I keep teaching. I like being in touch with universities and schools and so on. The idea that you could take a full-time job and devote it to reading, learning, and discussing things, that was an incredible luxury for me. Now I feel like I don't have that luxury much any more, and I really regret it.

The good thing about teaching for me is that it's a way to learn new stuff, and it's an excuse to read.

JD: Is there a particular teacher you had whose example you think about when you're having a difficult moment in teaching your own students?

TD: Well, I mostly teach MBAs and, in general, I don't find that they are that motivated by the ideas. Instead, they are mostly motivated by getting the MBA as a credential and then returning to work. I suppose, however, that my favorite teacher is a man named Richard Machalek, who helped me in sociology as an undergraduate. Even though I was a lowly student, he was willing to be friends with me and he didn't make any distinction between us as student and professor. That's the kind of teacher I would like to be, one who does not make hard-and-fast distinctions between teacher and student. Richard was interested in learning from me, just as much as I was interested in learning from him, even though I felt like I had a great deal less to offer him.

JD: You won't be surprised by my last question. What is it about libraries that you love?

TD: Oh, I like the smell of the books. I like the serendipity of finding a book that you never thought about before or for which you weren't even looking. I like comfortable chairs. And I like being around other people who are reading and looking at books.

To learn more about Tom Davenport and the Attention Economy, visit www.attentionbook.com on the World Wide Web.

We're Listening

Nerac extends a thank you to all of our customers and friends who visited us at SLA in June. As you may have seen first-hand at SLA, we incorporated several updates to Nerac's services and Web site over the past year. Through ongoing feedback and valuable responses from a recent customer-loyalty survey, Nerac continues to implement changes that make sense for our users.

You said: "We need even more relevant and useful information."
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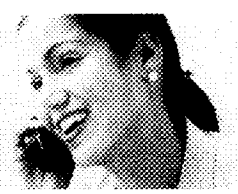
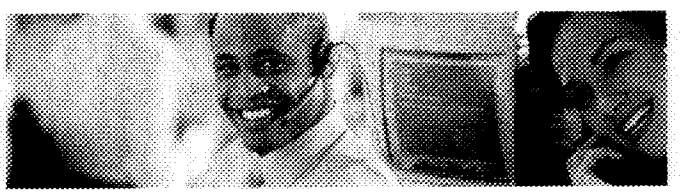
We responded: Increased client communication, from first contact to every Nerac experience, has become the focus for all staff.

You said: "Give us information that we can't find anywhere else."
We responded: Expansion of our in-house database collection continues to be a top priority.

You said: "Your recent website renovations have been great. We want more."
We responded: Expanded systems upgrades and more user-friendly tools on Nerac.com are on the way.

And, we're not finished yet. Look for even more changes from Nerac in the upcoming year!

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The "Yellow-Brick" Road to KM

by Bethann Ashfield, New York Stock Exchange

Question:
What do shamrocks, symphony orchestras, gazelles, federations, astronauts, atoms and molecules, school of sharks, virtual networks, white water rafting, jazz bands, diamonds, and ant colonies have in common?

Answer:
"Not much. But all of them have been invoked to describe the properties of a new organizational model that is replacing top-down bureaucratic machines," said Roseabeth Moss Kanter in *On the Frontiers of Management*.

What this Harvard Business School Professor has written sums up what my "StarShip Enterprise" is all about. We are ensemble players, working under the "baton of a world renowned brand." We're a community or beehive at work or play.

You may be asking what the theme of this column is? It's about what radically changed my attitude, as well as my ability to explore what's inside—like exploring the ocean rather than blasting off into outer space. It's a necessary, vital part of truly being alive! We've done it on the NYSE trading floor. The specialists' books are open. The floor's completely transparent and there is nothing to hide.

It is sharing.

I learned the mantra "share and share alike" at KCI (Knowledge Champion Institute).

KCI is not some brick and mortar building. It's a "state of mind." It is a very well orchestrated, flexible group of individuals pulled together to serve a purpose.

