

Reverse Strategic Planning: Create Harmony Out of Chaos at Your Library

Pat Wagner - pat@pattern.com - ALTA/CAL/MPLA - October 22nd, 2004

Reverse Strategic Planning: Create Harmony Out of the Chaos of Your Library

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Reverse Strategic Planning

- Each person creates a snapshot of what they do, sorted by importance.
- Each snapshot is commented on in writing (by up to 25 people).
- Each snapshot is discussed by the entire group.

Standard

Start with vision/mission
Group creates
Plan for the future
Hierarchy: strategic
Focus on big picture
Written by group

Reverse

Start with tactics
Individual reports
Snapshot of today
Hierarchy: choice
Focus on individual
Written by oneself

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Purposes: *Summary*

- Transparency: Everyone knows.
- Communication: Give and seek.
- Planning: Write the plan.
- Feedback: Improvement.
- Personnel Management: People.
- Project Management: The big picture.

When Not To Use

- To discipline or chastise employees.
- To resolve emotional issues.
- When it is meant to be a lecture.
- When everyone is *not* treated equally.
- When the director or manager abstains.
- When there is not enough time.

Step One: *The environment*

- Room to write: tables.
- Room to post or share final results: walls or easels.
- Room to move chairs around to see and hear each presentation.

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Step One: *The people*

- Outside facilitator.
- Everyone participates.
- The “boss” participates as an equal.
- Everyone is treated as an equal.
- Not more than 25 people.

Step One: *Tools*

- Sheets of paper for preparing worksheets, notes and final report.
- Two big sheets of paper per person.
- Tape, pens and poster markers.
- **FOOD!**

Step One: *Time*

- Time to prepare each worksheet:
 - Minimum **30 minutes total.**
- Time for everyone to comment:
 - Minimum **one hour total.**
- Time for each presentation:
 - Minimum **ten minutes each.**
- Time for frequent breaks.

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Step Two: *The work sheets*

- Each person writes down **20 things** they do regularly that they feel:
 - **Contribute** the most to library.
 - Take up most of their **time**.
 - Are most **pressing** or **critical**.
- **Importance** is up to each person.

Step Two: *The work sheets*

- Each person picks top **ten** items and **sorts** them by **importance**.
- **Importance** is up to each person.
- **Note:** *People who have problems sorting by importance can have trouble managing their time.*

Step Two: *The work sheets*

- If more than ten people, use 24" by 36" poster paper and post results on walls or easels.
- In smaller group, 18" by 12" or legal-size sheets of paper can be handed around.

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Step Two: *The work sheets*

- Horizontal line separates top and bottom halves of sheet.
- Everyone prints ten sorted items on top half of sheet.
- Each sheet is signed by "author".

Step Two: *The work sheets*

- Sample with five items.
- Person is marketing/pr director for her library.
- This is her list of what she thinks is most important.

Pat Wagner: Sample (with 5)

1. Event press releases.
2. Meet local media.
3. Meet department heads.
4. Produce newsletter.
5. PR for programs.

Note: Imagine this is a large sheet of paper and the horizontal line is drawn 1/2 way down the page.

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Step Two: *The work sheets*

- Sheets posted on walls or easels, or, in smaller groups, sheets are passed around.
- Each person supplied with colored pen or marker.

Step Three: *Comments*

- If person agrees with the item *and* its order, they initial item.
- If person disagrees with item, they:
 - change the order
 - add new items
 - add notes below the line.

Pat Wagner: ab

1. Event press releases. (ab) 3
2. Meet local media. (ab) 5
3. Meet department heads. (ab) 1
4. Produce newsletter. (ab)
5. PR for programs. (ab) 2

No comments

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Pat Wagner: ab, rt

1. Event press releases. (ab) 3 (rt)
2. Meet local media. (ab) 5 (rt) 6
3. Meet department heads. (ab) 1 (rt)
4. Produce newsletter. (ab) (rt)
5. PR for programs. (ab) 2 (rt)

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6. Meet local media (rt) waste of time
 2. Advocate for library (rt)

Pat Wagner: ab, rt, ww

1. Event press releases.(ab) 3 (rt) (ww) 6
2. Meet local media. (ab) 5 (rt) 6 (ww) 5
3. Meet department heads. (ab) 1 (rt) (ww) 7
4. Produce newsletter. (ab) (rt) (ww)
5. PR for programs. (ab) 2 (rt) (ww) (2)

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6. Meet local media (rt) waste of time
 2. Advocate for library (rt)
 1. Signs (ww)
 7. Meet dept heads (ww) do on own time
 6. Press releases (ww) others can do
 3. Train internal pr classes (ww)

Pat Wagner: ab, rt, ww, II

1. Event press releases. (ab) 3 (rt) (ww) 6 (II) 6
2. Meet local media. (ab) 5 (rt) 6 (ww) 5 (II) 5
3. Meet department heads. (ab) 1 (rt) (ww) 7 (II)
4. Produce newsletter. (ab) (rt) (ww) (II)
5. PR for programs. (ab) 2 (rt) (ww) 2 (II) 7

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6. Meet local media (rt) waste of time (II) 5
 2. Advocate for library (rt)
 1. Signs (ww) time sensitive (II)
 7. Meet dept heads (ww) do on own time
 6. Press releases (ww) others can do (II)
 3. Train internal pr classes (ww) (II) 2

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Step Four: *Present*

- Each person presents to group what they wrote and why.
- They discuss comments with group.

Step Five: *Modify*

- Each person can modify items based on feedback.
- **Note:** The lead manager or director can make suggestions, but should not dominate group process.

Step Five: *Modify*

- Each person creates new snap shot, incorporating changes.
- Each person gets copy of everyone else's new snap shot.

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Pat Wagner

1. Get the signs done.
2. Advocate for library at critical events.
3. Train internal press release class.
4. Produce newsletter.
5. PR for programs.

After input, some changes are made.

Note: About 75% of participants make at least one change to their snap shot.

Use Reverse process for:

- Team evaluations.
- Staff meeting discussions.
- Management meeting discussions.
- Project management planning.
- Creating benchmarks for projects.
- Budgeting.

FAQs

- Too complicated?
- Does the director have to do it?
- Will people be honest?
- What if it is not perfect?
- What if people are defensive?
