

Strategy: Building an academic institution *for the future*

With the right strategic approach, academic leaders can build a dynamic and future-looking institution fit for the next generation



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Introduction

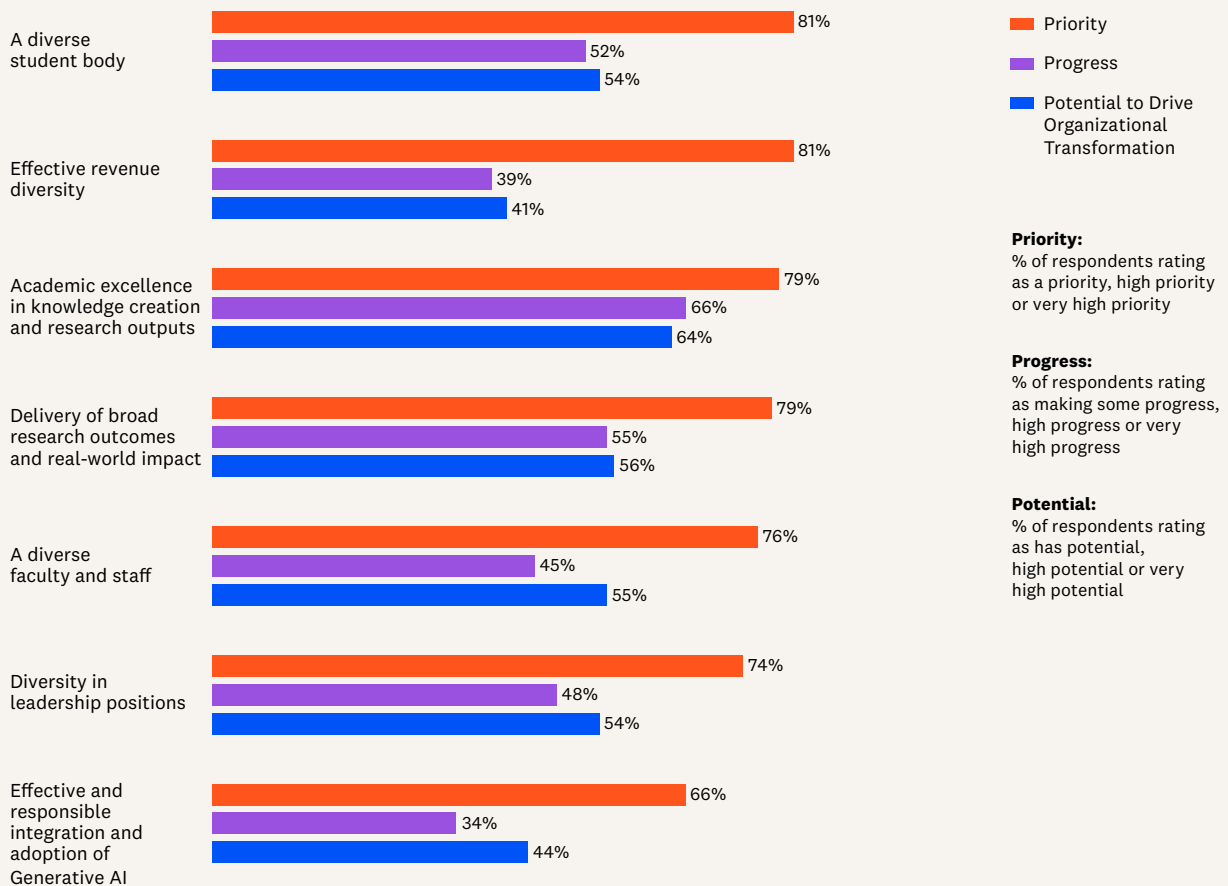
Academic institutions are facing challenges on multiple fronts, with an operating backdrop in a constant state of flux and leaders being forced to juggle between competing priorities.

Regulatory and political change continues to impact the broader operating environment, while a weaker global economic climate and uncertain funding landscape is putting pressure on institutions to find new ways to generate revenue beyond traditional sources.

Increased competition globally, coupled with a shrinking student enrollment in some countries – such as the US, Japan and parts of Europe – is also increasing the need for institutions to stand out in a crowded market.

Our High Performance Objectives research highlights the key priorities of academic leaders when it comes to strategy, comparing their progress in achieving these goals, and exploring the transformative potential of successfully delivering on them. To learn more, [read our report](#).