"Knowledge Management" is a critical part of doing business in today's economy. It is a term used to differentiate left-brain or concrete knowledge from right-brain or intuitive knowledge. KM is "...the harnessing and organization of information assets that reside in the databases of a company or in its employees' collective brainpower." It has become such a critical part of doing business in today's economy that my StarShip must have it.

KCI asks its participants to "sign" a contract with their chosen mentor. My mentor happens to be my boss and partner. He pioneered the stock exchange's intranet initiative, and is now set to explore this discipline in order to capture whatever I get for his "tech silo." But KM is shared, not compiled. The intranet is the vehicle that conveys the knowledge map, but the central processing unit of KM is the caliber of the brainpower in your individual enterprise. It's the minds that mine the data.

SLA's managing director of Strategic Learning and Development, Jeff De Cagna (a.k.a., the "Learning Guy"), is so gung ho about teaching KM that he set up a three-and-a-half day symposium about it this past April at the Hyatt Regency in Crystal City, Va. The symposium's panel

Technology Forum Coming to California

The SLA Technology Forum (SLATech 2001) will be coming to Monterey, Calif., on October 24-28, 2001. Leading thinkers like John Seely Brown, Hal Varian, and Kevin Kelly will join session leaders from IBM, Dow Chemical, and UCLA to discuss:

- The Future of Knowledge Technologies
- Beyond the Cutting Edge: Technologies for Tomorrow's Information Professional
- Lessons for Building a 10,000-Year Library
- Content Personalization, User Customization, and Portal Strategies
- Ultra Power Searching: Advanced Search Strategy Formulation, Tools, and Techniques

A day-by-day agenda and a registration form are available the SLA website at http://www.sla-learning.org/slatech. Please contact SLA's Strategic Learning hotline at 202/939-3679 with your questions. The early decision registration date is August 31, 2001.

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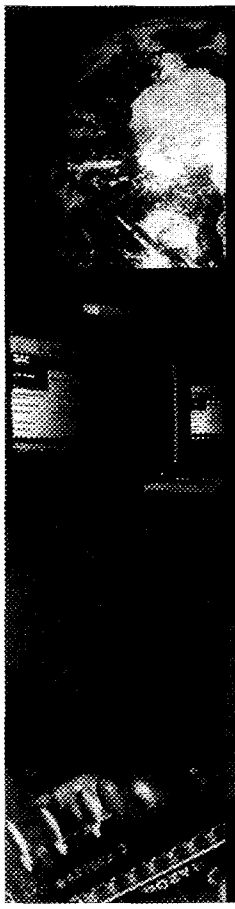

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focused on Dr. Nancy Dixon's textbook, *Common Knowledge: How Companies Thrive by Sharing What They Know*. The book outlines five "serial knowledge transfers" embraced by five separate enterprises.

Seth Weaver Kahan, senior information officer of The World Bank, which was first to implement KM, used his storytelling skills to lead off the symposium. Storytelling is a critical part of KM and Seth set the stage for journey by passing around a "talking stick" (I immediately recognized the "Shaman" in him and recalled Joe Campbell's lectures on these mystic healers) so that each of us could discuss our journey to Crystal City and, in so doing so, find out where we had come from and why we were there.

The KM panel included Dixon, Kahan, Ann Noles, knowledge champion of Capital One, and Cheryl Lamb, manager of the Knowledge Resource Center at Buckman Laboratories International. De Cagna led the discussion groups for the entire symposium. As our mornings, afternoons, and evenings blended together, I got the sense that we were becoming one family.

Each of our days together gave us a clearer understanding of what our individual enterprises sought, where each stood in relation to the other, and how the knowledge of the serial transfers Dixon conveyed in her book could be used and repackaged to suit the unique enterprises we represented. We listened to what the panelists shared with us and digested it through a series of improvisational exercises. When we gathered together on our last morning there, we told each other what we would say to our enterprises when we returned home.

It's amazing what I thought I knew about my own enterprise, but once I participated in the exercises and shared my knowledge with the others at the symposium, my knowledge had evolved.

