

# Strategic Marketing for Academic and Research Libraries Participant Manual

## Table of Contents

<b>How to Use This Manual</b>	<b>3</b>
<b>Chapter 1: Introduction: Preparing to Develop Your Promotional Campaign</b>	<b>6</b>
The Challenges Facing Academic Libraries	6
The Opportunity for Academic Libraries	7
Leading the Marketing Planning Process	9
The Marketing Planning Process	11
Status Inventory – Progress Toward Marketing Our Library	13
Status Inventory Action Options	14
<b>Chapter 2: Marketing Planning Process: Doing Library User Research</b>	<b>15</b>
First, Know Who The Customers Are	15
Second, Know Who Has Great Influence on the Direction of Your Library	16
Third, Find Out What Your Customers Want and Need	18
Customer Needs Worksheet	23
Selecting the Customers to Address First	25
<b>Chapter 3: Marketing Planning Process: Library Strategic Plan</b>	<b>26</b>
Setting Library Direction	26
Library Strategic Plan Goals and Objectives	27
One Action Area: Product and Service Offerings	28
Products/Services and Benefits Map	30
<b>Chapter 4: Marketing Planning Process: Promoting the Library – Identify Messages, AIDA and Platforms</b>	<b>31</b>
Building An Aligned Campaign Storyline	31 First,
Identify the Positioning Messages of Your Library	32
Second, Transform Benefits Statements into Messages	34
Third, Categorize the AIDA Language of the Messages	35
Fourth, Identify the Platforms Suggested by the Messages	36
Messages Identification Worksheet	40

<b>Chapter 5: Marketing Planning Process: Promoting the Library – Vehicles and Campaign Design</b>	<b>41</b>
First, Select the Vehicles to Carry the Messages	41
Vehicle Identification Worksheet	46
Second, Arrange the Vehicles into a Campaign with an Effective Sequence and Frequency Pattern	47
Campaign Design Worksheet	51
<b>Chapter 6: Marketing Planning Process: Finalize and Implement the Promotional Campaign</b>	<b>52</b>
Finalize the Campaign with a Dose of Reality	52 Costs
Analysis Worksheet	54
Strategic Benefits Analysis Worksheet	55
Funding and Resources Survey Worksheet	56
Mobilizing the Resources to Implement Your Promotional Campaign	57
Influencers and Catalysts Preferences Worksheet	58
Promotional Campaign Implementation Plan	59
Assessing Campaign Success	60
<b>Chapter 7: Marketing Planning Process: Providing Products and Services</b>	<b>61</b>
<b>Appendix</b>	<b>62</b>
Marketing That May Be Seen, Heard And Felt By All	62
ALA/ACRL Marketing Toolkit	64
Resources	66
Notes: Planning My Library’s Campaign	67

## How to Use This Manual

### Purpose

This manual is intended to serve academic and research librarians, library leaders and administrators (in community college, college, university, research or special library settings) who are searching for a tool set and a process to help them create a marketing plan and promotional campaign for their library. Completing the marketing process and creating a promotional plan are key steps in responding to change and planning to make change. It is up to the leaders of libraries to direct these efforts.

### Materials

This Participant Manual contains marketing information and process, worksheets, examples and workshop suggestions. An accompanying Facilitator Guide is also available which includes a variety of presentation outlines, tips and slides.

### Content

This manual is based on the work of Charles D. Schewe and Alexander Hiam found in The Portable MBA in Marketing, 1998. Their general approach serves as the basis for this marketing approach. The application of the model to the library setting, the tools, examples, slides and workshop processes were developed by the author of this manual. Together, the model and tools will help librarians:

- Understand library users' current and future needs
- Adjust the current strategic plan to address new realities
- Develop and implement a promotional campaign to attract new and keep current users
- Align library staff and resources to serve the users effectively

### The Participant Manual

The manual is organized into 7 chapters:

1. Introduction – Preparing to Develop a Promotional Plan
2. Doing Library User Research
3. Library Strategic Plan
4. Promoting the Library – Messages, AIDA and Platforms
5. Promoting the Library – Vehicles and Campaign Design
6. Promoting the Library – Finalize and Implement the Promotional Campaign
7. Providing Products and Services

In each chapter, the following are provided:

- Introductory information including models, definitions and steps
- Tools to use to collect and display research and make decisions

### Facilitator Guide

To assist the librarians who want to use this process in their own libraries or have agreed to introduce this program to other librarians (who want to use this approach in their own library), a separate booklet contains several facilitation outlines (including a train-the-trainer outline), a variety of resources, teaching instructions and tips. Presentation slides are included and

identified for the train-the-trainer sessions as well as other sessions, allowing slides, less important to that particular use, to be hidden.

### **ALA @ your library Materials**

Be sure to check out the ALA's Campaign for America's Libraries Web site at [www.ala.org/@yourlibrary](http://www.ala.org/@yourlibrary) under Academic and Research Library Campaign to locate a wide range of support materials. Available to you are:

- An @your library® Toolkit for Academic and Research Libraries developed by ALA and ACRL.
- Online tools and resources including downloadable graphics, sample publicity materials, case histories, librarian profiles and more.

### **Suggestions for Getting the Most Out of the Workshop**

As a participant, you will want to get as much out of the Strategic Marketing workshop as possible -- for your own personal skill development and for your library's future success. As an individual, be sure to ask questions as they occur to you, jot notes on the Notes pages in the Appendix, engage in the exercises and listen to the great ideas of other members of your team. To contribute positively to your team's success offer your ideas freely, stay loose so you can be creative, help others learn the process, and, again, listen to the great ideas of others.

### **Suggestions for Conducting Workshops in Your Library**

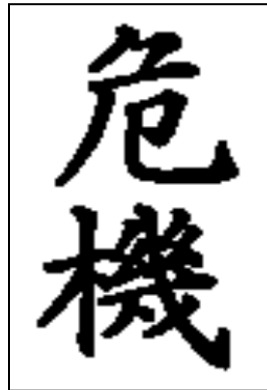
The writer's goal when creating this manual was to boil down the many steps of the marketing, strategic planning and influence process into a logical, easy to use approach that library leaders would be able to employ in their libraries, with little outside assistance. Of course, each librarian will have to adapt the materials to best fit their own library's situation. To help leaders lead this process with comfort and ease, the following suggestions are offered:

- Prepare yourself: read the 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](http://www.3M.com/library).
  - Try out all the meeting and workshop steps before you use them with a group.
  - Practice with the facilitator slides in preparation of your presentation.
- Assess your library's readiness so you can choose the best approach:
  - If the steps and content are entirely "new" to your library, consider working first with a small team to develop a strong central core of people who understand and can communicate the process to others.
  - If your library has already taken many of these steps, involve as many people as possible and indicate clearly how the work already done fits in with this process.
- Lessons learned from previous workshops suggest:
  - Keep to the set workshop timelines because time boundaries tend to help people focus. You can always renegotiate additional time or meetings if needed.
  - Allow people to "sleep on" their ideas before they finalize a plan.
  - Be willing to do things differently than they have been done before: i.e., doing "real" user research, defining your library's central focus, or being intentional about influence and persuasion strategies.

- Have some fun with the process and the people. This is an engaging and interesting process. People like to talk about their “business”!

## Chapter 1

# Introduction – Preparing to Develop a Promotional Campaign



The Chinese symbol for the word “crisis” is a combination to two other symbols: “opportunity” and “danger”. Academic and research libraries, like every other institution and business, are increasingly aware of the opportunity and danger that exist in our changing world. Following this new state of awareness must be some concerted effort to deal with the changes. The charge for leaders of all institutions is to step into the “danger”, define the “opportunity” and lead their organizations to a new level of success. This chapter of the manual lists the challenges and opportunities, along with the description of an overall process and a tool that can be used to introduce the overall process.

## The Challenges Facing Academic Libraries

### The Issues

In the Fall of 2001, the Focus on the Future Task Force was formed to “ help the association meet the challenge of keeping our focus on the big questions –those questions which have the potential to help academic librarians shape and change their services to further improve learning and research.” The task force collected data concerning the most important issues facing academic libraries through a variety of means from over 300 librarians. The following issues were reported by W. Lee Hisle:

1. Recruitment, education, and retention of librarians – to find and retain quality leadership for libraries.
2. Role of library in academic enterprise—to maintain the importance and relevance of the academic library as the place of intellectual stimulation and a center of activity on campus.
3. Impact of information technology on library services—to maintain the balance between traditional library materials and services and those of instructional and information technology departments.

4. Creation, control, and preservation of digital resources –to determine what should be digitalized, to find resources to do the work, and develop appropriate bibliographic control mechanisms.
5. Chaos in scholarly communication—to advocate fair scholarly communication models for copyright or fair use questions in a digital context.
6. Support new users-- to provide appropriate services and resources to new users whether students in distance education or other new learning methods.
7. Higher education funding—to respond creatively to potential reductions in funding, increasing costs of resources and the current low pay of librarians.

### **The Concerns**

Overall, academic and research librarians are concerned that:

- Libraries will become marginalized, losing their central role in academic institutions.
- The increasing power of competition may overcome libraries before they can figure out how to deal with it.

### **Recommendations**

Recommendations for action for librarians from an ACRL chat session include:

- Become better leaders, do less following
- Reposition the library in response to the needs of the users
- Adopt attitudes and responses to the changes
- Become increasingly comfortable with change
- Actively market the library with the administrators who make the funding decisions

## **The Opportunity for Academic and Research Libraries**

### **Real Needs that Libraries Can Meet**

There is little doubt that academic and research libraries will continue to exist. The question is, though, in what form and serving what functions? How will academic and research libraries evolve to address the new realities? A few more questions are:

- Students use the Internet for information gathering and research, but are they using it fully, honestly and intelligently?
- Faculty members provide classroom materials packets to students, but are they comfortable building class Websites and information links and using course management software?
- Researchers continue to utilize personal assistance in libraries, but will libraries purposely design their collections and staff to meet their needs?
- Administrations depend on the stature of their libraries to enhance their standing, but will they be willing to fund the digitization of their libraries, build information networks and preserve their collections?

### **A Good Defense is a Good Offense**

ACRL, acting in its leadership role, received several suggestions for actions it can take to help libraries and librarians take a proactive position through effective marketing:

- Develop tools and an understanding about the changing nature of information management
- Provide leadership in building relationships with accrediting bodies
- Collaborate with faculty and administrators to influence those who make decisions about libraries and fund them.
- Teach basic marketing to librarians

### **Why Market Your Library?**

Marketing is the process that successful businesses and organizations use to ensure continuing success. Following a complete marketing process may result in:

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

### **Help from ALA and 3M**

To assist librarians, the American Library Association (ALA), with the assistance/support of 3M, Inc., has provided materials and workshops in the past several years. See [www.3M.com/library](http://www.3M.com/library) for these resources:

- How to map the future of your library
- How to sell your library of the future
- How to lead the design and development of your library of the future
- How to market your library of the future

Additional help is provided by ALA. Visit the Campaign for America's Libraries website at [www.ala.org/@yourlibrary](http://www.ala.org/@yourlibrary) and click on Academic and Research Library Campaign for support materials specifically designed to help academic and research libraries market themselves.

These include:

- An @ your library® Toolkit for Academic and Research Libraries
- Online tools and resources including downloadable graphics, sample publicity materials, case histories, librarian profiles and more.

### **This Program**

ACRL and 3M offer this version of the 'how to market your library' designed for academic and research libraries. This program includes:

- A participant manual that guides librarians through the process of developing a marketing plan and creating a promotional campaign. Also included are workshop instructions in the manual that show leaders how to involve others.
- A facilitator guide that includes a set of presentation slides that leaders can use to conduct meetings/workshops, optional meeting/workshop outlines and teaching tips and tools.