Strategy: High Performance Objectives



All of this comes at a time when universities are trying to solve three macro-objectives that are critical to their future: accelerating digital transformation, growing their global networks and improving sustainability. To achieve these ambitions while navigating funding challenges and maintaining enrollment numbers, academic leaders must develop a holistic, fluid strategy that can power sustained high performance in any operating environment.

Institutional strategies will need to contain all three levers to drive that sustained high performance – from maintaining funding opportunities and building outstanding global partnerships, to improving operational efficiency and bolstering institutional reputation. By taking this approach, universities can ensure they continue to build momentum and make an impact faster.

Plan for progress

Academic leaders must be visionaries

The starting point for developing a strategy for sustained high performance is ensuring there is always a clear vision for what an institution wants to be known for. This will inform its mission objectives and key performance indicators. Without this clarity, it becomes challenging to adopt a shared vision and consistent objectives across all parts of the organization. This can result in disjointed messaging and departments being disconnected from the broader institution, leading to negative consequences for revenue, academic success and impact.

Increasing competition for funding and students also means it is critical for an institution's vision to focus on their specialty areas for research and competition. This is not just an exercise for the present; the vision needs to also consider potential future specialties and then create a strategy for strengthening those as part of longer-term strategic plans.

Build on your strengths

This overarching vision will inevitably vary by institution. For example, some might want to be recognized as being Fourth-Generation Universities: orchestrators of regional innovation ecosystems, achieving societal and economic impact through partnerships with industry, government and civil society.

Within this vision, academic leaders must also think about what specifically they want to be known for. For instance, it could be close links to a particular industry to make it more attractive to prospective students.

It could be that the institution produces highly employable graduates in a certain field, painting it in a favorable light among corporate leaders. Or, it could be that it is known for generating successful patents and spin-outs in a certain discipline, bolstering the institution's wider reputation as being at the cutting edge of innovation and commercialization. Whatever those specialisms are, it is all about differentiation and standing out from other institutions.

This means focusing strategy on building that differentiation and creating noise about the academic and research areas that make an individual institution unique. In other words, promoting those specialisms by highlighting stories that demonstrate impact. By focusing on these specialisms – which are effectively areas of competitive advantage – institutions without historic brand recognition can start to elevate their reputation and stand apart from their peers.

Keep your ears open

While being a visionary is an important trait when setting strategy, the best academic leaders should also constantly have their ear to the ground. That means speaking to faculty members, getting a sense of what peer institutions are doing, understanding the regulatory and political environment and where funders are directing their resources. This can ensure institutions don't miss out or get left behind if there are significant opportunities to be tapped.

Build dynamism into your strategy implementation

The next step is recognizing that delivering on a long-term vision requires institutions to stay ready to adapt to how they pursue their strategic goals. Shifts in the broader external environment, such as adjustments to regional or national priorities, could affect funding availability; similarly, movements in the wider employment market could impact skills needs.

Or, changes to what undergraduate students want to study and the availability of student visas could alter enrollment numbers.

While these shifts may not affect an institution's five- or 10-year strategy, they may impact how they operationalize their plan for reaching these goals.

Institutions need to expect that frequent adjustments and shifts in their plan will occur.

For example, suppose funding for strategic priorities was to dry up significantly. Institutions may need to help departments and research teams tap into new funding streams or partnership opportunities or even pivot to new subject areas. Drawing from a web of connected and current data and insights can help institutions continually monitor and understand shifts in the global research landscape so they can dynamically adapt to any changes impacting funding availability for their strategic priorities.

Such volatility is also why diversifying revenue streams is crucial to embedding resilience into an institution's strategic goals, as that will allow it to remain nimble as operating conditions change.

Draw on a wide evidence base

Another challenge is that strategies are often measured only periodically using high-level key performance indicators, meaning it is difficult to know what has driven progress, or even if those strategies ultimately delivered what they set out to achieve. Institutions need to continue embracing and evolving performance benchmarking to gain comprehensive analytical baselines of where their institution is right now. They should then track and measure progress, ensuring that those efforts remain aligned with their overall strategic objectives.

By blending an array of metrics with qualitative insights, such as how an institution's research output is impacting the economy or society, academic leaders can provide realworld evidence to support the quantitative metrics.

Adopting tools and services that draw upon the latest technologies can enhance an institution's ability to monitor performance and benchmark against peers. It can also help leaders understand where their institutions' strengths or potential areas for improvement are, giving them more confidence in strategic decision-making. This also makes it easier to uncover where market conditions have changed and whether leaders need to course correct. All of this enables institutions to improve their agility and put themselves on a path to achieving sustained high performance.





