

4 **EXPLORATION OF STRATEGIC OPTIONS**

Turning Insight into Intentional Strategy

CONTENTS - SECTION 4

- 4 EXPLORATION OF STRATEGIC OPTIONS
Turning Insight into Intentional Strategy
- 4.1 STRATEGIC PORTFOLIO MAPPING
Aligning Initiatives with Future Readiness
- 4.2 AI OPPORTUNITY MAPPING
Exploring Innovation Paths Beyond the Scenarios
- 4.3 IMPACT VS. DIFFICULTY MAPPING
Organizing Strategic Possibilities for Decision-Making
- 4.4 PRIORITIZING FOR ACTION
Translating Foresight into Near-Term Strategic Commitment
- 4.5 THINKING THE UNTHINKABLE
Stretching Strategic Imagination Beyond Expected Futures

4. EXPLORATION OF STRATEGIC OPTIONS - LEADERS

After exploring multiple futures, it's time to ask: "What should we do now—knowing what we know?"

This chapter shifts from exploration to strategy development. You'll work with the strategic insights generated from the scenarios and begin testing, organizing, and prioritizing them. This includes both scenario-informed ideas and emergent opportunities—especially those related to AI.

This part of the process helps you:

- Identify actions that are robust, contingent, or at risk
- Explore AI-related investments and innovation pathways
- Prioritize efforts based on impact, feasibility, and institutional fit
- Develop a shortlist of strategic priorities to carry forward

The goal isn't to finalize a detailed plan—but to move from possibility to directional clarity, and to identify which ideas deserve near-term investment and leadership attention.

4. EXPLORATION OF STRATEGIC OPTIONS - FACILITATORS

This chapter helps participants begin shaping real strategy. The tone shifts again—this time toward decision-making, evaluation, and trade-offs.

Your job is to:

- Help groups synthesize what they've generated through scenarios
- Facilitate conversations about fit, alignment, risk, and readiness
- Encourage both strategic creativity and realism as they prioritize

Key activities in this section include:

- Portfolio mapping (How aligned are our actions with future conditions?)
- Exploring AI opportunities not covered in the scenarios
- Mapping actions by impact and difficulty
- Identifying 3–6 strategic priorities for the next 1–3 years

This is also a good moment to remind the group: you don't need to do everything—but you do need to decide what matters most, and why. Keep energy focused and constructive. This is where foresight becomes action.

4.1 STRATEGIC PORTFOLIO MAPPING

Aligning Initiatives with Future Readiness

As leaders reflect on strategic actions surfaced through scenario-based planning, a key question emerges: how do these ideas fit with what we're already doing—and what's worth prioritizing for investment, redesign, or retirement?

This exercise invites teams to step back and take stock. Using a portfolio lens, you'll assess how the strategies generated during the workshop align with your institution's current activities and their relevance across future scenarios.

This isn't just a prioritization tool—it's a way to recognize:

- Robust strategies that are already well-resourced and future-aligned
- High-potential ideas that may need incubation or strategic sponsorship
- Initiatives that may be over-invested relative to their future fit
- Legacy programs that are vulnerable in multiple futures

By mapping your strategic actions against present investment level and future alignment, you create a visual snapshot of your readiness to act intentionally in the face of disruption. This is where strategy meets decision-making.

4.1 STRATEGIC PORTFOLIO MAPPING - FACILITATORS

Purpose: This activity helps participants evaluate and balance their institution's strategic efforts. It provides a framework for comparing both the new strategies generated in earlier exercises and the current activities already underway.

By plotting strategies on the portfolio matrix, participants can see where they are over- or under-invested, identify areas of duplication, and highlight opportunities to redirect resources. The goal is not to create more priorities, but to make intentional choices: which existing activities to sustain, which to reduce or retire, and where to invest in new initiatives that better align with future needs.