## Leading the Marketing Planning Process

### The Essential Role of Leaders

Today's challenges require that librarians in leadership roles transform their libraries to meet the evolving needs of their users and to better serve their institutions. Leaders of any organization, including libraries, are essentially 'catalysts of change.' That means that library leaders initiate the whole process that includes:

- Understanding the evolving needs of their users and institutions
- Conveying the importance and process of marketing to all the staff
- Defining the 'new' form and function of the library
- Implementing a campaign to promote the 'new' library for increased usage and to gain funding
- Implementing necessary changes in library operations and staffing

### Using Proven Steps and Tools

There are proven steps and tools, many of which are familiar, that are available to help librarians lead the whole process. The difficult part is doing the unfamiliar things. The marketing leadership activities require:

- Choosing the marketing tools and a process to follow and, then, implementing them with discipline
- Doing research to become personally convinced about the future of the library and being able to tell the story to others
- Linking the marketing process with the current strategic planning and budgeting processes
- Finding what energizes you personally so you drive the process with enthusiasm
- Becoming a teacher, influencer, and advocate of the future
- Involving others in effective ways to design, promote and implement the "new" library

### Choosing the Best Approach for Your Library

Librarians have very busy schedules and must choose the best way to leverage their leadership time as well as ensure that the marketing process really works. Keep several change management rules in mind when choosing the approach:

- **The scope of the marketing effort.** Only initiate a full marketing process if you really mean to follow through. Unsuccessful efforts, even if well intended, make the next efforts more difficult. Decide if the full marketing planning process is needed or whether to focus primarily on creating the promotional campaign. Scale can be limited further by selecting only one customer to focus on at a time.
- **The size of the library.**
  - In small libraries, the leader must take a larger role in the development and implementation of the marketing plan. Realistically, the campaign should be designed in doable chunks, perhaps focusing on one customer at a time. Particular care should be given in communicating the steps and progress to inform the staff. In this situation, involving the campus public relations office or others

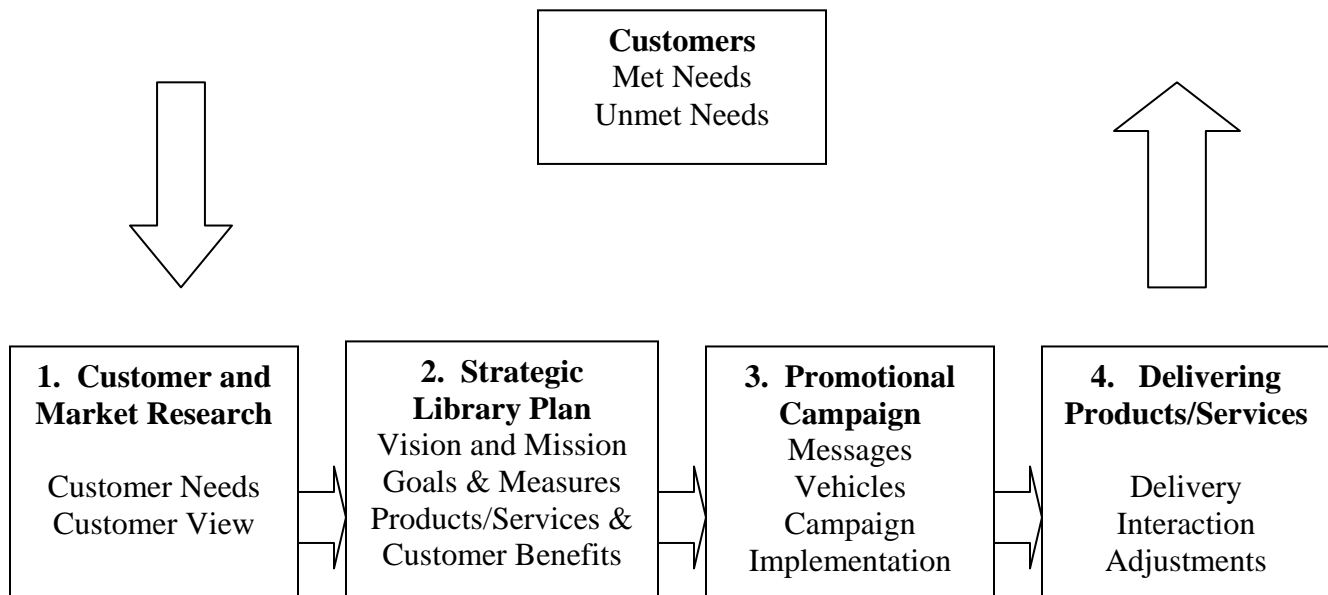
might be helpful.

- The larger the staff, the more people should be involved in the process. The leader still must set the stage and lead key steps of the process to establish the tone and importance of the effort. But a smaller leadership team could easily lead the full process. By collecting the ideas from the larger staff, the marketing plan and promotional campaign will be better and increase the understanding and commitment of all library staff.
- **The degree of change.** The greater the change in customer demands and other external conditions, the greater the involvement of staff and others is required. If there is a great deal of change, a full marketing planning process is probably needed (which can serve as a mechanism for bringing about the desired shifts in the library). If there is less change, focusing only on the promotional campaign may be appropriate.
- **The level of experience.** With less staff experience with the total marketing process, the library administrator/director or leadership team must play a larger role. The leader and/or leadership team must be visible and a constant source of information and energy. A small team (including leaders and staff) can learn to conduct the process together, educating and engaging the rest of staff in the process.

## The Marketing Planning Process

### The Marketing Planning Process

The marketing planning steps are illustrated and defined below. This manual provides steps, tools and meeting/workshop agendas to assist you in designing and implementing your library's overall marketing plan and promotional campaign.



### The Focus: The Customers and Their Needs

The fundamental idea of marketing is *to focus on how to better satisfy consumers*. Simply stated, marketing requires that you look at your library from your customer's point of view. Customers include both the current users of your library, as well as those people who could but don't use your library. Marketing requires that you find ways to not only fulfill your customers' current expectations about your library's services, but also to prepare to offer products and services for future needs for which customers, themselves, may be only vaguely aware!

### Four Steps

Marketing includes four key activities that enfold the customers. "Enfolding" the customer means that some sort of marketing activity interacts with the customers from the "front end" through the "back end" of the customer interaction process. The definitions of the four primary activities (applied to a library setting) are:

1. **Customer and Market Research:** Researching potential customers and markets; grouping them into logical segments; identifying their current and future wants and needs; choosing targets and examining the perceptions customers have of your library; and the benefits your library is providing.

2. **Strategic Library Plan:** Selecting the customers and markets to serve; choosing the products and services to provide; defining the “distribution” processes to use; setting goals, objectives and measures about participation and price; defining the values (including customer interaction values) that your library holds true; and arranging the operations, resources and staff to achieve the plan.
3. **Promotional Campaign:** Communicating effectively about what your library has to offer the customers so they will choose to use your products and services; selecting the overall promotion methods; understanding customer “buying” habits; choosing the specific communication vehicles; creating a plan that schedules all the promotional activities over the years of the promotional campaign; and implementing that plan with discipline.
4. **Delivery:** Delivering on the promises made in the promotions; making major and minor changes in the ways the library operates; addressing complaints and glitches immediately; making adjustments as needed; and learning even more about the customers and their evolving wants and needs.

Excellent leadership and marketing results when:

- 1) You understand your customers, customer groups and their needs now and into the future,
- 2) You have created a detailed library mission statement for your library,
- 3) You promote your library’s offerings so your customers use them
- 4) You serve your customers as you have promised in your promotions.

### **Leadership Tool and Tip: Status Inventory**

One quick way to share the marketing steps and to initiate a focused discussion on the status of your library is to personally fill out the inventory on the next page and to ask others in your library to do the same. Average the scores and show the range of scores for each box. The Status Inventory Options Grid will help you and your fellow staff members consider which actions to take first. A lively discussion will help you answer the questions, “Are we ready to create our promotional campaign?” and “What two or three steps should we take immediately?”

## Status Inventory

### Progress Toward Marketing Our Library

Rate progress in your library on a 1-7 scale for each step below, placing the rating number in the most appropriate column. Use "NA" for items that are not relevant to your situation.

Marketing Step	Not/Just Begun 1-2	In Process 3-5	Com- pleted 6-7
<b>Customer and Market Research</b>			
1. Research on key customers' current and future needs.			
2. Clarity about the benefits customers receive from our products and services.			
3. Description of architecture of the relevant elements of the information industry and the effects on our library.			
4. Conclusions reached about the impact of technological innovations on our library.			
5. Documentation of the recruitment and training needs of staff.			
6. Forecast of the likely economic trends and budget decisions.			
7. Research on the perceptions customers have about the library.			
<b>Strategic Library Plan</b>			
8. Decisions reached about the customers and markets to serve.			
9. Decisions made about the products and services to provide.			
10. Description of the vision of the future.			
11. Statement of the mission of the library.			
12. Statement of the values the library will uphold.			
13. Statement of specific goals and key measures.			
14. Adjustments made to the operations, resources and staffing structure to fully implement the plan.			
<b>Promotion of the Library</b>			
15. Identified messages and theme platforms.			
16. Identified vehicles to communicate through.			
17. Design of multi-year, customer-centered campaign.			
18. Identification of the funding sources for the campaign.			
19. Selection of the most realistic plan to implement.			
20. Identification of supporters for the campaign: funding agents and influential leaders.			
21. Implementation plan for the promotional campaign.			
22. Secured funding.			
<b>Service</b>			
23. Delivery of the products and services as promised.			
24. Check-ins with customers for their responses.			
25. Descriptions of problems identified by complaints.			
26. Adjustments made to fix problems.			

**Analysis Question:** What 2-3 steps must we take immediately?

## Status Inventory Action Options

Place the averages and ranges for each box on the Action Options grid below. Based on the results of the inventory, the following options grid will help you determine the action steps that are most appropriate for your situation. The arrows suggest a path for action. Locate the first box that has an average below 3.0 and assume that your first actions must begin there. If all scores are above 3.0, select the lowest scoring box and begin there.

### Status Inventory Analysis and Action Path

Inventory Section	Rating Results		
	Not Begun (1-2)	In Process (3-5)	Completed (6-7)
<b>Customer and Market Research</b>	Identify 3 key customers and 2-3 ways to learn about their current and future needs.	Continue research efforts. Share information and conclusions with all staff and others.	Review from time-to-time to check stability of external conditions.
<b>Strategic Library Plan</b>	Connect customer research findings to the priorities and plans for your library. Set goals for increased use by customer groups, list products and services to offer to meet current and future needs.	Continue process to identify other priorities in the library. Discuss how efforts in all library areas will assist meeting customer needs and goals.	Review to guide resource allocation to the highest priorities.
<b>Promotional Campaign</b>	Outline the steps to follow, select the involvement approach and set a time schedule for drafting the campaign.	Test the draft campaign against realities, prepare the influencers and catalysts, prepare to tell the story.	Monitor the implementation of the campaign and collect information about the effects – are the goals met? Adjust as needed.
<b>Providing Products and Services</b>	Determine library areas to adjust first. Create tools to help staff learn from customers if promises are being kept.	Monitor customer and staff comments, discuss progress toward goals. Celebrate success. Make adjustments.	Stay alert for changing customer needs.

## Chapter 2

# Marketing Planning Process: Doing Library User Research

The first step in the overall marketing planning process is doing customer and market research. For the purposes of this manual, the focus is on the “users” of the academic or research libraries who will be called “the customers”. Steps, definitions of terms, customer information collection tools and examples are provided in this chapter.

### First, Know Who The Customers Are

The customer is the starting and ending point for any business, institution, or agency. Once a customer need is identified, then products and services can be designed to meet the need. As products and services are used by customers, customer reactions should guide adjustments to current products and services and the development of new ones. Understanding thoroughly the customer’s goals and challenges is essential to success. The first step is to identify which customers your organization desires or is chartered to serve. It is the customers, then, who are the subject of the strategic library plan and who are the audience for the promotional campaign.

**Users and Potential Users:** The primary customer is always the user of your products and services or the potential users. For the community college, college, university, research and special library settings, the following is the general list of customers:

- **Undergraduate students:** use the library and library resources primarily to locate course materials, to complete undergraduate course assignments, to locate information about campus activities, and for personal entertainment.
- **Graduate students:** use the library and library resources primarily to locate course materials, complete graduate course assignments, for further research for theses or dissertation topics and to locate rare and unique materials. They especially appreciate knowledgeable reference and research assistance.
- **Faculty:** use the library and library resources primarily to locate information for course development or for use in courses by students and for their own research.
- **Researchers:** use the library and library resources for the collections, the reference services, and rare or unique materials.
- **Staff and administration:** use the library collections and research services to assist them in institutional tasks.
- **Community members:** use the library, especially in smaller communities where their nearest public library is small or not convenient, to research business and personal topics, use the collections and meet with others.

- **High school students:** use the library, again in smaller communities, in place of or in addition to school and public libraries for class work.
- **Business and government agencies:** use the library in all sizes of communities, for their collections, their research services and facilities to assist them in accomplishing their institutional tasks.
- **Others:** including community group, interest groups, professional groups and others may also use the library for the collections, research services and facilities.

