Strategic Marketing
for Academic and Research Libraries
Facilitator Guide

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How to Use this Facilitator's Guide

Purpose
This guide is intended to prepare and assist facilitators of the program, "Strategic Marketing for Academic and Research Libraries."

Content
This guide provides options, outlines, tips, slides and examples that will help you:
- Prepare to facilitate a meeting or workshop
- Present the content and examples
- Provide instructions for meeting or workshop activities

Meeting/Workshop Options
The following facilitation situations are addressed:
- Facilitating the process in your own library
- Conducting workshops for librarians: from introductory to in-depth planning in one library
- Facilitating a Train-the-trainer workshop that helps others become trainers of the process

Meeting/Workshop Designs
To create the best adult learning experience possible, the meetings and workshops have been designed with an experiential design where:
- Content is presented in a summarized form, relying on participants to read the information provided in the participant manual ahead of time
- Participants are viewed as experts on their own libraries and are people who are interested in learning a new process
- Individuals are allowed to think through the topics before sharing their ideas
- The process for sharing ideas encourages collaboration, rather than competition
- Participants practice the process and then apply it to their own library situations
- Participants are encouraged to share ideas and think 'out-of-the-box'
- Participants are encouraged to become real 'catalysts for change' through marketing their libraries

Preparing to Facilitate a Program Designed by Someone Else
Presenting a program that has been designed by someone else presents two main challenges:
1) Learning the content and activity flow well enough to present it effectively
2) Developing a sense of ownership and confidence to add personal touches, stories and even your own slides

The following are general suggestions to help you prepare:

- Read the participant manual and complete all the worksheets.
    - To see how to use the sticky wall, view the ALA Web cast of April 2001 on the 3M Website: www.3M.com/library.
    - Become familiar with the ALA's Campaign for America's Libraries website (www.ala.org/@yourlibrary) and the materials on the site for academic and research libraries (click on Academic and Research Campaign), as well as the @ your library® Toolkit for Academic and Research Libraries.

- Read through the facilitator guide to find the resources that will suit your situation
    - Read through the general sections of tips and examples
    - Find the resources that best serve your particular situation (facilitate in your own library, lead a workshop for other librarians, or train other trainers)
    - Try out all the meeting and workshop steps before you present them
    - Practice with the facilitator slides in preparation of your presentation

- Set personal goals that will "program" you for success. Identify the goals you would like to achieve as a facilitator. Some options are:
    - Mastery of the strategic marketing process
    - Mastery of information about the future of academic and research libraries
    - Mastery of knowledge about success marketing campaigns
    - Closer working relationships with the participants
    - Achievement of personal goals or advancement of skills
    - Accomplishment of the outcomes of the meeting/workshop
    - Contributing to the future success of academic and research libraries

Facilitating the Strategic Marketing Process

The following steps will help facilitators prepare:

1. Attend, if possible, an introductory workshop to watch the facilitator, see the process in play and to develop familiarity with the content.

2. Read the Participant Manual to solidify your knowledge of the content; complete the worksheets.

3. Read the Facilitator Guide, especially the introductory sections, pages 1-26.

4. Decide which workshop option you will facilitate:

Workshop Option	Use	Page No.
Meetings/workshops in your own library	Self study materials for: a) doing the plan alone b) involving a small team c) involving a large group or the whole staff	29-51
An introductory one-day workshop for librarians from a variety of libraries	Workshops for Librarians One-day Version	52-59
An in-depth two-day workshop for librarians from a variety of libraries	Workshops for Librarians Two-day Version	60-64
An in-depth two-day workshop for one library staff or a library services organization	Workshops for Librarians Two-day Version	60-64
A workshop to help others become trainers of the process	Train-the-trainer	65-69

5. If you are facilitating a workshop for your own library make the following arrangements. If you are facilitating the workshop for others, coordinate with the sponsor or administrator of the workshop, regarding:
   - Location and dates of the event
   - Billing arrangements
   - Attendee list: who they are, their level of experience with marketing, their goals

- Pre-assignment decisions and letter to participants
- Sending the Participant Manual out ahead
- Copying/providing the Facilitator Guide
- Supplies lists for the table teams
- Purchase and preparation of the sticky walls or lapboards if used
- Equipment ordering and electronic set up
- Introductory remarks at the meeting
- People to pay attention to
- Support roles needed/provided during the workshop

6. Talk with sponsor or administrator 2 weeks ahead and 1week ahead to confirm and finalize arrangements.

7. One-two weeks ahead, read through the materials provided for your option, pages 29 - 70.

8. Tailor the workshop outline as needed.

9. Review the facilitator slides. Practice presenting them. Notice how the slides guide the facilitator and the participants through the process. Add or hide slides to make sure the slides automatically guide the workshop.

10. Collect and select the stories and examples you want to use.

11. Set your facilitation goals and your personal goals for the workshop. Visualize the workshop as you would like it to go.

12. Review the slides and examples two days before presenting them. If it is the first time you are presenting them, practice aloud. Some people like to review the presentation the day before the presentation. However you like to prepare, be sure to allow yourself some "downtime" to think about other things and engage in other activities.

13. Deliver the workshop with confidence and be open to all the learning that the participants will offer.

General Tips About Facilitation

The following is a summary of tips for facilitators of any group:

Preparation: Getting ready for the meeting/workshop takes some care.

1. **Self:** Set aside time several weeks ahead to quickly review the materials and expectations. Then establish a preparation schedule that fits the situation and your style. Preparation for presenting something new generally takes twice as many hours as the participants will spend in the meeting or workshop.

2. **Room, Materials, Supplies and Equipment:**
    a. Room size matters if the sticky walls will be used. Get permission to hang them, assuring the managers of the space that the walls will not be damaged. Specify round tables if possible limiting the number of chairs at the each table so no one has to sit with their back to the podium.
    b. List the supplies and materials that are needed, clarify who will be responsible to prepare and bring the materials and supplies to the room. Bring extra copies of each set of materials for people who show up unexpectedly or for those who forget their materials.
    c. Order the equipment ahead of time, specifying the computer or overhead projection technique you will use, whether a microphone is needed. Be sure to order a flipchart stand and pad for your use, flipchart pads (without stands) are often sufficient for the team exercises.

3. **Participants:** State pre-meeting/workshop assignments clearly in a pre-session letter. Explain how the assignment will be used and when it will be used. Describe what the participant will gain if the pre-assignments are completed.

4. **Sponsors and Partners:** Define the roles that you would like meeting/workshop sponsors and other partners to play. They can be very helpful keeping you alert to concerns or ideas that participants have. They can help you identify the content or instructions that need to be repeated or clarified. Plus, they have a greater sense of responsibility for its success when they serve as your partner.

Presentation: Presenting the content and yourself in an appealing way.

1. **Presence and role:** Provide some information about yourself, your background and why you are delivering this program. Explain that as facilitator you are simply guiding them through a process; it is their job to make it work! Be yourself!

2. **Speaking Style:** Using the prepared slides provides a real advantage for presenting the key content. To reduce the heaviness of the delivery of content, identify examples from your experience to share for each of the main topics. Allow others to connect with the content by asking questions that allow participants to provide examples or state their experience. Positively reinforcing

active participants creates a very satisfying experience for all.

3. **Slides and notes:** Practice presenting the slides and write down your personal notes. Providing participants with a copy of the handout version of the slides (3 per page with note space) may be sufficient. Alternatively, you might choose to print the slides one per page to allow more note space. Add any additional slides that you think will explain or illustrate the key points. (Remember, if you add slides, the slide numbers will change.) Hide slides that you find less useful.

4. **Examples:** Collecting examples (of messages, vehicles, campaigns) from library or other media and using them in your presentation increases the number of examples and provides some color and variation in the slides. Transparencies of the actual promotional pieces can be shown or the pieces themselves can be placed on a 'bulletin board' somewhere in the room. The ALA/ACRL Toolkit is a good place to find library examples.

5. **Flipcharts:** You may want to illustrate a point by drawing a diagram on the flipchart, or collect ideas or list resources that the participants suggest. Remember to write in LARGE letters (at least 2 inches high) and leave plenty of white space on the flipchart sheet.

Typical Challenges faced in facilitation.

1. **Tricky terminology:** Be sure you can define terms easily and clearly. When the content is new to the participants, be sure to state the definition of the terms quite a few times. Prepare two-three examples of each term.

2. **Examples:** The better the examples and the earlier you show them, the more confident the participants will be in you, the workshop and their ability to perform.

3. **Instructions:** Put group instructions on a slide or flipchart sheet. Read them aloud, verbatim once. Then read them again. Ask if there are any questions about what to do. Then be ready to answer questions from different teams.

4. **Time frames:** Different teams work at different paces, but try to keep to the designated workshop activity times. If you deliver the workshop several times, you might find that your rhythm varies from the set times, then feel free to make adjustments. Typically, lost time early on in a workshop makes the end hurried and incomplete.

5. **Managing Meeting Hogs:** The meeting/workshop design is intended to prevent a few individuals from dominating the process. Be willing to recognize persistent idea givers, but also quickly move on to anyone else. In teams, the activities are set up to reduce the amount of domination by one or two individuals, but (rarely) you might have to intervene and suggest that a group speed up, or that roles are

switched, or that the people dominating the air time make sure everyone else is learning the process too.

6. **Managing 'Critical' Comments:** It takes longer for some participants to get the hang of the workshop. In this case, their questions may sound critical, but question-asker is really frustrated with him/herself and needs some help. The facilitator should find out the precise point that is unclear, clarify it and then be sure the person is satisfied with the answer. (If one person is not clear, there are likely to be others.) If the person is still confused after several tries, promise to take them aside during the next exercise to work with them.

   In a few cases, people don't really like the idea of doing marketing or the workshop itself, and can be quite frustrated. Their questions may be quite pointed. The best response is to paraphrase the question (to be sure you understand), ask if others share the view (usually two to three people will offer the opposite view), and if necessary–later and privately, suggest the person consider whether this is the right workshop for them. If it is not where they want to be, they should feel free to leave.

7. **Managing People Who Get Bored:** In a few cases, especially in workshops including people from a variety of libraries and where one library is the focus of the group, a few people from other libraries may get bored as the workshop goes on. You can suggest to them that they work on their own library simultaneously (to increase the sense of the value) and their creativity is very much needed. If someone 'drops out' of the activity in a team, the other members tend to close ranks and work around the person. It is not unusual to have a 'drop-out' re-join the group at a later step in the process.

8. **Managing Your Own Energy:** Your energy level is infectious. If you have interesting stories to tell and have personal goals you want to achieve, your energy is likely to remain high. The design of the workshop is such that there should be fairly short presentations of content followed by at least 30 minutes of team work-time. During the team time, you can move around to see how the teams are progressing – getting energized by their discoveries. You can also check over your notes for the next content presentation and think about what you really want them to understand. And you can refresh your own sense of accomplishment by reviewing progress made toward your goals. It is especially important to find ways to stay fresh in the afternoon – right after lunch and right after the break. Even inserting an energizing story or short exercise is a good idea.

General Tips about Designing Promotional Campaigns

Three options mean different starting and focus points.

1. **Your Own Library Meeting/Workshop:** The purpose of an in-house meeting or workshop is to actually create the marketing plan for the library. The agenda includes completing each step of the overall process, taking time to do the worksheets ahead of time, discussing them carefully, creating a draft promotional plan, and deciding how to implement it.

2. **Workshops for Librarians from Different Libraries:** The purposes of this workshop are to introduce the process to librarians, create some examples that they might use in the future and create a network of librarians who can help each other complete their marketing plans and promotional campaigns. The agenda includes being guided through each step, trying out key worksheets, selecting one library to create ideas for, working on the sticky wall, sharing ideas with other teams and taking notes to apply to their own setting. These workshops can range from 1 day introductory workshops to 2 day in-depth planning workshops.

3. **Train-the-trainer workshop:** The purpose of a TTT workshop is to prepare others to facilitate workshops. The agenda includes: showing the flow of the workshop, introducing the materials, working with the sticky wall (and lapboard) tools, defining terms and practicing delivering the program in the allotted time segments..

