



INTRODUCTION

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This chapter will provide an overview of social media and of the basics of strategic planning. After these basic tenets of the book are defined, I will offer a rationale for using strategic planning in relation to social media–based services in libraries.

▶ WHAT IS SOCIAL MEDIA?

The term “social media” is multifaceted and complex, and it has been defined in many different ways. For the purposes of this book, “social media” will refer to any online platform that allows users to link to each other and contribute and share content and/or commentary. On the whole, social media is intended to facilitate sharing, collaboration, transparency, and conversation. The aim of social media is to form a large, internally communicative collective that works together to create meaning and content. So, instead of a few gatekeepers parsing out information to the masses, in the world of social media the masses produce, evaluate, and share the information themselves. The ultimate output of social media is a huge body of content created directly and often collaboratively by the web’s users. These creations are known as user-generated or user-created content. Suzanne Vara (2010) notes that “social media is not a new conversation, but a new way of conversing.”

A recent article on the types of social media found that six primary types exist: “collaborative projects, blogs, content communities, social networking sites,” and two types of virtual worlds: “virtual game worlds, which ask users to follow the rules of the game, and virtual

social worlds, wherein users can behave without rules in almost any way they like” (Kaplan and Haenlein, 2010: 59). These categories are useful in understanding the huge scope of social media, and they correspond to the 2007 OECD (Organisation for Economic Co-operation and Development) statement that in order for content to be genuinely user-generated, it must meet three criteria:

1. it must include “content made publicly available over the Internet,”
2. it must “[reflect] a certain amount of creative effort,” and
3. it must be “created outside of professional routines and practices” (OECD, 2007).

As Kaplan and Haenlein (2010: 61) point out, “The first condition excludes content exchanged in e-mails or instant messages; the second, mere replications of already existing content (e.g., posting a copy of an existing newspaper article on a personal blog without any modifications or commenting); and the third, all content that has been created with a commercial market context in mind.”

A Shift in Leadership

Strategic planning has traditionally been seen as the duty of top administrators. However, some professional strategic planners do find a “planning from the ranks” approach to be useful, and I like it the best. In the spirit of social media, we may do well to continue this second, more inclusive, model, where administrators and nonadministrators alike are included in setting the direction for social media.

This list is by no means comprehensive (and will, surely, soon be dated), but some concrete examples of social media include:

- ▶ Social networking platforms, such as Facebook, Meetup, and LinkedIn
- ▶ Social news sites, such as Digg and Reddit
- ▶ Location-based social networking services, such as Foursquare and Facebook Places
- ▶ Website and group creation software, such as Ning
- ▶ Wikis, such as *Wikipedia*
- ▶ Video- and photo-sharing sites, such as YouTube and Flickr
- ▶ Social bookmarking tools, such as CiteULike
- ▶ Blogging and vlogging sites, such as LiveJournal
- ▶ Microblogging sites, such as Twitter and Tumblr
- ▶ Book-sharing sites, such as LibraryThing and Goodreads

- Community question-and-answer sites, such as Yahoo! Answers, Quora, and WikiAnswers
- Virtual worlds, such as Second Life (an example of a virtual *social* world) and *EverQuest* and *World of Warcraft* (examples of virtual *game* worlds)

This brief list and escalating usage statistics among users of all ages, ethnicities, and socioeconomic groups show how pervasive social media has become. While social networking services have emerged at present as the most frequently used of these groups, many of the others command significant time and attention from the populations in our library service areas and can be used by libraries to deliver valuable content and services.

► WHAT IS STRATEGIC PLANNING?

Strategic planning is the process of defining strategy for future directions for an organization or, in this case, suite of services. A strategic plan will help you:

- identify the needs of your target audiences,
- identify the ways in which you can meet those needs, and
- identify ways to respond confidently and proactively to changes in those needs.

By planning, you set a rough guide for your library to follow. That guide will be a largely common sense–based quantification of ideas and initiatives that are already present and even obvious in your mind and the minds of your patrons.