We all came to the realization that our journeys had barely begun. Now, we're learning and reading the literature about KM. The short journey to Crystal City was merely the stepping-stone onto the "Yellow-Brick Road" of KM.

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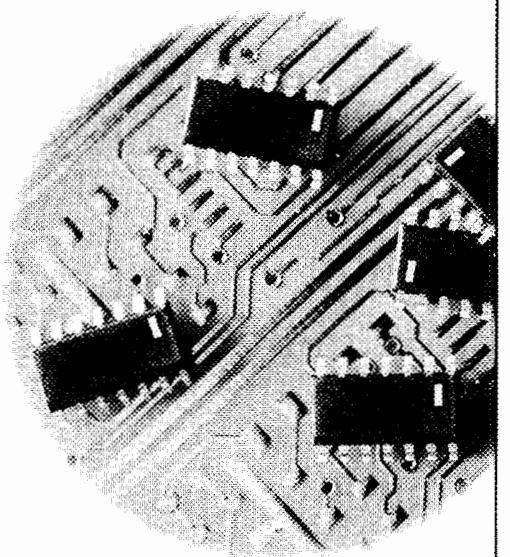

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copyright corner

Tasini: The Final Chapter

by Laura Gasaway

After more than eight years of litigation, the final chapter in *New York Times v. Tasini* was written when the United States Supreme Court handed down its decision in the case on June 25, 2001.[1] Six freelance writers had sued the *New York Times*, Time Warner and other publishers over the electronic rights to their articles originally published in printed newspapers and magazines but which publishers subsequently made available through various online databases such as LexisNexis and New York Times Online and on General Periodicals OnDisc and other similar CD-ROM products.

When freelance writers signed agreements with publishers to include their articles in print journals and newspapers, republication of the articles in an electronic database was not mentioned in the agreements. Since no one envisioned such a development at the time, it is not unusual that copyright transfers were silent about electronic rights.

The district court had held for publishers[2] *(see September, 1999 Copyright Corner)*, which publishers appealed to the Second Circuit Court of Appeals[3] *(see February, 2000 column)*. The Second Circuit reversed, upholding the writers' claims. The case was then appealed to the U.S. Supreme Court. In a seven-two decision the Supreme Court agreed with the Second Circuit and held for the writers.

Under the 1976 Copyright Act, copyright belongs to the author. The author may transfer the entire copyright to a publisher or only certain parts of the exclusive rights. In order for a publisher to publish an article, the author must transfer at least the reproduction and distribution rights for including the work in the journal or newspaper issue. Since 1995, newspaper and magazine publishers have required that transfers of reproduction and distribution rights also include electronic rights. Thus, the case dealt with articles by freelance authors published in print publications before 1995 and later incorporated into online databases by the publishers.

Newspaper and journals are collective works in which separately copyrighted articles are published as a collection. Two copyrights are involved, the first is in the individual article. In *Tasini*, the authors had registered the copyrights in their individual articles. The second copyright is in the collective works, such as the journal issue, and that copyright is held by the publisher. According to the Court, one of the reasons for the revision of the copyright statute in 1976 was to ensure that authors were not so disadvantaged as they had been in comparison to publishers. Thus, any right not specifically transferred to a publisher belongs to the author. Since the writers did not transfer the electronic rights to the publishers, such rights remain with the author.

The issue on appeal was whether incorporation of articles by freelance authors into online databases (i.e., copying them into the database), constituted a permissible revision under § 201(c) of the Copyright Act. The statute states that in the absence of an express transfer of copyright or one of the rights under it, the owner of the copyright in the collective work is "presumed to have acquired only the privilege or reproducing and distributing the contribution as a part of that particular collective work, any revision of that collective work, and any later collective work in the same series." Publishers maintained that the inclusion in a database of articles by freelance authors that had appeared in print issues was such a permissible revision. In an opinion written by Justice Ginsburg, the Court disagreed stating that such an encompassing construction of this section of the Act would diminish the authors' exclusive rights in their articles.