Use of the term "customer"

"Customers", although the meaning is clear, is a term that has not been traditionally used in library settings. It is not unusual to get some resistance from participants about using this term. It helps them participate better to state: 1) this is a marketing technical term that is worth knowing how to use and 2) its value is that it helps librarians keep the focus of the plan on the needs and wants of the "users" of the library rather than the internal, day-to-day operations of the library . A shift in language might help a few shifts in thinking.

Other terms to make clear

Because most of us are not trained marketers, the terminology sounds foreign-enough that we resist using it. We aren't sure really what actions are linked with the terms, and therefore, are not sure how to proceed. The facilitator's job, almost always, is to state the terms and their definitions over and over with examples, at least 4 times, so people can learn enough to include them in their personal lexicon. Particular care should be given:

1. **Products and Services:** The offerings of the library, tangible and intangible.

2. **Benefits:** The gains received by the customers from the products and services.

3. **Library Positioning Statements:** the slogans or catch phrases that summarize the type, personality, or goals of the library as defined in the vision and mission

documents.

4. **Messages:** The statements that reflect the customer's point of view about the benefits received from the library's products and services.

5. **AIDA:** The "buying phase" the language of a message should reflect: **A**wareness, increasing **I**nterest, stimulating **D**esire and urging **A**ction.

6. **Platforms:** A higher order theme of a group of similar messages.

7. **Vehicles:** The form of communication selected to convey particular messages: in person, advertisements, flyers, posters, TV/radio, Internet, etc.

Where the fun and value are in the Process

Behavior changing meeting/workshops naturally have their difficult moments. But there also are some great moments to look for and highlight for the participants:

1. **Choosing the customers to focus on first:** After people decide, with your urging, that it is OK to focus on some sooner than others, people are able to select a real problem to work on. You will be able to see the participant's commitment grow to making the process work through their non-verbal and verbal behavior.

2. **Creating messages**: It takes several steps to get to the message development part of the workshop. As you urge them to use creativity and to list any idea that comes to mind, the tension drains and people begin to move around more, sharing ideas more quickly and with greater relevance. Sometimes it is surprising who excels at this step. The facilitator should reinforce this lightheartedness and energy by visiting each group several times and sharing ideas among groups. Typically, there is an initial period during a brainstorming activity when lots of ideas are offered, then a lull time, followed by another period of ideas that are more refined and focused.

3. **Attaching the vehicles**: As participants are able to link current promotional activities to the messages and to add others, the process begins to take on a very practical, familiar, and easy-to-implement feeling. Interesting new applications of old ideas appear and participants begin to personally integrate the plan.

4. **Sequencing the campaign**: An even greater sense of 'can-do' is evident as participants lay the activities out over the length of the campaign. Linking the campaign to the rhythm of the academic or research library year, allows people to visualize the actual implementation of the campaign. People tend to move from group to group, enjoying the ideas.

Ground rules -- Who decides finally?

It is also important for the leader to state clearly from the onset who actually will make the final decisions about the campaign. Are participants creating a draft that the leader(s) will finalize later, or is this a situation where the group actually makes the final decision that would only be modified because of budget issues or unexpected events? Either option is generally acceptable to library staff if it is stated at the beginning. Generally, unhappiness comes only when participants assume one thing and another happens.

ALA/ACRL @ your library® Toolkit for Academic and Research Libraries

- Introduction
- How to Use This Toolkit
- The Campaign for America's Libraries: Spotlight on Academic and Research Libraries
- Telling Your Story
  -The Message
  -What Makes a Good Story?
  -Tough Questions
  -The Big Picture: Issues
- Outreach Strategies…
  -Students
  -Administrators and Faculty
  -Multicultural Audiences
  -Allies in Getting the Word Out
  -Tips for Collaboration
- Marketing and Promotion
  -Building a Marketing Communication Plan
  -Marketing That Can Be Seen, Heard, and Felt by All
  -Putting the @ your library™™ brand to work
  -Who's On Board
  -Ideas too Good Not to Share
- Media Relations
  -Sample News Release
  -Sample Opinion Column
  -Sample PSAs
- More Tools
- Feedback Form
- Acknowledgements

Example Worksheets

The worksheets and information provided in the Participant Manual, if completed by a library staff, will do a pretty good job of guiding the way through the process and helping the staff make good decisions about their promotional campaign.

The following are the **completed examples** of program worksheets provided in the Participant Manual. Librarians facilitating the process in their own library or facilitating workshops for others will find these examples helpful.

1) **Customer Needs Worksheet:** displays examples of library customers and their current/future and known/implied needs.

2) **Products/Services and Benefits Map:** illustrates through examples the customers to address first, their most important needs, the products/services that meet those needs and the benefits received by the customers from the products/services.

3) **Messages Identification Worksheet:** shows examples of the products/services and benefits, the messages to send about the benefits, AIDA of the messages and the platforms that apply to groups of messages.

4) **Vehicle Identification Worksheet:** displays examples of the selected promotional method, the specific vehicles chosen and the AIDA use of the specific vehicles.

5) **Campaign Design Worksheet:** illustrates through examples the campaign design for each customer including the products/services and benefits received, the messages and platforms, the vehicles, the frequency and strategy of sending the messages, and the dates suggested.

Example: Customer Needs Worksheet

Use this worksheet to list the current and future needs for each customer group. Answer the Analysis Questions to focus the resources of your library.

Customer	**Needs Categories**			
	Current Met Needs	**Current Unmet Needs**	**Future Known Needs**	**Future Implied Needs**
Undergraduate Students	Course assignment materials Skills classes	Course materials Course resource lists	Internet aids Digital reference assistance	Online classes resources
Graduate Students	Document delivery services Reference assistance Electronic journals	Sufficient retro-spective print materials	Digital references assistance Numeric and statistical data bases	More medical resources (for a new medical school)
Faculty	Workshops on new resources Design assistance for library research assignments	Significant special collections	Assistance with course manage-ment software Assistance on achieving copy-right clearance for text, images, sound Expansion of electronic finding aids	Assistance in identifying electronic plagiarism Collaboration with libraries to extend learning beyond classroom
Researchers	Databases and software Research assistance	Certain specialized collections	Expansion of electronic finding aids for archives/ special collections	Research sharing vehicles
Community Members	Leisure reading Computers, data-bases and software	Computer instruction	Greater computer research capability Public information access Public meeting space	Life skills collection and instruction
Businesses	Journals and collections	Search engines Research assistance	Global business information Global search engines	Business interface software Business support resource location

Example -- Customer Needs Worksheet
Analysis Questions:

1. Is your list of needs correct and complete? How do we know that? What else should be researched?
   - *The list is not complete.*
   - *We just used our own experiences and anecdotes.*
   - *Specific customer group needs: current unmet, future known/implied*
2. Place a star (*) next to the two customers you must address first. Who are they? Why must you focus promotional activities toward them first? What percentage of the library's resources should be devoted to these customer groups? Are there some new customers to consider?
   - *Undergraduate students and faculty*
   - *Undergrads—especially juniors and seniors – they have been neglected, need to use the greater resources better.*
   - *Faculty – new resources are not reaching them, could aid their work and help us build better collections*
   - *We should focus 70% of our resources on these customer groups.*
   - *New customers are staff and administration., must consider them too.*
3. Place stars (*) next to the three most important needs being met currently for each customer. What are they? How do we meet these needs? What would the customer say about how well these needs are being met?
   - *Undergrads- access and understanding how to use advanced resources*
   - *Faculty – access and understanding how to use advanced resources*
   - *Meet needs currently by flyer introductions, asking questions about their needs, helping when they request it.*
   - *We are missing many opportunities to help them be effective.*
4. Indicate with an (x) any critical, current unmet need for each of the customers. Why are we not meeting this need: on purpose, from a lack of resources or an oversight? Why are we not meeting this need well – what is wrong with our approach or process? Should we fix this? What products and/or services might fill this need?
   - *Use of advanced research resources.*
   - *They don't really know about it, we have not communicated it well. Plus we are busy doing other things.*
   - *We should fix this. It will make us all more effective.*
   - *We need some specialized advertising, some classes, some dedicated help, and follow through.*
5. Indicate with a check (√) any critical, future need (known or implied) that you believe your academic library must serve for each of the customers. Why are these "must serve" needs so important to the customer? What will it take for us to meet these needs?
   - *Online classes resources – increasing offering, it is new, we need to do some research and find the greatest problems& address them. Learning beyond classroom- key to transfer of learning, find, list, introduce resources.*

Example: Product/Services and Benefits Map

Complete the following worksheet in preparation for the development of your promotional campaign. Examples are provided below. A blank worksheet form is provided as well.

Customers to Address First	Their Most Important Needs	Products/Services Offered to Meet Needs	Benefits Received from the Products/Services
Undergraduate students	Course materials Course assignments Skill assistance Study space Social space	Online copies of class packets Extra copies of texts Multiple copies of reading materials Computer help Writing help Research help Comfortable tables and chairs Privacy sections Lounge areas Food and beverages	Have what they need when they need it Have what they need when they need it Reduce glitches Follow format Better, faster resources Quiet, comfortable place to study, work Sustenance and relaxation
Graduate students	Course reference guides Reference and research assistance Study rooms	Online reference guides by discipline Dissertation consultation Acquisition/consortial agreements document delivery Place to keep research materials	Better, faster resources Have what they need/want when they need/want it Convenience for extended research
Faculty	Research assistance	Acquisition/consortial agreements document delivery Journals and subject related collection Updates on resources in fields Workshops/presentations at department meetings Books, pages, articles copied	Time saved Greater knowledge to use library well
Researchers	Document delivery	Search engines Databases Ordering systems Online delivery software	Find the best resources. Easy, fast ordering Get what I need, when I need it
Community Members	Collections Leisure reading Public information	Topic collections New titles Used book sale Book Club support Files, posters Databases	Ample information base Access to the newest books, quickly Get rid of old books, get ‘new’ ones Sharing about books Easy access to info Find what I need

Example: Messages Identification Worksheet

Customer *Undergraduates*

Instructions: For this customer, list the priority needs to be met, the products/services that will meet them and the benefits the customer will receive in the left column. Transform the benefits statements into messages that the customer should hear; write them in the Messages column. Identify the AIDA stage of each message based on the customers current level of awareness regarding each message; write the code (A, I, D, Ac) in the AIDA column. Identify 1-2 platform messages that summarize the content of the messages; write these in the Platform column.

Need, Products and Services and Benefits	Messages	AIDA	Platform
1. *N: Required class materials* *P/S: Multiple copies, catalogued lists per class* *B: I can get what I need when I want it*	*Your library can help you with required class materials – complete lists, multiple copies, and easy access!* *Let us show you how to find the required materials.* *Check out our step-by-step display!*	A D Ac	*Helping you succeed in your classes.*
2. *N: Reference assistance* *P/S: Reference desk, roaming librarians, reference location tools/assistance* *B: I can get what I need and learn to find it myself.*	*New search tools to find the best resources.* *Librarians = Search Coaches!* *XXX Search Engine helps you …..* *Learn your way around the library…a walking tour!*	*A* *A* *I* *Ac*	*Helping you find the best resources.*
3. *N: Research assistance* *P/S: Research desk, research tools, research coach* *B: I can get help today and learn to be a solid researcher.*	*Research assistance at your library!* *We have tools to help you map out your research project.* *Use our terrific search engines to find easily the best resources.* *See our display and online example of research project tools and results.*	*A* *I* *D* *Ac*	*Helping you be a great researcher.*
4. *N: Quiet places* *P/S: comfortable, varied, wired study rooms, monitoring* *B: I can find guaranteed quiet*	*Looking for a little peace and quiet?* *Quiet rooms – guaranteed!* *Plug in, sit back, make real progress on your assignments.* *Take a tour, find the quiet spot for you.*	*A* *I* *D* *Ac*	*Helping you find a place to do your best.*

Example: Vehicle Identification Worksheet

Customer *Undergraduates*

For each promotional method, identify the specific vehicles that already exist. List the vehicles in precise language, such as ' monthly article in the campus paper "On Campus", or 'presentations to department faculty groups". Review the list, and add any new vehicles that might be useful. Next, give each vehicle an A, I, D or Ac code.