Group Format:

Small teams (3–5 people)

Groups may work on the same set of strategies (for shared prioritization) or customized lists (for department-specific planning)

Materials Needed:

- A master list of strategic actions (from Scenario Action Planning) and of current activities
- Wall-sized Portfolio Matrix poster (see below) or digital whiteboard
- Markers or voting dots

TIME: 40-60 minutes

USE: To consider strategic actions against resource availability

OUTPUT: A set of themes and issues to be considered as we begin to develop strategies

4.1 STRATEGIC PORTFOLIO MAPPING - FACILITATORS

1. Introduce the Matrix (5 min)

Display or hand out the Strategic Portfolio Matrix. Explain the two axes:

	High Alignment with Future Scenarios	Low Alignment with Future Scenarios
Strong Current Investment	 Maintain / Scale: Resilient, core strategies	 Reevaluate: At risk of misalignment
Weak or Emerging Investment	 Incubate / Invest: Emerging, high-opportunity	 Divest / Avoid: Low value across time

This matrix will be used to assess how each strategic action fits with what your library is currently doing—and whether it's likely to remain relevant across the four scenarios we explored.

4.1 STRATEGIC PORTFOLIO MAPPING - FACILITATORS

2. Sort Actions onto the Matrix (20–30 min)

Each group considers the list of strategic actions and current activities. They should discuss each and place it on the matrix based on:

X-axis: How well does it align with future conditions?

Y-axis: How much is currently invested in this (budget, staffing, visibility, institutional commitment)?

Encourage teams to talk through placement disagreements—they're often revealing

3. Reflect and Annotate (10–15 min)

For each quadrant, ask:

- What do we feel confident about? Why? Are there surprises? Gaps? Misalignments?
- Which items in the “Invest” or “Divest” zones need further analysis?
- Which of our current activities clearly align with future scenarios? Where are we over-invested?
- Are there areas where we should reduce or retire activity, so that resources can shift to new priorities?
- What new strategies deserve investment — and what will we need to stop or slow down to make room?

4.1 STRATEGIC PORTFOLIO MAPPING - FACILITATORS

Debrief Prompts (10–15 min)

Facilitator leads a full-room discussion:

- Where are we over-invested or under-invested?
- Which existing activities might no longer fit our values or future context?
- Which “Maintain” items need reinforcing to stay relevant?
- What does this map suggest about how we’re aligning resources to future needs?

Deliverables

A completed Strategic Portfolio Matrix (poster, photo, or digital file)

A shortlist of:

- Strategies to scale
- Ideas to incubate
- Areas to investigate further
- Items that may need to sunset or shift

4.2 AI OPPORTUNITY MAPPING

Exploring Innovation Paths Beyond the Scenarios

Scenarios are powerful tools to help us navigate uncertainty—but they aren't the only source of strategic insight. Sometimes the clearest opportunities come not from imagining the distant future, but from paying close attention to the emerging possibilities already in front of us.

In this activity, you'll explore how AI could be applied across key functions in research libraries—not through the lens of one future world, but through a broader, innovation-focused view. The goal is to identify areas of opportunity, and to think strategically about what it would take to act on them.

Where might AI enhance services, systems, workflows, or engagement? What new capacities, roles, or partnerships would be needed? What should be explored, prototyped, or invested in?

This is an invitation to expand the map—to bring new ideas into your strategic conversation, and to see where they align with your scenario-informed work. Innovation is not separate from planning for uncertainty; it's an essential companion.

4.2 AI OPPORTUNITY MAPPING - FACILITATORS

Purpose:

To help participants surface, discuss, and assess potential applications of AI in research libraries, generating new strategic possibilities and identifying what investments or changes would be required to act on them.

This activity builds awareness of concrete innovation pathways, and connects emerging technologies to institutional strategy.

Group Format:

Small groups of 3–5

Each group explores 1–2 AI application domains

Materials Needed:

- A list of 6–8 AI application areas relevant to libraries (see suggestions below)
- Worksheets or flip charts

Optional: AI application “prompt cards” with sample use cases, technologies, or trends

TIME: 45-60 minutes

USE: To identify applications of AI in research libraries

OUTPUT: A set of AI opportunities and actions that can be considered for implementation

4.2 AI OPPORTUNITY MAPPING - FACILITATORS

Suggested AI Application Domains

Facilitators may choose or invite groups to select from topics such as:

- AI-enhanced search, discovery, and metadata
- Personalized learning and instructional support
- Predictive analytics for collections and access
- Chatbots and user experience automation
- Research support and scholarly communication
- Data curation and preservation
- Ethical AI governance in knowledge organizations

4.2 AI OPPORTUNITY MAPPING - FACILITATORS

1. Introduce the Activity (5–10 min)

We've explored scenarios and strategic options. Now we'll widen the lens and explore where AI might create new value for research libraries, independent of any specific future. This is about innovation—thinking about what we could do, not just what we're already doing.