Publishers argued that microform reproductions of journals were privileged revisions and electronic databases were no different. They believed that "revisions" should be media neutral, and thus a database was the same as a microform version of a printed journal. The Court accepted the classification of microform reproductions as privileged because they look just like the printed editions, including all advertising, headlines, etc., and articles appear in the same order The majority did not agree, however, that databases were the equivalent of microforms since the articles do not appear as an "issue," but instead a database is an entirely new compendium. The fact that users of the databases can via a search generate a "revision" was not persuasive; instead, the Court framed the issue as whether the database itself presents the author's contribution as part of a revision of the collective work.

The Court also recognized that other countries have decided under their domestic laws that either Internet or CD-ROM reproduction and distribution of works by freelance authors violates the copyrights of freelancers. So, this decision tracks what is occurring internationally.

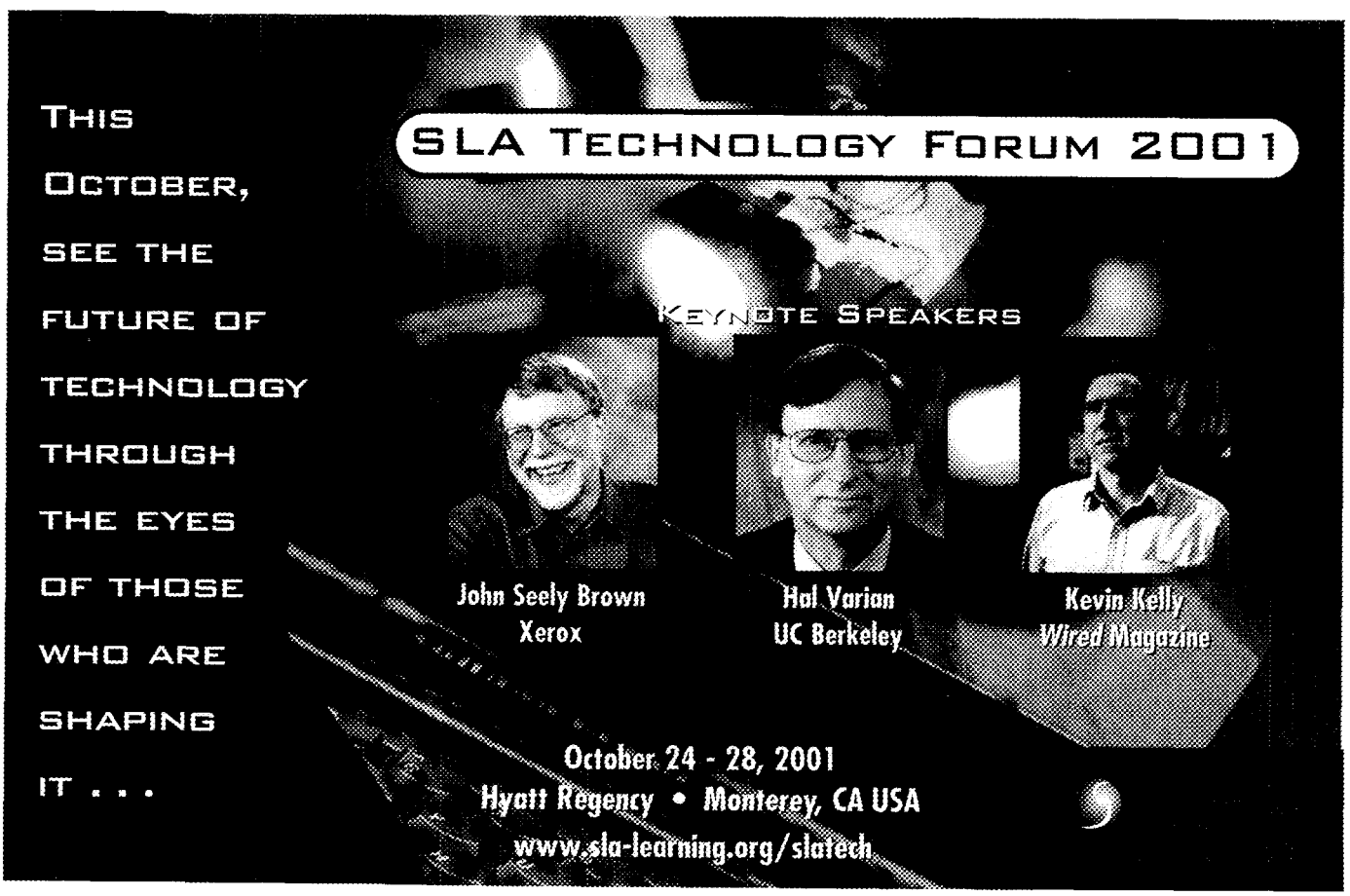
Justice Stevens authored a strong dissent joined by Justice Beyer. The dissent basically disagreed that inclusion of articles by freelance authors in a database absent a specific transfer of the electronic rights does not constitute a permissible revision under § 201(c). The dissent believed that under the theory of media neutrality, when a publisher reproduces a collection of articles as ASCII files, it should be treated as a revision of the original text as long as each article refers to the original collection such as the volume, page number, and date of the publication.