Promotional Method	Specific Vehicles	AIDA Application
Advertising	*Ads 2x year in alumni magazine* *Ads in trade magazines for special collections* *Ads in campus paper* *Flyers to researchers and business librarians on key topics* *Bookmarks* *Posters*	A A A A A A
Direct Marketing	*Acquisition notes to appropriate departments and faculty* *Emails to students in certain classes* *Introductory class for new students* *Handbook for Freshmen* *Topic resource lists*	A and I I I and D I to Ac I to Ac
Personal Selling	*Presentations to faculty* *Presentations to Friends of the Library* *Presentations to Chamber of Commerce* *Regular, informal meetings with Trustees* *Kiosk in student union* *Staff/other greeters at the door* *Flyer about research consultant on call*	I and D to Ac I and D I and D I, D, Ac I, D I, D to Ac I, D
Sales Promotions	*Finals "Free Donuts" nights* *Free copies night for faculty, researchers* *Stump Your Librarian contest*	D to Ac D to Ac D to Ac
Public Relations and Publicity	*Press releases on new collections* *Monthly "At your Library" column at local paper* *Topical press releases with photos* *Advance notice of key events*	A A, I I I, D, Ac

A: Awareness, I: Interest, D: Desire, Ac: Action

Example: Campaign Design Worksheet

Customer: *Undergraduates*

Complete the Campaign Design Worksheet to integrate all your promotional decisions.

Need, Product/Service, Benefit	Messages and Platform(s)	Vehicles	Frequency & Strategy	Dates
1. Technology training program	*New databases!* *Using video conferencing* *Making the Internet work for you!* *P: Technology training @ your library™™*	*Email to faculty and students (via distribution lists)* *Updated sections of Websites* *Ads in the campus newspaper* *Information tables in student union/ center*	*Flighting (per semester/quarter)* *Every semester* *3 weeks in a row each term* *At start of each semester*	*3-4 times a year* *Aug and Dec.* *Aug, Nov, Mar, Jun* *Aug,. Dec*
2. New research interface for an existing online product	*New search capability!* *Global search!* *P: Easier searching @ your library™™*	*Vendor supplied bookmarks & posters* *Online newsletter announcement* *Announcement during faculty/ department meeting* *Invitation to "try it out" at designated workstation near help or reference desk*	*Concentrated at introduction, reminder in 4 months*	*2-4 weeks in selected month* *September* *September* *September, Dec.*
3.				
4.				
5.				

Using the Sticky Wall Technique

One powerful technique to use in the workshops is the “sticky wall.” This is a large piece of fabric that serves as the design board for the promotional campaign. Participants are guided through a series of steps in which they write ideas on ½ sheets of paper and place them on the sticky wall. They are able to arrange and re-arrange the ideas to illustrate linkages among the ideas, create several drafts of a plan and select the final sequence of steps for the promotional campaign. This technique allows for the full involvement of up to 7 participants per team (per sticky wall). It is a great technique if large groups are involved and the goals are to educate the full group about the process and to gather as many ideas as possible. Directions for preparing sticky walls are below.

Fabric

1. Purchase nylon fabric that is 54 inches wide and at least 4 yards long for one “sticky wall.” Often facilitators like to have two “sticky walls” for large groups or dual activities.
2. Use 3M Spray Mount Artist’s Adhesive which allows for repositioning and is “ideal for temporary bonding”.
3. Spray the fabric ahead of time, following the directions on the spray can. Spray new fabric 2-3 times; touch up already sprayed fabric from time to time. Remove contact lenses when spraying.
4. If additional stickiness is needed during the session or meeting, spray the wall when people are on break or at lunch to avoid triggering sensitivity reactions participants might have.

Mounting the Fabric on the Wall

1. Purchase 3M Command Adhesive Strips for use with 3M™ Large Hooks, Jumbo Hooks and Picture Hangers.
2. Follow the directions on the package of the Command Strips, but it is not necessary to use the hooks. Affix the Command Strip directly to the fabric and then directly to the wall. For a 4-yard piece of fabric, 5-6 strips are needed, placed 2 to 2.5 feet apart. Press the Command Strips firmly on the fabric and firmly to the wall.
3. To remove the fabric from the wall, follow the directions on the back of the Command Strip package.

½ Sheets of Paper

1. Decide if you want a particular color scheme for different elements of the exercises.
2. Use regular 8.5” x 11’’ pastel colored paper and cut in half (into 8.5” x 5.5” pieces.)
3. Cut at least a 2” stack per team..

Other Supplies
Often the process requires additional supplies such as;

- Square and rectangular Post-It™ Notes, multiple colors
- Transparent tape
- Scissors
- Colored dots

To Store the Fabric

1. When finished with the meeting or session, fold the fabric, sticky side to sticky side. It will be easy to separate for later use.

Eventually, a sticky wall will collect a lot of lint. Because they are not expensive, it is more practical to purchase another, rather than try to clean it.

Using the Lapboard Technique

Another technique to consider is the lapboard. It can be used instead of the sticky wall or along with it. A lapboard is a 12 x18 piece of hardboard. A lapboard is provided to each participant along with a few sheets of 11x17 paper and several packets of the smallest Post-Its™. Individuals can create promotional campaigns for their own library on the lapboard while assisting a teammate create an example for the whole group on the sticky wall. This option is especially useful with dealing with very large groups (50 or more) of librarians from different libraries. Directions for using lapboards are below.

Materials

Option 1: Hardboard (40 cents each plus 35 cent fee for cutting)

1. Purchase hardboard or plastic sheets that have one finished surface and are at least ¼ inch in thickness to ensure sturdiness. (A 4’ by 8’ sheet costs about $8.00. You can cut 20 lapboards per sheet. Home Depot charges $1 per cut. An 8’x 4’ sheet would require 7 cuts.)
2. Buy enough material to cut one lapboard per participant (plus a few extras).
3. Cut the hardboard into 12 x 18 inch sections. Round the edges (if practical) to minimize sharp corners and edges.

Option 2: Foam board

1. White foam board can be purchased at art supply stores or craft stores. At Michael’s 20 x 30 inch pieces of 3/16 inch foam board cost $2.79 per sheet. 2 lapboards can be cut from a 20 x 30 inch piece, costing about $1.39 per lap board. Larger pieces of foam board can be purchased at art supply stores, providing more lapboards at a much reduced cost.
2. Cut lapboard sized pieces using an artist’s knife and a yardstick as a guide.

Supplies

1. For each participant purchase the following supplies:
    - 2-3 packets of the small Post-Its™ made by 3M, Inc.
    - 1 roll of transparent tape.
    - 10 sheets of paper sized 11 x17 inches (for the hardboard option.)
2. Provide for each table group:
    - 2 or so pairs of scissors
    - Additional tape

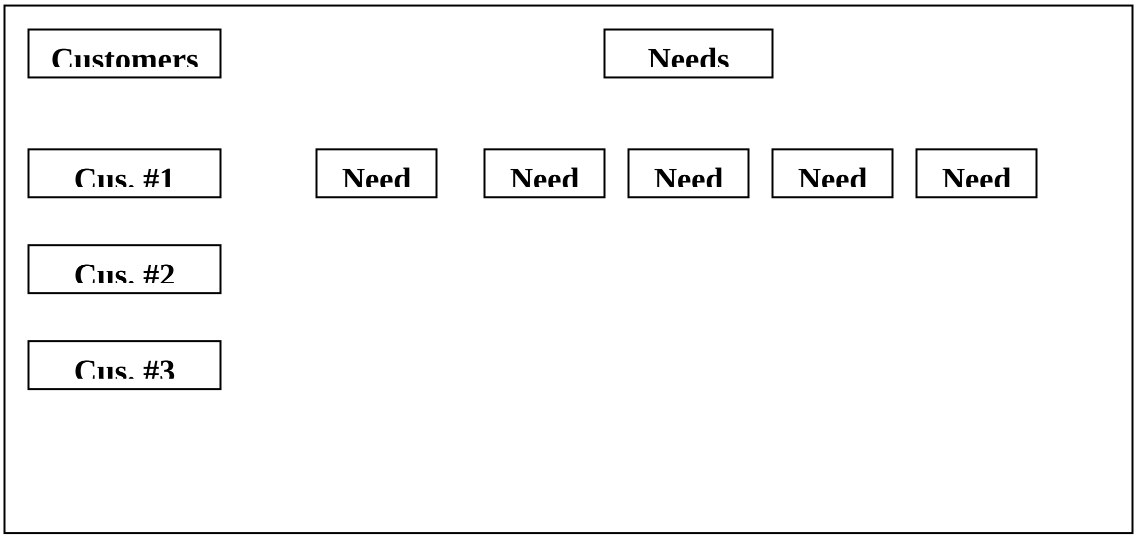
Energy Toy Suggestions

In workshops that require significant mental concentration and creativity, it is helpful to provide a variety of toys that allows the participants to use their hands to manipulate, rotate, shift, shape and combine objects. The physical activity stimulates the mental creativity that is required. Provide 3-4 different toys per table. Ideas for toys are:

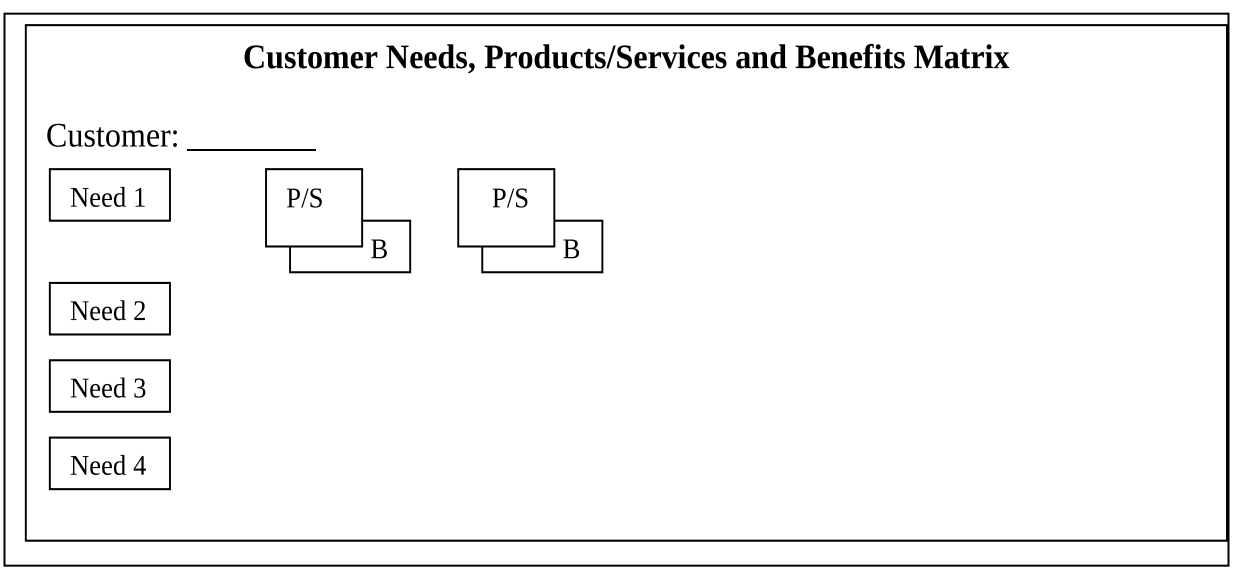
- Silly putty or modeling clay
- Colored pipe cleaners
- Small puzzles (plastic or paper)
- Koosh balls or other objects to squeeze and toss with others
- Legos or small building sets
- Small toys with wheels