Provide a brief overview of each domain. Distribute prompt cards or handouts if using.

2. Group Exploration (25–30 min)

Each group chooses or is assigned 1–2 application areas. For each one, answer:

- **What opportunities does AI create in this area?**
(What could be improved, reimaged, or invented?)
- **What strategic actions might we take?**
(Could we pilot, partner, scale, or train?)
- **What would we need to invest?**
(Skills, tech, data, infrastructure, policy, relationships)
- **What risks or equity concerns might arise?**
(Ethics, bias, access, transparency)

Optional: Use a 2x2 matrix to map impact vs. readiness for each idea.

4.2 AI OPPORTUNITY MAPPING - FACILITATORS

3. Share and Cluster (15–20 min)

Each group shares 2–3 of their most promising opportunities. Facilitator or note-taker clusters them by theme, type, or investment area.

Optional Debrief Prompts:

- Which ideas are low-cost experiments vs. longer-term bets?
- Where do these ideas align with scenario-informed strategies already discussed?
- Are we seeing new strategic pathways emerge?

Deliverables:

- Opportunity maps or idea boards per group
- A cross-group shortlist of high-potential AI strategies
- A draft “AI innovation portfolio” to carry into prioritization or leadership review

4.3 IMPACT VS. DIFFICULTY MAPPING

Organizing Strategic Possibilities for Decision-Making

By this point in the toolkit, you've generated a wide range of strategic options—from scenario-informed actions to emerging AI opportunities. Some are already in motion; others are new ideas surfaced through creative foresight. Now it's time to organize these possibilities to support informed, intentional planning.

This activity introduces a simple but powerful tool: the Impact vs. Difficulty Matrix. By assessing each potential strategy in terms of its expected impact and implementation difficulty, you can begin to:

- Identify quick wins worth pursuing immediately
- Recognize strategic projects worth sustained investment
- Avoid resource traps that consume energy without delivering value
- Flag ideas for incubation or partnering

Used thoughtfully, this tool helps leadership teams prioritize effort, sequence innovation, and communicate trade-offs clearly.

This activity also creates a natural link between scenario-informed actions (Section 5.1) and emerging AI strategies (Section 5.2), helping teams see where converging priorities or contradictions might exist.

4.3 IMPACT VS. DIFFICULTY MAPPING - FACILITATORS

Purpose: To assess and compare potential strategies—both from scenario planning and AI exploration—based on:

Impact: How significant will the benefit be if successful?

Difficulty: How challenging will it be to implement?

This exercise supports prioritization, sequencing, and resource allocation in the next stage of planning.

Group Format:

Small groups (3–5 people)

Can be same teams as previous sessions, or new mixed-role groups

Materials Needed:

- A large 2x2 wall chart or digital whiteboard
- Strategy cards or sticky notes (from Sections 5.1 and 5.2)

Optional icons or color codes to indicate origin (scenario-based, AI-based, existing plan)

TIME: 30-45 minutes

USE: To map strategic actions by impact and difficulty

OUTPUT: An assessment of strategic actions by ease of achievability

4.3 IMPACT VS. DIFFICULTY MAPPING - FACILITATORS

1. Introduce the Matrix (5 min)

Display or hand out the Impact-Difficulty Matrix. Explain the two axes:

Impact = Potential value, influence, reach, or strategic importance

Difficulty = Cost, complexity, change management, risk, required resources

High Difficulty

Low Difficulty

High Impact ■ *Strategic Projects* – Worth the effort

■ *Quick Wins* – Prioritize and resource now

Low Impact ■ *Resource Traps* – Question or scale back

■ *Nice to Haves* – Defer or delegate

This matrix will be used to consider the resources required (and how difficult those are to allocate) to achieve each strategic action and map that assessment against the resulting impact.