True, page placement, column width, and other such superficial features are lost, but the important editorial selection is wholly preserved. Further, the dissent found that nothing the database does to the files transmitted from the publisher strips it of its status as a revision. More importantly, Justice Stevens indicated that the policies underlying copyright and the reasons for its existence make it wrong for the majority to reject this reading of the statute.

Publishers alleged that if the case were decided in favor of the freelance writers, they would be forced to excise these articles from their databases. The majority stated that although this was possible, "speculation about future harms is no basis .... to shrink authorial rights ...." The dissent noted, however, that this decision, which seems to favor authors, could actually result in publishers requiring complete transfer of the entire copyright before it would accept freelance articles for publication, and that would put authors back in the same undesirable place they had been before passage of the 1976 Act.

Although the American Library Association and the Association of Research Libraries filed an amicus curiae brief on the side of authors, librarians clearly have an interest in the completeness of databases of magazine and newspaper articles.[4] If the result of *Tasini* is that articles are by freelance writers are removed from electronic databases, then the public and libraries will be seriously disadvantaged. On the other hand, some publishers may offer to settle with freelancers, which would benefit everyone. If this proves too complicated or difficult to achieve, then the quality of the databases on which librarians and library users depend will be compromised since articles by freelance writers prior to 1995 will be removed. Libraries that eliminated back runs of printed journals and newspapers in reliance on electronic access to complete runs, will be especially disadvantaged.

[1] This case will be cited 533 U.S. _____ 2001. The page number for the blank will be assigned later.
[2] 972 F. Supp. 804 (S.D.N.Y. 1997).
[3] 192 F.3d 356 (2d Cir. 1999).
[4] SLA and several other library associations elected not to join in this brief but to remain neutral. SLA specifically hoped for a settlement among the parties.



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The Special Libraries Association has as its long standing motto "Putting Knowledge to Work.® What better way to apply this motto than to the 2002 Annual Conference in Los Angeles. The sessions and presentations will highlight how information professionals have always creatively met the information needs of their organizations and clients by utilizing the core values inherent in the motto of the Special Libraries Association.

The emphasis on "Knowledge" recognizes the activities of many Association members in all disciplines inherent in Knowledge Management. There will be sessions devoted to how information becomes knowledge and how information professionals can work with senior managers in their organizations to ensure that relevant knowledge is made available.

The Conference will also highlight strategies used in member organizations that reflect the Association's recently adopted strategic plan - "Professionals Putting Knowledge to Work in the 21st Century." These sessions are meant to give proper attention to our future directions. We will learn how our colleagues actually put knowledge to work in their organizations.

SLA's 2002 Annual Conference recognizes our past, our present, and our future. Working with the tracks and program levels, conference attendees should find themselves with a rich diversity of topics to ensure a rewarding and professionally stimulating conference.

See you next year in Los Angeles! Don't be left out!

Plan to attend the 93rd Annual Conference. Join fellow information professionals as we take advantage of new opportunities!