Sticky Wall Layouts
for Five Stages of the Promotional Campaign Planning Process

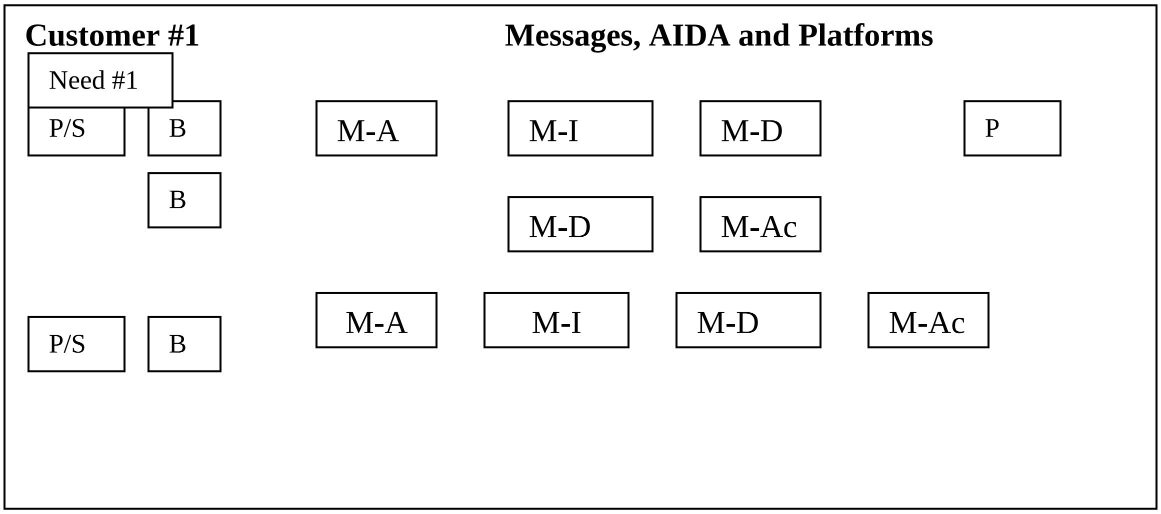
Customers and Needs Sticky Wall



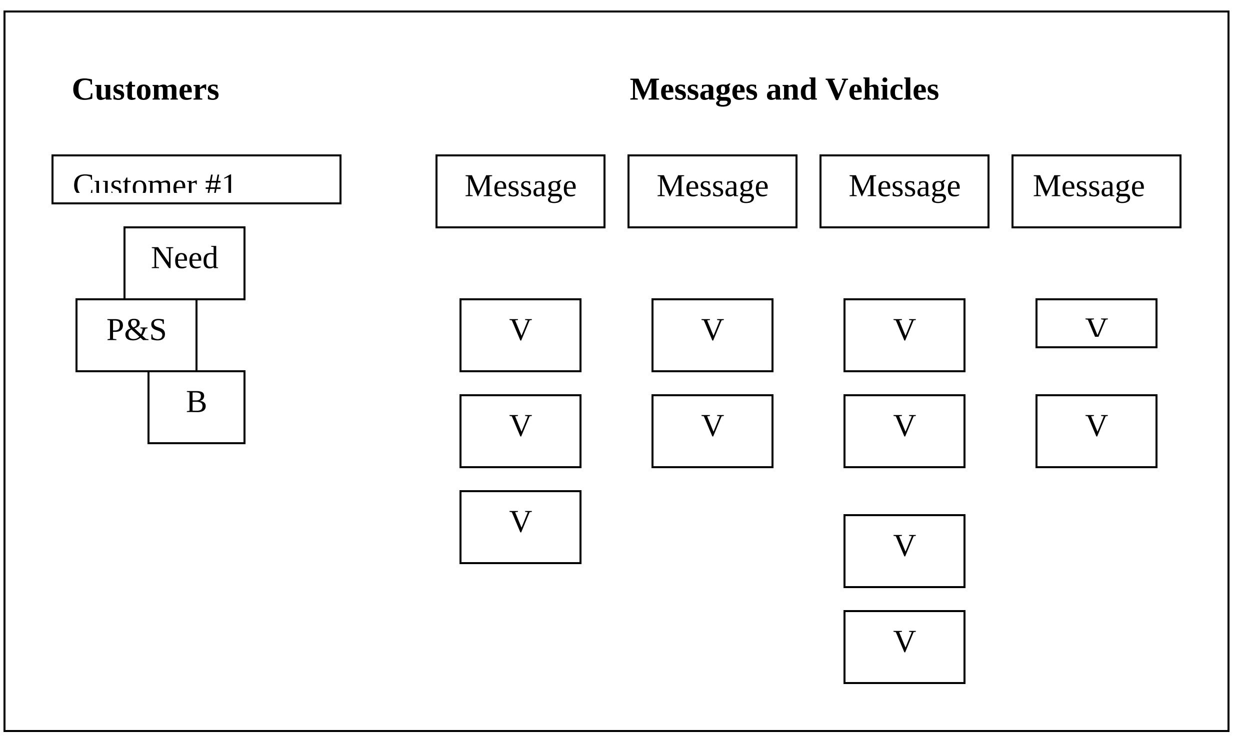
Products/Services and Benefits Sticky Wall



Messages and AIDA Sticky Wall

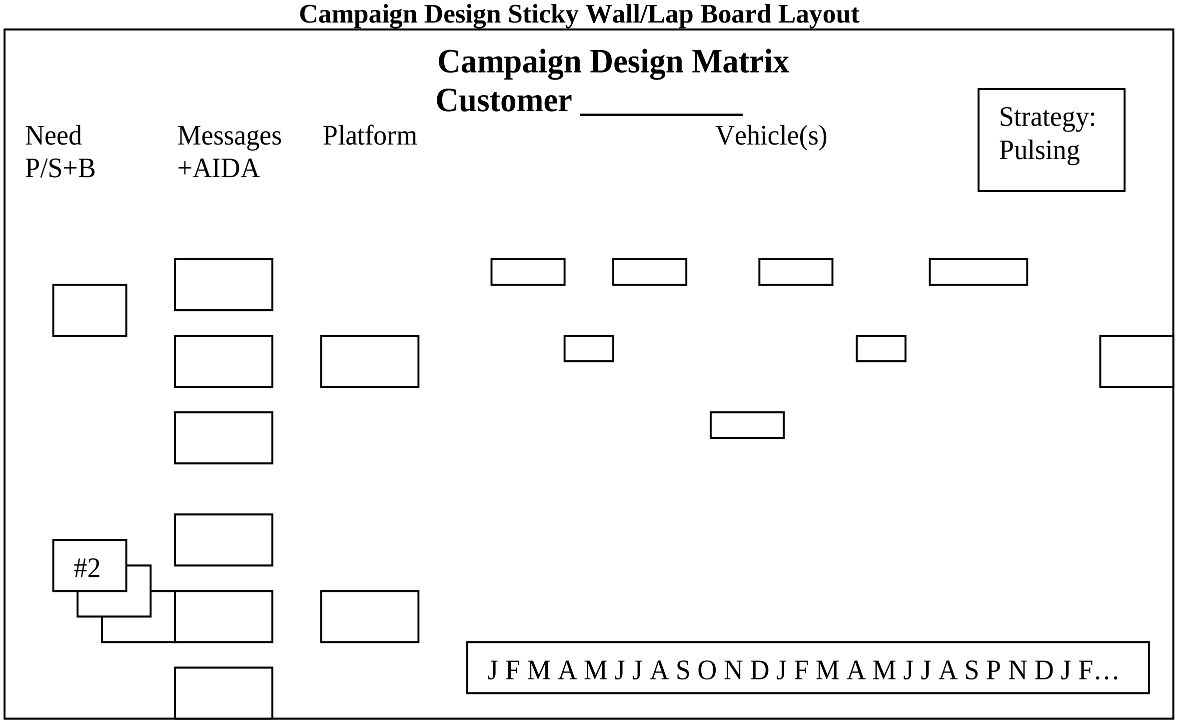


Messages and Vehicles Sticky Wall



Campaign Design Sticky Wall

Campaign Design Sticky Wall/Lap Board Layout



Example Messages

You have questions? We have answers.
Search and you shall find.
Got Research?
The Community College Library – it's bigger than it looks
High School to Higher Education @ your library®
Get connected @ your library®
Climb into Library Resources –We're not your traditional Library
Globally connected @ your library®
Einstein you mind @ your library®
Discover a World of Information @ your library®
Deliver it @ your library®
Get help @ your library®
Don't go it alone … come into/get help @ your library®
Shop @ your library®
Join a learning community @ your library®
Browse @ your library®
Go to the movies @ your library®
People, knowledge and fun @ your library®
Just do it @ your library®
Discover @ your library®
Overwhelmed? Dig it out @ your library®
Papers stressing you out? Find it! @ your library®
Latest issue not online? Find it @ your library®
Information overload? Sort it out @ your library®
Find solutions @ your library®
Get buried treasure @ your library®
Link it @ your library®
Get turned on @ your library®
Navigate the Net @ your library®
Smart learning @ your library®
Savvy searching @ your library®
Find the shortcut @ your library®
Beyond the Web @ your library®
What's in Vogue @ your library®
Got information? Find it @ your library®
Curious about George? Get info @ your library®. Its here. He's in here, too!
Don't drown in the sea of information, fish it out @ your library®
Love to learn @ your library®
Scholarship begins @ your library®
Information central @ your library®
Cure your information blues @ your library®
Become workplace-ready @ your library®
Find yourself @ your library®
Find it in person @ your library®
Touch the future @ your library®
Information rules @ your library®
Begin here @ your library®
Find an expert @ your library®
Gray matter in the pink @ your library®
It doesn't suck @ the library
Information slammin' @ your library®
Insure student's information literacy @ your library®
Student achievement begins @ your library®
Information Power @ your library®
High test scores begin @ your library®
Collaborate @ your library®
What's special about special libraries @ your library®
Celebrate National Library Week
Patterns for life @ your library®
What cooks @ your library®
Dreams come true @ your library®
Info 24/7 @ your library®
Meet your librarian @ your library®
Get info savvy @ your library®
Get smart at your library
Get books for your kids @ your library®
Expand your mind @ your library®
Get 'NYSNC @ your library®
Build bridges @ your (engineering) library
It's elemental @ your (chemistry) library
It rocks @ your geology library
Heal thyself @ your library®

See a Noble Prize @ your library®
Plow new ideas @ your ag library
Tome Raider @ your library®
Raiders of the Lost Art @ your library®
Navigation tips @ your library®
Treasure! @ your library®
Converse with the greatest minds
Find your place in history
Support @ your library®
Listen & learn @ your library®
Read & reflect @ your library®
Sanctuary@ your library®
Find your center @ your library®
Ask anything @ your library®
Homework help @ your library®
Power up @ your library®
Ideas flow @ your library®
Talking is required @ your library®
The power of information @ your library®
See what's new @ your library®
Sound advice @ your library®
Collaborate with classmates @ your library®
Get carded @ your library®
Check yourself out @ your library®
Research made easy @ your library®
Theses and dissertations @ your library®

Training Options and Considerations

To date, the program has been delivered in three different general formats:

1. **Facilitating the process in your own library:** Library or library services leaders and their teams create their own promotional campaign. The leader must decide whether to create the plan alone, involve a small team, or involve the whole staff or a large group. These self-study outlines provide step-by-step guides to facilitating the process.

2. **Workshops for Librarians:** A mixed group of librarians representing different libraries and even different types of libraries might participate in a workshop intended to help them create some useful examples and to learn to the process so they could apply it at their own library. A one-day outline for an introductory experience and a two-day outline for an in-depth exercise are provided.

3. **Train-the-trainer:** A train-the-trainer workshop is intended to enable participants to train other librarians to use the program. A 1 day workshop is provided to help potential trainers practice teaching the content and using the various workshop techniques.

For each of these options, this guide will provide information to:

- Help the facilitator prepare to lead the meeting or workshop
- Prepare the pre-assignment notices
- Provide tips or slide references
- Collect and prepare needed materials and supplies

Option 1: Self Study Outline

Facilitating the Process in Your Own Library – Preparing the Campaign Alone --

Materials required beyond the Facilitator Guide:
Participant Manual: Strategic Marketing for Academic and Research Libraries.
Additional resource: The Portable MBA of Marketing by Schewe and Hiam, 1998.

(Facilitator: insert the PM pages numbers and slide numbers you plan to use.)

		Creating the Marketing Plan and Promotional Campaign Alone		
Chapter	**Time**	**Activity**	**PM#**	**FS#**
1		**Introduction: Preparing to Develop a Promotional Campaign** To ensure that, as a leader, you are prepared to lead the efforts to revise or complete the redevelopment of your strategy and marketing plans: • Read through the participant manual (PM) and summary reports provided by ALA in their recent workshops (see their Website: www.ALA.org/@yourlibrary or www.3M.com/library. Complete all worksheets. • Read through this facilitator guide (FG). Look through the ALA/ACRL Toolkit. • Note other library leaders in ALA and ACRL newsletters who can share stories and tips – and call them. • Think through how you would like the process to go and the outcomes you would like to achieve – setting a personal vision for the effort.		
2		**Overall Process: Doing Library User Research** • Read the information about customers in the PM and fill out the customer needs worksheet and its analysis questions. • Do some informal customer interviews if necessary to validate your intuition or data. • Plan a formal customer research process, if necessary. • Find a few resources that describe what other libraries have done to gather customer needs information. Call a few librarians to learn about their experience.		