4.3 IMPACT VS. DIFFICULTY MAPPING - FACILITATORS

2. Map the Strategies (20–30 min)

Provide a curated list of 10–15 strategies (or have participants use their own). For each:

Discuss as a group and place the strategy on the grid

If there's disagreement, encourage quick deliberation—disagreements often reveal key assumptions

Encourage teams to note key barriers or enablers (e.g., cost, staff skills, executive support)

Optional: Use different shapes or colors to indicate origin:

- Scenario-informed
- AI opportunity
- Existing plan

4.3 IMPACT VS. DIFFICULTY MAPPING - FACILITATORS

3. Reflect and Cluster (10 min)

Ask each group to:

- Identify 1–2 actions in each quadrant they believe are most important to carry forward
- Flag any surprises or contradictions (e.g., high-impact ideas rated as low-priority)

Facilitator captures these in a shared document or on a final board.

Optional Debrief Prompts:

- Are we overloaded in any one quadrant?
- Are we neglecting “quick wins” because they don’t seem innovative?
- Are any “strategic projects” feasible with partnerships or staged investment?

Deliverables:

A completed Impact vs. Difficulty Matrix (per group or in synthesis)

A visual summary of quick wins, strategic bets, and items to re-evaluate

4.4 PRIORITIZING FOR ACTION

Translating Foresight into Near-Term Strategic Commitment

By now, you've explored possible futures, tested current and potential strategies, and assessed your ideas across multiple dimensions: scenario alignment, organizational investment, strategic impact, and implementation difficulty.

The final step in this process is to distill those insights into concrete priorities—strategic actions you can take in the next 1–3 years to build capacity, reduce vulnerability, and move toward long-term resilience.

This is not about finalizing a polished plan. It's about identifying where to focus attention, investment, and leadership in the immediate future. In uncertain times, action matters—but so does reflection. This exercise helps you focus on actions that are not just responsive, but meaningful and adaptive.

By the end of this section, you will have a shortlist of strategic priorities, each connected to:

- A rationale grounded in the scenarios and other exercises
- An early sense of investment requirements and enablers
- A plan for ownership and next steps

4.4 PRIORITIZING FOR ACTION - FACILITATORS

Purpose:

To consolidate all previous work into a focused list of 3–6 strategic priorities to pursue or stage in the short to medium term. This list will serve as an input to institutional strategy, planning, or leadership retreats.

Time Required: 45–60 minutes

Group Format:

Mixed-role leadership groups (3–6 participants each), or full-room facilitation

Use outputs from previous sections: Impact/Difficulty Matrix, Portfolio Map, Scenario Ratings

Materials Needed;

- Final list of strategic options (consolidated across prior exercises)
- Prioritization worksheet or decision matrix
- Sticky notes or markers
- Optional: strategy summary cards with brief descriptions and scores

TIME: 45-60 minutes

USE: To consolidate all previous work

OUTPUT: A list of 3-6 key strategic priorities for implementation

4.4 PRIORITIZING FOR ACTION - FACILITATORS

1. Introduce the Goal (5–10 min)

“We’ve surfaced a wide range of strategies, assessed them against possible futures, and explored their impact and feasibility. Now we’ll identify which actions deserve focused leadership, resourcing, or exploration in the next 1–3 years.”

Clarify that the goal is to build a short, actionable list, not to rank every item.

2. Review and Group Strategies (10–15 min)

Display the list of strategies from prior sessions.

Invite participants to group them into themes or categories (e.g., workforce, infrastructure, services, partnerships). Gather these on flip charts for subsequent voting in step 3.

Use this to reduce redundancy and surface synergies.

4.4 PRIORITIZING FOR ACTION - FACILITATORS

3. Prioritize: Voting or Dot Exercise (15–20 min)

Each participant receives 3–5 votes to place on the strategies they believe:

- Are most urgent
- Are most foundational for future capacity
- Have broadest support across scenarios

Optional: Use weighted votes (e.g., 2 dots for #1 choice, 1 dot for others)

4. Identify Top Priorities (10–15 min)

As a group, reflect on:

- Which strategies rose to the top?
- Are any missing?
- Do any “high-vote” items need further refinement?