## **Second, Know Who Has Great Influence on the Future Direction of Your Library.**

**Influencers:** The importance of the influencers cannot be overstated. These are the people or organizations that make decisions or influence the decisions that provide the funding for capital improvements and day-to-day operations. Their perceptions of the value that academic or research libraries offer will vary as to the type of library (community college, college, university, research or special library and whether they are private or public institutions.) The influencers' perceptions will determine whether the vision of any academic or research library can be achieved. The most successful library leaders communicate purposefully and build strong working relationships with influencers.

- **Academic Administrators:** University and college administrators are a key audience for the academic library campaigns. The campaign must proactively reach out to this audience group to ensure that the central role of the academic or research library to the success of the institution is clear. When critical decisions about funding and/or programs are made, there should be no doubt about the value of the specific library or libraries in general.
- **Faculty/Faculty Committees/Faculty Government:** Like the academic administrators, the campaign must proactively reach out to this audience to ensure that the central role of the library in the institution is clear. When critical decisions about funding and/or programs are made, there should be no doubt about the value of the specific library or libraries in general.
- **Boards:** Boards of trustees or regents, and other similar decision makers are also critical audiences to ensure that the role of the academic library is top-of-mind when budget decisions are made that affect academic institutions.
- **State and Federal Elected Officials:** Elected officials at the state and local levels (e.g., mayors, state legislators, city council members, etc.), Federal legislators, and key members of the Executive branch are all critical audiences for the campaign as they are the key decision makers during funding and advocacy debates.



- **Alumni:** Former students and faculty of educational institutions also have tremendous collective influence with elected officials. Indeed, as the baby boom population ages, alumni will comprise a larger and larger proportion of the voting public and will become the holders and donors of most of the wealth.
- **Accrediting Agencies:** The formal organizations that certify that the library of an institution meets accepted standards.
- **Campus Marketing Office:** The institutional public relations department that provides assistance, funding and sets policy and restrictions.
- **Research and Other Offices:** The institutional research center and other offices that provide assistance, funding, and set policy and restrictions.

**Catalysts:** The opinions, preferences and actions of catalysts not only ensure the maintenance of established organizations but also provide the start-up funding for new approaches to business or providing service. They are a key audience in maintaining the current functions of academic and research libraries and funding the transition to new offerings and services. Successful library leaders locate such important opinion leaders, communicate purposefully with them and build strong working relationships.

- **Allies/Partners:** Associations (such as CIC, AAHE, Educause), and other kinds of educational organizations as well as businesses are willing to assist institutions and academic and research libraries that generally support their own mandate. But with the competition from the Internet, allies and partners may need to be reminded about the importance of the academic and research library.
- **Donors:** Individual donors or foundations are critical targets as they represent the front lines of support for libraries. This campaign must ensure that this group understands the role and value of libraries and that they are engaged in the active promotion of libraries.
- **Grant Funding Organizations:** Established business and non-profit foundations and organizations play a key role in supporting the current operations and new efforts of academic and research libraries.
- **Professional Associations:** ALA, ACRL, and other library or educational professional organizations influence the direction and provide specific grants or other resources to assist academic and research libraries.
- **Taxpayers:** Taxpayers influence the priority and budget dollars available for academic and research libraries through their selection of representatives and votes on referendums and bond issues.
- **Media:** In addition to being a vehicle to reach target audiences, the media are also a key audience. Journalists who post positive feature stories about libraries, library services and

librarians can broadly influence other constituents.

- **Friends of the Library:** Volunteers who assist with library activities ranging from raising money to working in the library. This group traditionally serves as a very powerful partner.
- **Publishers:** With the changes caused by the Internet in the publishing world, publishers of books, journals and other materials are seeking new kinds of relationships that can limit the access libraries have to their materials.

### **Third, Find Out What Your Customers Want and Need**

There are six arenas of conventional customer knowledge to be considered. Each of the following arenas should be researched in detail so that the library leadership is prepared to make the key decisions about changes in the direction of the library or its products and services.

#### **Customer Wants and Needs**

Each of your primary customers (students, faculty, researchers, community members, etc.) has a set of wants and needs in relationship to the academic library.

- **Wants** are those things the customers would like the library to provide for comfort, extension of services or interest.
- **Needs** are the basic things the library must provide to assist the customer adequately to accomplish their information gathering goals such as having the proper collection, an easy access system, personal support, and amenable facilities and equipment.

Needs can be as specific as ‘learning to use the online catalogue’ and as general as ‘improving learning capability.’ Current and future needs must be identified. Sometimes, the customer is not aware of their emerging future needs. In this case, research must identify needs that are implied by the conditions and requirements of the future. (Schewe and Hiam, 1998, p. 17-18.)

- **Product** -- The focal point of any business or institution is the products or services it provides its customers. Not only does this include tangible goods and services, but also less tangible things such as planning processes, research consultation, or software or equipment coaching.
- **Price** -- Price is what the customer must give up (pay) to receive your product. Although money is the usual exchange in a business setting, other factors like time and convenience need to be considered. Price is influenced by product availability, competition and uniqueness. **For libraries, “price” refers to the time and energy customers must expend to use the library.** Exploring this issue allows the library to make adjustments in the products and services it offers (and how they are provided) if the “price” is perceived too high for the customers.

- **Place** -- Place, or distribution, makes sure the product is available when and where it is wanted. Products can be found in public buildings or storage locations, in central and branch centers, in catalogs, in accessible data bases, in kiosks, mobile libraries, on the Internet. Distribution includes inventory decisions, how to transport products between locations and to the customer, and where to locate warehouses. A thorough mapping of the distribution plan is required.
- **Promotion** -- Promotion is the term to describe “sales” communication – the messages and vehicles used to let the customer know what products and services are available. It includes advertising, direct marketing, personal selling, sales promotions, and public relations. Its purpose is to increase customer awareness both of the product and of knowledge about the product’s desirable features and benefits.
- **Experience** -- Experience refers to the treatment that your customers receive when they interact with library staff, facilities, equipment and resources. If the setting is convenient, easy to use, and customers are treated with respect by the staff, then the customers are more likely to use the library frequently. The converse is true also.

## Customer Needs

The following chart illustrates the questions library leaders and their teams should be able to answer about their customers' needs.

	Current Needs	Future Needs
<b>Known Needs</b>	<p>How well are the current products and services meeting product, price, place and experience needs?</p> <p>Do our customers know about these products and services?</p>	<p>How well do our plans for new products and services match the future needs for product, price, place, and experience elements?</p> <p>Do our customers know we plan to offer these new products and services?</p>
<b>Implied Needs</b>	<p>What current needs are not being met at this moment?</p> <p>What complaints do we get over and over?</p> <p>Who is not using the library as much as we'd like them to? Why?</p>	<p>What are the environmental shifts that are placing new expectations and requirements on our customers?</p> <p>What new information needs will they have?</p>

## Ways to Learn About Your Customers

There are many formal and informal ways to learn about the needs (actual or perceived) of your customers. The following is a list of options.

Formal	Informal
<p>National surveys on quality of libraries</p> <p>Yearly surveys of each customer group</p> <p>National or regional surveys</p> <p>Academic department surveys</p> <p>Focus groups of selected customer groups</p> <p>Quick satisfaction questionnaires</p> <p>Observation of interactions</p> <p>Library-use analysis</p>	<p>Short informal interviews</p> <p>Spot interviews</p> <p>Chat room discussions</p> <p>Suggestion drop boxes or display walls</p> <p>Planned department discussions</p> <p>Surveys as students take particular classes</p> <p>Use the library yourself</p> <p>Observations</p>

### Determining Customer Wants and Needs

Three tools are provided on the next several pages to assist you and your staff in researching your customers wants and needs.

- 1) Examples of academic and research library customer needs
- 2) The Customer Needs Worksheet – one example and a blank form.
- 3) Selecting the Customer(s) to Address First

## Examples of Customer Needs

The following is a general list of needs for the main customers of academic and research libraries.

<b>Undergraduate Students</b>	<b>Researchers</b>
<ul style="list-style-type: none"> <li>Course primary materials</li> <li>Course reading assignments</li> <li>Course reference materials</li> <li>Computer assistance</li> <li>Internet assistance</li> <li>Social interaction space</li> <li>Meeting rooms</li> <li>Food and beverages</li> <li>Self-serve copy services</li> <li>Whole document copy services</li> <li>Computers, printers and scanners</li> <li>Data bases and software</li> <li>Video conference spaces</li> <li>Audio-visual equipment</li> <li>Meeting equipment</li> <li>Electronic and overhead projectors</li> <li>Basic skills assistance</li> <li>Reference and research assistance</li> <li>Study rooms</li> <li>Leisure reading materials</li> <li>Library collections to promote self-discovery</li> </ul>	<ul style="list-style-type: none"> <li>Ample collection</li> <li>Dedicated reference assistance</li> <li>Access to materials in other libraries, globally</li> <li>Access to contributing researchers and organizations</li> <li>Computers, printers</li> <li>Computer assistance</li> <li>Data bases and software</li> <li>Internet assistance</li> <li>Website assistance</li> <li>Social interaction space</li> <li>Meeting spaces</li> <li>Audio-visual, meeting, overhead and electronic projector equipment</li> <li>Original documents/primary materials</li> <li>Rare materials</li> <li>Other special collections</li> </ul>
<b>Graduate Students</b>	<b>Faculty</b>
<ul style="list-style-type: none"> <li>Course primary materials</li> <li>Course reading assignments</li> <li>Course reference materials</li> <li>Additional course reference guides</li> <li>Computer assistance</li> <li>Internet assistance</li> <li>Social interaction space</li> <li>Meeting rooms</li> <li>Food and beverages</li> <li>Self-serve copy services</li> <li>Whole document copy services</li> <li>Computers and printers</li> <li>Databases and software</li> <li>Video conference spaces</li> <li>Audio-visual equipment</li> <li>Meeting equipment</li> <li>Electronic and overhead projectors</li> <li>Reference and research assistance</li> <li>Document delivery services</li> <li>Electronic journals</li> <li>Knowledgeable reference/research assistance</li> <li>Original documents/primary materials</li> <li>Rare materials</li> <li>Other special collections</li> </ul>	<ul style="list-style-type: none"> <li>Selection of teaching texts</li> <li>References for texts</li> <li>Help in codifying course reading materials and reference materials</li> <li>Departmental reference lists</li> <li>Computer assistance</li> <li>Internet assistance</li> <li>Website assistance</li> <li>Social interaction space</li> <li>Meeting rooms</li> <li>Food and beverages</li> <li>Copy services: self serve, whole document</li> <li>Computers and printers</li> <li>Databases and software</li> <li>Video conference spaces</li> <li>Audio-visual equipment</li> <li>Meeting equipment</li> <li>Electronic and overhead projectors</li> <li>Reserve materials for students to access (traditional and "e" materials)</li> <li>Journals and subject related collections</li> <li>Control/house reserve materials</li> <li>Workshops on new resources</li> <li>Research assignments design help</li> <li>Document delivery</li> <li>Original document/primary materials</li> <li>Rare materials</li> <li>Other special collections</li> </ul>

**Examples of Customer Needs, cont.**

<p style="text-align: center;"><b>Staff and Administration</b></p> <p>Function related resources Leisure reading Research assistance Databases and software Journals and subject related collections Selected acquisitions Document delivery</p>	<p style="text-align: center;"><b>Community Members</b></p> <p>Leisure reading collections Subject area collections Journals and magazines Public information access Research assistance Computer, printers Computer assistance Databases and software Internet assistance Website assistance Social interaction space Meeting spaces and equipment Copy services</p>
<p style="text-align: center;"><b>High School Students</b></p> <p>School topic collections Leisure reading Basic skills assistance Reference assistance Research assistance Computer assistance Databases and software Internet assistance Copy services Study rooms</p>	<p style="text-align: center;"><b>Business and Government</b></p> <p>Subject area collections Journals and magazines Databases and software Research assistance Reference assistance Dissemination of public information Internet assistance Document services Copy services Meeting spaces and equipment Website assistance</p>
<p style="text-align: center;"><b>Others: Interest Groups</b></p> <p>Collections Research assistance Library facilities</p>	<p style="text-align: center;"><b>Others</b></p>

## 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

## Customer Needs Worksheet

### Analysis Questions:

1. Was your list of needs correct and complete? How do we know that? What else should be researched?
2. Place a star (\*) next to the two customers you must address first. Who are they? Why must you focus promotional materials to them first? What percentage of the library's resources should be devoted to these customer groups? Are there some new customers to consider?
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?
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?
5. Indicate with a check (√) any critical, future need (known or implied) that you believe your 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 ?