<table>
<tr><th></th><th></th><th>Creating the Marketing Plan and Promotional Campaign Alone</th><th></th><th></th></tr>
<tr><th>Chapter</th><th>Time</th><th>Activity</th><th>PM#</th><th>FS#</th></tr>
<tr><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>3</td><td></td><td>Overall Process: Adjusting the Library Strategic Plan
• Read this section of the PM and complete the worksheet.
• Identify any situations where products and /or services are being offered that fulfill a low priority need.
• Identify any situations where no products and/or services exist to fulfill a high priority need.</td><td></td><td></td></tr>
<tr><td>4</td><td></td><td>Overall Process: Promoting the Library – Messages, AIDA and Platforms
• Read this section of the PM and complete the Messages Identification Worksheet.
• Collect a variety of library and non-library messages that attract your attention from library and other sources.
• Check the requirements, resources and capabilities of the campus public relations office.
• Think about messages that you receive that influence your buying habits.</td><td></td><td></td></tr>
<tr><td>5</td><td></td><td>Overall Process: Promoting the Library – Vehicles and Campaign Design
• Read this section of the PM and complete the two worksheets (listed above.)
• Collect a list of alternative vehicles provided by other departments, agencies, and businesses.
• Check into the funds and assistance available from the campus public relations office.
• Pay attention to promotional campaigns of other colleges, universities, institutions and businesses.</td><td></td><td></td></tr>
<tr><td>6</td><td></td><td>Overall Process: Promoting the Library – Implementing the Campaign
• Read this section of the PM and complete the worksheets.
• Contact other librarians to learn about their experiences.
• Inventory your own leadership strengths and preferences; identify others who have complementary skills to team with you during the selling and implementing processes.</td><td></td><td></td></tr>
</table>

Option 1A: Self Study Outline

Leading the Process in Your Own Library
-- Working with a Small Leadership Team --

Working with a small team of 3-4 interested staff members, especially if this is your first strategy and marketing planning effort, may help build your confidence and know-how before the whole staff and others are included.

Materials, Supplies and Equipment:

- 1 copy per team member -- Participant Manual: "Strategic Marketing for Academic and Research Libraries"
- 1 additional resource: The Portable MBA of Marketing by Schewe and Hiam, 1998.
- Flipchart stand, pads, markers, tape, Post-It™s
- Energy Toys
- Computer for slide show, projector, screen if needed
- Room large enough for 4-5 people to spread, plenty of wall space.

Pre-Meeting Assignment:

- Invite small team members to join you in the process. Explain the amount of work and time that will be involved. Clarify your expectations for their participation and desired outcomes of the process.
- Have each member read through the Participant Manual (PM) and complete the Self-Preparation steps.
- (Facilitator: insert the PM page numbers and slide numbers you plan to use.)

		Working with a Small Leadership Team in Your Library		
Chpt.	**Time**	**Activity**	**PM #**	**FS #**
1	2 hrs	**Introduction: Preparing to Create Your Promotional Campaign** Before the meeting: • Have them fill out the inventory form in the PM. • If possible, collect the filled out inventories and combine the results prior to the meeting. During the meeting: • Use the presentation slides to present this section of the PM. • Lead a meeting discussion in which the following questions are answered: ◦ What conclusions can we reach about the inventory results? (Write down conclusions on flip chart sheets.)		

		Working with a Small Leadership Team in Your Library		
Chpt.	**Time**	**Activity**	**PM #**	**FS #**
		• What are the steps we must take next? (Write down list of steps on flipcharts.) • What is the best sequence of the next steps? • What will it take (effort and resources) to accomplish these steps? (Record staff time and other resources required.) After the meeting: • Sleep on the conclusions and at another meeting: • Decide how to proceed, make improvements to the plan. • Document your decision. • Select the tools and materials you'll use to inform and involve the rest of the staff.		
2	3 hrs.	**Overall Process: Doing Library User Research** Before the meeting: • Have each team member read the information and fill out the customer needs worksheet and analysis questions in the PM. At the meeting: • Lead a discussion, first having each person share the lists of needs. Create a combined list on flipchart sheets. • Continue the discussion by answering the analysis questions together. Record the answers on a flipchart. The leader asks if there is a general consensus (agreement level at 80%). • Create together a list of the next steps the library should take to fill in any information holes: formal or informal steps. Write on flipchart. • Create a list of the next steps to take to meet critical unmet needs. • Decide which customer group(s) to address first in the promotional campaign. • Decide and list ideas about what and how to communicate with the rest of the staff. • Decide how to document the information.		

		Working with a Small Leadership Team in Your Library		
Chpt.	**Time**	**Activity**	**PM #**	**FS #**
		After the meeting: • Communicate the conclusions with the rest of the staff. Collect their reactions and ideas. • Circulate staff reactions and ideas with the team for review before the next meeting.		

3	2 hrs.	**Overall Process: Adjusting the Library Strategic Plan**
		
		Before the meeting:
		• Have team members read this section of the PM and complete the worksheet.
		• Collect the completed worksheets prior to the meeting and collate and disseminate the information.
		
		During the meeting:
		• Share the collated version and lead a discussion answering the following questions. Record answers to questions on flipcharts.
		  o Where are the areas of agreement among team members?
		  o Where are areas of differing views among team members?
		  o Is there a solid link between customers and their needs and the products and services we offer?
		  o Are some important customer needs being under-served or not served at all?
		  o Are we delivering some products and services that are not high priorities to our customers?
		  o What product and service options should be considered?
		  o Are our goals and measures clear enough to guide our daily decisions and actions? What should we add?
		  o What next steps should we take?
		• Record the product/service options, goals and measures suggestions and step ideas on flipcharts.
		• Ask if there is agreement in the group and make assignments to complete the steps.
		• Decide how to communicate with and get input from the rest of the staff.		

		Working with a Small Leadership Team in Your Library		
Chpt.	**Time**	**Activity**	**PM #**	**FS #**
		After the meeting: • Document and disseminate the ideas and decisions listed on flipcharts.		

4	3 hrs.	**Overall Process: Promoting the Library – Messages, AIDA and Platforms**
		
		Before the meeting:
		• Have the team members read this section of PM and the documents from previous meetings.
		• Have them complete the Messages Identification Worksheet ahead of the meeting.
		
		During the meeting:
		• Present the slides and discuss the definitions of terms.
		• Display a list of the products/services to be promoted and the benefits that have been agreed upon. Confirm this list.
		• Review/list the broad positioning messages that summarize the vision and mission of your library
		• For each customer, discuss and agree as a team the 2-4 most important messages. Write on a flipchart sheet.
		• For each message on the flipchart sheet:
		    o Identify the AIDA
		    o Improve the language of the message to be more appealing.
		• For each customer, identify platforms that might serve groups of messages. Write on the flipchart sheet.
		
		After the meeting:
		• Document the conclusions and disseminate them.
		• Encourage people to test them (informally) with other staff or with customers		

<table>
<tr><th></th><th></th><th>Working with a Small Leadership Team in Your Library</th><th></th><th></th></tr>
<tr><th>Chpt.</th><th>Time</th><th>Activity</th><th>PM #</th><th>FS #</th></tr>
<tr><td>5</td><td>3 hrs</td><td>Overall Process: Promoting the Library – Vehicles and Campaign Design

Before the meeting:
Have team members read this section of the PM and complete the two worksheets and turn them in prior to the meeting. Note the examples in the FG.
Combine the input from all participants on the Vehicles Identification Worksheet.
Have team members review the documented results from previous meetings.
During the meeting:
Present the facilitator slides and discuss the terms and their definitions.
Review the combined lists of vehicles that are available (Vehicle Identification Worksheet). Add any additional ideas, listing them on a flipchart sheet for later inclusion.
Taking one customer at a time, create a replica of the Campaign Design Worksheet using flipchart sheets. Have the team help you fill in the columns from previous meetings (columns 1 & 2 of the worksheet).
Lead a discussion to answer the following questions:
For each customer, what are the best vehicles that will convey the key messages? List them on a flipchart. (Vehicles Identification Worksheet)
Be sure to illustrate the link between the need, product/service and benefits with messages and then vehicles.
Write additional ideas for vehicles, messages or platforms on flipcharts.
For each customer, what is the best overall strategy for scheduling the vehicles? Which vehicle/message will be presented at what point in the campaign period? (Campaign Design Worksheet). Record answers and agreements on the flipchart sheets.</td><td></td><td></td></tr>
</table>

		Working with a Small Leadership Team in Your Library		
Chpt.	**Time**	**Activity**	**PM #**	**FS #**
		After the meeting: • Document and disseminate the information collected on flipcharts. • Have everyone sleep on the decisions, and discuss them again at a following meeting. • Plan how you will communicate this plan to the remaining staff and to the influencers and catalysts who are important to your effort.		
6	3 hrs.	**Overall Process: Finalize and Implement the Promotional Campaign** Before the meeting: • Have team members read this section of the PM and complete two worksheets: Funding and Resources Survey Worksheet and Influencers and Catalysts Preferences Worksheet. • Collect completed worksheets prior to the meeting and collate the information. During the meeting: • Share the collated version of the worksheets and lead a discussion answering the following questions: o Which elements of our Campaign Design Draft should be “A”, “B”, or “C” elements? Why? Where do we have consensus? Where do our views differ? How shall we arrive at a common view? Document the decisions. o What funding and resources sources are likely to be available for us? What realities should we face? Where are some sources we must pursue? Write answers on a flipchart. o Who are the most important influencers, catalysts or decision makers who we must at least get to a 0 (neutral) position on our plan? Who are the people who will resist the most? Who can reach them? Who are the people who will help us the most?		

		Working with a Small Leadership Team in Your Library		
Chpt.	**Time**	**Activity**	**PM #**	**FS #**
		o What steps should we take to complete the Costs and Strategy Benefits Worksheets to tell our story about the value and importance of the Promotional Campaign? Who will work on it? By when? o Are there other steps to include in our Sales and Implementation Plan? Write them on flipcharts. o How will we assess the success of our campaign? • Document the meeting notes and create a "to-do" list showing the steps, who agreed to do them and when they will be done. • Ask: how often shall we discuss progress on these steps? In what form? After the meeting: • Document and disseminate the plans. • Create a promotional campaign calendar. • Identify key information to present to staff at key points in the timeline.		

Option 1B Self Study Outline

Leading the Process In Your Library – Working with a Large Group or Whole Staff --

Sometimes, because of small staff size or because of the seriousness of the challenges facing the library, it makes sense for the leader to involve the whole library staff (or a large number of them) from the beginning. Even if the library staff is large, workshops of up to 30-40 participants are quite manageable. Sometimes, leaders of different library departments are selected to participate, or alternatively, representatives from all departments and all levels are selected. The leader decides which method will generate the best results and fastest implementation. In all cases, the following steps are suggested.

Materials, Supplies and Equipment:
- 1 copy per team member -- Participant Manual: "Strategic Marketing for Academic and Research Libraries"
- 1 additional resource: The Portable MBA of Marketing by Schewe and Hiam, 1998.
- Flipchart stand, flipchart pads for each team, markers, tape, Post-Its™
- Energy Toys for each team
- Computer for slide show, projector, screen if needed
- Room large enough for 25-40 people to spread, plenty of wall space.
- Sticky walls: 5' x12' fabric for each team, sprayed 3x with 3M repositional adhesive, Command Strips™, 2" stack of ½ 8"x11" pastel sheets of paper, plenty of markers per team

Pre-Meeting Assignment:
- Invite team members to join you in the process. Explain the amount of work and time that will be involved. Clarify your expectations for their participation and desired outcomes of the process.
- Have each member read through the Participant Manual (PM) and take the Self-Preparation steps.
- (Facilitator: insert the PM page numbers and slide numbers you plan to use.)

