Strategic Marketing for Academic and Research Libraries

Welcome !

Purpose: to provide a marketing planning tool for academic and research librarians and library administrators

Desired outcomes:

- Become familiar with the process and materials

- Develop ideas for promotional campaigns

Agenda

- Introduction – primary model/process
- Customer needs resources
- Key elements of the strategic plan – products and services
- Identifying messages

- Identifying vehicles to carry the messages
- Sequencing the campaign
- Preparing to implement the campaign and library vision
- Implementation

Format

- Facilitator introduction of content and materials
- Teams work on assignments to develop a promotional campaign
- Individuals have time to take notes for your own library
- Large group discussion

Style

- Only one day
- Fast
- Show the basic process
- May not finish every step

- Help each other under-stand the process
- Build a few good examples
- Have some fun
- Use sticky walls

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Materials

Participant Manual

- Content
- Overall process
- Leadership tips
- Worksheets
- Examples
- Resources

Facilitator Guide

- Facilitation Tips
- Promotional Campaign Tips
- Meeting/workshop options & outlines
- Resources
- Guide to facilitation slides

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Materials, cont.

Facilitation Slides

- Basic content slides
- Train-the-trainer workshop slides

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Get the Most Out of the Workshop

Individually:

- Ask questions
- Take notes, pages 66-67
- Participate actively
- Listen to others' great ideas

As team member:

- Offer ideas
- Stay loose, be creative
- Help others learn and apply the process
- Listen for others' great ideas

Chapter 1: Introduction

- Crisis?

- Challenges

- Opportunities

- Why market your library?

- Leadership

- The Marketing Planning Process

- A Status Inventory Tool

Are You Facing A Crisis ?

危機

Dangerous – "wei"

Opportunity – "ji"

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The Issues

- Recruitment, education and retention of librarians – to find future leaders

- Role of the library in the academic enterprise –- as center of activity on campus

- Impact of information technology on library services – balance of traditional and new

The Issues, cont.

- Creation, control and preservation of digital resources – decision, resources and control
- Chaos in scholarly communication – intellectual property and fair use rules
- Support new users – in residential, distance or other learning settings
- Higher education funding -- funding, costs and pay

Concerns

- Libraries will become marginalized, losing their central role in academic institutions
- Increasingly powerful competition will overcome libraries before they can figure out how to deal with it
- Others?

Recommendations

- Become better leaders; do less following
- Reposition the library in response to the needs of the users
- Adopt attitudes and responses to the changes

- Become increasingly comfortable with change
- Actively market the library with administrators who make the funding decisions
- Others?

Real Needs to Address!

- Are students using the Internet fully, honestly and intelligently?

- Are faculty skillful enough in building class websites, using information links and using course management software?

- Will librarians design their collections and staff to meet real needs?

- Will administrators understand the investments needed to maintain the stature of their libraries?

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15

A Good Offense

- Develop tools; understand the management of information

- Build relationships with accrediting bodies

- Collaborate with faculty and administrations who influence library funding

- Teach basic marketing to librarians

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16

Why MARKET Your Library?

- Greater use by your customers
- Better decisions about what to provide at your library
- Better partnerships with faculty and administrators
- Maintenance of central position of library in the institution
- Adequate funding
- Better informed and more supportive legislators
- Others?

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Help from ALA, ACRL and 3M

- See **<www.3M.com/market/security/ library/whatsnew>** for resources:
- How to map the future of your library
- How to sell your library of the future
- How to lead and design the development of your library of the future
- How to market your library of the future

This Program

Strategic Marketing for Academic and Research Libraries

- Manual – information, process & tools
- Guide – tips, outlines and examples
- Slides – presentation slides

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The Issue of Leadership

Accountabilities:

- Understand evolving needs of their institutions

- Define the "new" form and function of the library

- Market the "new" library for increased use and funding

- Implement necessary changes in library operations

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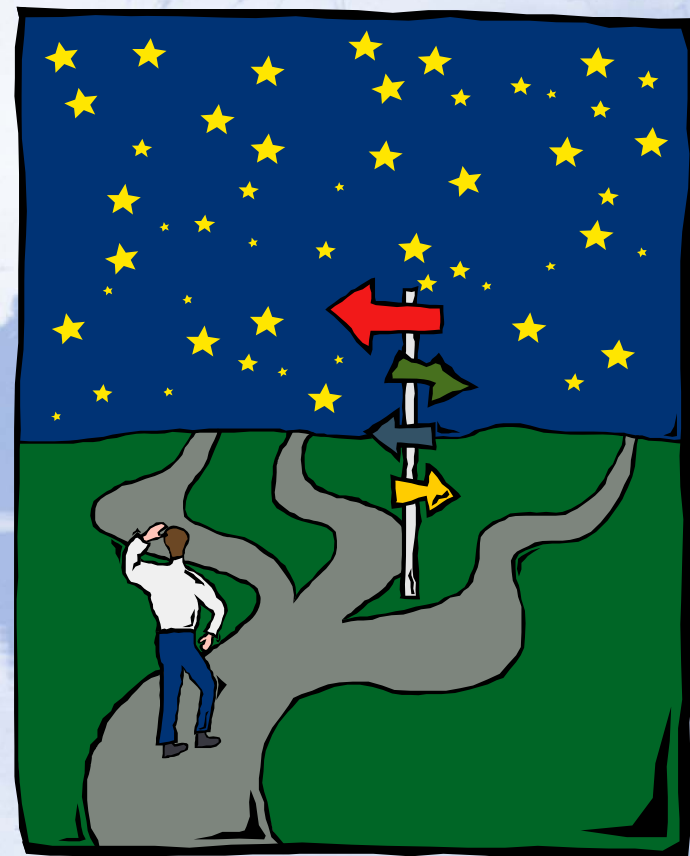
The Issue of Leadership

Proven steps/tools:

- Choose tools/process
- Do personal research/ thinking to form an opinion and tell others
- Find your own energy
- Teach, influence, advocate
- Involve others to design, market and implement

Remember…
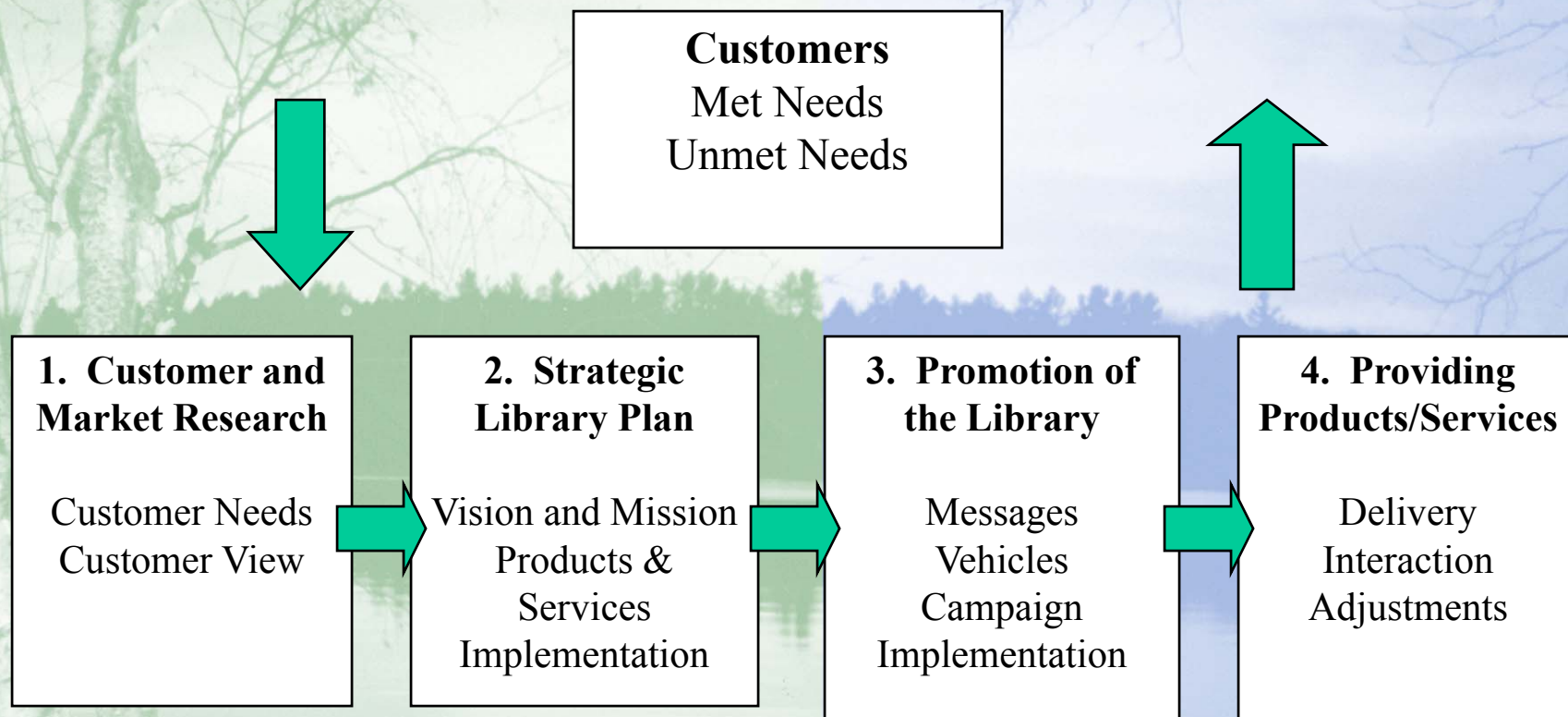
You:

- Set the standard
- Show what you believe
- Set the priority
- Establish the value of the marketing plan for the library

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3M
Founding Partner

@
Campaign
for
America's
Libraries

@ your library

Choosing the Best Approach

Factors	Large – A Lot	Small – A Little
Library Size	More staff involvement activities	Fewer staff involvement activities
Degree of Change	More staff involvement activities	Fewer staff involvement activities
Experience with Marketing	Fewer staff involvement activities	More staff involve-ment activities

3M Founding Partner

@ your library

Campaign for America's Libraries

The Marketing Planning Process

Customers
Met Needs
Unmet Needs

1. Customer and Market Research	**2. Strategic Library Plan**	**3. Promotion of the Library**	**4. Providing Products/Services**
Customer Needs Customer View	Vision and Mission Products & Services Implementation	Messages Vehicles Campaign Implementation	Delivery Interaction Adjustments

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Excellence Occurs

When you …

- Know your customers, their current and future needs
- Have a detailed vision and mission statement for your library
- Promote your library
- Serve your customers as you have promised.