## Selecting the Customer(s) to Address First

Creating a comprehensive promotional campaign that addresses all customers of the library takes time and human resources and can be overwhelming the first time a staff engages in the process. To make progress toward creating a promotional campaign and to introduce the process to a library leadership team, it often makes sense to select one or two primary customers to address first.

When deciding upon the customers to address first in the campaign, the following consideration grid is helpful. List the customers under consideration for being addressed first in the left column. For each customer, supply the number of people in the customer group and estimate the relative proportion of use of each customer group. Rate each customer group on how central they are to the mission of the library, their influence in funding decisions and the quality of the current level of service they are receiving.

Generally, select the customer group(s) to address first who are:

- Large
- Central to your mission
- Under-using the library
- Have influence on funding
- Receive less than adequate service

But, in certain situations, giving the categories varying weights might be helpful to focus on the key challenges facing your library. If large funding cuts are looming, make sure your campaign addresses customer groups (and influencers and catalysts) who influence funding decisions. If the role of your library is in question, focus your campaign on the largest customer groups and raise usage rates. If you have shifted your mission or the products and services you offer, focus more on the customer groups who are central to that mission.

Customer	Size of Group	Central to Mission H – M - L	Frequency of Use		Funding Influence H – M - L	Quality/Current Service H – M - L
			Estimated	Potential		

## Chapter 3

# Marketing Planning Process: Library Strategic Plan

The elements of a strategic plan are similar for any type of organization. A strategic plan builds on market and customer research and identifies the actions an organization must take to further meet its customers' needs and the goals of the organization. Organizations, especially those facing dramatic shifts in their environment, benefit from developing strategic plans, involving organization members in the process, and using the strategic plan as its guiding document. In this chapter, the elements of strategic plans are defined and particular focus is given to the selection of the products and services to be offered.

## Key Elements of a Strategic Plan

Once you identify current and future customers and understand their current and future wants and needs, it is time to make choices about the direction (or re-direction) of your library. This "library direction" includes the strategic intent, vision, mission and value statements of your library.

- The **strategic intent** statement describes the scope, the attitude and the overall nature and personality of your library. Broad positioning messages are crafted carefully to convey the strategic intent.
- The **vision** statement lists very specific decisions you have made about the customers to serve, the products and services to offer, the specific goals and objectives to meet (with measures), and the basic delivery system to implement.
- The **mission** statement describes the purpose of the leadership team and the library as a whole.
- The **values** statement lists the fundamental principles that guide interactions among members of the organization and with its customers and partners.

The intention is that the "**library direction**" will be achieved at some future date, usually 3, 5 or even 10 years in the future. Naturally, everything in the library's direction statement has not currently been achieved, but all the elements of the 'direction' are desired. Because some of the elements don't currently exist, a plan has to be created to transform the library from the way it exists today to its desired state in the future -- filling the **gap** between 'here' and 'there'.

The plans created to fill the gaps are called **strategic plans**. They usually include planned activities in most of the areas of the library's basic functioning, such as development of new products and/or services, facilities, funding, development, staff development, acquisition, circulation, preservation, administration and all the activities of marketing --additional knowledge needed, further plan development, promotions and service and change assessment.

## Library Strategic Plan Goals and Objectives

Specific goals and objectives are identified for each of the action areas of the library’s strategic plan and measures are carefully selected.

Examples of goals and objectives for each of the action areas include:

- Facilities: Expand, renovate, or modify the facilities.
- Development/Funding: Increase funding, expand the funding sources, improve relationships with and satisfaction of funding agencies, start capital campaigns.
- Staff development: Help staff develop new skills or work in different ways with customers, retain, promote, expand the experience of staff.
- Acquisition: Increase acquisition rates or shift the acquisition dollars to new arenas.
- Circulation: Improve circulation processes, speed, ease, costs, accessibility, etc.
- Preservation: Reduce the need for restoration of materials, find new/better preservation methods, etc.
- Administration: Simplify administrative processes, speed up approvals, etc.
- \*Marketing: Increase the number and groups of customers, increase customer satisfaction, increase or shift the number of products and services they use, increase or shift the kinds of activities they participate in, etc.
- \*\*Product/Service Offerings: Add, delete, increase usage of products/services, etc.
- Legal and Regulatory: responses to laws and requirements such as the disability act.

**Measures**

Once the goals and objectives have been selected for your library, clear measures should be identified to create the parameters and expectations for the library and guide the promotional plan. These measures should include endpoints as well as specific interim measures that would apply to various promotional options(\*) you are choosing. Leaders and staff track progress by reviewing current measures versus desired goals. A few examples of measures include:

<ul style="list-style-type: none"> <li>• Awareness increase by %</li> <li>• Attitude toward the products and services improved by %</li> <li>• Purchase/participation intent increased by %</li> <li>• Increase in number of inquiries about products and services by #</li> <li>• Support of promotional campaign from library staff, volunteers, board and funding agencies by %, \$, goal</li> <li>• Circulation increase by #</li> <li>• Desired increase in the number of research inquiries by #</li> <li>• Increased funding by \$ or %</li> </ul>	<ul style="list-style-type: none"> <li>• Organizations linked/partnership by #</li> <li>• Speed of processes by time/\$ saved</li> <li>• Speed for research services by time and customer satisfaction</li> <li>• Facility use by organizations by #, importance, value to community</li> <li>• Facility use by new priorities/programs, by different customer groups, etc.</li> <li>• Use of equipment by % up, % down</li> <li>• Maintenance of equipment by \$ saved, kinds of repairs, etc.</li> <li>• Theft or damage to property by # of times, \$ to repair, by site/program</li> </ul>
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Specific implementation plans are developed for each of the goal areas in the strategic plan and each plan is designed to achieve its identified measures. Assignments are made and timelines developed to focus the energy of the staff and resources of the library on achieving the specific plans and, therefore, the overall desired direction of the library.

### **One Action Area: Product and Service Offerings**

During the direction setting and gap identification process, the products and services the library wants to offer are selected and stated. The list might not change from the past or there might be several new kinds of products/services included. These decisions are based on the customers' needs research and conclusions that have been drawn. It is the products and services that are the communication focus in the promotional campaign.

#### **Products and Services Provide Benefits to the Customer**

Each product or service is offered because it meets a need of a customer (directly or indirectly) and, therefore, provides some benefit to the customer. The following are examples of academic and research library product/services and the benefits they provide.

<b>Products and Services</b>	<b>Benefits to Customer</b>
------------------------------	-----------------------------

<p><b><u>Products</u></b>          Book and journal collections          Manuscript collections          Resource lists          Data bases          Software          Research guides          Skill development guides          Computer instruction guides          Special topic research guides          Writing and research guides          Faculty online materials guides          Manuscripts and or special collections          Online learning support</p> <p><b><u>Services</u></b>          Research          Research assistance          Reference assistance          Computer instruction          Software instruction          Facilities set up          Meeting management assistance          Copy services          Equipment maintenance          Course materials management          Online materials distribution          Document delivery          Open URL          Hardware use          Way finding</p>	<p>Information is available          Information is available          Best resources and time saver          Best resources and time saver          Key tools are available          Help to make research faster          Help to fill in skill holes          Help to use computers more easily          Best resources and time saver          Help to meet standards          Help to do things online          Information available to help create knowledge          Easier location of online resources</p> <p>Find things for me          Help to find things I need, faster          Help to find right resources          Immediate help with computer problems          Immediate help to manage software          Have space set up well          Have meeting equipment set up well          Can make my own copies as needed          Equipment always works          Makes sure I get what I need for classes          Makes sure I get what I need for classes          Find what I need and gets it for me          I can find what I need and get help as well          I have the equipment I need          I am able to find the information I need</p>
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### **Libraries that May Be Used by All**

A key step in designing a library is to ensure that the library can be used successfully by all its customers – taking into account the variety of learning skill levels as well as accommodating customers with disabilities. The marketing plan should include methods to reach the full variety of customers and the language of the promotional materials should be phrased to explain clearly how the library meets the needs of these customers. A resource called “Marketing That May Be Seen, Heard, And Felt By All” is included in the Appendix.

### **Focusing Attention on the Key Products and Services**

In the previous chapter, the customers to address first in the promotional campaign were selected and their most important needs were identified. The following tool, Product/Services and Benefits Map will help link the products and services that are currently being offered (or will be offered) to those most important customer needs. At that point, the benefits that the customers receive from the products/services can be identified. Laying out the information according to the worksheet allows leaders and their teams to:

- Identify obvious customer needs that are not being served by library products or services -- called offering gaps.

- Determine whether the mix of products and services is complete or varied enough to meet customer needs satisfactorily.
- State specifically what benefits customers are gaining from the products and services.
- Conclude whether the benefits gained by the customers truly meet their needs.

The information on this worksheet summarizes the key elements of the strategic plan that are central to the development of the promotional campaign.

## Products/Services and Benefits Map

Complete this worksheet in preparation for the development of your promotional campaign.

<b>Customers to Address First</b>	<b>Their Most Important Needs</b>	<b>Products/Services Offered to Meet Needs</b>	<b>Benefits Customers Receive from the Products/Services</b>

## Chapter 4

# Marketing Planning Process: Promoting the Library – Messages, AIDA and Platforms

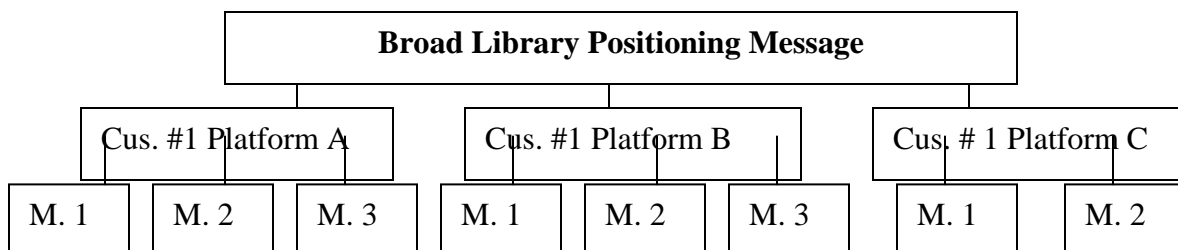
Now that there is clarity about which customers and needs you are serving through which products and services and the benefits that the customers gain, it is time to tell that story to your current and future customers. The overall message is that your library is in tune with your customers and their needs, and your customers will be happy to hear about that.

The first phase of promoting your library is accomplished through the following process.

- **Library Positioning Messages:** Identify, often during the strategic planning process (Chapter 2), the 1-3 positioning messages that convey the vision and/or mission of your library.
- **Messages:** List the messages that you want your customers to hear regarding the benefits they receive from specific products and services.
- **Awareness, Interest, Desire, Action (AIDA):** Evaluate the match between the exposure of the customers to the products/service and the language of the message.
- **Platforms:** Identify one (or more) overarching themes around which several of the messages cluster.

## Building an Aligned Campaign Storyline

Creating an aligned storyline is the goal with messages to customers about specific products/services, refined by AIDA, that are linked by platforms and sometimes united through a broad library positioning message. Sometimes the storyline is created inductively by starting with the individual messages; other times the story line is created deductively by starting with the broad positioning message about the library. Usually, one idea leads to another and pulls people through the levels in no particular order. At the end of the creative brainstorming and discussions is the time to check out the architecture of the messages and to decide if they, in combination, tell the story you want to tell.





## **First, Identify the Positioning Messages of Your Library**

### **Vision/Mission Provide Broad Positioning Messages**

During your library's strategic planning process great care was taken in visualizing the nature of the library that would best meet the goals of your institution and its stakeholders: students, faculty, researchers and others. Boiling the vision and mission statements down to 1-3 useful positioning messages, sometimes called slogans or catch phrases, can serve as powerful tools to inform stakeholders and staff about the personality, focus and aspirations of your library. Examples include Nike's "Just Do It" and the University of Oregon's Libraries, "Push Hard, Think Big."

### **Broad Positioning Messages from the American Library Association**

After careful customer research considering both customer needs and customer message preferences, the following broad messages or themes were selected by the ALA as key messages about the purpose and value of libraries to be shared in the Campaign for America's Libraries. They serve, really, as starting places for ideas when you find it necessary to promote/position your library as a key part of your institution and/or you want to be synchronized with the Campaign for America's Libraries.