		Working with a Large Group or Your Whole Library Staff		
Chpt.	**Time**	**Activity**	**PM #**	**FS #**
1	**3 hr.**	**Introduction: Preparing to Develop a Promotional Plan** Before the workshop: • Have each person read the PM and complete the Status Inventory. • Collect the filled-out inventories and combine the responses onto one form. • Decide the parameters of the workshop: are participants creating a <u>draft</u> or making the decisions?		

		Working with a Large Group or Your Whole Library Staff		
Chpt.	**Time**	**Activity**	**PM #**	**FS #**

		During the workshop:
		• Start this introductory section of the PM by a brief introduction of the content using the presentation slides. Note on flipcharts additional trends, challenges or questions the group raises.
		
		• Pass out the combined results of the inventory.
		
		• Form smaller teams (4-6 people) to conduct sharing and analysis.
		
		• Have each team:
		    o Take 5 minutes for each individual to review the results.
		    o Discuss the following question: Which of the items on the inventory have we completed? What important improvements could we make to them at this point?
		    o Teams write on a flipchart the list of the completed items with suggestions for important improvements.
		    o Each team makes a short presentation. Allow questions for clarity from other teams.
		    o The leader asks:
		        ▪ What seems to be our common view of completed items? Which of these improvements are essential for us to do immediately? Allow each person 3 votes and a few minutes to make their selections. Then the leader goes from item to item on the flipcharts created by the teams and asks/records how many votes each item received.
		        ▪ Once voting is completed, the leader asks, “Is this an acceptable consensus?”
		    o If consensus has not been reached, locate the disagreement points, allow the sharing of points of view, and vote again.		

		Working with a Large Group or Your Whole Library Staff		
Chpt.	**Time**	**Activity**	**PM #**	**FS #**

		• Next, focus on the "Not Begun" and "In Process" items of the inventory. Have each group answer two questions on flipcharts.
		  o In what sequence should we work on these items?
		  o What suggestions do you have about how we should proceed on particular items or in general – how fast we act, who to involve, particular resources to use, communication ideas, etc.
		
		• Each team makes a short presentation.
		• The leader closes the meeting with a short summary of the progress and comments about the importance of these activities and likely next steps.
		
		After the workshop:
		• Document the flipchart notes of the teams.
		• Review the recommendations.
		• The leader (or small team) creates an action plan with a timeline and assignments identified.
		• The leader shares the plan with staff		

		Working with a Large Group or Your Whole Library Staff		
Chpt.	**Time**	**Activity**	**PM #**	**FS #**

2	**2 hr**.	**Overall Process: Doing Library User Research**
		
		Before the workshop:
		• Have all participants read the information in the PM and fill out the customer needs worksheet and analysis questions.
		• If possible, collect them ahead of time and compile all the ideas. Hand out the compiled set of ideas at a meeting.
		
		During the workshop:
		• Introduce this section with the facilitator slides.
		• Form small teams, one for each customer group of your library (undergraduate and graduate students, faculty, researchers, community members, etc.).
		    o On flipcharts, have each group list the conclusions for their customer group from the compiled customer needs worksheet and questions.
		    o Have each team briefly present their conclusions. Allow questions from the other groups.
		• Each team answers the questions: 1. Based on our work so far, which of our customers and which of their needs should be addressed first in our promotion campaign? and 2. Which needs should be addressed early, mid or late campaign? Steps for this activity are:
		    o Individuals think about and write down their choices for customer needs.
		    o Each team discusses the answers and the differences of opinion. Agreements are reached about the customer/needs and ½ sheets are placed on the sticky wall at the front of the workshop room.
		    o Each team makes a brief presentation. Discussion follows each presentation.
		• Leader asks for confirmation that the customers and their particular needs that appear on their sticky wall are the ones that will be addressed in the promotions campaign.
		• Review the list of next steps listed in the status inventory section of the workshop and add any additional steps on the flipchart that have been brought out in this discussion.		

		Working with a Large Group or Your Whole Library Staff		
Chpt.	**Time**	**Activity**	**PM #**	**FS #**
		After the workshop: • Document and disseminate the results of the workshop exercises. Ask for additional ideas. • Make the final decision about which customer group(s) and which needs to address first in the promotional campaign. Note: The advantages of using a formal process like Focused Discussions or the Sticky wall Processes with a larger group are: • Each participant has the opportunity to contribute and discuss their ideas. • Ideas are combined and collated at several steps to show common ground. • A few people can't dominate the process. • If managed tightly, the process can accomplish a lot in very little time. • As people become familiar with the process, it goes faster and is more creative. • The leader can feel confident that the process works, is fair, is engaging, and truly involves the staff in a respectful way.		

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<tr><th></th><th></th><th>Working with a Large Group or Your Whole Library Staff</th><th></th><th></th></tr>
<tr><th>Chpt.</th><th>Time</th><th>Activity</th><th>PM #</th><th>FS #</th></tr>
<tr><td>3</td><td>2 hr.</td><td>Overall Process: Adjusting the Library Strategic Plan

Before the workshop:
• Have all participants read this section of the PM and complete the worksheet.
• Have someone collate all the responses and create a summary for each customer group.

During the workshop:
• Introduce this section using the facilitator slides.
• Form teams, one for each customer group (already identified).
• Provide sticky wall instructions:
  o Have each team member review the summary for the assigned customer group.
  o Have each team identify conclusions they have reached about the needs, the products and services, and the benefits received.
  o Each team creates a sticky wall using ½ sheets arranged as diagrammed below.
    ▪ Place the customer ½ sheet at the top of the left hand column.
    ▪ Place needs ½ sheets under the customer in the left column.
    ▪ Place a ½ sheet for each of the products and services that meet a need to the right of each need. Label the product/service sheets “P/S.
    ▪ Place a ½ sheet for each benefit received by the customer from each product/service ‘under’-lapping the P/S ½ sheet. Label the benefits sheets “B”.
  o Each team answers the following questions:
    ▪ Have we included the most critical needs of this customer from the customer’s point of view?
    ▪ Have we included the key P/S (products and services) we currently offer or plan to offer to meet each need?
    ▪ Have we listed the benefits the customer receives (will receive) from each P/S from the customer’s point of view?</td><td></td><td></td></tr>
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		Working with a Large Group or Your Whole Library Staff		
Chpt.	**Time**	**Activity**	**PM #**	**FS #**
		▪ Where does it appear that needs are not served well by our P/S? ▪ Where does it appear that needs are served well by our P/S? ▪ What recommendations would you make to serve this customer better? • Each team makes a brief presentation. Allow questions to be asked by others. • List on a flipchart any notes or next steps about products and services to be considered in future strategic planning. After the workshop: • Document and disseminate the sticky wall work. Request additional ideas. • Allow some time for the conclusions to sink in. • Send out the agenda for the next session, emphasizing that the promotional campaign will be based on the work completed to date. (An example of a completed Customer Needs Worksheet is in the FG.)		

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<tr><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>4</td><td>3 hr.</td><td>Overall Process: Promoting the Library – Messages, AIDA and Platforms

Before the workshop:

Have participants read this section of the PM and complete the Messages Identification Worksheet.
Have participants review the document results from previous workshops.

During the workshop:

Forms teams, one for each customer you have selected in previous workshops to address first in your promotional campaign.
Present the slides and discuss definitions of terms.
Review the broad positioning messages of the library summarized from the vision and mission. Show how they fit in the message architecture.
Have each customer team create a Messages sticky wall using ½ sheets of colored paper in the layout provided below:

The most important needs of the customer. (Label the sheets “N.”)
The products and services that serve those needs (Label the sheets “P/S.”)
The benefits received by the customer from the products/services. (Label the sheets “B.”)
The important messages for each customer about the benefits received. (Label the sheets “M.”)

Review the messages, and decide which intention the message should have, AIDA. Label each message “A, I, D, or Ac.” Revise the messages to reflect the intention.
Select platform messages for groups of messages that have a similar them. (Label the platform sheets with a “P.”)
Have each team present their conclusions. Allow time for discussion about each team’s presentation. Write down new suggestions on ½ sheets and place them on the sticky wall for further consideration.
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		Working with a Large Group or Your Whole Library Staff		
Chpt.	**Time**	**Activity**	**PM #**	**FS #**
		After the workshop: ▪ Document and disseminate the sticky wall work. ▪ Test messages informally on other staff and customers. ▪ Collect ideas for revisions.		
5	**4 hr.**	**Overall Process – Promoting the Library – Vehicles and Campaign Design** Before the workshop: • Have all participants read this section of the PM and complete one worksheet: Vehicles identification Worksheet and look over the Campaign Design Worksheet – one for each customer. Note the examples in the FG. • Have someone compile all the responses on the Vehicle Identification Worksheet and create a summary for each customer group. • Have participants review the documents from previous workshops. During the workshop: • Introduce the content of this section using the facilitator slides. Discuss terms as needed. • Pass out the compiled Vehicle Identification Worksheet. • Form teams, one for each customer. • Provide Vehicles sticky wall instructions: o Present an example of the Vehicles Sticky Wall to serve as a guide. o Provide time for individual team members to review the compiled input from the worksheets regarding their customer assignment. o Have each team discuss the general conclusions they draw from the compiled Vehicles Identification Worksheets about the messages, platforms, and vehicles and campaign design.		

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<tr><th>Chpt.</th><th>Time</th><th>Activity</th><th>PM #</th><th>FS #</th></tr>
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Each team creates a Vehicles sticky wall using ½ sheets arranged as illustrated in the diagram below:

Reconstruct the Messages sticky wall from the previous meeting, with appropriate changes.
Add the specific vehicles that should be used to convey the messages. Stay in a brainstorming mindset – suggesting more vehicles than are likely to be used. Also, don’t worry at this time about the sequence of the messages, but do pay attention to providing an adequate vehicle to carry the message.
Have each team present their sticky wall. Allow time for discussion.

Present the slides that deal with the campaign strategy and timing issues.
Continue with the same teams.
Provide instructions to the teams:

Rearrange the Vehicles sticky wall and create the Campaign Design sticky wall.

Move the Needs, P/S and Benefits into the left hand column. Stack sheets as necessary.
Move the Messages into the second column, lined up with the P/S and Benefits they refer to.
Add a timeline at the bottom of the wall: By years, or months, quarters, semesters, etc. within the years of the campaign.
Array the vehicles (on the same level as the message they carry) across the timeline.
Decide which campaign strategy is best as an overall pattern and write on a ½ sheet and put it on the wall.

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		Working with a Large Group or Your Whole Library Staff		
Chpt.	**Time**	**Activity**	**PM #**	**FS #**
		o Step back to review the draft of the campaign: ▪ For each message, be sure that the vehicle choice and frequency will get the message across. ▪ Look at the array of vehicles, remove any that seem duplicative or add little value. ▪ Discuss what you like about this draft. o Present the campaign to the other teams. (Limit the presentations to one key Need if necessary because of time.) After the workshop: • Document and disseminate the sticky walls. Accept further ideas and suggestions. • Remind the teams that these are drafts that will need to be tested for practicality and effectiveness.		
6	**4 hr.**	**Overall Process: Finalizing and Implementing the Promotional Campaign** Before the workshop: • The leader (or a small team) completes a first draft of the Costs Analysis Worksheet and the Strategic Benefits Analysis Worksheet and sends it to participants along with the PM page assignments and the pre-workshop assignment. • Have all participants read this section of the PM and complete two worksheets: Funding and Resources Survey Worksheet and Influencers and Catalysts Preferences Worksheet. • Have someone collate all the responses to the two worksheets and create a summary for each one. During the workshop: Costs Analysis Worksheet and Strategic Benefits Analysis Worksheet • Lead a discussion about each of the worksheets, asking questions such as: • What additional costs would you add to the worksheet?		