Visit www.sla.org periodically to receive updates of the program development and activities as they unfold.

making news

sla news

Special Libraries Association Announces New African Provisional Chapter

The SLA board of Directors approved a petition to create a Sub-Saharan Africa Provisional Chapter at its business meeting during the 92nd Annual Conference in San Antonio in June.

The chapter, SLA's fifty-eighth overall, will include all members of the association who reside and work within the nations of Angola, Benin, Botswana, Burkina Faso, Cameroon, Cape Verde, Democratic Republic of Congo, Djibouti, Eritrea, Gabon, Gambia, Ghana, Ivory Coast, Kenya, Lesotho, Liberia, Madagascar, Mali, Mauritania, Mauritius, Mozambique, Namibia, Niger, Nigeria, Rwanda, Senegal, Seychelles, Sierra Leone, Somalia, South Africa, Swaziland, Tanzania, Togo, Uganda, Zaire, Zambia, and Zimbabwe.

Naylah Abrahams and Mariam Stuurman first proposed the idea of forming a South African Chapter at SLA's 91st Annual Conference in Philadelphia in June 2000. Four months later, at the Global 2000 Worldwide Conference on Special Librarianship in Brighton, England, an African Fellows Group decided to pursue the idea of forming an SLA African Chapter. In an attempt to bolster support, both of the groups merged their initiatives and proposed the formation of the Sub-Saharan Africa Chapter.

"We are delighted at the prospect...this collective initiative requires enhanced collaboration, a proactive approach in attempting to bridge the digital divide, but combined with SLA's recognition of the developing nations as opportunities for meaningful growth, it heralds the start of an exciting era for information professionals in Sub-Saharan Africa," Chapter President Naylah Abrahams said.

"The creation of the Sub-Saharan Africa Chapter marks the birth of SLA crossing into a new digital frontier. Nayla Abrahams and Sub-Saharan Africa Chapter members have worked diligently over the past year directing support for this initiative, while expanding SLA's presence in these regions. We are very pleased to welcome the Sub-Saharan Africa Chapter into the SLA family and look forward to working with the chapter in all its future endeavors," said Dr. David R. Bender, executive director of SLA.

High-Digital Imaging Expert Awarded 2001 Goldspiel Award

The SLA has awarded its 2001 Steven I. Goldspiel Memorial Research Grant to Mark Rorvig for his project "Exploiting Image Content Features for Image Index Term Assignment." The SLA Research Committee recommended the proposal, which was approved by SLA's Board of Directors at its June Annual Business Meeting in San Antonio, Texas.

Named in honor of the former president of Disclosure, Inc. (now known as Primark), the Steven I. Goldspiel Memorial Research Fund was established in 1991. The endowment was created to provide up to $20,000 to support research projects that promote the advancement of library sciences, particularly those projects focusing on the goals identified in SLA's Research Agenda. Recent winners have

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been awarded up to $20,000, though projects with smaller budgets are also encouraged.

Rorvig is an associate professor at the School of Library and Information Sciences at the University of North Texas, Denton, Texas. He is an established researcher in the areas of storage, retrieval, and indexing, including image classification, visual analysis for information retrieval, and measurement and evaluation. The results of his research project will be disseminated at information technology conferences, publications, lectures, and tutorials.

SLA Inducts LexisNexis Into New John Cotton Dana Circle

The SLA honored LexisNexis as the inaugural member of the John Cotton Dana Circle during its 92nd Annual Conference in San Antonio, Texas. LexisNexis also served as one of the three Major Conference Partners with SLA this year.

Named in honor of SLA's founder, the John Cotton Dana Circle recognizes outstanding corporations and individuals demonstrating generosity and support of SLA and its members during a five-year period. Members of the John Cotton Dana Circle take a proactive role in providing continuing education to information professionals worldwide.

A division of Reed Elsevier PLC, LexisNexis Group provides electronic research services to libraries, schools, colleges and universities, corporations, non-profits, and government offices.