Different planning gurus each lay out different steps and variations on the process, but I like Carter McNamara’s description best; he says, simply, that a strategic planning team will consider three points:

1. Where the organization is
2. Where the organization should go
3. How the organization can get there (McNamara, 2011)

A solid strategic planning team will have to consider a fair amount of data in conjunction with each of these points, some formal and some informal. Those data will relate primarily to the patrons being targeted but also to the library employees’ abilities to achieve the goals they identify. The process usually takes between three and six months but can be done more quickly.

You can also choose to implement a rolling cycle of planning in order to stay even more flexible. Many libraries use this approach to plan for social media and find it best meets their needs. You may even find that you want to do some planning but don't want to have a strategic plan with initiatives, goals, and action items. This book is designed so that you can skip around and sample the different planning projects that suit you and your library in order to produce a plan that is feasible and truly attainable.

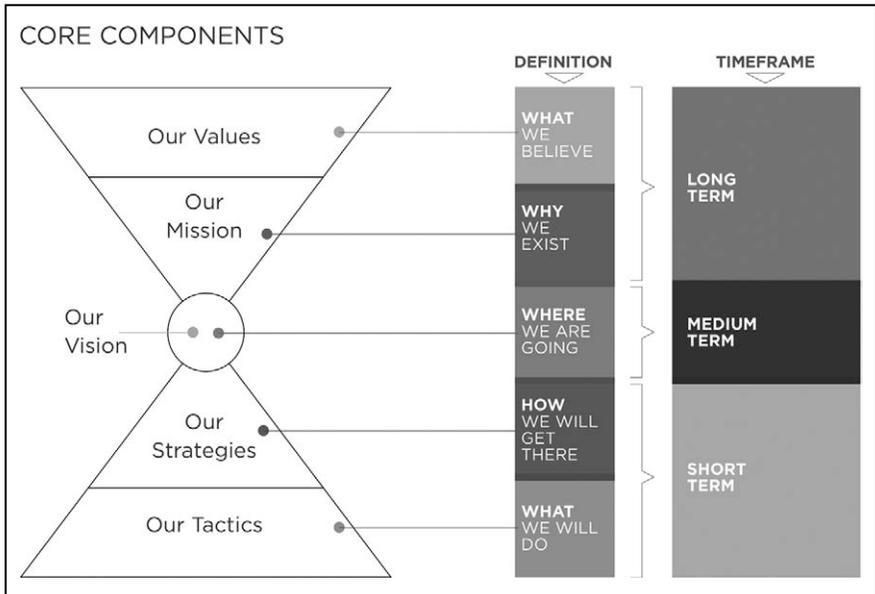
Strategic plans are, in most cases, generated using the direction set by formal vision, mission, and even values documents for the institution or the service. Vision and mission statements will be discussed at length in Chapter 5, but, on the whole, they are brief statements that provide the library's purpose, ambitions, goals, guiding principles, and philosophy. You will have to decide if you want to generate a vision and mission specific to social media or if you would rather use existing larger scale documents. The formal strategic plan itself has a tiered organizational structure that lays out broad goals. Each goal will be more closely directed by strategic initiatives, which will in turn be directed to action items. In your final product, all of these components come together to form a flexible and useful guide that can help facilitate informed and meaningful decision making.

Columbus Metropolitan Library's strategic plan offers a great visual illustration of the process of general strategic planning (Columbus Metropolitan Library, 2011: 2). In Figure 1.1, the role of mission, vision, and strategy are clearly aligned with definitions and time frame guides.