		Working with a Large Group or Your Whole Library Staff		
Chpt.	**Time**	**Activity**	**PM #**	**FS #**
		• What conclusions have you drawn about the costs? Benefits? • What should we do next to confirm our first draft of the worksheets? A, B, or C Plan? • Form teams, one for each customer group. Provide red, green or yellow dots or pens to each team member. This part of the exercise can be done either directly on the sticky wall already completed, or on a documented version of the sticky wall. o Allow 10 minutes for each individual to place their dots (or colored marks) on the Campaign Design Draft for their customer. (Red= A Plan, each person gets 20 dots, Yellow = B Plan, each person gets 10 dots, Green = C Plan, each person get 5 dots.) o Have each team answer the following questions on a flipchart: ▪ Where is agreement about the dots? Where is the disagreement? ▪ What different ways are we looking at this? ▪ What would be the best compromise of our views? ▪ How would you describe briefly the A, B, and C Plans to others? ▪ Teams make short presentations to the other teams. • Continue with the same team formation, discuss the collated results on the Funding and Resource Survey Worksheet and the Influencers and Catalysts Worksheets. Then answer the following questions on a flipchart: • Considering your customer's situation, how would you summarize the funding realities? • Considering your customer's situation, what other resources are available? • Considering your customer's situation, how would you summarize the challenges and opportunities? • Teams make short presentations to other teams. Allow questions and brief discussion.		

		Working with a Large Group or Your Whole Library Staff		
Chpt.	**Time**	**Activity**	**PM #**	**FS #**
		• Continue with the same team formation, each team answers the questions: o "Considering realities, which plan would you recommend for your customer, A, B or C? Why? o Teams make short presentations to the other teams. o The leader asks, if appropriate, "Are we in agreement (90%) so we can move on to planning the selling and implementation of our promotional campaign?" • Introduce the four major campaign implementation steps that must take place: 1) doing the second draft of the costs/ strategic benefits analysis, 2) completing the campaign documents, 3) planning the influence strategy, and 4) implementing the campaign itself. • Form four teams (allow people to volunteer or assign them.) o Ask each team to: 1) list the steps required and in sequence, 2) identify who will do the steps, and 3) identify the date by which they must be done. o Have each team make a short presentation to the other teams, capturing suggestions and answering questions. • Close o Review what has been accomplished o Summarize next steps o Describe how the leader/leadership team will act to make the plan happen o Ask for their continued creativity, energy and support. o Allow some time for the leadership team to review the campaign draft before finalizing the plan.		

Option 2

Workshops for Librarians: Introductory One-Day Workshop and a Two-Day, In-depth Workshop

In some cases, the best way to share the marketing approach and tools is to invite librarians from a variety of libraries to attend a one- or two-day workshop to learn the process, develop useful examples and to build a mutual-assistance network with other librarians. Librarians can represent a number of different like-libraries (community colleges in a state) or represent different kinds of libraries (public, school, academic and special.) One-day workshop designs are often used to introduce the marketing process. But, two-day workshops are also offered to ensure the participants have plenty of time to develop good examples and to learn the process.

Alternatively, a library or library services group might want assistance from an outside facilitator to help them build a real promotional campaign. In this case, the facilitator will work closely with the leader of the library or organization to design the session, prepare the participants and to list the desired outcomes. The two-day workshop is most beneficial in this situation to ensure that the staff have plenty of time to talk through the real issues of their organization and to create a plan they will implement.

Materials, Supplies, and Equipment:

- Send one copy per participant -- Participant Manual: "Strategic Marketing for Academic and Research Libraries" out prior to the workshop with a letter that describes the pre-workshop assignment. (Take several extra copies to the workshop for those who forget their own copy.)
- Take one copy per participant – Facilitator Guide (+ several extra copies) to the workshop.
- Take one additional resource: The Portable MBA of Marketing by Schewe and Hiam, 1998 to the workshop as a resource.
- One flipchart stand with flipchart pads for the facilitator; flipchart pads for each team, markers, tape, Post-Its™
- Energy Toys for each team
- Computer for slide show, projector, screen if needed
- Room large enough for 25-40 people to spread, plenty of wall space.
- Sticky walls: 5' x 12' fabric for each team, sprayed 3 times with 3M repositional adhesive, 8 large Command Strips™ per sticky wall, 2" stack of ½ 8"x11" pastel sheets of paper per team, and plenty of colored markers per team
- (Optional: 1 lapboard per participant so each person can create their own version of the sticky wall if the librarians come from different libraries.)

Pre-Meeting Assignment:

- Invite prospective participants to join you at the workshop. Explain the amount of work and time that will be involved. Clarify your expectations for their participation and desired outcomes of the process. If it is a group of librarians from different libraries and it is a one-day workshop tell them which customer they are assigned, if that is possible to do ahead of time.

- Have each participant prepare for the workshop by:
  - Skimming the Participant Manual (PM)
  - Completing the Status Inventory in Chapter 1 and the Customer Needs Worksheet in Chapter 2.
- Facilitator insert the PM page numbers and slide numbers you plan to use.

Working with a Librarians from Different Libraries

There are several options to choose among when setting up this version of the workshop:

1) All participants work only on their own library using the lapboards and/or worksheets.
2) Participants are put into teams based on the similarity of their libraries and are allowed to select the library they will use as the focus for their promotional planning efforts. Individuals can take notes to apply to their own library.
3) Participants are put into teams based on the similarity of their libraries and are assigned one customer to work on and the product/service to focus on.

Workshops for Librarians
One-Day Workshop

Workshops for Librarians – One Day				
Chpt.	**Time**	**Activity**	**PM #**	**FS #**
1	**30 min.**	**1) Introduction** a) Meeting hosts b) Facilitator start up i) Welcome – Purpose – Agenda – Format – Style – How to Use Manual --Notes ii) Crisis iii) The Challenges iv) The Opportunities v) Leading with Confidence vi) The Overall Process vii) Status Inventory exercise (1) How/when you might use it (2) Conclusions to draw viii) Meeting/Workshop Instructions pages		
2	**30** 10 15 5	**2) Overall Process: Doing Library Customer and Market Research** a) Quick review of content i) Know Who The Customers Are ii) Influencers iii) Catalysts iv) What Customers Want and Need v) Examples of needs vi) Customer Needs Worksheet vii) Selecting the Customer(s) to Address First b) Exercise: With your assigned customer and assigned product/service -- i) Brainstorm a list of current and future needs on flipchart – use this in next steps ii) Remember brainstorm rules iii) Answer questions: (1) How valid is this list? (2) What steps might you take to make it more valid? c) Large group discussion: i) Fairly easy to do? ii) Do you do it in your library? **iii)** How important is this step?		

Workshops for Librarians – One Day				
Chpt.	**Time**	**Activity**	**PM #**	**FS #**
	15	**BREAK**		
	50 10 30 5 5	**3) Overall Process: Library Strategic Plan** a) Quick review of the content i) Setting Library Direction – elements of a strategic plan ii) Gaps iii) Goals and measures iv) Product and service offerings – to meet needs and to fill gaps v) Products and services provide benefits to the customers vi) Products/Services Benefit Map b) Exercise: Customer, Needs, Products/Services and Benefits sticky wall i) Look at sticky wall layout ii) Use resources in this chapter iii) Create the sticky wall for your customer iv) Include the needs (from the flipchart that apply) v) Include the product/service you have been assigned vi) Identify the benefits the customer receives from the product/service vii) Answer the questions: Is our list of needs complete (for this P/S)? Is our list of benefits complete? c) Large Group Discussion: i) A few examples ii) Questions iii) This is the base of information you need before creating your promotional campaign d) Write NOTES for your own library		

Workshops for Librarians – One Day				
Chpt.	**Time**	**Activity**	**PM #**	**FS #**
4	**85** 5 10 30 10 30 **60** **55** 10 20 15 5 5	**4) Overall Process: Promoting Your Library – Messages, AIDA and Platforms** a) Four steps: i) Review library positioning messages ii) Write the messages iii) Adjust to AIDA iv) Identify platforms v) Do a step-by-step process b) Writing messages information—first draft c) Exercise: Write the messages, put on sticky wall i) Look at sticky wall layout ii) Tables write messages iii) Match the benefits? -- revise d) AIDA information e) Exercise: Identify AIDA i) Revise messages for AIDA phase ii) Put on sticky wall **LUNCH** f) Platforms information (plus broad messages) g) Exercise: Identify 1-2 platforms i) Identify platforms ii) Identify broad message and architecture h) Team reports- key messages, platform, (broad message) i) Large group discussion: i) Messages Identification Worksheet ii) Key or difficult steps? iii) Valid messages? Interesting messages? j) Write NOTES for your own library		

Workshops for Librarians – One Day				
Chpt.	**Time**	**Activity**	**PM #**	**FS #**
5	**80**	**5) Overall Process: Promoting Your Library -- Vehicles and Campaign Design**		
	10	a) Quick review of the vehicles content i) Select the vehicles (1) Vehicle types with examples (2) Vehicles with AIDA (3) Vehicle Identification Worksheet ii) Steps in this section: (1) Brainstorm vehicles (2) Attach vehicles to messages		
	15	b) Exercise: Brainstorm vehicles that you use – remembering 5 types on a flipchart		
	30	c) Exercise: Identify the vehicles you think would be most powerful to carry the messages i) Look at brainstormed options, add new ones ii) Look at sticky wall layout iii) Put on sticky wall		
	15	d) Table presentations: 1 message and selected vehicles		
	5	e) Large group discussion: i) Examples? ii) Why does it matter which vehicle you choose? iii) Lessons?		
	5	f) Take NOTES for your library		
	15	**BREAK**		

Workshops for Librarians – One Day				
Chpt.	**Time**	**Activity**	**PM #**	**FS #**
	55			
	10	g) Quick review of the campaign sequence content i) Period of time, frequencies, sequence issues ii) 4 strategies iii) Campaign examples iv) Sequencing messages over the campaign v) Campaign Design Worksheet vi) See example matrices		
	30	h) Exercise: Sequencing the campaign i) Look at the sticky wall layout ii) Identify the length of the campaign – reference at bottom of sticky wall iii) Re-arrange the sticky wall iv) Distribute the vehicles across the time frame v) Name and post the strategy for this campaign		
	10	i) Large group discussion i) Examples? ii) Questions?		
	5	j) Take NOTES for your own library		

Workshops for Librarians – One Day				
Chpt.	**Time**	**Activity**	**PM #**	**FS #**
6	**15** (40) 5 5 (20) (5) 5	**6) Overall Process: Promoting the Library – Finalize and Implement the Promotional Campaign** a) Quick review of chapter content i) Finalize with Reality (1) A,B, or C plan (2) Cost Analysis Worksheet (3) Strategic Benefits Analysis Worksheet (4) Funding and Resource Survey Worksheet ii) Mobilize the Resources to Implement your Promotional Campaign/Library (1) Working with influencers and catalysts (2) Creating an implementation plan (3) Assessing campaign success b) Optional Exercise: A, B, or C plan? i) Look over your plan—realistically and strategically ii) Remove any less-than-inspiring M/V iii) Mark “A” items with a green dot iv) Mark “B” items with at blue dot v) Mark “C” items with a red dot c) Optional Large Group discussion: i) Value in the A,B, C exercise? ii) Tools you use now (like those presented here)? d) Take NOTES for your own library		
7	**15** 10 5	**7) Overall Process: Delivering Products and Services** a) Quick review of content i) Six reminders ii) Leadership Tip/Tool iii) Materials in the Appendix b) Workshop summary c) Workshop close	 85 86 87	

Workshops for Librarians
Two-Day Workshop

Workshop for Librarians – Two Day				
Chpt.	**Time**	**Activity**	**PM #**	**FS #**
		DAY ONE		
1	**70** 20 20 30	**1) Introduction** a) Meeting hosts – 20 minutes b) Facilitator – workshop start up—40 minutes i) Welcome-Purpose-Agenda-Format/Style ii) Crisis iii) The Challenges iv) The Opportunities v) Leading with Confidence vi) The Overall Process vii) Status Inventory exercise (1) Introduction (4 minutes) (2) Individuals fill out (4 minutes) (3) Table (#1) groups share (15 minutes) (4) Debrief (5 minutes) viii) Meeting/Workshop Instructions pages		
2	**75** 15 10 15 20 10 5	**2) Doing Library Customer and Market Research** a) Facilitator introduction and present content on slides i) Summary of steps ii) Customer Needs Worksheet b) Large group discussion: i) What information do you have (for sure)? ii) What information must you get? **BREAK** c) Table exercise: i) Select one library to use as the group's practice example ii) Others use NOTES page and lapboard (if appropriate) iii) Exercise instructions iv) Teams create sticky wall layout v) Prep 2 minute summaries d) 2 minute summaries and overall summary e) Large group discussion: Lessons so far?		