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Status Inventory –
A Tool to Help You Decide Where to Start

Customer and Market Research	Strategic Library Plan	Promotion of the Library	Providing Produces and Services
Do you really know what your customers need?	Have you designed your library to meet customer needs?	Are your messages reaching your customers?	Are you delivering what you promised?

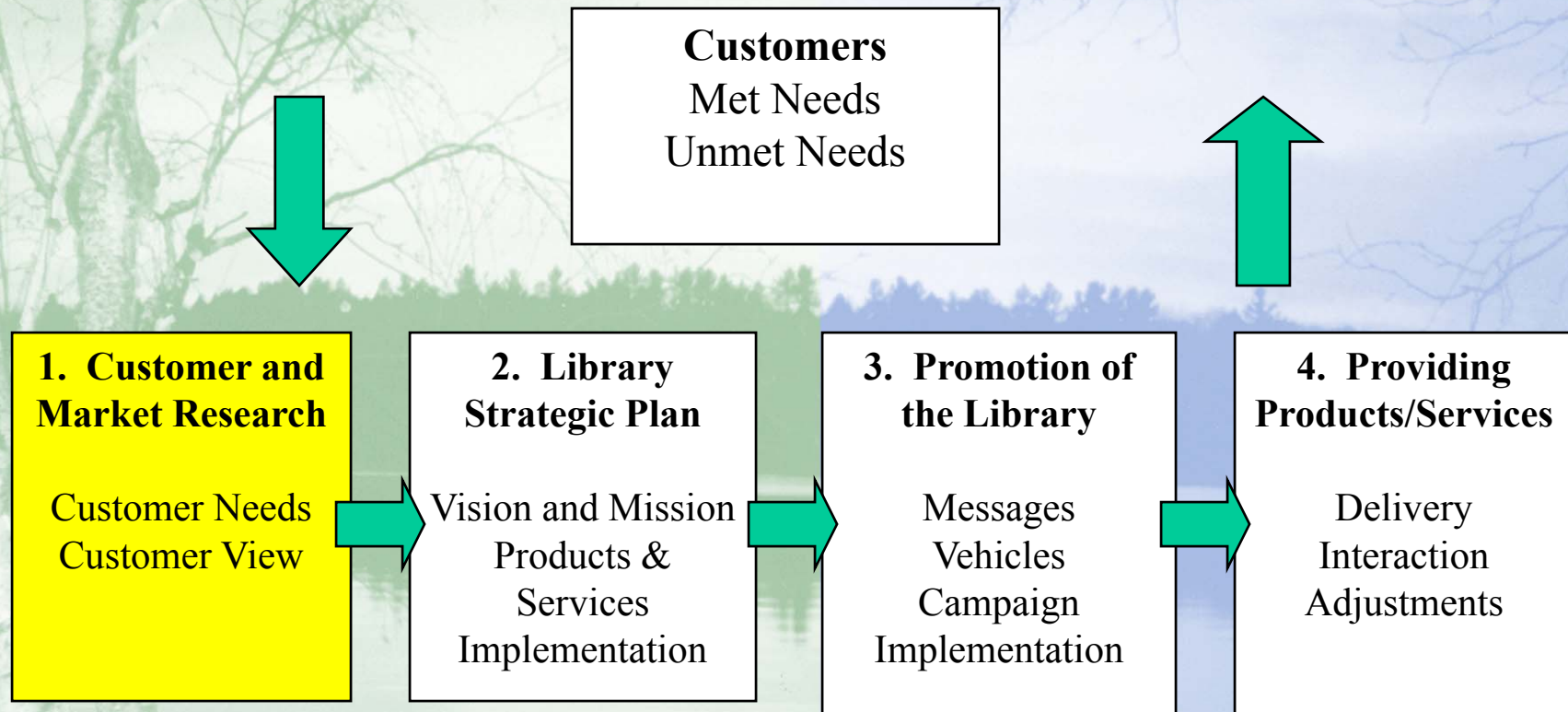ALA, ACRL and 3M Library Systems

PM pp. 13-14

26

Status Inventory

- How and when might you use this tool?
- What conclusions might you be able to draw?
- How much of each step should be completed before you can move on to the next step?

Marketing Planning Process
Box 1: Doing Library User Research

3M
Founding Partner

@ **@ your library**

Campaign for America's Libraries

Customers
Met Needs
Unmet Needs

1. Customer and Market Research	2. Library Strategic Plan	3. Promotion of the Library	4. Providing Products/Services
Customer Needs Customer View	Vision and Mission Products & Services Implementation	Messages Vehicles Campaign Implementation	Delivery Interaction Adjustments

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28

Chapter 2:
Marketing Planning Process
Box 1: Doing Library User Research

- First, know who the customers are
- Second, know who has great influence on the direction of your library
- Third, find out what your customers want and need

Customer knowledge is the starting point.

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First, Know Who The Customers Are

- Undergraduate students
- Graduate students
- Faculty
- Researchers
- Staff and administration

- Community members and groups
- High school students
- Business
- Government agencies
- Others?

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Second, Know Who Has Great Influence on the Direction of Your Library
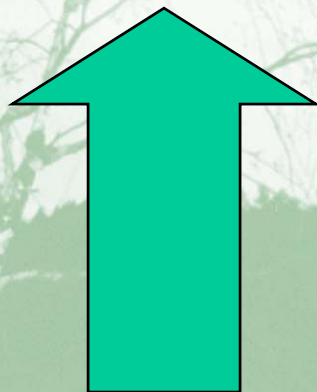
Influencers make/influence funding decisions

- Academic administrators
- Faculty/Faculty Committees
- Boards
- State and Federal Officials
- Alumni
- Others

Catalysts are key opinion leaders

- Allies/partners
- Donors
- Grant funding orgs.
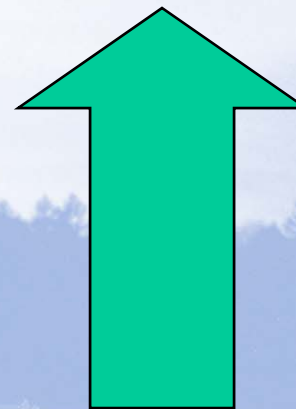- Professional associations
- Taxpayers
- Media

Relationships

Customers   Influencers/Catalysts

Serve   Educate, inform,
                             & influence partners

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Third, Find Out What Your Customers Want and Need

- **Wants:** products/services the customer would like the library to provide for comfort, extension of services, or to fulfill interests

- **Needs:** basic products/services that customers use to find and use information to fulfill their education assignments and goals

Customer Wants and Needs

Current needs: what do they really
need/want now?

Future needs: what are their future needs:
known and implied?

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Customer Research Topics

- **Product:** do your current and future products/services meet the wants/needs of the customer?
- **Price:** is the "price" affordable?
- **Place:** are the products/ services accessible?

- **Promotion:** do you customers know what you have to offer?
- **Experience:** how do your customers describe your library to others?

Questions to Ask Customers

	Current Needs	Future Needs
Known Needs	Do current P/S meet product, price, place, and experience needs? Do customers know about your P/S?	How well do your future P/S plans match known needs? Do customers know you plan to offer these?
Implied Needs	What current needs are not being met now? What repeated complaints do we hear? Who is not using the library as much as we'd like?	What environmental shifts will change things for your customers? What new information needs will they have?

Ways to Learn About Your Customers

Formal

- Yearly surveys for customer groups

- Focus groups

- Quick satisfaction questionnaires

- Observation of interactions

Informal

- Short informal interviews

- Spot interviews

- Chat room discussions

- Suggestion boxes

- Dept. discussions

- Focused surveys

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37

Examples of Needs

Undergraduate Students	Researchers
Course primary materials	Ample collections
Course reference materials	Dedicated reference assistance
Computers, printers, scanners	Data bases and software
Basic skills assistance	Website assistance
Study rooms	Meeting spaces
Graduate Students	**Faculty**
Course primary materials	Help in codifying materials
Course reference materials	Departmental reference lists
Internet assistance	Internet assistance
Whole document copy services	Reserve materials for students
Reference and research assistance	Library research help

Customer Needs Worksheet

List Matrix

- Customer

- Current – met and unmet needs

- Future known and implied needs

Analysis Questions

- Complete list?

- Most important customers

- Most important needs

- Unmet needs

- Future needs

Selecting the Customer(s) to Address First

- Size of group
- Centrality to vision, mission
- Frequency of use
  - Actual
  - Potential

- Funding influence
- Quality of current service

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One-Day Workshop
Exercise Instructions
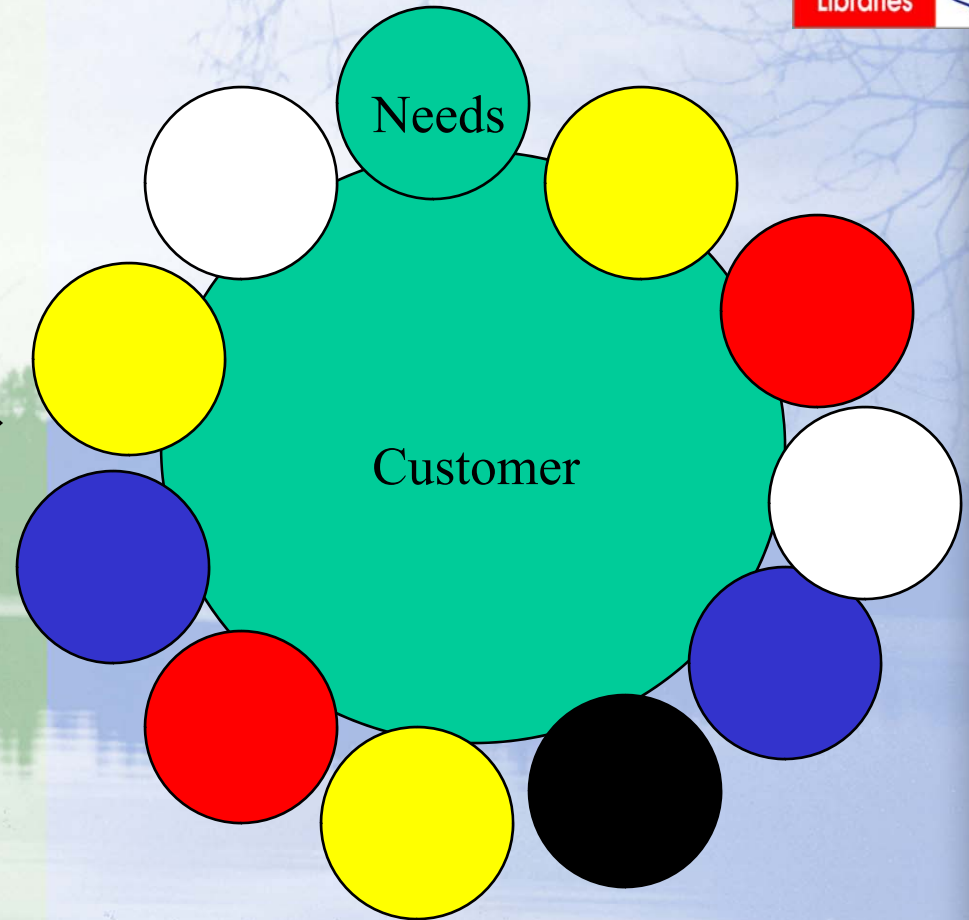
Team Instructions: 15 minutes