"We are very excited to announce LexisNexis as the inaugural member of the John Cotton Dana Circle. In order to be inducted into the circle, one is recognized for one's outstanding leadership as demonstrated by their financial and other commitments to the association and its members. LexisNexis, through their generous and sustained support of SLA programs and activities, has consistently taken into account the pivotal role our members perform in the global information community by setting a standard by which other organizations can be measured," said SLA Executive Director, David R. Bender, Ph.D.

Bill Pardue, CEO and President of LexisNexis was on hand to accept the award at the Opening General Session in the Henry B. Gonzales Convention Center. "LexisNexis values highly our continuing partnership with SLA, because we value highly the information professional," Pardue said. "These trained specialists are more important than ever in helping decision-makers navigate the increasing volume of information they need to be successful. At LexisNexis, we see ourselves not as a vendor to, but a partner with, information professionals, and we are creating a legacy of enrichment and support to the SLA membership."

industry news

IMLS To Host Learning Conference

The Institute of Museum and Library Services (IMLS) will host a conference in Washington, D.C., on Nov. 7 - 9, to examine experiments in creating community partnerships for lifelong learning.

The goal of the conference, which is part of the agency's 21st century learner initiative, is for communities to take responsibility for fostering a learning culture in the information age. The agency said that continuing developments in technology and the increasing mobility and pluralism of populations present opportunities to increase skills, knowledge, and understanding. Because libraries and museums are trusted stewards of the artifacts of history, culture, science, and the natural world, they are among the most vital providers of these new learning opportunities.

As the Federal agency that provides support for both libraries and museums, IMLS has a primary focus on lifelong learning, partnership, and technology. In fiscal year 2003, it anticipates awarding more than $2 million for partnerships that address the needs of 21st century learners.

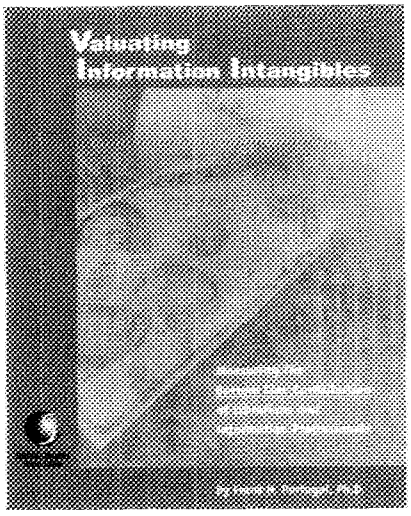
All who have an interest in or experience with creating community partnerships for lifelong learning, including representatives of libraries, museums, colleges and other educational institutions, the broadcast field, the technology field, the research field, and the funding and public policy sectors, are welcome to attend.

Registration is free. To register for the free conference contact Elizabeth Lyons at (202) 606-4649 or elyons@imls.gov.

Valuating Information Intangibles:

Measuring the Bottom Line Contribution of Librarians and Information Professionals

by Frank H. Portugal, Ph.D.



A determination of the bottom line value of libraries and information centers has proven difficult because of the intangible nature of the value and the use of archaic accounting systems that for the most part focus on tangible or physical assets rather than intangible ones. The problem is that the intangible value of libraries and information centers may be orders of magnitude greater than their tangible value. To overcome some of these measurement difficulties this workbork presents four different approaches to the intangible valuation of information resources.

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www.eusidic.org

October

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www.cddc.vt.edu/aoir/

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West Palm Beach, FL, USA
www.sla.org/chapter/cfc/workshops/011019workshop.htm

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October 24-28, 2001
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www.sla-learning.org/slatech

Information Today, Inc.
Knowledge Drivers of the e-Enterprise
October-29-November 1, 2001
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www.infotoday.com/kmw01/default.htm

November

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Washington, DC, USA
http://ww.asis.org/Conferences/am01.html

ACM CIKM
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November 5-10, 2001
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http://www.cikm2001.cc.gatech.edu/

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E-Content 2001
November 12-13, 2001
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http://www.econtent2001.com/

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http://www.online-information.co.uk/online/

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