Workshop for Librarians – Two Day				
Chpt.	**Time**	**Activity**	**PM #**	**FS #**
3	**65** 15 40 10 **60**	**3) Library Strategic Plan 65 Minutes (11:00-12:05)** a) Facilitator presents: i) Slides ii) Library Products and Services -- examples? iii) Products and Services Benefits Map b) Table exercise – Create P/S + B sticky wall i) Facilitator introduces steps ii) Teams work on sticky wall iii) Prep 2 minute summary c) 2 minute summaries and overall summary (15 minutes) **LUNCH**		
4	**50** 10 30 10 **50** 10 30 10 **15**	**4) Promoting the Library – Messages, AIDA and Platforms** a) Facilitator introduction i) Transform Benefits to Messages ii) Table exercise (B to M) (#4) – 30 minutes (1) Facilitator presents steps (2) Teams create messages and place on sticky wall iii) Large group discussion: (1) Examples? (2) Questions **b) Categorize AIDA** i) Facilitator introduces Messages and AIDA ii) Table exercise (AIDA) (1) Facilitator provides the steps (2) Team adjust messages to AIDA on their sticky wall iii) Large group discussion: (1) Examples of messages and AIDA? (2) Questions? **BREAK**		

Workshop for Librarians – Two Day				
Chpt.	**Time**	**Activity**	**PM #**	**FS #**
	65 10 30 15 10	**c) Identifying Platforms** i) Facilitator introduces section (1) Slides (2) Platforms Guide the "look" ii) Table exercise (M + P) (#5) – (40 minutes) (1) Facilitator provides steps (2) Teams add platforms to their sticky walls (3) Prep 2 minute summaries: one product/service + its benefits, 1 group of messages, AIDA adjustments and platform iii) 2 minute summaries d) Large group discussion: i) Questions? ii) Conclusions iii) Overall summary (15 minutes)		
		DAY TWO		
5	**2 hr.** **10** 5 20 30 10 40 15 10	**5) Promoting the Library – Vehicles and Campaign Design** a) Facilitator reviews yesterday's progress b) Facilitator introduces Chapt 5: i) Slides ii) Examples c) Table exercise: Vechicles Identification Worksheet (1) Facilitator provides steps (2) Participants list current vehicles on flipchart, add others ii) Large group discussion (1) Examples? (2) Questions? d) Table exercise: Select vehicles for the key messages. i) Facilitator provides steps ii) Participants select vehicles for each message and place on sticky wall iii) Prepare 2 minute summary e) Tables share summaries f) Large group discussion: i) Examples? ii) Questions?		

Workshop for Librarians – Two Day				
Chpt.	**Time**	**Activity**	**PM #**	**FS #**
	15 **1 hr. 30** 15 40 20 15 **60**	**BREAK** g) Designing the Campaign i) Facilitator introduces section with slides (1) Four Broad Strategies (2) Example: MADD (3) Example: Library Campaign (4) Campaign Design Worksheet ii) Table exercise- Campaign Design (1) Facilitator provides steps (2) Teams work on sticky walls (3) Prep 5 minute summary: owner to present iii) 5 minute summaries iv) Large group discussion: (1) Useful examples? (2) Questions? **LUNCH**		
6	**75** 15 20 10 10 **15**	**6) Implement the Promotional Campaign** i) Facilitator introduces the section (1) Slides (2) Examples ii) Table exercise - Planning for Implementation (1) Facilitator provides steps (2) Teams discuss different planning tools (3) Owner prepares 2 minute summary iii) 2 minute summaries iv) Large group discussion (1) Useful examples? (2) Questions? **BREAK**		

Workshop for Librarians – Two Day				
Chpt.	**Time**	**Activity**	**PM #**	**FS #**
	10	**7) Providing Products and Services** **a) Facilitator introduces the section** i) Reminders ii) Leadership Tip and Tool		
	40 10 20 10	**8) Planning for my own Library** a) Individuals fill out NOTES page or complete lapboard b) Share with partner or table group c) Large group discussion i) Useful 'take-aways' are … ii) My next steps are … iii) Questions?		
	15	**9) Evaluating this Workshop and Close** a) Facilitator describes how the evaluation will be used b) Facilitator thanks group c) Participants complete evaluation and depart **END**		

Option 3

Train-the-Trainer Workshop: Helping Others Become Trainers of the Process

A key goal of ACRL is to disseminate the Strategic Marketing process and to assist library administrators in using the process in their libraries. To that end, the participant manual, the facilitator guide, and the ALA toolkit have been provided. Also, to spread the news, various presentations and workshops have been (or will be) conducted to introduce the process. One other workshop format is also available – a half-day train-the-trainer workshop, designed to prepare future trainers of the process. In this workshop the focus is on the facilitation outlines and tips along with time allotted for analyzing various segments of the process.

Materials, Supplies, and Equipment:

- 1 copy per participant -- Participant Manual: “Strategic Marketing for Academic and Research Libraries” (plan on having extra copies available)
- 1 copy per participant – Facilitator Guide (plan on having extra copies available)
- 1 additional resource: The Portable MBA of Marketing by Schewe and Hiam, 1998.
- Flipchart stand, flipchart pads for each team, markers, tape, Post-Its™
- Energy Toys for each team
- Computer for slide show, projector, screen if needed
- Room large enough for 25-40 people to spread, plenty of wall space.
- Sticky walls: 5’ x12’ fabric for each team, sprayed 3x with 3M repositional adhesive, Command Strips™, 2” stack of ½ 8”x11” pastel sheets of paper, plenty of markers per team

Pre-Meeting Assignment:

- Invite prospective trainers to join you in the process. Explain the amount of work and time that will be involved. Clarify your expectations for their participation and desired outcomes of the process. Encourage them to attend a workshop as a participant before taking the train-the-trainer workshop.
- Have each participant read the Participant Manual (PM) thoroughly, filling out as many worksheets as possible with their own library in mind . There will be little time in the workshop to teach the content, so the participants must come prepared.
- Facilitator: insert PM pages and slide numbers you plan to use.

Half-Day Train-the-Trainer Workshop

		Half-Day Train-the-Trainer Workshop		
Chpt.	**Time**	**Activity**	**PM #**	**FS #**
	20 min.	**1) Workshop Introduction** a) Introduce yourself b) Welcome and a quick overview of workshop purpose and desired outcomes for this train-the-trainer workshop. c) Confirm the team assignments and outcomes expected from each participant: i) Learn to deliver the one-day workshop. ii) Teams work together on exercises iii) Assist each other to learn to facilitate the one-day program. d) Present the materials, delivery options, agendas, style, and tools that individual library leaders will have access to for the self study materials to be used in their own libraries. There are three options: self, small leadership team, large group i) The Participant Manual (PM) – content, worksheets ii) The meeting/workshop outlines and tips in the facilitator guide (FG) iii) Experiential, step-by-step process focused on producing a product e) The workshops for librarians i) The PM: content and worksheets ii) The FG: One-day and two-day workshop outlines, tips, and facilitator slides iii) One-day workshop is the focus – (two day is essentially the same with long times allowed for the activities) f) In this Train-the trainer i) Little emphasis on content ii) Mostly getting use to the flow and the tools iii) A little practice, discussion and planning time iv) Agenda		

		Half-Day Train-the-Trainer Workshop		
Chpt.	**Time**	**Activity**	**PM #**	**FS #**
		g) Large group discussion: i) Content questions? ii) Agenda questions? iii) Things you would like included?		
1	**15 min**	**2) One-day Workshop Flow** a) Present the flow chart of the one-day workshop b) Point out the Marketing Process model c) Point out the key decisions participants must make d) Point out how each part of the process builds on the decisions made in previous steps e) Show end-point examples of: i) A campaign design sticky wall ii) A campaign design worksheet iii) Real vehicles that conveyed the messages		
	5 min	**3) Present the Facilitator Tips in the FG**		
	5 min	**4) Present the Promotional Campaign tips in the FG**		
	20 min	**5) Present how to use sticky Walls** a) What they are b) Why and when sticky walls are used c) How to put them up d) Teams put their sticky walls up		
	5 min	**6) Present information about Lapboards** a) What they are b) Why and when lapboards are useful c) How to make them, use them d) Teams set up lapboards		
	5 min	**6) Present information about Energy Toys** a) Indicate the toys at the table b) Indicate their purpose c) Ask: Suggestions for other energy toys?		
	15			

		Half-Day Train-the-Trainer Workshop		
Chpt.	**Time**	**Activity**	**PM #**	**FS #**
	min.	**This is a good time for a break.**		
	60 min.	**7) Set up for practice sessions** a) Teams are assigned a segment of the one-day workshop. If the time is short, do not assign the optional segments below. Provide each team with an example that they can build on. i) Introduction and Status Inventory (Optional) ii) Customer Research and Customer Needs Worksheet (Optional) iii) Library Strategy Plan and Products/Services and Benefits Map iv) Promoting the Library and Messages, AIDA and Platforms and sticky wall v) Promoting the Library and Vehicles and sticky wall vi) Promoting the Library and Campaign Design sticky wall vii) Promoting the Library and Implementing the Campaign worksheets and steps (Optional) b) Each team reviews their segment and prepares a report for the other teams including: (One-two people document the team's report, make copies for other teams) i) The PM pages ii) The slides numbers that apply iii) Key content to stress iv) Two good examples v) A completed sticky wall for the section vi) Facilitation suggestions c) Teams work for 45 (+) minutes		
	100 min	**8) Teams make presentations (10 minutes each)** a) Teams present in order of the flow b) After each presentation large group discusses: i) Content questions? ii) Flow questions? iii) Technique questions? iv) Facilitation questions? v) Emphasis questions?		

		Half-Day Train-the-Trainer Workshop		
Chpt.	**Time**	**Activity**	**PM #**	**FS #**
		vi) Other lessons?		
	5 min **240 min**	**9) Facilitation tips** a) Be sure all the arrangements are made and roles clear with the sponsors b) It takes about 1 hour to put up the sticky walls and prepare the room by yourself – one option is to have participants put up their own sticky walls. c) Take time to present the definitions of key terms carefully to present examples of the terms i) Prepare little lists that you can use in the session ii) Make and share transparencies of examples from magazines—business and library d) Use the ideas that come from participants to reinforce the process e) Error on the side of asking questions, rather than telling answers f) Trust the process, the slides and have a good time.		
	3 hours	**10) Optional exercise for a Full-Day Workshop** a) Team members select one segment of the workshop to present aloud to teammates. b) Individuals prepare c) Individuals present and receive feedback from teammates d) Large group questions and answer session		

Facilitation Slides and Use Grid

Facilitator slides are made available for your use. To help you prepare to facilitate the workshop, simply make paper copies of the slides from the CD or diskette provided or by downloading the file from www.ALA.org/acrl and www.3M.com/library. Of course, you are free to add, delete or modify slides as you wish. The slides are available in several Power Point formats. The recommended format for facilitator preparation is the 3-per-page handout format with space along side each slide to write presentation notes. Use the slides in the slide-show format as you present the program to your audience. The following slides are provided:

1) **Basic program content slides:** Slides for each chapter of the program that summarize the content and provide instructions for the participant activities. These should be sufficient for the facilitator presentation sections of the workshops.

2) **Train-the-trainer slides:** Slides that are used in the Train-the-Trainer one-day workshop to set up the particular purpose and activities of that workshop.

You may want to add your own slides to:
- Match your presentation style
- Introduce yourself and/or your library
- Tell more about ALA's @ your library® Campaign
- Tell more about ACRL's efforts
- Provide additional examples
- Provide interesting stories
- Set up a group discussion
- To add color or humor

Slides Use Grid				
PM Chapter	**In Your Own Library**	**One-Day Workshop for other Librarians**	**Two-Day Workshop for Other Librarians**	**Train-the-Trainer Workshop**
	Content slides:	Content slides:	Content slides:	Train-the-trainer slides 1-25
1	1, 2, 6, 9-26	1-28	1-28	
2	28-40	29-42,45	29-40,43-45	
3	46-52	46-55	46-55	
4	56-69, 72-73, 75-78	56-80	56-80	
5	81-90, 95-101	81-104	81-104	
6	105-107,109-113	105-107	105-113	
7	114-117	114-121	114-121	