#### **Libraries are changing and dynamic places.**

Librarians are techno-savvy, on the forefront of the information age. In a world that's information rich, they are information smart, and help ensure a society where everyone is information literate. You'll find the right answer @ *your library*®.

#### **Libraries are places of opportunity.**

Libraries are part of the American dream. They are a place for education and self-help. And because they offer free access to all, they bring opportunity to all.

#### **Libraries bring you the world.**

Libraries are unique. In person. Online. Where else can you have access to nearly anything on the Web or in print as well as personal service and assistance in finding it?

### **ACRL Communication Goals and Target Audiences**

An external public relations firm was hired to assist ACRL in identifying suggested messages specifically for academic and research libraries. Target audiences were identified as: Boards of Trustees, faculty and administrative leaders; students and alumni; legislators, community and business leaders; and the media. The following are the ACRL campaign goals for communications that academic and research librarians should keep in mind as they design their own promotional campaigns:

- Heighten awareness and knowledge of academic and research libraries
- Broaden understanding of academic and research libraries
- Increase support for academic and research libraries

## **Key Academic and Research Library Messages**

After conducting research with academic library stakeholders and external audiences, the following key messages were identified. These messages are consistent with the core themes of the ALA @ *your library* campaign while they distinguish the unique value of academic and research libraries. These messages can be woven into print and online communications, in-person presentations and conversations and will help achieve the identified communication goals.

### **1) College and research libraries are an essential part of the learning community.**

- If the classroom is the first stop in the undergraduate experience, the library is the next destination. It's the place where students go to access resources, conduct research and write papers.
- College and research libraries offer access to countless opportunities through their extensive collections and wide-ranging resources. At our library, [insert example].
- In an information rich world, librarians collaborate with faculty and students to provide guidance on navigating electronic and print resources.
- College and research librarians are active partners in educating students, offering new perspectives, developing curricula, and facilitating innovative research projects.

### **2) College and research libraries connect you with a world of knowledge.**

- Today's college and research libraries put information from around the world in your hands – using traditional materials and archives, as well as extensive online resources.
- The resources at academic and research libraries range from print and electronic materials to cultural and historical archives to music and art collections.
- Librarians in academic libraries are experts in information management – identifying library resources for faculty, students, and researchers to advance learning.

### **3) College and research libraries are investing in the future, while preserving the past.**

- At [insert library name] we're committed to preserving print and electronic resources to ensure their availability for research and to support advanced learning.
- Academic and research libraries are home to the latest books and journals, as well as historical archives and records. Discover the past and the future at your library.
- The [insert name] library is both a gateway to our cultural heritage and a place where scholars and others come to imagine our future.

## Second, Transform Benefits Statements into Messages

The second step is to transform benefits statements (benefits that customers receive from the products and services) into message statements. These messages summarize general benefits or point out specific benefits that the customer will gain from the products and services you offer. The message indicates how products and services meet the needs of the customer.

Examples of the transformation of benefits statements into message statements are below. Often the message language is a simple rewording of the benefit, but is stated in words that are understandable and meaningful to the customer

It is preferable to minimize the number of messages for each customer. Two to four messages are probably sufficient for a 2 to 3 year campaign. Longer campaigns can include more messages per customer. Messages can also be sequenced over the duration of the campaign to build awareness and use of a larger number of the library's products and services over time.

### Transforming Benefits Statements into Messages

Writing messages is a fairly simple task as the examples below illustrate. The difference between the benefit and the message statement is the point of view the language reflects. With benefits statements, we are describing what "they" -- the customers -- receive, in the third person. The message, however, should be stated as though you are talking directly to the customer group, i.e., "you will receive...."

Products or Services	Benefit	Message
<ul style="list-style-type: none"> <li>Undergraduate basic and supplemental course material packets</li> </ul>	<ul style="list-style-type: none"> <li>Undergraduate students have the course materials they need when they need them.</li> </ul>	<ul style="list-style-type: none"> <li>Save time, money and hassle by getting your class materials at your library.</li> </ul>
<ul style="list-style-type: none"> <li>Research and reference staff devoted to graduate students</li> </ul>	<ul style="list-style-type: none"> <li>Graduate students get timely and knowledgeable reference desk help.</li> </ul>	<ul style="list-style-type: none"> <li>Use state-of-the-art resources to create new knowledge.</li> </ul>
<ul style="list-style-type: none"> <li>Research assistance service for faculty</li> </ul>	<ul style="list-style-type: none"> <li>Faculty members will save time and get good results with the aid of specialized research staff.</li> </ul>	<ul style="list-style-type: none"> <li>We can provide you with collections to create new knowledge!</li> </ul>
<ul style="list-style-type: none"> <li>Acquisition and consortia agreements and document delivery</li> </ul>	<ul style="list-style-type: none"> <li>Researchers can acquire the information they need from a wide array of sources.</li> </ul>	<ul style="list-style-type: none"> <li>Use state-of- knowledge resources in your research.</li> </ul>
<ul style="list-style-type: none"> <li>Research help for businesses and governmental agencies</li> </ul>	<ul style="list-style-type: none"> <li>Librarians assist by finding the right resources, fast to get the information you need</li> </ul>	<ul style="list-style-type: none"> <li>Good information prepares you to make great decisions.</li> </ul>

### Getting to the Essence of the Message

A second step is often required when writing message statements. Once the first draft is written, focus on the essence of the message to find language that is as direct and meaningful as possible. Continue to speak directly to the customer, but in interesting and motivating words.

First Draft Message	Essence Message
<ul style="list-style-type: none"> <li>• Save time, money and hassle by getting your class materials at your library.</li> <li>• Use state-of-the-art resources to create new knowledge.</li> <li>• We can provide you with collections to create new knowledge!</li> <li>• Use state-of-the-art knowledge resources in your research.</li> <li>• Find the most useful and relevant information easily.</li> </ul>	<ul style="list-style-type: none"> <li>• Ready for class! Fast!</li> <li>• Tools to help you find anything!</li> <li>• The best collection anywhere on ...!</li> <li>• Global reach!</li> <li>• Good information prepares you to make great decisions.</li> </ul>

### Third, Categorize the AIDA Language of the Messages

The language selected for a message statement should reflect the amount of exposure the customer has to the products/services being described in the messages. (Schewe and Hiam, 1998, pages 381-399.)

- **Awareness (A):** If the product/service is new, then the message must be stated in a way that raises the awareness of the customer. Awareness messages are simple, they are provided frequently with eye-catching phrases, graphics or colors.
- **Interest (I):** If the product/service is not new, but is under-used, then messages should increase interest by providing more information about how the product/service fits into the life of the customers and the problems it solves.
- **Desire (D):** If the goal is to help the customer decide to buy the product or service, then the messages should provide specific information, with testimonials, about how the product/service assists.
- **Action (AC):** If the goal is to spur the customer to actually use the product/service, then special promotions, price reductions, or introductory offers are included.

Shifting language slightly can make the message easier for the customer to receive, understand and act. New products/services messages should flow through the AIDA cycle. Messages to new customers about existing products and services should also flow through the AIDA cycle. Increasing usage of current products and services will occur when customers become more interested, can see themselves using the products/services in a way that makes their life easier, and are enticed to act. After all, your library has valuable products and services that meet customers' real needs – you just need to let them know in words that will appeal to them. Note the subtle shifts in language below.

Message	A - Awareness	I - Interest	D- Desire	Ac - Action
<b>Ready for class! Fast!</b>	Something new – ready for class, fast!	Let us show you how to be ready for class, fast!	Make your life easier, be ready for class, fast!	Check the website: Ready for class, fast!
<b>Tools to help you find anything!</b>	New tools to increase your search power --	What is the best search engine for Shakespeare?	The quality of your work is related to the quality of the search.	Contest! Find these sources the fastest and win ....
<b>Global reach!</b>	Welcome to the world of global information exchange...	Would you like to be connected with the best global experts?	Save research time and frustration by ...	Ask any librarian to show you the options!
<b>Good information prepares you to make great decisions.</b>	A librarian is waiting to help you....	Business issues we can help you with...	Streamline the decision process...	Call for personalized search service planning ...

#### Fourth, Identify the Platforms Suggested by the Messages

Platforms can serve as the next level theme statement under which several messages might fit and which summarize the overall intention of the library. Platforms often suggest different graphics or logos that build visual recognition which, in turn, support the individual messages. For example:

Messages	Platforms
<p><b>For undergraduate students:</b></p> <ul style="list-style-type: none"> <li>• Save time and money by getting your class materials at the library.</li> <li>• There are plenty of copies of class reading assignments.</li> <li>• Past tests will help you focus on what's important in the course.</li> </ul> <p><b>For graduate students:</b></p> <ul style="list-style-type: none"> <li>• The references are here when you need them.</li> <li>• We have skilled research librarians to help you.</li> <li>• We can help you find the best resources.</li> <li>• We can acquire or locate resources from around the world.</li> <li>• Serving you so you can create new knowledge.</li> </ul>	<p><b>We simplify the process so you can excel!</b></p> <p><b>Partners in research!</b></p>
Messages	Platform
<b>For faculty:</b>	<b>Serving you to serve the students!</b>

<ul style="list-style-type: none"> <li>• We can get you the most pertinent resources, fast!</li> <li>• We can make locating and providing students with class materials simple and quick.</li> <li>• We can help you expand your reach through acquisitions and consortia agreements.</li> <li>• We'll partner with you to improve your students skills and ability to use resources.</li> </ul> <p><b>For researchers:</b></p> <ul style="list-style-type: none"> <li>• We can acquire and locate the best resources for your specialized subject areas.</li> <li>• We have complete, up-to-date collections.</li> <li>• We can help you find obscure resources.</li> <li>• We can help you use new tools to manage your research information.</li> </ul>	<p><b>Experts in research!</b></p>
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### The Campaign for America's Libraries

The American Library Association has created the *@ your library* brand or platform for the national *@ your library* campaign. Creating a brand name and using it as a consistent platform is a powerful technique to raise the level of awareness of the library public and to create a common orientation that provides consistency across the nation.

What is so terrific about this brand is that you can customize it to fit the vision, priorities, products, services, customers and messages of your library. Here are examples collected from the ALA *@ your library* materials that might suit an academic or research library in community college, college, university or special library settings.

#### **@ your library Brand Platform Examples that Suit Academic and Research Libraries**

<p>The Ultimate Search Engine <i>@ your library</i>  All that jazz <i>@ your library</i>  A class act <i>@ your library</i>  Theses and dissertations <i>@ your library</i>  Sight and sound <i>@ your library</i>  Learning spaces <i>@ your library</i>  Research short cuts <i>@ your library</i>  Exhibits <i>@ your library</i>  Manuscripts <i>@ your library</i>  Copy services <i>@ your library</i>  Bits and books <i>@ your library</i>  Government information <i>@ your library</i>  It's not just academic <i>@ your library</i>  24/7 access <i>@ your library</i>  Learn to love learning <i>@ your library</i>  PSATisfaction <i>@ your library</i></p>	<p>Service with a smile <i>@ your library</i>  What you need, we can find <i>@ your library</i>  Guides to what you want <i>@ your library</i>  All the ideas that are fit to <i>print @ your library</i>  Smart starts <i>@ your library</i>  Kansas City history <i>@ your library</i>  Research consultations <i>@ your library</i>  Investigate <i>@ your library</i>  Research made easy <i>@ your library</i>  Ponder thoughts <i>@ your library</i>  Get the answers <i>@ your library</i>  Library access in your pajamas <i>@ your library</i>  Open your eyes <i>@ your library</i>  Open your ears <i>@ your library</i>  Find your intellectual home <i>@ your library</i>  GREat beginnings <i>@ your library</i></p>
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One library used a similar technique by using the word “research” as the platform in each of their ads displaying the various departments within the institution, e.g., “Research –Make Beautiful Music –Bob Agnew Professor of Music for your Edison Library”. Another library used the “Ask

a librarian any time, any where” platform on a series of posters, articles, bookmarks and pamphlets.

### **Platforms Suggest Campaign Graphics**

One of the interesting and powerful things about platforms is that they can often suggest the **logo, graphic design or color scheme** of the campaign. The logo, graphic design or color scheme provide a visual shortcut for your customers that enhances a message’s visibility, attractiveness and consistency, and which, over time, helps the customers attend to your messages and eventually take action.