- Answer the following questions:
  - What are the customer's needs that the product/service (assigned to your team) addresses? Write on a flip chart. Use your best brainstorming skills.
  - How valid is this list?
  - What steps might you take to make it more valid?

Flip Chart

Product/
Service

→

Needs

Customer

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Two-Day Workshop
Exercise Instructions

Teams work for 40 minutes: Create the Customer and Needs Sticky Wall (FG p. 24, next slide)

• Brainstorm a list of customers of the library

• Place the customer in order of who should be addressed first in the promotional campaign

• Brainstorm the needs (from the customer's point of view) of each customer

• Put each customer's needs in order of priority to the customer

Two-Day Workshop
Customers and Needs
Sticky Wall

Customers		Needs				
Customer #1		Need 1	Need 2	Need 3	Need 4	Need 5
Customer #2		Need 1	Need 2	Need 3	Need 4	Need 5
Customer #3		Need 1	Need 2	Need 3	Need 4	Need 5
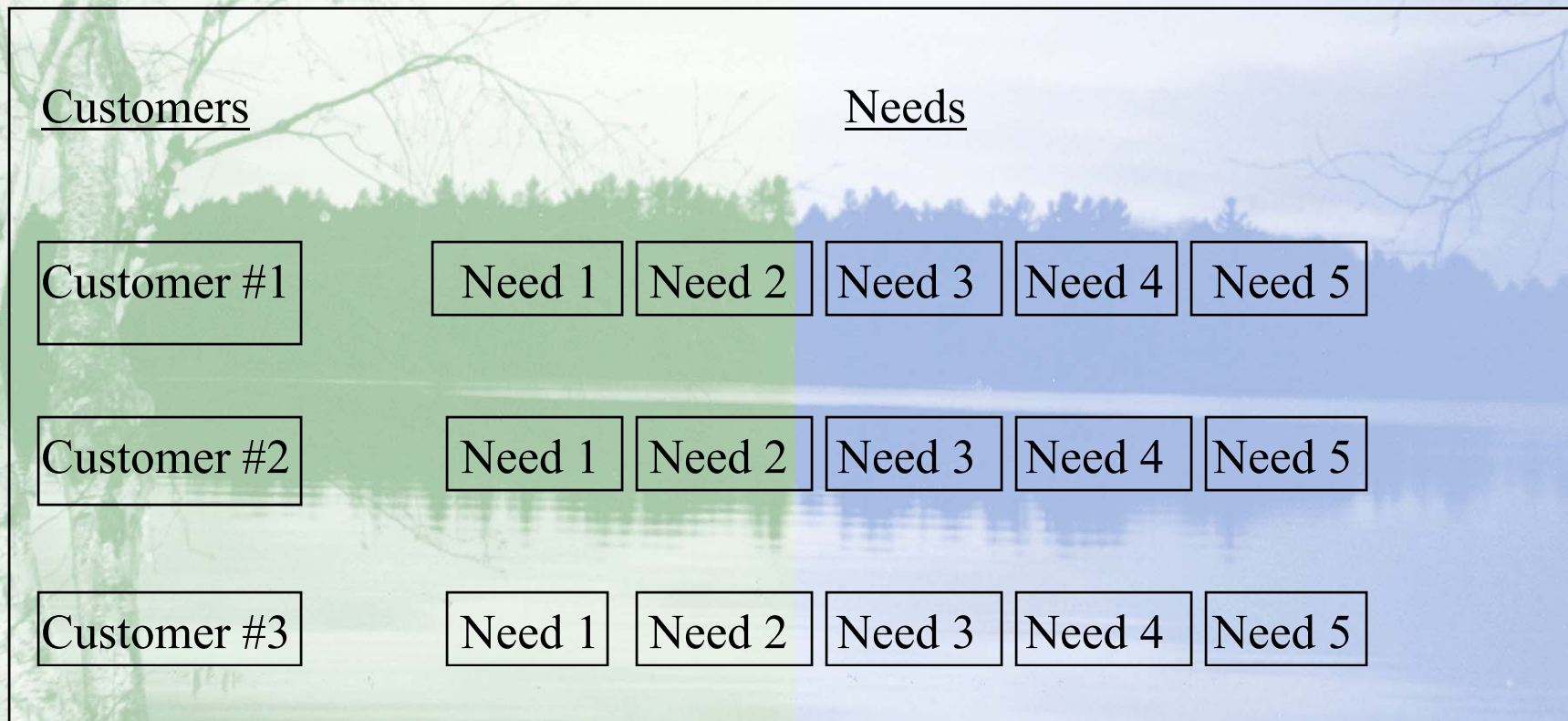
Questions:

- Was identifying needs fairly easy to do?
- Do you do a process like this at your library?
- How important is this step?

Take a minutes to jot NOTES for your library on PM pages 67-68.

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Chapter 3:

Marketing Planning Process

Box 2: Library Strategic Plan

Customers
Met Needs
Unmet Needs

1. Customer and Market Research	2. Library Strategic Plan	3. Promotion of the Library	4. Providing Products/Services
Customer Needs **Customer View**	**Vision and Mission** **Products &** **Services** **Implementation**	Messages Vehicles Campaign Implementation	Delivery Interaction Adjustments

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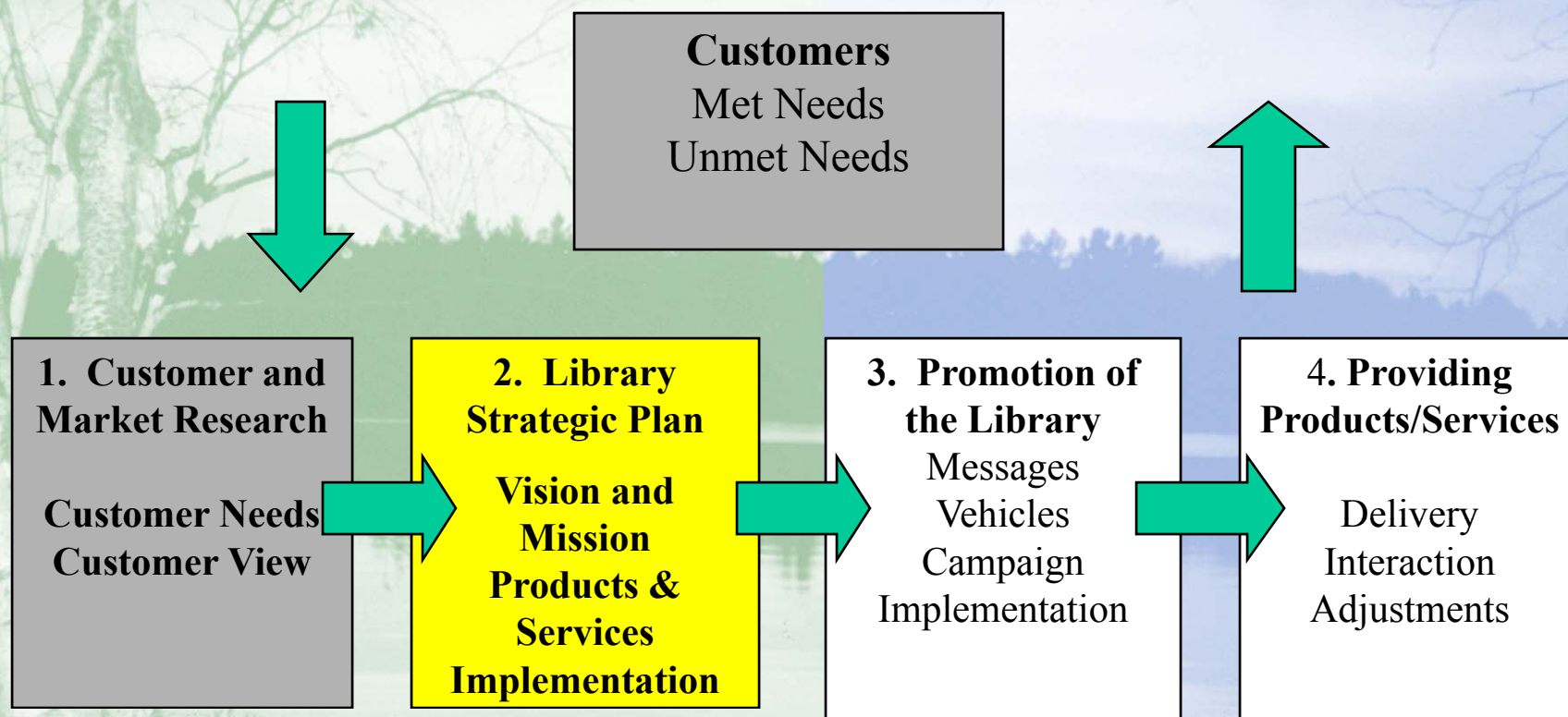
Key Elements of a Strategic Plan

- Strategic Intent– what kind of library do you plan to be?