Finalize a Top 3–6 Strategic Priorities list, and (if time permits) capture:

- Rationale (“Why this?”)
- Key enablers or resources
- Early next steps or champions

4.4 PRIORITIZING FOR ACTION - FACILITATORS

Optional Discussion Prompts

Which actions can begin immediately with existing capacity?

Which require cross-unit collaboration or executive sponsorship?

Are any low-cost, high-symbolism “momentum builders”?

What will we say “no” or “not yet” to?

4.5 THINKING THE UNTHINKABLE

Stretching Strategic Imagination Beyond Expected Futures

Not all disruptions give us time to prepare. Some come fast, from the margins, and change everything.

That's where wild cards come in! The Covid-19 pandemic is now a standard example of a wild card.

Wild cards are low-probability, high-impact events. They're the curveballs—the "what ifs" that often go unconsidered in traditional planning. While unlikely, they're plausible enough to warrant reflection—and when they happen, they can challenge assumptions, invalidate strategies, or create new opportunities.

This exercise invites participants to consider a few wild cards and imagine how research libraries, universities, or society might respond. It helps leaders:

- Explore the outer edges of uncertainty
- Strengthen strategic flexibility
- Recognize vulnerabilities—and possibilities—they might not otherwise see

Wild cards don't predict the future. But they prepare us to lead when the future refuses to behave.

This is an energizing closing activity or a bridge to ongoing foresight work.

4.5 THINKING THE UNTHINKABLE - FACILITATORS

Purpose: To help participants stretch their strategic imagination and consider disruptive or unexpected developments that could reshape the operating landscape of libraries and higher education.

Group Format: Small groups (3–5 people each)

Each group receives or generates a wild card to work with

Materials Needed:

- A set of 6–10 wild card prompt cards (see below for examples)
- Worksheets or flip charts
- Markers or sticky notes

Deliverables:

- A set of wild card scenario sketches or response notes
- One or more recommendations for institutional preparedness

TIME: 30-45 minutes

USE: To consider the impact of extreme events on future plans

OUTPUT: A set of responses to inform preparedness planning

4.5 THINKING THE UNTHINKABLE - FACILITATORS

Example Wild Cards - of course, you can customize these based on institutional context.

- A major AI model “goes rogue” and triggers global regulation within a year
- A sudden collapse of trust in higher education accreditation systems
- A cyberattack disables key academic infrastructure for a month
- A major publisher makes all new research content AI-exclusive
- An AI-generated fake discovery fools the research world for six months
- The government eliminates all federal support for higher education
- Brain-computer interfaces go mainstream for learning and research
- Open-source AI models outperform commercial systems—and become mandated
- Global pandemic 2.0 emerges with permanent border closures
- AI is granted legal “agency” under certain jurisdictions

4.5 THINKING THE UNTHINKABLE - FACILITATORS

1. Introduce the Concept (5 min)

Wild cards are disruptions we don't expect—but could plausibly face. They're not predictions—they're challenges to our mental models, assumptions, and readiness.

2. Distribute Wild Cards (5 min)

Each group receives one wild card (randomly or by choice). You can also invite groups to invent their own.

3. Group Discussion (20–25 min)

Groups reflect on:

- What would happen if this wild card occurred?
- How would our institution be affected—in the first 48 hours? First year?
- Which of our current strategies would break down—or become even more vital?
- What could we do now to prepare, reduce risk, or seize advantage if this were to happen?

Encourage creative thinking and discomfort. That's the point.

4.5 THINKING THE UNTHINKABLE - FACILITATORS

4. Share & Reflect (10–15 min)

Each group presents a brief summary:

- The wild card
- The scenario that unfolded
- Key risks, vulnerabilities, or surprising strengths
- One preparedness move they'd recommend

Optional Debrief Prompts

Which wild cards felt most plausible—or most unsettling?

Did this activity change how you view your current priorities?

How could we build a resilience mindset without becoming paranoid?