The examples provided on the next page of the platforms suggested by the ALA in its materials for its @your library® campaign readily suggest interesting visual options:

- *Investigate @ your library®* suggests various famous sleuths searching through various resources the library has to offer.
- *Everything from Shaq to Shakespeare @ your library®* suggests images of Shaq on a stage as Othello or Shakespeare taking a shot at the basket.
- *The Ultimate Search Engine @ your library®* suggests a reference librarian in superhero costume easily accessing just the right resources.

### Messages, Platform and AIDA Examples

The following are examples of messages, refined by AIDA, with possible platforms. The Messages Identification Worksheet follows and can be used to record message and platform ideas.

Messages	AIDA	Platform
<p>Welcome to our new .... Introducing .... You've been asking for ..., here it is.... We now have a direct link with ... Librarians are experts! % times you get the book you want Our @ <i>your library</i> campaign is ... Come see our new check out system Resource linking is our skill ...</p>	<p><b>Awareness:</b> helping the customer become aware of a newly offered or under-used product or service.</p>	<p>The library will help you succeed with your classes!  Help anytime, on anything.  Government documents @ <i>your library</i> New journals @ <i>your library</i> Reciprocal privileges @ <i>your library</i></p>
<p>Specific features included are ... This helps you ... Personalized service for your needs Meets these key challenges... Saves you time by ... Helps you develop more skills by ... Global linkage on .... Best collection on ... Key resources linkages are ... Service helps you solve X problem</p>	<p><b>Interest:</b> building product or service recognition, encouraging people to learn more about it.</p>	<p>We help you find your class materials and references.  Favorite Websites @ <i>your library</i> Electronic reserves services @ <b>your library</b> Quality services free to you @ <i>your library</i> Create new knowledge @ <i>your library</i></p>
<p>Imagine this working for you ... Easy application of .... Simplifies by ... Use it while you ... It is available quickly at ... Enjoy the satisfaction of ... You can't get this anywhere else ... Initial reactions have been ...</p>	<p><b>Desire:</b> helping the customer decide that this product or service could fill their needs</p>	<p>Our new software makes formatting papers easy.  Try chat room resources @ <i>your library</i> Group project assistance @ <i>your library</i> See new, faster book return @ <i>your library</i> New knowledge @ <i>your library</i></p>
<p>Come in for quick introduction... Check our Website for more ... Set an appointment for personalized service Refreshments! Group of like-minded people ... Special trial session... Proven, successful service... Customer comments are ...</p>	<p><b>Action:</b> spurring action and making it easy for the customer to "buy" the product or service.</p>	<p>Come for the demonstration and donuts.  Check yourself out @ <i>your library</i> Use extended hours @ <i>your library</i> We make it easy @ <i>your library</i></p>



## Messages Identification Worksheet

### Customer \_\_\_\_\_

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.			
2.			
3.			
4.			
5.			

### Chapter 5

## **Marketing Planning Process: Promoting the Library – Vehicles and Campaign Design**

Once you have defined the precise products and services you want to offer and have a clear understanding of the messages you would like your customers to receive, it is time to begin designing the promotional campaign. First, select the vehicles that best carry the messages and second, sequence the messages throughout the length of the campaign period. Careful planning at this stage, minimizes wasted efforts and resources.

- **Vehicles:** Decide which communication method or channel(s) will be used to convey the messages/platforms.
- **Campaign Sequence:** Design how often and in what order the vehicles and messages should be communicated to your customers.

### **Partnering with Your Campus Public Relations Office**

Available to many academic and research libraries is a campus public relations or marketing office. The amount of assistance they can provide library administrators in the development of their promotional campaign is likely to vary depending on the size of their office and the number of priorities they have. But generally, they can help by:

- Revealing any particular branding or public relations requirements your institution has set
- Sharing which methods seem to work best in your specific academic or research institution setting for the different audiences
- Providing general advice on your campaign
- Providing access to vehicles that you would not be able to access on your own such as radio or T.V. ads and funding
- Providing copy preparation and dissemination services

### **First, Select the Vehicles to Carry the Messages**

There are five general types of vehicles used to promote products and services. Within each type there are many choices of specific vehicles to use. Key to making selections of vehicles is to remember the concept of a promotional *campaign*. Rarely will using only one vehicle type -- on a one-time-only basis or as a continuous effort -- succeed. A campaign is a series of messages (sometimes linked to platforms) that are repeatedly conveyed to a target audience over an extended period of time using a variety of vehicle types and vehicles. The repetition enhances learning and reinforces the message. Important messages that ask for some change in behavior require more repetition, must be provided in more ways, over a longer period of time.

What combination of advertising, direct marketing, personal selling, sales promotions or public relations/publicity will get your messages across best? Examples of vehicles in each general vehicle type include (Hiam and Schewe, 1998, pages 376-399.)

- **Advertising:** Advertising is any form of communication about products, ideas, goods or services that is paid for by a sponsor (library or university, in our case). It is generally transmitted by mass media – newspapers, magazines, T.V., radio, direct mail, or outdoor billboards. Less common advertising includes things like circulars, catalogs, and calendars.

The message of advertising is not personal and not specifically targeted as are other promotional activities. As a result, advertising tends to use a rather basic appeal (status, hunger, approval, safety) to get the attention of the receiver. Advertising has the advantage of being able to convey a message many times in a relaxed atmosphere where there is no immediate pressure to buy. The impact of good advertising can be quite high, but it is not very flexible in terms of tailoring the message to meet different audience needs. Examples: TV Nike ads, grocery store flyer inserts in your newspaper, or the @ *your library*@ brand on publicity materials.

The core of effective advertising is translating the goals and objectives into a specific message concept. The advertising message is based on a concise statement of issues and benefits. Conventional wisdom has it that one can develop an advertising message by answering three questions:

1. What features are unique to the products, goods, or services?
2. What criteria do customers use to evaluate those products, goods or services?
3. How do the products, goods or services compare to those offered by competition?

Messages are repeated in various forms throughout the advertising campaign. Creativity, humor, surprise, and excitement are used to animate the message, but care must be given to not obscure the underlying message.

The most common and successful message strategies include (Schewe and Hiam, page 383-384.)

1. Testimonials – use of an authority to present the message ( Bill Cosby and Jello)
2. Humor – good humor attracts and holds people’s attention (Wendy’s and ‘Where’s the beef?’)
3. Sensual/sexual messages --used often, but not effective in getting the message across, due to focus difficulty (Chanel perfume ads)
4. Comparative messages – naming the competitor and identifying their weaknesses (‘Bring your Visa because they won’t take American Express’)
5. Slice of life messages – use of a popular song and a brief scene from life to position a product. (MCI’s “friends and family” commercials or the Pepsi song)
6. Fantasy messages – Relate a product to some desirable person or situation such that if the product is used, the desired state is achieved. (Red Baron pizza or car ads)
7. Infomercials – slick, half-hour broadcasts using fictional story lines, real actors, and Hollywood quality production. (Veg-O-Matic or Caribbean real estate sales)

Library vehicle examples include: TV spots, newspaper ads, banners, posters, celebrity testimonials, presentations, tables and flyers at events, bookmarks, T-shirts, table signs, brochures, campus radio ads, etc.

- **Direct Marketing:** Direct marketing is defined as any direct communication to a specific consumer(s) or business recipient(s) that is designed to generate a response in the form of an order, a request for further information, and/or a visit to the store or other place of business for purchase of specific products or services. Advertising, in contrast, is aimed at the mass of potential 'buyers'. With the evolution of our electronic communication and computer systems, specific consumers can communicate directly with the marketers to get more information. For example, interest groups or project teams can work directly with libraries to locate materials.

Library vehicle examples include: special group flyers (club groups, class lists, customer groups, departments, topic groups), e-mail messages to data base groups, special sections in Websites, posters in selected spots, etc.

- **Personal Selling:** Personal selling is person-to-person communication in which the receiver provides immediate feedback to the source's message through words, expressions, and gestures. Personal selling is a conversation between two parties with a tailored message to the audience. Personal selling is especially useful when a detailed explanation is required or when the benefits have to be closely linked to the customer needs.

For example, Nabisco Biscuit Company uses personal selling to set up biscuit departments in grocery stores. Their sales person, using a laptop computer, shares information about the retail outlet's position in a market, who its customers are, what its average purchase price is, and how to create a more effective merchandise mix for that environment. A library subject specialists could use the same approach to work with faculty.

Library vehicle examples include: Library greeters for new students, kiosk sessions at busy spots, specialized offers for information and assistance to class groups, presentations to classes or faculty groups, personal surveys for interests, online help, subject specialists working with faculty, etc.

- **Sales promotions:** The American Marketing Association defines sales promotion as "those activities, other than personal selling, advertising, and publicity, that stimulate consumer purchasing and dealer effectiveness, such as displays, shows and expositions, demonstrations, and various non-recurrent selling efforts not in the ordinary routine." These vehicles include store displays, sampling, coupons, contests, trading stamps, premiums, refund offers, sweepstakes, and rebates. Sales promotions are very helpful for the sale of impulse items whose features can best be judged at the point of purchase, for example, magazines at the checkout counter at the grocery store. Libraries can offer bookmarks to remind people of upcoming events or offer special computer or library services classes to attract new customers.

Sales promotion is intended to increase sales over a short period of time. It is used in infrequent intervals, since the response diminishes over time. Advertising, direct marketing and personal selling are used on a more continuous basis.

Library vehicle examples include: Special free introductory classes, introductory individualized assistance, free t-shirts or mugs, Apple-for-the-student/faculty day, learn from a celebrity event, etc.

- **Public relations and publicity:** Public relations is an activity intended to communicate a favorable product image and to promote goodwill. For example : General Mills dispatched two marketing managers, each armed with a suitcase filled with *Wheaties*, to attend a Super Bowl game. One suitcase was full of packages with a photograph of the Patriots on the front, while the other suitcase had packages with the Packers pictured on them. As it became apparent that the Packers would win the game, the PR people sped to newscasters, dispensing boxes with the victorious Packers photographs as champions. What happened? The sportscasters showed the boxes on Fox, CNN, ESPN, and various local stations.

Every organization deals with important groups, called “publics” such as stockholders, funding agencies, government agencies, the community, employees, vendors and the media. Public relations vehicles are directed at these publics such as announcements in their publications, special flyers, event schedules, presentations, issue papers, and other information pieces intended to be shared with the members of that “public”.

Publicity: One activity that is part of public relations is publicity. This term refers to messages conveyed to the public through mass media, but not paid for by the organization. Public relations personnel can send press releases, stories, and pictures to the media (newspapers, radio, TV, newsletters, letters to the editor, sample articles, etc.) to stimulate publicity. For libraries, the publics are community, parents, alumni, potential donors and the influencers and catalysts.

Library vehicle examples include: Letters to the editor, columns in campus papers or alumni brochures, releases to local papers, TV spots, announcements, notices in professional publications, etc.

### Linking Methods, AIDA and Vehicles

Different categories of vehicles often serve the kind of message (refined by AIDA) that you want to send. Below is a chart illustrating how vehicles are linked to the level of the message.

#### AIDA:

**Awareness** → **Interest** → **Desire** → **Action**

#### Vehicles:

@ your library brand use	Displays of books and information	Spokespersons and testimonials	Personal appointments Special day for ...
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Posters and banners Flyers and mobiles Public notices, press releases Newspaper articles and letters Announcements at public meetings Flyers at frequented places Link to National Library Week, or Banned Books Week, etc. Bulletin Boards Email notices Select a public spokesperson	Bookmarks, pens, hats, etc. Website information Targeted, detailed flyers at associated locations (flyer at Rec. Center) Co-sponsor community events Presentations to groups A "How to" tool Personal calls on key customers TV coverage, campus radio, paper coverage Partner with campus organization to help with a problem	TV coverage of local 'celebrity' tour Resource lists for key customers 'How we help you' flyer Sponsor events for faculty, student, dept., interest groups Feature stories/photos to local papers Host the "library bowl" competition	Host special seminars: career, interest group, technology, etc. Offer skill classes and other tutoring Community topic debates Voter registration services Research table at local companies Faculty Day
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**General Methods**

Institution image advertising  
Library advertising  
Public relations and publicity

General advertising  
Trade advertising  
Specialty magazine advertising

Customer sales promotions  
Direct marketing  
Personal selling  
'Coupon-ing'  
Sweepstakes  
Classified

Use the worksheet below to identify the vehicles that already exist. After reviewing the list, you might identify some new vehicles that would be useful. This worksheet then will serve as a resource as you define your marketing plan.