- Mission – the task of the leaders, the role of the library

- Vision – what the library will look like in the future

- Values – the beliefs and day-to-day behaviors

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47

The GAP

Current Products and Services

Desired Products and Services to meet customer needs

Decisions about the Library and Products and Services

Goals

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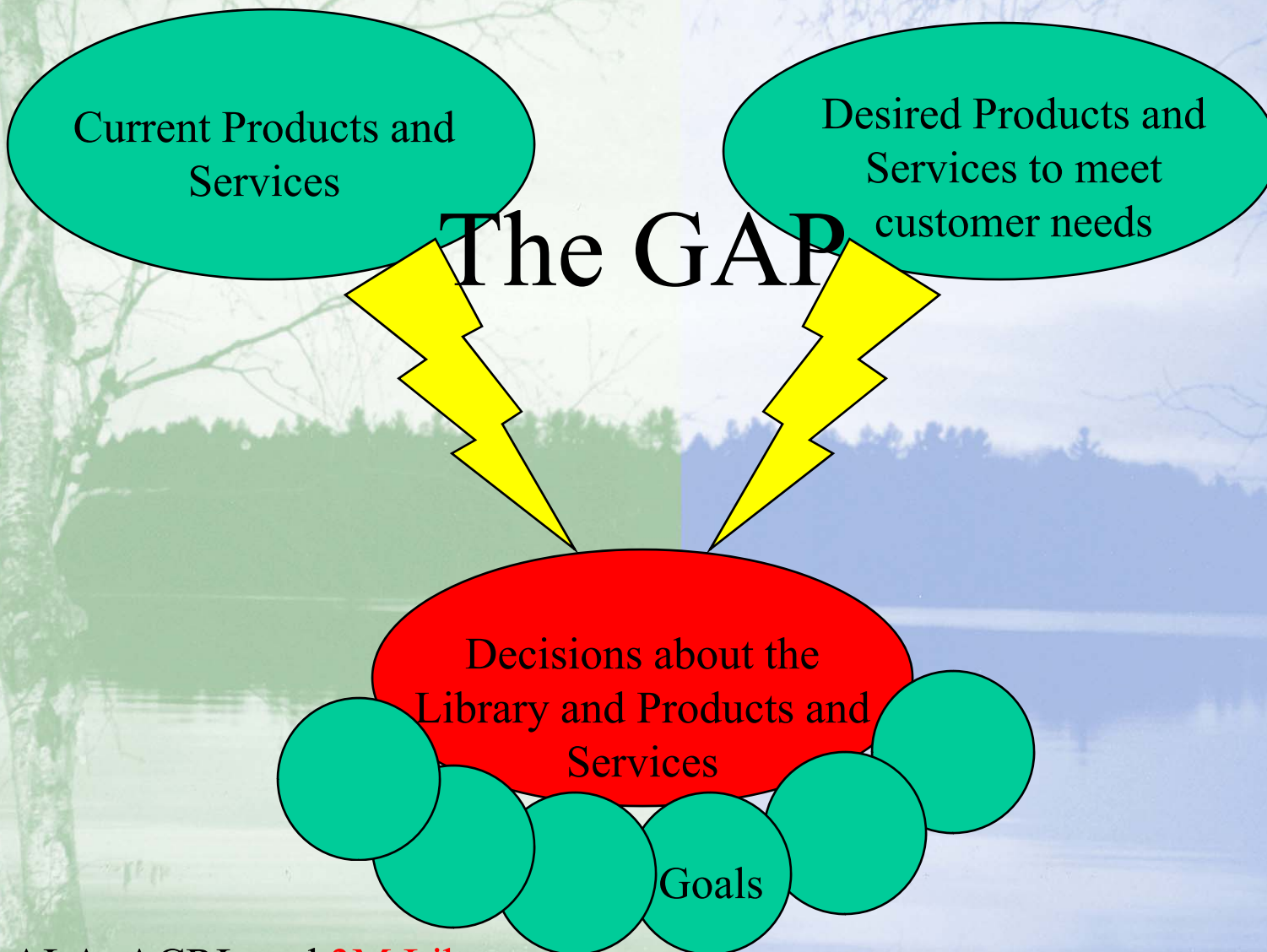
Strategic Plans Lead to Desired Change

Goals

- Facilities
- Development
- Staff Dev.
- Acquisitions
- Processes
- Marketing/promotions
- Legal/regulatory
- Product/Service

Measures

- Cost
- Staffing
- Time invested
- Increased use
- Satisfied customers
- More inquiries
- Speed
- Increased funding

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Product/Services and Benefits

Products

- Book/journal collections
- Manuscript collections
- Electronic resources
- Research guides

Services

- Research assistance
- Instruction
- Copy/Scanning services

Benefits

- Available information
- Best resources available
- Faster research
- Skill development

- Find best resources
- Manage software
- Access to data

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50

Marketing That May Be Seen, Heard, and Felt By All

- Goal: library can be used successfully by all customers

- Marketing plan should reach all customer groups

- Promotional campaign language should address learning skills or style needs

Example: Product/Services and Benefits Map

Customer	Needs	Products/Services	Benefit
Undergraduate students	Course materials	Online copies of class packets	Have what they need when they need it
Graduate students	Reference and research assistance	Online reference guides	Easy, convenient access
Faculty	Research assistance	Acquisition/con-sortial agree-ments/document delivery	Ability to use library well
Community Members	Collections	Certain topics, new titles	Fast access

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Exercise Instructions

Team Instructions: 20 minutes

- Task: state the benefits your customer receives from the product/service
- Note the sticky wall layout, FG p. 24, next slide
- Use the examples in this chapter
- Use ½ sheets, be sure to label them "C, N, B, or P/S", write in 2" letters
- Then, answer the questions as a team:
  – Is our list of needs complete?
  – Is our list of benefits complete?

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Customer Needs, Products/Services and Benefits Matrix

Customer: _____

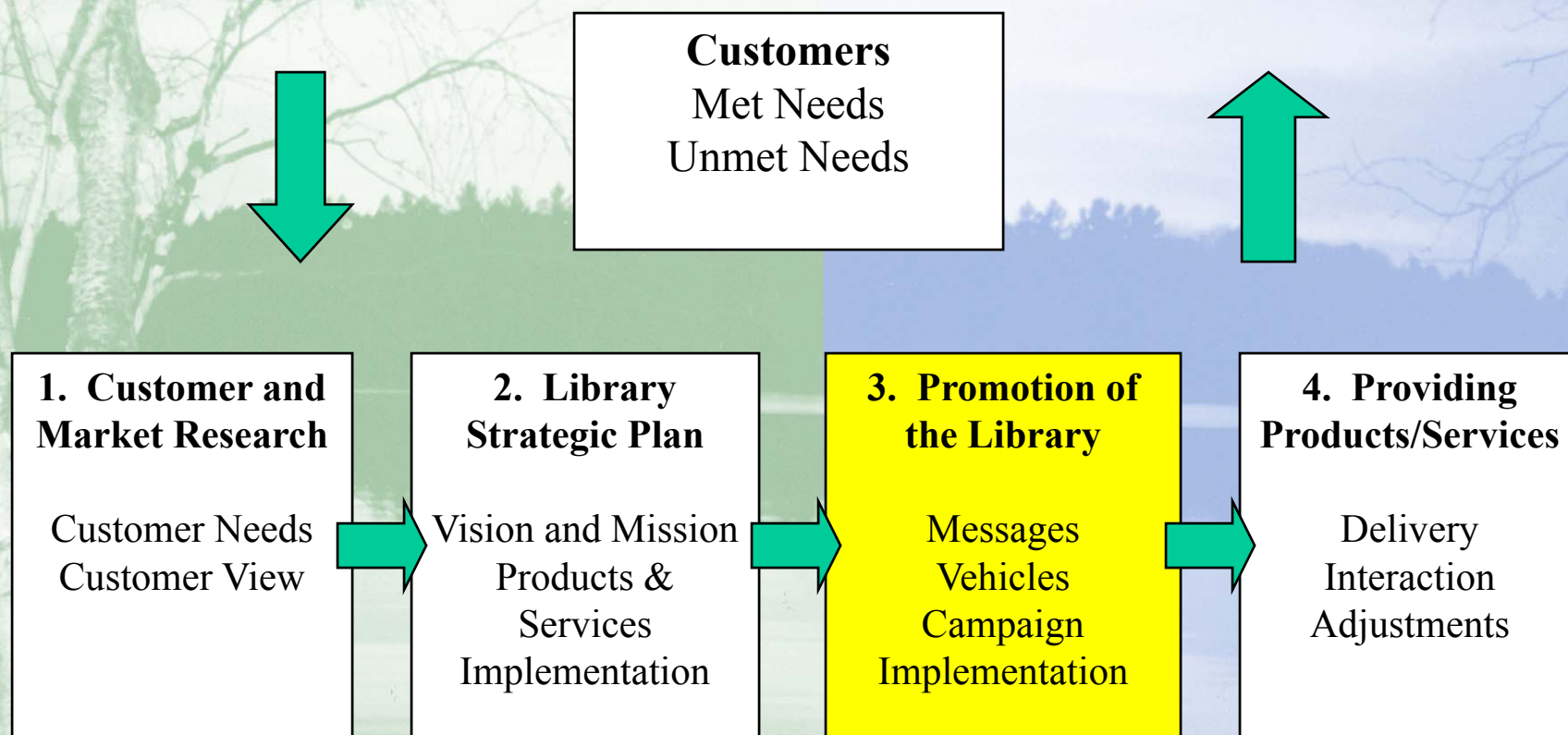| Need 1	P/S	P/S	P/S
	B	B	B
	B	B	B

Need 2

Need 3

Need 4

Questions:

- What are some examples of your customer and their needs

- Do you have questions?

Take NOTES on pp. 67-68.