► SOCIAL MEDIA + STRATEGIC PLANNING

Countless studies show that, for a number of psychosocial reasons, social media has become a point of congregation for individuals from all age groups and walks of life. Furthermore, they don't want to interact with just each other but also with us, as representatives of nonprofit businesses. A large body of research on social networking platforms has shown that marketing conducted in social media can be far more effective than marketing done in any other type of medium, including dedicated websites. Most compellingly, Universal McCann's 2010 study *Wave.5: The Socialization of Brands* has documented some striking findings about what social media usage means for nonprofit organizations. Overwhelmingly, the study found that social media users are interested in engaging nonprofit companies

► **Figure 1.1: Core Components of the Columbus (OH) Metropolitan Library's Long-Term Plan**



Source: Figure provided courtesy of the Columbus Metropolitan Library.

through their social media activities. It notes that close to half of the “[a]ctive Internet Universe has already joined a brand community” and that today’s Internet users create a “huge demand for more social and interactive relationships with brands.” They also note that these links do a lot to generate “brand loyalty, endorsement and sales” (Universal McCann, 2010: 5). Clearly libraries aren’t interested in sales, but perhaps we could substitute “circulation numbers” or “reference questions.” Perhaps the most heartening findings of the study are the most often-cited motivations of those who join the branded groups. They express a desire “to learn” (78.6 percent) and to “get access to advance news of products” (76.1 percent) (Universal McCann, 2010: 56).

There are hundreds of other studies that I could cite about the psychological bases for marketing success in social media platforms, but this volume is largely based on the assertion that all the evidence in favor of social media ubiquity and usefulness in marketing make it a worthwhile avenue for libraries to pursue. Now we must ask which social media platforms we will choose to focus on, and why. How will we measure the impact of our efforts in order to make useful changes

and spend our time wisely? While it is by no means the only answer, or a magical fixer of all problems, strategic planning can be an intensely useful framework for addressing these questions, saving time and frustration, and giving employees a truer sense of what patrons want from the library.

Where social media is a fairly new phenomenon, strategic planning has long been tied to better success rates in a variety of organizations. It has been used in the business world to help bring in revenue, reduce time waste, increase employee motivation and inspiration, decrease costs, and secure and keep customers (Miller and Cardinal, 1994; Schwenk and Shrader, 1993). Those successes have also been found in libraries. A quick literature search for “strategic plan” and “library” reveals hundreds of relevant case studies and advisory articles. Library employees have been planning for technology for years, but the new kid, social media, has spurred very little strategic planning. Perhaps it is still too new, or perhaps we assume that strategic planning is too time-consuming and limiting for social media, because social media services change so frequently. Planning can seem cumbersome, but, in the long run, it can help save time and focus creativity. As a profession, we help others to sort out information overload, but even librarians often feel overwhelmed by the informational hydra of social media. A strategic plan can also help employees to realize that they don’t need to be everywhere at once, nor can they be. By setting a specific direction and set of initiatives based on patron needs and wishes, we can direct our precious time more effectively. Short-term or general goals can be used in conjunction with more specific action plans in order to create a meaningful and flexible plan that can generate user engagement and loyalty and focus librarian inspiration and efforts. Additionally, the creation of a strategic plan will not require you to start from scratch, and it will not necessarily add initiatives without subtracting others. The assessment phase may reveal that some of your efforts can be abandoned or repurposed to make time for more useful initiatives, but it may instead show that the services you’re already offering are right on target and help you to make the decision to spend more time in those areas instead of branching into new ones.

If you or your library has already engaged in strategic planning, then the lessons you have learned will be relevant in creating your strategic plan for social media. Strategic planning for social media is not fundamentally different from strategic planning for your library on the whole. As with any other plan, your blueprint for social media

does not need to be highly formal and should not be excessively detailed. It must be:

- ▶ Flexible
- ▶ Based on data
- ▶ Maintainable
- ▶ Regularly cared for

A well-written strategic plan will help you focus your energy and time on the most relevant tools for your chosen population.

While strategic planning will not be the answer for every library, we should seriously consider setting some strategy for organized, sustained effort that will create meaning and useful content for patrons on an ongoing basis. Many of the libraries with the most successful social media services engage in some form of planning.

The next chapter will explore available models for your social media strategic planning process.