**Vehicle Identification Worksheet**

Customer \_\_\_\_\_

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
<b>Advertising</b>		
<b>Direct Marketing</b>		

<b>Personal Selling</b>		
<b>Sales Promotions</b>		
<b>Public Relations and Publicity</b>		

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

## **Second, Arrange the Vehicles into a Campaign with an Effective Sequence and Frequency Pattern**

Most promotional campaigns run for a stated period of time. The @ *your library* campaign sponsored by the American Library Association (ALA) is slated for five years. The campaign you are designing for your library should have a set period of time as well: 2-5 years is recommended to provide enough time to determine if the campaign is working. To be most effective, the messages (expressed through various vehicles) should be shared frequently so the customers receive the messages and decide to “buy”. Therefore, messages are rarely offered only once and are offered in different forms over time. Four broad sequencing approaches are available: the continuity, flighting, massed (or concentrated) and pulsing strategies. (Schewe and Hiam, 1998, page 389-390.)

- **Continuity Strategy:** Messages (within selected vehicles) are spread out over the entire planning period. When the demand for the advertised products, goods or services is evenly dispersed throughout the year(s), this strategy often works best. This strategy works best for convenience items and other products, goods or services with high repeat purchase rates. A monthly “what’s new at the library” article in the local newspaper or a poster at the library entrance engenders continuous awareness.
- **Flighting Strategy:** When the demand for the products, goods or services has distinct and identifiable peaks and valleys, the flighting strategy can be used. In this case, message sending follows a stop-and-go pattern. Typically, there is heavy communication during some days, weeks, or months and no communication in between. Supermarkets know that shopping is heaviest over the weekend, so they do their advertising on Thursdays and Fridays. College and university programs follow a predictable yearly pattern with term startup, paper writing periods and examination periods.
- **Massed or Concentrated Strategy:** Messages are bunched into specified periods and no advertising or other communication occurs in between. Makers of swimming pools, gas grills, and snow blowers use this approach. Department stores have white sales, carpet, and furniture sales at selected times during the year. Libraries traditionally promote ‘Banned Books’ in September of each year or offer convocation or orientation ceremonies as new students arrive.
- **Pulsing – Combining Strategies:** Combining the three strategies: continuity, flighting and concentrated, allows for a thorough, continuous and focused strategy that maintains contact with the customers over a period of time. Florists often use this strategy to remind us year round to purchase flowers, but emphasize their products and services around special holidays and have actually created ‘holidays’ such as Mothers Day to expand their sales.

### **Examples of Excellent Campaigns**



Putting together a successful promotional plan is a very challenging task. The problem is that following a process alone cannot guarantee results -- it takes a little inspiration and creativity as well. Schewe and Hiam, in their book The Portable MBA in Marketing, 1998, describe several examples of excellent campaigns in business and non-profit settings. The following are examples of campaign elements gathered from thirty-one academic and research libraries. The goal for each library is to select a varied set of vehicles to carry the messages over the period of the campaign. The ALA/ACRL Toolkit contains many more examples and case histories; see page 63 for a Toolkit outline.

**National Spokesperson:**

- Laura Bush invitations to speak
- READ campaign celebrities

**Media Coverage (regional, local and campus newspapers):**

- Newspaper ads in student newspaper “Cyberspace meets human space @ your library”
- Poster-size calendar of events in student newspaper
- Regular column in student newspaper called “Preview of coming attractions @ your library”

**Local Coverage:**

- Library building plans, moving day
- City-wide campaigns “One City, One Book”

**Packets of Information:**

- Booklets for high school principals and guidance counselors called “Information @ your library”
- Information cards about various services
- Women Students Safety information in cooperation with Campus Police
- Flyers for “Begin Your Career Training @ your library”

**Fundraising and Awareness Events:**

- 5K Run “– “Exercise your mind @ your library
- Librarians tell customers for a week about the personal service available using the slogan “person-to-person @ your library”
- National Library Week displays: “Baseball @ your library”, “Summer reading @ your library”
- Homecoming events: “M&M’s @ your library”
- Game events: “NUs Clues @ your library”
- Selling plants: “Grow where you are planted @ your library”
- Open house: “Learn the library @ your library”
- Author’s receptions
- Book fairs
- Guest speakers
- Musical band performances

- Story-telling for pre-schoolers on campus
- High-schoolers do research and tour the campus
- Presentation ceremonies with “@ your library” cards, or mugs
- Carnival Day faculty and students as fortuneteller, ringmaster, dancing bears, theatre presentations, jugglers, and Elvis impersonators.
- Women’ Studies Conference
- Poetry slams, music recitals, debate team meets etc.
- Women’s Health Fair with information, exams and counseling
- New Student Orientation greeters
- Community or city-wide events with presentations at the library

**Legislative Agenda:**

- “@ your library” on invitations and bookmarks to legislators

**Personal Contact:**

- New students assigned a “personal librarian”
- Art Task Force uses student art to brighten the library
- Show and Tell sessions about electronic resources
- Orientation sessions for college counselors

**Information/ Websites:**

- “Superheroes @ your library” logo

**Displays and Kiosks:**

- Summer beach room with free fruit drinks, neck massages, aromatherapy and games to relieve stress during exams
- Booths at various events, fairs, student group events
- Botanical, anatomical and instrument art displays
- “@ your library” Power Point presentation that runs continuously
- “@ your library” campaign, “Baseball @ your library”
- Faculty authors and their works

**Signs:**

- Posters, “ultimate search engine” slogan for librarians, map of the world with “@ your library” across it
- Banners “Celebrate @ your library”
- Desk and library section signs

**Give-Aways:**

- Bookmarks for “Begin Your Career Training @ your library”
- Pencils, pen lights, sticky notes with slogan “Power up @ your library”
- Calendar of events in student planners
- T-shirts for staff
- Fans

### Sequencing Messages

How the messages are sequenced will depend on the customer. If the customer is present for a short period of time, e.g. undergraduates for 4 or so years, you may repeat the same messages in 4 year cycles. However, if the customer is fairly constant, you may be able to change the messages over the campaign period to encourage the full use of your library by that customer group, introducing new products/and services and gaining greater use of them over time. The following are two examples of sequencing messages over the campaign period.

Customer	Year 1 Messages	Year 2 Messages	Year 3 Messages	Year 4 Messages
<p><b>Undergraduates</b></p> <p>Because of the cycling of students, the same messages might be repeated each year, but to different student groups.</p>	<p>Save time and money by getting all your class materials at the library.</p> <p>We have all your class materials when you need them.</p> <p>We can help you find the resources that you need.</p>			
<p><b>Faculty</b></p> <p>In this case, the goal is to show the faculty the full capabilities of the library to assist them in serving the students. The messages might change over the campaign period.</p>	<p>We can save you time by copying and packaging all the materials students need for your classes.</p>	<p>We can help you find the best resources for your classes.</p>	<p>We can expand your reach through acquisitions and consortia agreements.</p>	<p>We can team with you to improve your students' skills and ability to use resources.</p>

### Integrating Promotional Decisions into a Campaign

Use the Campaign Design Worksheet to help you pull together all the decisions you have reached so far for each customer. Examples are provided along with a blank worksheet.

## Campaign Design Worksheet

Customer: \_\_\_\_\_

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

<b>Need, Product/Service, Benefit</b>	<b>Messages and Platform(s)</b>	<b>Vehicles</b>	<b>Frequency &amp; Strategy</b>	<b>Dates</b>
1.				
2.				
3.				
4.				
5.				

## Chapter 6

# Marketing Planning Process: Promoting the Library -- Finalize and Implement the Promotional Campaign

Now that you and your team have a very good first draft about the messages, vehicles and campaign timing, attention must turn to making sure the campaign becomes realized. The focus of the leader turns to implementation. Staff members can participate in this stage, as well. Included in this chapter are several tools that might be helpful.

There are several steps required to implement the promotional campaign:

- **Finalize the plan with a dose of reality:** Refine the plan considering funding availability, resources required and readiness of the decision makers.
- **Mobilize the resources to implement your promotional campaign.** First, develop a plan and materials to present your campaign recommendation to institutional administrators and campus public relations sources as well as to your complete staff. Second, arrange for the campaign to be developed and delivered through current staff, public relations staff and/or outsourced experts.

## Finalize the Campaign with a Dose of Reality

Teams, when designing the first draft of their promotional campaigns, typically identify a large number of vehicles and messages to share. Creative exuberance is important to achieve a good campaign design draft, but reality must be considered when finalizing the campaign. The following steps are recommended to help teams select campaigns that a) will achieve their goals and b) will be supported by the decision makers and funding agencies.

The library administrator has a real responsibility to do a bit of research to set the stage for good decision making and buy-in by team or staff members. Prepare and present some basic resource guidelines to assist participants as they consider the draft:

1. The funding that is currently available and the likelihood and source of additional funding available for the promotional campaign.
2. The partners that can help implement the plan such as campus public relations and other offices as well as Friends of the Library, Trustees, local business/government sponsors, interested associations, etc., depending on your type of library/institution.
3. General guidelines for the cost (\$ and resource time) of various kinds of vehicles such as advertisements for the campus paper, press releases, posters, etc.
4. Remind the team of the goals and measures that were set in the strategic plan and how the promotional campaign will assist in achieving those goals.

### **A, B, or C Plan?**

Invite the planning team or participating staff to help you decide which elements should remain in the plan, considering three different versions that vary in scope, required effort and amount of resources.

- The “A” Plan: all the vehicles and activities that participants would like to include if money were no object and, if necessary, decision makers and influencers were in total, enthusiastic agreement with the Library Direction and Promotional Campaign.
- The “B” Plan: the vehicles and activities that would be included if money were an issue, but there is ample agreement among, if necessary, decision makers and influencers that the Library Direction and Promotional Campaign are needed.
- The “C” Plan: the few vehicles and activities that would have to be implemented for any progress to be made, realizing that getting, if necessary, the decision makers and influencers to agree and finding the funding will be a challenge. (This kind of campaign requires the most creativity.)

### **Costs and Strategic Benefits Analysis**

Completing the estimation of the costs of the draft promotional campaign is another step to gain a more realistic view. The following worksheet is essentially a reminder of key elements to consider when ‘costing’ out the plan. This information will be helpful for overall budgeting purposes and, in the case where additional funding is needed, will be useful to present the case for funding. Assign a team to work on this worksheet.

Rarely is an estimation completed of the benefits of a promotional campaign. During the strategic planning process, gaps were identified between the current customer use pattern and the desired use pattern. The Benefit Analysis Worksheet links the campaign efforts to the library strategy and its specific goals and measures. The clearer the link with strategy and the more precise the measurement of benefit, the more attractive the plan is to others. Assign another team to work on this worksheet.

### **Funding and Resource Analysis**

For some libraries, additional funding or assistance will be required to implement the promotional campaign. Doing a survey of the funding and resources prepares the leader to approach the best funders. Assign a third team to work on this worksheet.

## Costs Analysis Worksheet

Customer Group: \_\_\_\_\_

Fill in pertinent unit number and dollar cost estimates for each of the funding and resource levels of plan: A: no limitations, B: some limitations, or C: severe limitations.

Resource Required	Plan A		Plan B		Plan C	
	Amt.	\$	Amt.	\$	Amt.	\$
<b>Time required:</b> By staff: By consultants: By others:						
<b>Supplies/Materials:</b> Materials: Agreements:						
<b>Equipment:</b> Rental: Purchase: Maintenance: Repair: Training: Software:						
<b>Space:</b> Moving: Rental: Refurbishing: Furniture:						
<b>Political Will:</b> Gain agreement: Active support: Leadership:						
<b>Expertise:</b> Train In-house: Get training: Use consultants: Purchase tools:						
<b>Staffing:</b> Reallocate staff: Volunteers: Additional staff:						
<b>Totals:</b>						

## Strategic Benefits Analysis Worksheet

Illustrate the link between the library strategy and the promotional campaign.

<b>Customers and Key Strategies, Goals and Measures</b>	<b>Plan A</b>	<b>Plan B</b>	<b>Plan C</b>
<b>Undergraduate students:</b>			
<b>Graduate students:</b>			
<b>Faculty:</b>			
<b>Researchers:</b>			
<b>Community members:</b>			
<b>Business and Government Agencies:</b>			
<b>High school students:</b>			
<b>Other:</b>			



## Funding and Resource Survey Worksheet

Fill in the following worksheet to map the funding opportunities and answer the analysis questions

<b>Funding Source</b>	<b>Current Priorities</b>	<b>Future Priorities</b>	<b>Proposals/Ideas That Have Appeal</b>	<b>Likelihood of Funding H – M -- L</b>
<b>Current budget</b>				
<b>Other department budgets</b>				
<b>State and Federal Governments</b>				
<b>Donors</b>				
<b>Alumni</b>				
<b>Foundations</b>				
<b>Businesses</b>				
<b>Other</b>				

**Analysis Questions:**

1. How do the priorities of the funding organizations line up with your Library Direction and Promotional Campaign goals?
2. What further research about funding must you do?