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Marketing Planning Process
Box 3: Promotion of the Library
Messages, AIDA and Platforms

Customers
Met Needs
Unmet Needs

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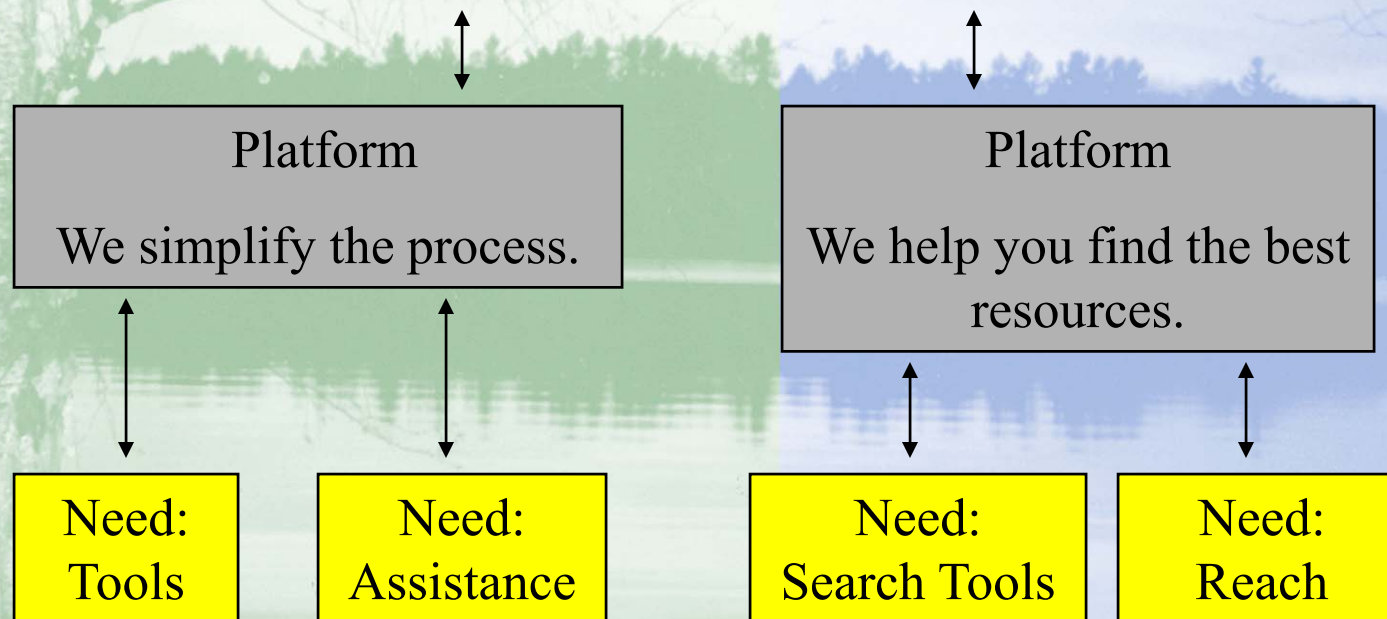
Promoting the Library

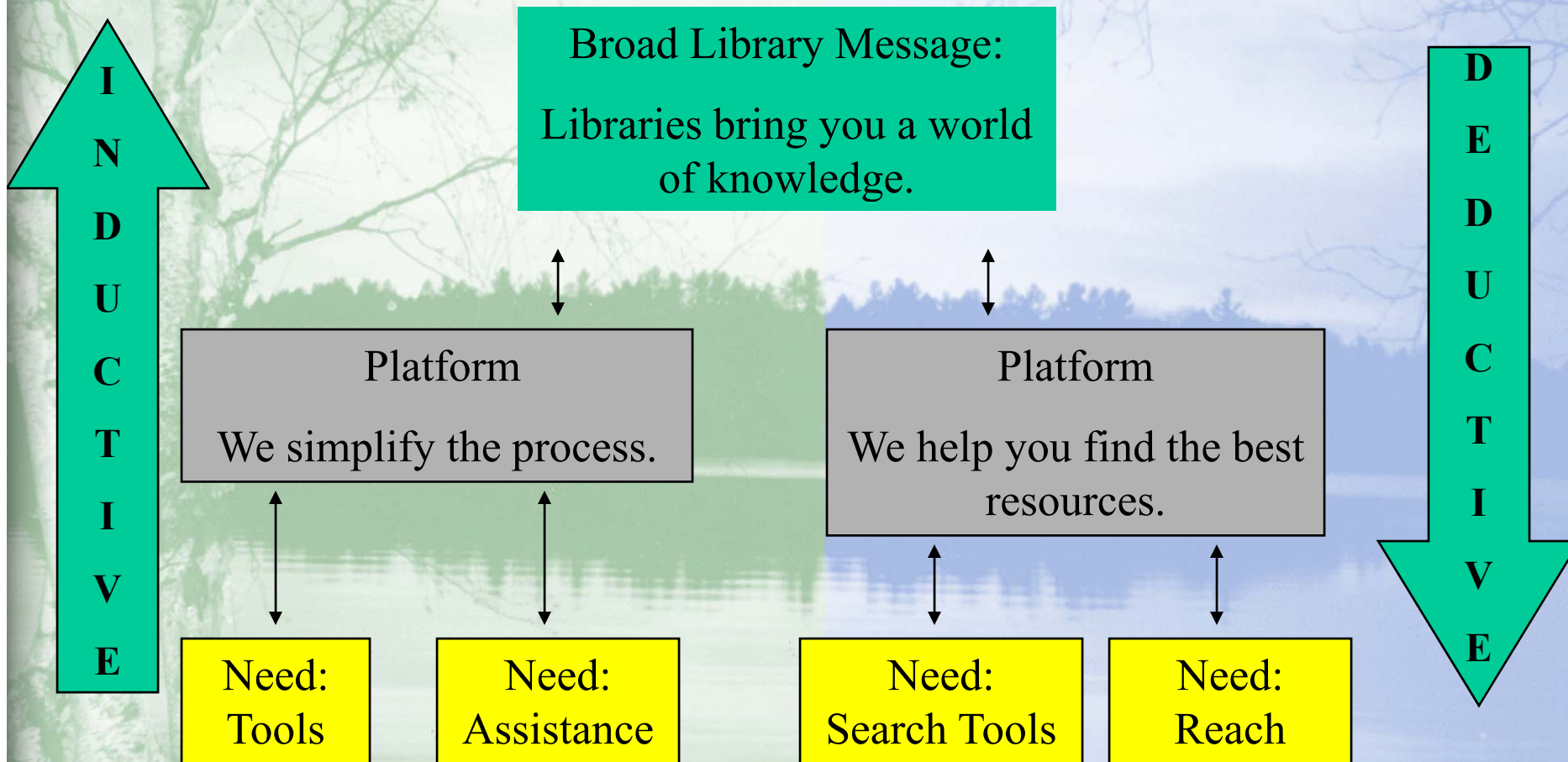**Step-by-step information and exercises:**

- Library positioning messages (brand)
- Messages
- AIDA phase
- Platforms

Levels of Messages

Broad Library Message:

Libraries bring you a world of knowledge.

Platform

We simplify the process.

Platform

We help you find the best resources.

Need: Tools

Need: Assistance

Need: Search Tools

Need: Reach

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PM p. 31

58

Levels of Messages

INDUCTIVE

DEDUCTIVE

Broad Library Message:

Libraries bring you a world of knowledge.

Platform

We simplify the process.

Platform

We help you find the best resources.

Need: Tools

Need: Assistance

Need: Search Tools

Need: Reach

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Ideas for Broad Library Messages

ALA Key Messages

- Libraries are changing and dynamic places
- Libraries are places of opportunity.
- Libraries bring you the world.

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ACRL Broad Messages

Stakeholders and key audience groups liked:

- College and research libraries are an important part of the learning community.

- College and research libraries connect you with a world of knowledge.

- College and research libraries are investing in the future, while preserving the past.

Second, Transform Benefits Statements into Messages

Products or Services	Benefit	Message
Undergraduate basic and supplemental course material packets	U. students have the course material they need when they need it.	Save time/money by getting your class materials at your lib.
Research and reference staff devoted to graduate students	G. Students get timely and knowledgeable help	The references are here when you need them.
Research assistance service for faculty	Faculty will save time and get good results	We'll help you get the best resources, fast!
Acquisition and consortia agreements and document delivery	Researchers can acquire the information they need from an array of resources	Use state-of-the-art knowledge resources in your research.

Getting to the Essence of the Message

First Draft

- Save time, money and hassle by getting your class materials at your library

- We can provide you with collections to create new knowledge

Essence message

- Ready for class! Fast!

- The best collection anywhere on …

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63

Tips for Selecting Messages

- Convey what is **unique** about your library's P/S
- Communicate about the **librarians** as well
- Choose important and relevant for both internal and external **audiences**
- Make the messages short, concise, focused, and **interesting**
- Speak to the **customer** in appealing language

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64

Message Examples

- You have questions? We have answers.
- Search and you shall find.
- Got research?
- The Community College Library – it's bigger than it looks
- Get ahead @ your library®
- Find yourself @ your library®

- High School to Higher Education @ your library®
- Get connected @ your library®
- Globally connected @ your library®
- Einstein your mind @ your library®
- Discover a world of information @ your library®

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More Message Examples

- We're here for you …on your schedule

- Cappuccino & Computers

- Now more hours at our house and yours!

- Start here. Go anywhere.

- Sunrise research begins online

- Term papers @ your library®

- One-on-one help @ your library®

- Your secret weapon

- Just ask a librarian

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Exercise Instructions

Team Instructions: 30 minutes

- Look at the sticky wall layout, FG p. 24, next slide
- Move P/S and B ½ sheets as needed
- Write a message(s) for each of the benefits the customer receives from the product/service.
- Answer these questions:
  - Do our messages match the benefits?
  - Are the messages reaching the essence?
  - Are our messages interesting?

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Messages, AIDA and Platforms Sticky Wall

Customer #1   Messages, AIDA and Platforms

Need #1

| P/S | B | | M-A | M-I | M-D | | | P |
| B | | | | M-D | M-Ac | |

P/S   B   M-A   M-I   M-D   M-Ac

Third, Categorize the AIDA Language of the Messages

AIDA helps you:

- Identify the amount of experience your customers have with the products/services you are marketing

- Adjust the language of the messages to match the experience level

- Decide if a series of messages is required

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AIDA

Where is your customer…?

- **A = Awareness:** needs to be introduced to a new product or service
- **I = Interest:** needs more information to pay attention, be intrigued
- **D = Desire:** needs more information, motivation to decide to acquire the product or service
- **Ac = Action:** needs an invitation, reason to acquire the product or service

AIDA:
Customize the Message

Message	Awareness	Interest	Desire	Action
Ready for class! Fast!	Something new – ready for class, fast!	Let us show you how to be ready for class fast!	Make your life easier, be ready for class fast!	Check the website: Ready for class, fast!
	Introduce	Describe	Match to Needs	Urge to act

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PM p. 36

Exercise Instructions

Team instructions: 20 minutes

- Look at the messages on your sticky wall, revise them using AIDA to match the message to the customer (see sticky wall layout, FG p. 24-26)

- Label each message A, I, D, or Ac

- Add messages to move people toward *Action*

- Answer questions:

  - Do these messages hit the customers' needs?

  - Are these messages phrased in appealing language?

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Fourth, Identify the Platforms Suggested by the Messages

Messages

- Save time and money by getting your class materials at the library.

- There are plenty of copies of class reading materials.

- Past tests will help you focus on what's important.

Platform

- We simplify the process so you can excel!

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Campaign for America's Libraries: Platforms

@ *your library* brand

- Within your reach *@ your library*®

- 24/7 @ your library®

- Sound advice *@ your library*®

Platforms suggest logos, graphic design, and color schemes.

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Messages, Platforms, AIDA Examples

Messages	Platform	AIDA
Introducing ….	The library will help you succeed with your classes!	A = Awareness Help the customer become aware of a new or under-used P/S
Specific features included are …	We help you find your class materials and references.	I = Interest Build P/S recognition, encourage customer to learn more about it
Use it while you …	Our new software makes formatting papers easy.	D = Desire Help the customer decide to use this P/S
Come in for a quick introduction to …	Demonstration and donuts!	Ac = Action Spur the customer to "buy"

Messages Identification Worksheet

Need, P/S and Benefit	Messages	AIDA	Platform
N: Required class materials P/S: multiple print or online catalogued copies B: I can get what I need when I want it	Your library can help you with required class materials. Let is show you how to find the required materials. Check out our step-by-step display.	A D Ac	Helping you succeed in your classes!

Exercise Instructions

Team instructions: 20 minutes

- Review the messages on the sticky wall

- Identify platforms for groups of messages that share an underlying theme, write on a ½ sheet and place on sticky wall (FG p. 25, next slide)

- Phrase the platform in interesting language, consider AIDA for this language as well

- Answer questions:
  - Is there a nice linkage from need-p/s-benefit-message-AIDA-platform?
  - What are a couple examples of platforms (and their messages) fitting into a library's broad message?

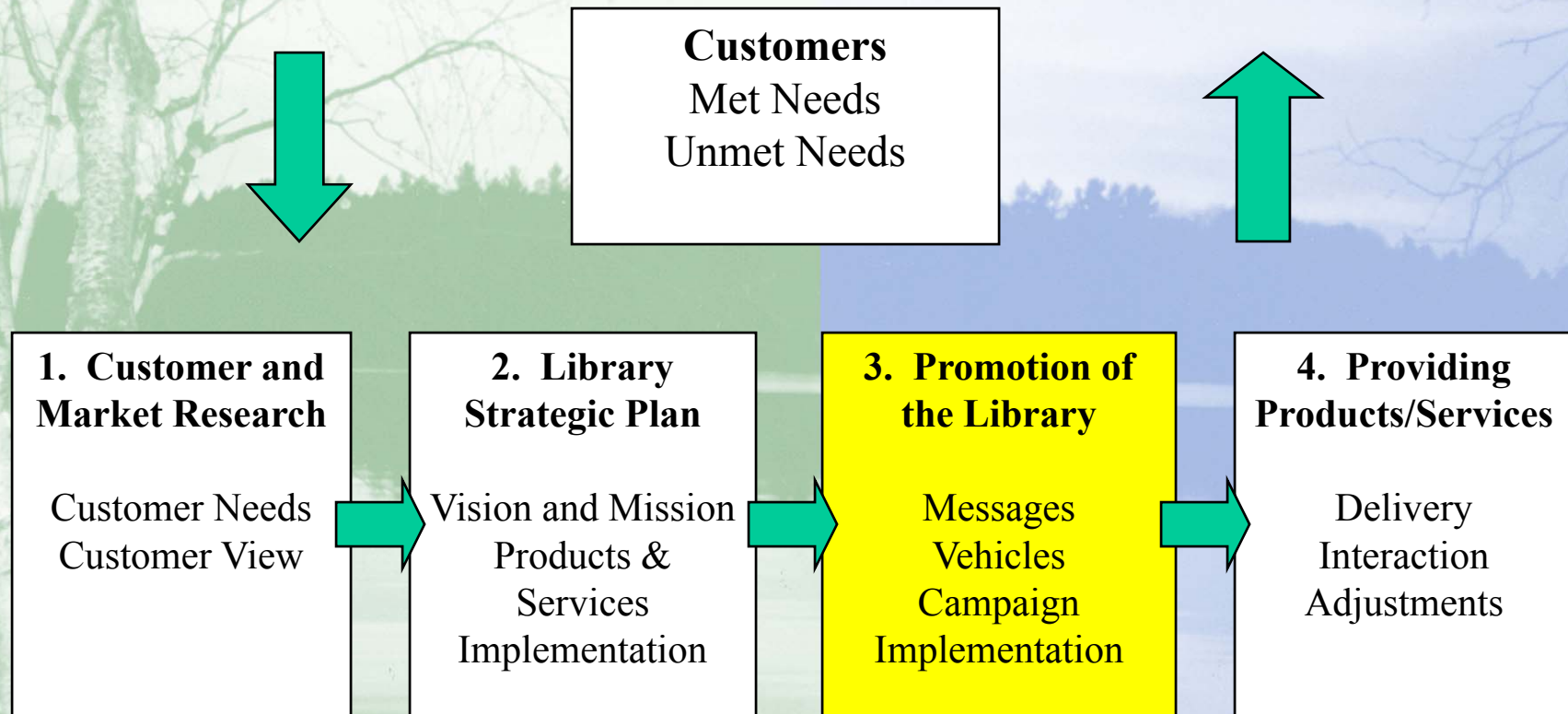ALA, ACRL and 3M Library Systems

Questions:

- Would the Messages Identification Worksheet work for you?
- What are the key steps in this part of the process?
- What are the difficult steps?
- Did you come up with valid messages? Interesting messages?

Take NOTES on pp. 67-68.

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Marketing Planning Process
Box 3: Promoting the Library
Vehicles and Campaign Design

Customers
Met Needs
Unmet Needs

1. Customer and Market Research	2. Library Strategic Plan	3. Promotion of the Library	4. Providing Products/Services
Customer Needs Customer View	Vision and Mission Products & Services Implementation	Messages Vehicles Campaign Implementation	Delivery Interaction Adjustments

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Partnering With Your Institution's Public Relations Office

- Learn about branding or other requirements

- Share methods that work best in your setting

- Get general marketing and promotions advice

- Provide actual service with copy presentation and dissemination

Marketing Planning Process
Box 3: Promoting the Library
Vehicles and Campaign Design

Step-by-step information and exercises:

- Vehicles: types and examples

- Campaign design issues

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First, Select the Best Vehicles

Choose vehicles that:

- Vary in format

- Reach the customer

- Carry the message appropriately

- In combination, serve as a campaign to move the customer through A,I,D, to Ac

- Attract attention

Vehicle Options

Advertising

- Paid for by the library

- Mass media: newspapers, magazines, TV, radio, billboards

- Catalogues, calendars

- Send clear, concise message and platform

- Help customer evaluate the P/S

- Show how P/S compare to competition

- Use creativity, humor, surprise, excitement to animate the message/ platform

- Libraries: TV spots, radio, campus paper ads, banners, posters, demos, testimonials, tables, presentations, flyers, bookmarks, t-shirts, mugs, brochures, etc.

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PM pp. 42

Vehicle Options

Direct Marketing

- Specific message
- To a specific consumer
- To generate a response (order, request, visit)
- Use "e" and other means
- Library examples: to class, faculty&department lists, via websites, posters, presentations & demos

Personal Selling

- Person-to-person comm.
- Receiver provides immediate feedback
- Sender adds more appropriate information
- Library examples: hosts for new students, kiosks a busy spots, demos, dept. presentations

Vehicle Options

Sales Promotions

- Activities to stimulate consumer purchasing

- Contests, trading stamps, premiums, rebates, discounts

- Library examples: free classes, free individual help, free mugs, apples for the faculty, learn from a celebrity, etc.
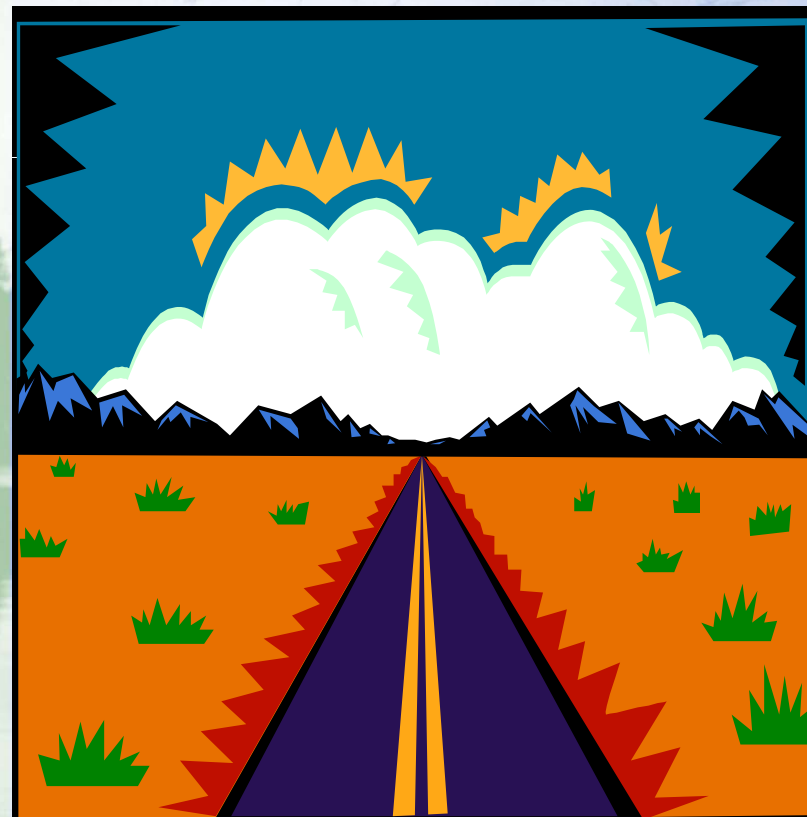
Public Relations

- To comm. a favorable image/promote good will

- To connect with key "publics"

- Via info. pieces, flyers, schedules, announcements

- Library examples: newspaper event schedule, announcements, issue papers, etc.

Vehicle Options

Publicity

- Messages conveyed through mass media

- Not paid for by org.

- Press releases, stories, letters to editor, pictures

- Library examples: letters to editor, releases, TV spots, notices in prof. publications, event news

Linking Methods, AIDA and Vehicles

Awareness	Interest	Desire	Action
Bookmark Posters Banners Flyers Email Announcements	Displays Web info Targeted, detailed flyers Radio spots Event partner	Spokespersons TV coverage Resource lists Special event Feature stories Testimonials	Personal appointments Free seminar Skill class invitation Free food
Advertising Public relations Publicity	General/dept. Advertising Direct marketing	Direct marketing Personal selling	Sales promo. Personal selling

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PM p. 45

Vehicle Identification Worksheet

Promotional Method	Specific Vehicles	AIDA Application
Personal Selling	Presentations to faculty	A, I, D
	Presentations to FIL	A, I, D
	Presentations to C of C	I, D
	Regular, informal meetings with B of T	I, D, C
	Kiosk in student center	I, D
	Staff greeters at door	I, D
	Flyer about researcher consultant on call	I, D

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PM p. 46

Exercise Instructions

Team instructions: 10 minutes

- Brainstorm a list of vehicles you use (have used) on a flip chart sheet.

- Refer to examples on PM p. 45

- Purpose: Raise awareness of team about <u>current</u>:
  - Promotional methods
  - Specific vehicles that are used
  - The AIDA application

- Suggest alternatives

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Exercise Instructions

Team instructions: 30 minutes

- Task: identify the vehicle(s) you think would best carry each message

- Use the brainstormed list, add new ideas

- Look at the sticky wall layout, FG p. 25

- Write vehicles on ½ sheets, place on sticky wall 'under'-lapping the messages

- Answer questions:
  - Are these the most powerful vehicles?
  - Which message/vehicle combination shall we report out?

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Messages and Vehicles
Sticky Wall

Customers   Messages and Vehicles

Customer #1 | M | | M | | M | | M |

  | Need |

P/S | V | | V | | V | | V |

  | B |

                 | V | | V | | V | | V |

                 | V | | V |

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Questions:

- What are some examples of powerful vehicles in your library settings?
- Does it matter which vehicle you choose?
- What are some lessons?

Take NOTES on pp. 67-68.

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Second, Arrange the Vehicles into a Multi-year Campaign

- Consider sequence of vehicles and the frequency of use
- Consider the total length of the campaign (1-5 years)
- Share the messages frequently
- Vary the vehicle to reach more people
- Move customers through AIDA

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PM p. 47

Campaign Strategies

Continuity Strategy:

- Messages via vehicles are spread out through the campaign

- Evenly dispersed demand for the product/service

- Good for routine, convenience items with high repeat purchase rate

- Library example: monthly 'what's new' column

Flighting Strategy:

- Demand has distinct and identifiable peaks and valleys

- Stop-and-go pattern

- Heavy periods, then none at all

- Thursday grocery ads

- Library examples: commencement, term start up, finals and paper writing periods

Campaign Strategies

Massed or Concentrated Strategy:

- Messages are bunched into specified periods with no messages in between
- Swimming pools, gas grills, snow blowers
- Library examples: "banned books", freshman entry, graduation

Pulsing or Combined Strategy:

- Combination of all three strategies for thorough, continuous, focus
- For major products/ services or changes
- Florists: all year, special events
- Library example: web/ computer assistance theme

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Excellent Campaigns

National spokesperson
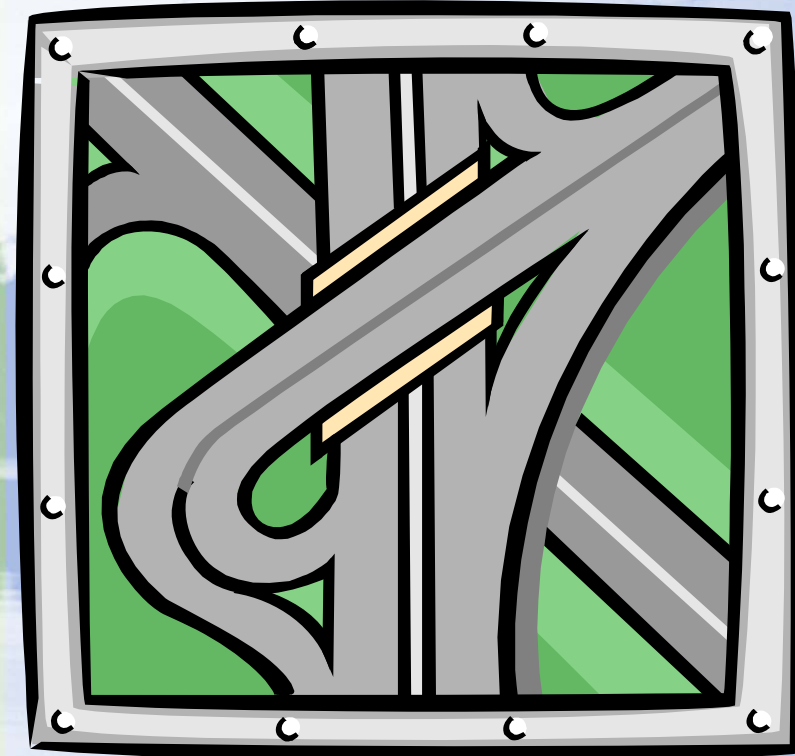
Media coverage

Local coverage

Library newsletter

Information packets

Events

Legislative contact

Excellent Campaign

- **Personal contact**
- **Information/websites**
- **Displays & kiosks**
- **Signs and banners**
- **Give-aways**

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Sequenced Messages

Customer	Year 1	Year 2	Year 3	Year 4
Undergraduate students	Save time and $ by getting all your class materials at the library.			⟶
	We can help you find the resources that you need.			⟶
Faculty	We can save you time by copying and packaging the materials students need for your classes.	We can help you find the best resources for your classes.	We can expand your reach through acquisitions/consortia agreements.	We can team with you to improve your students' skills and ability to use resources.

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PM p. 50

Campaign Design Worksheet

Customer: _____

Need, P/S, Benefit	Messages/ Platform(s)	Vehicles	Frequency/ Strategy	Dates
Technology training program	M: New databases! P:Technology training @ *your library*	Email to faculty/stud. Updated websites Ad in paper Info. tables	Flighting (per sem. or qtr.)	3-4 times a year: Sept, Nov., Feb., Mar.
New research interface for current P/S	M: Global Search ! P: Easier searching @ *your library*	Vendor supplied bookmarks Online announcement	Concentrated	2-4 weeks in a selected month

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Exercise Instructions

Team instructions: 30 minutes

- Task: arrange the messages/vehicles into a multi-year campaign
- Look at the sticky wall layout on FG p. 26
- Re-arrange the sticky wall, then
    – Insert the time frame at the bottom of the sticky wall
    – Distribute the vehicles across the timeline
    – Name and post the strategy on a ½ sheet
    – Select a recorder to capture the last sticky wall

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Campaign Design Matrix
Sticky Wall

Need	Messages	Platform		Vehicles				Strategy: Pulsing
	+ AIDA							
N #1	M		V	V		V	V	
	M	P	V		V	V	V	
	M			V	V		V	V V
N #2	M		V		V	V V		
	M	P	V	V	V			
	M							

JFMAMJJASONDJFMAMJJASOND

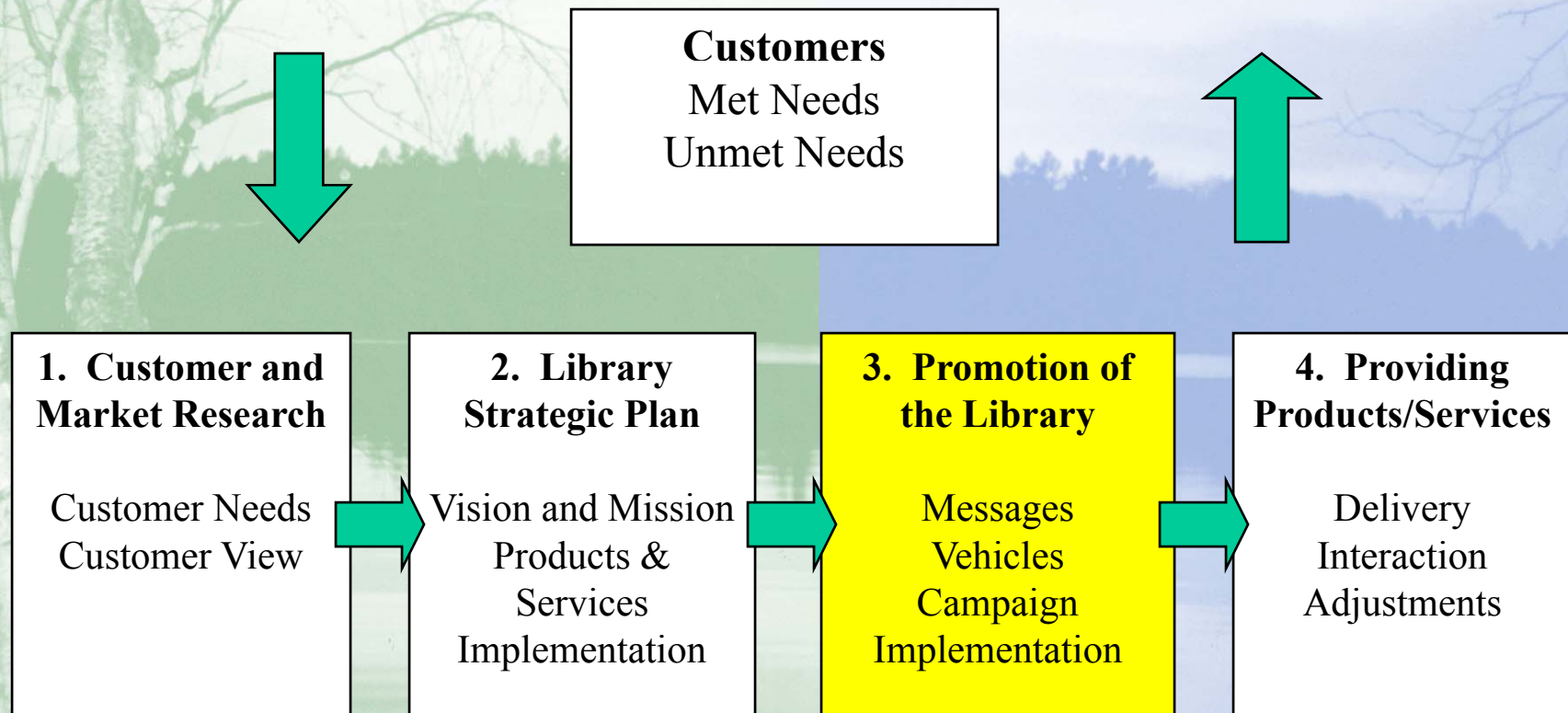ALA, ACRL and 3M Library Systems   101

Questions:

- What are some examples you'd like to share?

- Do you have any questions about this section?

- Lessons?

Take NOTES on pp. 67-68.

Marketing Planning Process
Box 3: Promoting the Library
Finalize and Implement the Promotional Campaign

Customers
Met Needs
Unmet Needs

1. Customer and Market Research	2. Library Strategic Plan	3. Promotion of the Library	4. Providing Products/Services
Customer Needs Customer View	Vision and Mission Products & Services Implementation	Messages Vehicles Campaign Implementation	Delivery Interaction Adjustments

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Marketing Planning Process
Box 3: Promoting the Library
Finalize and Implement the Promotional Campaign

- Finalize the campaign with a dose of reality
- Mobilize the resources to implement the campaign

PM p. 52

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Analysis Tools

- Finalize the plan with a dose of reality
  - A, B or C plan? PM p. 53
  - Cost Analysis Worksheet, PM p. 54
  - Strategic Benefits Analysis Worksheet, PM p. 55
  - Funding and Resources Survey Worksheet, PM p. 56
- Mobilize the resources to implement
  - Influencers and Catalysts Preferences Wkst., PM p. 58
  - Promotional Campaign Implemen. Plan, PM p. 59
  - Assessing Campaign Success, PM p. 60

Two-Day Workshop
Exercise Instructions

Team Instructions: 20 minutes

- Look at your campaign realistically and strategically
- Remove any less-than inspiring Ms and Vs
- Decide: A, B, or C Campaign?
  - Mark "A" items with a green dot
  - Mark "B" items with a blue dot
  - Mark "C" items with a red dot

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Finalize with a Dose of Reality

A, B, or C Plan?

- A plan: include all the good ideas

- B plan: include the best ideas

- C plan: include the best bare minimum ideas

Cost Analysis Worksheet

- For plans A, B, and C, What are the costs…?
  - Time
  - Supplies/materials,
  - Equipment
  - Space
  - Political Will
  - Expertise
  - Staffing
  - Other

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Finalize with a Dose of Reality

Strategic Benefit Analysis Worksheet

- For plans A, B, and C, what dollars are generated or saved through…?
  - Measures reached
  - Goals achieved
  - Vision fulfillled

Funding and Resources Survey Worksheet

- Considering the current and future budget sources what is the likelihood of funding …?
  - Current priorities
  - Future priorities
  - Appeal
  - Likelihood of funding rating
  - Partnerships

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Mobilize the Resources

Influencers and Catalysts Preferences Worksheet

- Considering our promotional plan goal, what must we do to "sell" the key influencers and catalysts…?
  - List of key influencers and catalysts
  - Their current view of the library and plan
  - The needed level of their agreement
  - Specifics about their preferences
  - Steps to take to influence them

Mobilize the Resources

Promotional Campaign Implementation Plan

- What steps must we take to successfully sell and implement our plan?
  - Needed information
  - Documentation
  - Influence steps

Mobilize the Resources
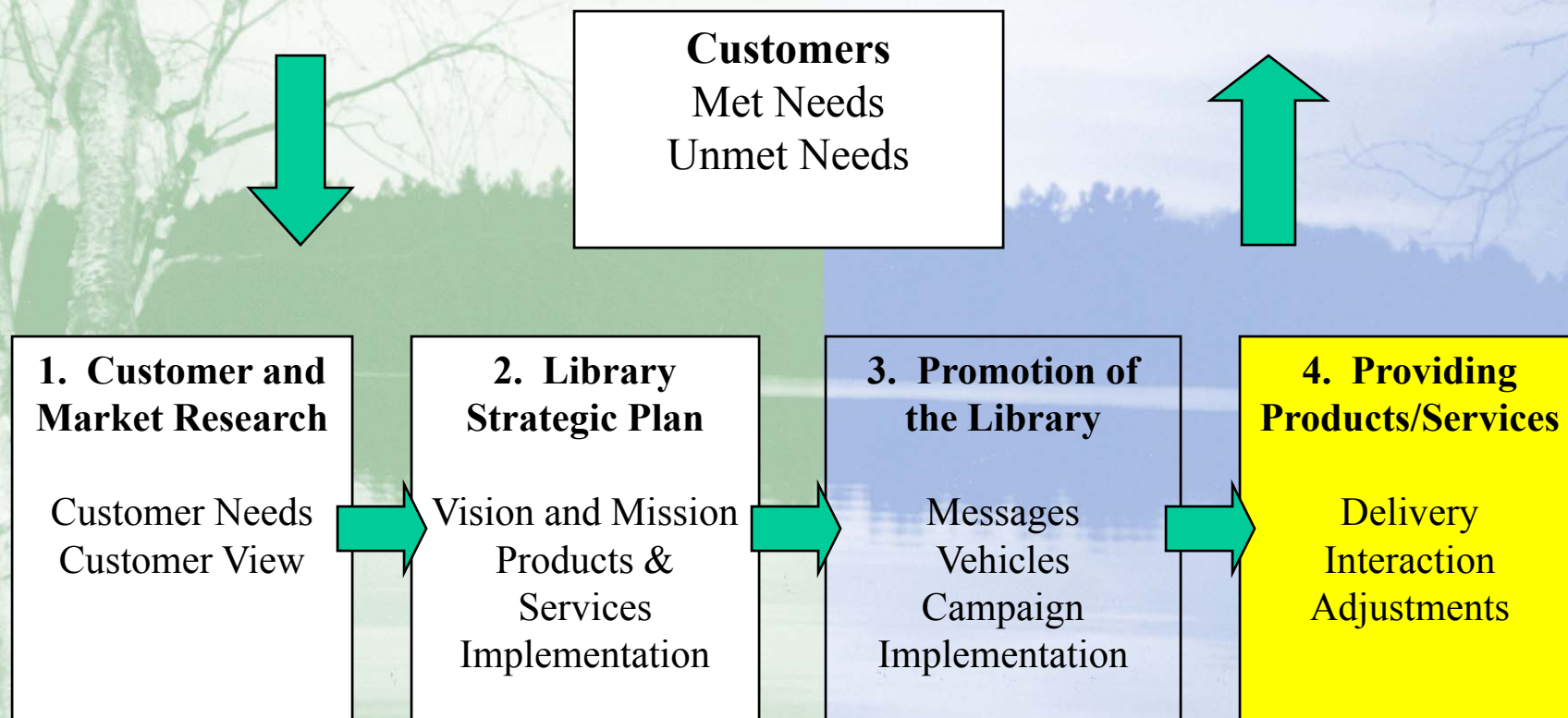
Assessing Campaign Success

- Customers
- Goals
- Measures
- Time frame
- Adjustments

Marketing Planning Process
Box 4: Delivering Products and Services

Customers
Met Needs
Unmet Needs

1. Customer and Market Research	2. Library Strategic Plan	3. Promotion of the Library	4. Providing Products/Services
Customer Needs Customer View	Vision and Mission Products & Services Implementation	Messages Vehicles Campaign Implementation	Delivery Interaction Adjustments

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PM p. 60

Delivering Products and Services

- **Refine the promotional plan-** realities may require some adjustments

- **Organize and staff for success-** to deliver new P/S, help staff grow

- **Deliver on promises and learn-** stay close to your customers

- **Integrate the campaign into the Library routine-** make this part of what you pay attention to routinely

- **Monitor and adjust the campaign as needed-** are customers getting what they need?

- **Celebrate and reinforce the vision-** talk about progress, stay on course

PM p. 61

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Appendix

- Marketing that May Be Seen, Heard and Felt by All – PM p. 62-63

- ALA/ACRL Marketing Toolkit – PM p. 64-65

- Resources – PM p. 66

- Notes –Planning My Library's Campaign – PM p. 67

PM pp. 62-68

Remember:

The leader determines the outcome:

- Knowledge
- Commitment
- Energy
- Plan
- Follow through

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Program Options

	Self Study	Small Team	Large Group	TTT/Mixed
Goals	Prepare to lead	Leading group creates the plan, leads others	Create the plan, full participation	Prepare others to lead
Length	Flexible	Series of 3-hour meetings	Series of ½ day workshops	2 day, 1 day, 5 hr., 3 hr intro
Format	Read, fill out forms, learn from others	Read, fill out forms, use flip charts	Read, fill out, sticky wall exercises,	Read, fill out forms, practice exercises
Participant Mix	Self, other librarians, experts	Key leaders, board members	Diagonal slice of staff, board	Those who will lead and/or train others
Display Options	Worksheets, Notes	Flip charts (sticky wall)	Sticky wall,	Sticky wall, lapboards

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116

Results to Expect

Positive

- Greater working knowledge
- Clearer connection with the customer
- Creative ideas
- More ideas than can be used
- Staff team building

Other

- Some people are more interested/able than others
- Tendency to continue doing same old things
- Wait and see if the leader is really serious about it

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Tips for Success

- Prepare yourself
- If this is new or the change is big, find 2-3 others to learn/lead with
- Do things you are sure will work first, take greater risks over time
- Tell the story, teach, listen and learn – over and over again

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118

Thank-you for your attention, creativity and good work!