Give people the tools to support decision-making

While data and technology play an important role in the evidence base used to inform strategic thinking and support operational effectiveness, it is only one part of the process. Institutions must empower their leadership and staff to make confident decisions by having access to the latest data and technology.

Indeed, our report found that **62%** of academic leaders see effective digital transformation as a transformational objective.

Rapid developments in AI and generative AI can help enhance strategic decision-making and strategyssetting in tandem with a robust evidence base underpinned by quantitative data and qualitative insights. However, academic leaders should remain cautious. While AI can support this process, it will not have the same level of insight as senior academics.

For example, an AI algorithm might suggest a particular area of research that is likely to become more prominent, but which might not be suitable for an institution.

An institution's academic experts might not be intellectually excited by a field (for instance, there may be other areas where there is less competition for funding), or, they may lack the facilities to support it. In those instances, the institution should continue to defer to their experts' judgement and expertise, complemented by the insights that an AI algorithm can provide alongside the whole evidence base.

Innovative thinking around strategy is an exclusively human domain. AI can support this and the subsequent implementation and monitoring of the strategy, but it can't replace the thinking that develops the strategic direction of an institution. Using the latest technologies to interpret data can also help institutions identify potential risks. For example, imagine one of an institution's leading areas of capability is reliant on a handful of academics who are all close to retirement. Effective data analysis and interpretation could help with early identification of risks like these and may even inform recruitment, retention incentives or succession plans.

In other words, complementing and supplementing human expertise in decision-making allows academic leaders and their teams to test ideas and identify points of difference. Technology can help them assess their historical and current situation and anticipate future trends. Ultimately, however, a forward-looking strategy and vision must come from leadership.

How Elsevier can help



Building your strategic research plan

To help institutions develop their strategies, Elsevier's [SciVal](#) platform enables institutions to better understand their position in the global research landscape so that they can confidently decide where to direct their focus for future success. With access to quantitative data and insights about research institutions globally, and across sectors, academic leaders can build a better understanding of strengths, weaknesses and performance. This strengthens the evidence base they can draw upon to complement their expertise and knowledge of their organization and community.

For example, SciVal can profile the research strengths and areas of expertise of any research institution globally, outline current and potential research partnerships in any field, and provide access to the actual bibliometric datasets used in major international rankings. Drawing upon this expanded view of their institution and the global research landscape can help academic leaders formulate a strategy and then see through the implementation and monitoring of it.



Measuring performance

Being able to track progress towards an institution's strategic objectives is essential to ensuring that vision is achieved. Elsevier's [Interfolio Faculty Information System](#) gives insights into an institution's most valuable asset – their academics. By centralizing faculty data, the Faculty Information System provides visibility into faculty work and insights to inform confident decisions. At times, this data might confirm what academic leaders already know, or it might contradict their understanding, highlighting an area to investigate in greater detail. For academic leaders, this is a powerful tool for strategic thinking, helping to reduce groupthink and adequately test any risky assumptions.



Managing academic appointments

Academic staff salaries are the biggest expense at many universities, yet it is common to see academic appointment information siloed in a spreadsheet. The [Interfolio Lifecycle Management](#) module allows university leaders to see rosters and career milestones at a glance, empowering them to anticipate budgets and plan for the future with unprecedented visibility into academic staff. It gives insights into academics through a central repository for appointments, terms of employment, workload allocation, upcoming reviews, eligibility for leave, contract exceptions and more.

Learn how Elsevier's Research Intelligence portfolio can help your institution gain the data and insights to develop, execute and monitor a transformational strategy that drives success and impact.

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SciVal

SciVal is a research analytics platform that provides dynamic insights for decisive strategy, enabling institutions to shape transformative research approaches and pursue future opportunities. By harnessing essential data for impactful analyses – considering publication and citation metrics, patent and policy citations, funding trends, and collaboration patterns – SciVal uncovers insights that inform critical decisions and drive your institution's strategic research goals.

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Interfolio

Interfolio's innovative Faculty Information System enables academic leaders to achieve strategic success and drive institutional impact. Trusted by more than 425 universities across 20 countries, the Faculty Information System streamlines processes for faculty hiring and recruitment, academic appointments and timelines, activity data reporting, reviews and promotions.

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