## **Mobilize the Resources to Implement Your Promotional Campaign**

### **Working with Influencers and Catalysts**

In Chapter 2 it was stated that Influencers and Catalysts, although they are not typically considered “customers” of the library, they play powerful roles in your library’s success. They make decisions, influence opinions, raise options, and mobilize resources. Clearly, they are key partners in the design, development and implementation of the promotional campaign. Library administrators study the preferences and biases of influencers and catalysts and devote ample time to share information and build a solid working relationships. The Influencers and Catalysts Preferences Worksheet is a great tool to identify their opinions and to provide the information they need to help you implement the promotional campaign.

### **Create an Implementation Plan**

Finalize the promotional campaign calendar and create a more specific implementation plan that lists the steps, persons who are accountable, requirements to be met and the dates due. Be sure to include all the people who will help you implement the plan: current staff, public relations staff, external experts, Friends of the Library, influencers, catalysts, and others.

### **Assessing Campaign Success**

It makes sense to track progress during the campaign for two reasons: 1) to celebrate successes and 2) to make adjustments to the plan (messages, vehicles or sequence). The assessment should be linked directly to the strategic plan’s goals and measures. A simple worksheet is provided.

## Influencers and Catalysts Preferences Worksheet

**Instructions:**

1. Enter the issue around which you are analyzing preferences, i.e. Promotional Campaign, Library Direction, Funding Priorities
2. Enter the names of the key influencers, decision makers and catalysts in the first column
3. Rate each influencer's current level of agreement with your approach to deal with the issue at hand in the second column.
4. Identify level of agreement needed from each influencer to achieve your goals in column 3.
5. Identify the specific element(s) of the preferences (that the influencer consistently expresses) in column 4.
6. List the steps you and staff can take to move each influencer to the needed level of agreement in column 5.
7. Answer the Analysis Questions.

<b>The Issue:</b>				
Influencer, Catalyst, Decision Maker	Current Level of Agreement: + 3 to - 3	Needed Level of Agreement + 3 to - 3	Specifics about the Preferences	Influence Steps

**Analysis Questions:**

1. If the needed level of agreement for all key influencers is achievable, how much time and energy will be required (be as specific as you can)?
2. If the needed level of agreement for all key influencers does not seem achievable in the near future, what would be the best steps to build a more accepting climate for the future?

## Promotional Campaign Implementation Plan

**Answer the following questions:**

1. What information must be documented to tell the story of the promotional campaign well?
  - Library direction
  - Customer needs and perceptions
  - Key messages and platforms
  - Campaign design
  - Costs and strategic benefits information
  - Likely funding options
  - Other:
  
2. Who will document the materials? In what format? By when?
  
  
  
  
  
  
  
  
  
  
3. What are the key selling points of your promotional campaign? How will the campaign serve the library, the customers and the institution?
  
  
  
  
  
  
  
  
  
  
4. Which influencers and catalysts will the library approach to assist with the campaign? How will you approach them? When? Who is accountable for taking these steps?
  
  
  
  
  
  
  
  
  
  
5. What steps will be necessary to fully implement the promotional campaign? How will you engage decision makers or staff? Who will be responsible for accomplishing each step? When will each step be completed? What criteria will you use to determine when each step is completed?

## Assessing Campaign Success

List below the customers you have chosen to address in the Promotional Campaign. Enter below the goals and specific measures identified in the strategic plan that relate to customer use. Define the assessment periods. Enter in the period columns the expected results and the actual results. The final column provides a place to identify adjustments to the campaign.

<b>Customer</b>	<b>Strategic Goal</b>	<b>Key Measures</b>	<b>Period 1</b>	<b>Period 2</b>	<b>Period 3</b>	<b>Period 4</b>	<b>Adjustments</b>

## Chapter 7

# Marketing Planning Process: Delivering Products and Services

Once the promotional plan has been created, it is time to focus on implementation of the library strategy to ensure that “promises made are promises kept” to the customers.

### **Refine the Promotional Campaign**

New ideas will be offered and clear realities faced as the promotional campaign is shared with other departments whose participation and “buy-in” are desired. Revisions are inevitable. Be ready to be flexible, but keep the messages and customers in mind.

### **Organize and Staff for Success**

Not only will the promotional campaign need to be implemented, but also there are likely to be new products or services that must be created, documented and implemented. Think ahead and define the skills and capabilities required. Find hidden talent in the staff or encourage them to develop new skills. Other situations will require that you work closely with other departments or find and manage external contract workers/consultants.

### **Deliver on Promises and Learn**

Carefully and purposefully implement the new elements of the library that you have promised in the promotional materials. Write out new procedures, provide models to follow, allow people to work in teams, coach and encourage and create an atmosphere that focuses on *servicing the customers*.

### **Integrate the Campaign into the Library Routine and Planning Cycles**

Intertwine the planning and administrative routines with the promotional campaign and implementation activities on a daily basis during informal interactions and during formal meetings. Campaign awareness keeps everyone focused on the customer. Process improvement discussions ensure successful implementation.

### **Monitor and Adjust the Promotional Campaign As Needed**

By paying attention to the success of each step of the campaign, it will be possible to evaluate two important things: First, how the promotional campaign is working – is it reaching people? And second, are you offering the right products and services to your customers? The campaign may be great, but the customers may not need/want what you have to offer. If this is the case, it is time to go back to the drawing board.

### **Celebrate and Reinforce the Vision**

Every success is worth noticing and celebrating because even small steps move you, your library and your customers closer to a more powerful and successful future. Progress messages should be shared at multiple times during the campaign to let customers and interested parties know about increases in use, satisfaction, new skills, and other achievements. Success breeds success!

## APPENDIX

### Marketing that May Be Seen, Heard, and Felt by All

When you are planning new programs and the campaigns to market them, include the following steps and resources to make your efforts both legal and strong. Consider what the library program and marketing needs may be for those with disabilities. Web resources are listed to help in this exercise:

1. Use sensitive language: The disability is just one facet of the person. He or she is far from being totally described by the disability.
2. Assess the library's traffic patterns and use of space:
  - ❖ If outside paths and inside aisles are not wide enough to accommodate wheel chairs, make a change for better accessibility.
  - ❖ If ramps are needed, install them.
  - ❖ Offer maps and signage <http://www.gag.org/resources/das.html> to guide those who need elevators and other accommodations.
  - ❖ Make room at desks and tables for adequate access by those in wheel chairs.
3. Assess the accessibility of the library's web pages at <http://bobby.watchfire.com/bobby/html/en/index.jsp> and follow guidelines to:
  - ❖ Allow access by web page readers and screen readers like JAWS.
  - ❖ Allow translation of print copies by, for example, Kurzweil readers or Braille embossers and readers.
  - ❖ Create alt pages to provide easy-to-access text describing graphics.
  - ❖ Create sites with light letters on a high contrast dark background, which are more visible on computer screens or slides for people with vision difficulties.
4. Assess the availability of on-site assistive and adaptive software and equipment.
5. Offer awareness training to the library staff:
  - ❖ If communication seems a problem with any patron, staff should consider immediately what solutions might be reasonable and considerate.
  - ❖ Staff should know proper approaches to market to and to help those with deafness, blindness, learning disabilities, mental illness, etc. to participate in programs.
6. Market through the campus Office for Services to Students with Disabilities or through local agencies like the Centers for Independent Living. Your students may be interacting with one or more CILs.
7. Know the laws and guidelines that must guide your efforts:  
<http://www.usdoj.gov/disabilities.htm>

8. Join a listserv that addresses libraries and disability access, by sending e-mail to [listserv@maelstrom.stjohns.edu](mailto:listserv@maelstrom.stjohns.edu) with one line of text saying: 'subscribe axslib-l' and your first and last names

More websites with broad-based, dependable information:

<http://www.trace.wisc.edu/>

<http://www.rit.edu/~easi/>

<http://www.ldonline.org/>



## **ALA/ACRL Marketing Toolkit**

- 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
- Acknowledgements

**ALA/ACRL Toolkit, cont.**

- Resource List (all of these will be linked on the Website)
  - 3M train-the-trainer manual (PDF)
  - Facilitator slides (PPT)
  - 3M participant manual (PDF)
  - New @ your library graphics/artwork (downloadable)
  - Examples of academic and research libraries participating in campaign (PPT)
  - Library Advocate's Handbook (PDF)
  - Quotable Facts about Academic and Research Libraries (PDF)
  - Summary of KRC and other pertinent research (Word doc and links)
  - [www.acrl.org](http://www.acrl.org)
  - [www.ala.org/@yourlibrary](http://www.ala.org/@yourlibrary)

## Resources

### Overall

1. Alexander Hiam, Marketing for Dummies, New World Press, New York, 1997.
2. Charles D. Schewe and Alexander Hiam, The Portable MBA in Marketing, Second Edition, John Wiley and Sons, Inc., New York, 1998. ISBN 0-471-19367-4.
3. Carl Sewell, Paul Brown and Tom Peters, Customers for Life, Pocket Books, July 1998, ISBN 067102101X.
4. A.B. Reynolds, Effective Organizational Development: A Guide to Implementation for Management, Consultants and Trainers, Lakewood Publications, 1997, ISBN 0-943210-47-X.

### Leadership

1. Noel Tichy, The Leadership Engine: How Winning Companies Build Leaders at Every Level, Harperbusiness, 1997, ISBN 0887307930.
2. James A. Belasco, Ralph C. Stayer, Flight of the Buffalo: Soaring to Excellence, Learning to Let Employees Lead, Warner Books, 1994, ISBN 0446670081.
3. James M. Kouzes, Barry Z. Posner, Leadership Challenge, How to Get Extraordinary Things Done in Organizations, Jossey-Bass Pub, 1990, ISBN 155542211X.
4. Robert Connors, Tom Smith, Craig Hickman, The Oz Principle: Getting Results Through Individual and Organizational Accountability, Prentice Hall Trade, 1994, ISBN 013032129X.
5. Timothy M. Nolan, Leonard D. Goodstein, J. William Pfeiffer, Plan or Die!: 10 Keys to Organizational Success, Pfeiffer & Co., 1993, ISBN 0893842079.
6. Peter R. Scholtes, The Team Handbook, Joiner Assoc., 1988, ISBN 0962226408.
7. William Bridges, Managing Transitions: Making the Most of Change, Addison-Wesley, 1991, ISBN 0201550733.

### Communication

1. James S. Kouzes, Barry Z. Posner, James M. Kouzes, Credibility: How Leaders Gain and Lose It, Why People Demand It, Jossey-Bass, 1995, ISBN 0787900567.
2. Steven Saint, James R. Lawson, Rules for Reaching Consensus: A Modern Approach to Decision Making, Pfeiffer & Co., 1994, ISBN 0893842567.
3. Robert Bolton, People Skills, Simon & Schuster, 1986, ISBN 067162248X
4. Linda Ellinor, Glenna Gerard, Dialogue: Rediscover the Transforming Power of Conversation, John Wiley and Sons, 1998, ISBN 0471174661.

### Websites

1. [www.3M.com/library](http://www.3M.com/library)
2. [www.ala.org/@yourlibrary](http://www.ala.org/@yourlibrary) The Campaign for America's Libraries, c/o ALA Public Information Office, 50 East Huron St. , Chicago, IL 60611, 800-545-2433, ext. 2148 and 4020, F: 312-944-8520, E: [atyourlibrary@ala.org](mailto:atyourlibrary@ala.org),
3. [www.ala.org/acrl](http://www.ala.org/acrl)

## **-- Notes –**

# **Planning My Library's Campaign**

Things to do to prepare staff, influencers and catalysts for the development of a promotional campaign.

According to the inventory form, the sequence of steps for my library is:

Ideas about customers and their needs are:

**-- Notes --**  
**Planning My Library's Campaign**

Key messages and platforms that are important to my customers are:

Efficient and effective vehicles are likely to be:

The general steps and timeline for my library's campaign are:

Tips I want to remember as leader of this process are:

