Strategic Marketing for Academic and Research Libraries
Welcome!

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

Desired outcomes:
• Become familiar with the process and materials
• Develop ideas for promotional campaigns
Agenda

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

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

ALA, ACRL and 3M Library Systems
Format

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

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

• Help each other understand the process
• Build a few good examples
• Have some fun
• Use sticky walls

ALA, ACRL and 3M Library Systems
Materials

Participant Manual
• Content
• Overall process
• Leadership tips
• Worksheets
• Examples
• Resources

Facilitator Guide
• Facilitation Tips
• Promotional Campaign Tips
• Meeting/workshop options & outlines
• Resources
• Guide to facilitation slides
Materials, cont.

Facilitation Slides
• Basic content slides
• Train-the-trainer workshop slides
Get the Most Out of the Workshop

Individually:
• Ask questions
• Take notes, pages 66-67
• Participate actively
• Listen to others’ great ideas

As team member:
• Offer ideas
• Stay loose, be creative
• Help others learn and apply the process
• Listen for others’ great ideas

ALA, ACRL and 3M Library Systems
Chapter 1: Introduction

• Crisis?
• Challenges
• Opportunities
• Why market your library?
• Leadership
• The Marketing Planning Process
• A Status Inventory Tool
Are You Facing A Crisis?

危機

Dangerous – “wei”

Opportunity – “ji”

ALA, ACRL and 3M Library Systems
The Issues

• Recruitment, education and retention of librarians – to find future leaders
• Role of the library in the academic enterprise – as center of activity on campus
• Impact of information technology on library services – balance of traditional and new
The Issues, cont.

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

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

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

ALA, ACRL and 3M Library Systems
Real Needs to Address!

- Are students using the Internet fully, honestly and intelligently?
- Are faculty skillful enough in building class websites, using information links and using course management software?
- Will librarians design their collections and staff to meet real needs?
- Will administrators understand the investments needed to maintain the stature of their libraries?

ALA, ACRL and 3M Library Systems
A Good Offense

- Develop tools; understand the management of information
- Build relationships with accrediting bodies
- Collaborate with faculty and administrations who influence library funding
- Teach basic marketing to librarians

ALA, ACRL and 3M Library Systems
Why MARKET Your Library?

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

ALA, ACRL and 3M Library Systems
Help from ALA, ACRL and 3M

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

Strategic Marketing for Academic and Research Libraries

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

ALA, ACRL and 3M Library Systems
The Issue of Leadership

Accountabilities:
- Understand evolving needs of their institutions
- Define the “new” form and function of the library
- Market the “new” library for increased use and funding
- Implement necessary changes in library operations

ALA, ACRL and 3M Library Systems
The Issue of Leadership

Proven steps/tools:

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

ALA, ACRL and 3M Library Systems
Remember…

You:
• Set the standard
• Show what you believe
• Set the priority
• Establish the value of the marketing plan for the library
## Choosing the Best Approach

<table>
<thead>
<tr>
<th>Factors</th>
<th>Large – A Lot</th>
<th>Small – A Little</th>
</tr>
</thead>
<tbody>
<tr>
<td>Library Size</td>
<td>More staff involvement activities</td>
<td>Fewer staff involvement activities</td>
</tr>
<tr>
<td>Degree of Change</td>
<td>More staff involvement activities</td>
<td>Fewer staff involvement activities</td>
</tr>
<tr>
<td>Experience with Marketing</td>
<td>Fewer staff involvement activities</td>
<td>More staff involvement activities</td>
</tr>
</tbody>
</table>

ALA, ACRL and 3M Library Systems

PM p. 9
The Marketing Planning Process

1. Customer and Market Research
   - Customer Needs
   - Customer View

2. Strategic Library Plan
   - Vision and Mission
   - Products & Services
   - Implementation

3. Promotion of the Library
   - Messages
   - Vehicles
   - Campaign
   - Implementation

4. Providing Products/Services
   - Delivery
   - Interaction
   - Adjustments

Customers
- Met Needs
- Unmet Needs

ALA, ACRL and 3M Library Systems
Excellence Occurs

When you …

• Know your customers, their current and future needs
• Have a detailed vision and mission statement for your library
• Promote your library
• Serve your customers as you have promised.
## Status Inventory – A Tool to Help You Decide Where to Start

<table>
<thead>
<tr>
<th>Customer and Market Research</th>
<th>Strategic Library Plan</th>
<th>Promotion of the Library</th>
<th>Providing Produces and Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do you really know what your customers need?</td>
<td>Have you designed your library to meet customer needs?</td>
<td>Are your messages reaching your customers?</td>
<td>Are you delivering what you promised?</td>
</tr>
</tbody>
</table>

ALA, ACRL and 3M Library Systems

PM pp. 13-14
Status Inventory

• How and when might you use this tool?
• What conclusions might you be able to draw?
• How much of each step should be completed before you can move on to the next step?
Chapter 2: Marketing Planning Process

Box 1: Doing Library User Research

Customers
Met Needs
Unmet Needs

1. Customer and Market Research
   Customer Needs
   Customer View

2. Library Strategic Plan
   Vision and Mission
   Products & Services
   Implementation

3. Promotion of the Library
   Messages
   Vehicles
   Campaign Implementation

4. Providing Products/Services
   Delivery
   Interaction
   Adjustments

ALA, ACRL and 3M Library Systems
Chapter 2: Marketing Planning Process

Box 1: Doing Library User Research

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

Customer knowledge is the starting point.

ALA, ACRL and 3M Library Systems
First, Know Who The Customers Are

- Undergraduate students
- Graduate students
- Faculty
- Researchers
- Staff and administration
- Community members and groups
- High school students
- Business
- Government agencies
- Others?
Second, Know Who Has Great Influence on the Direction of Your Library

Influencers make/influence funding decisions
- Academic administrators
- Faculty/Faculty Committees
- Boards
- State and Federal Officials
- Alumni
- Others

Catalysts are key opinion leaders
- Allies/partners
- Donors
- Grant funding orgs.
- Professional associations
- Taxpayers
- Media

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Relationships

Customers

Serve

Influencers/Catalysts

Educate, inform, & influence partners

ALA, ACRL and 3M Library Systems
Third, Find Out What Your Customers Want and Need

- **Wants:** products/services the customer would like the library to provide for comfort, extension of services, or to fulfill interests
- **Needs:** basic products/services that customers use to find and use information to fulfill their education assignments and goals
Customer Wants and Needs

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

**Future needs:** what are their future needs: known and implied?
Customer Research Topics

- **Product:** do your current and future products/services meet the wants/needs of the customer?
- **Price:** is the “price” affordable?
- **Place:** are the products/services accessible?
- **Promotion:** do you customers know what you have to offer?
- **Experience:** how do your customers describe your library to others?
## Questions to Ask Customers

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

ALA, ACRL and 3M Library Systems

PM p. 20
Ways to Learn About Your Customers

Formal
• Yearly surveys for customer groups
• Focus groups
• Quick satisfaction questionnaires
• Observation of interactions

Informal
• Short informal interviews
• Spot interviews
• Chat room discussions
• Suggestion boxes
• Dept. discussions
• Focused surveys

ALA, ACRL and 3M Library Systems
Examples of Needs

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

ALA, ACRL and 3M Library Systems

PM p. 21-22
Customer Needs Worksheet

List Matrix
- Customer
- Current – met and unmet needs
- Future known and implied needs

Analysis Questions
- Complete list?
- Most important customers
- Most important needs
- Unmet needs
- Future needs
Selecting the Customer(s) to Address First

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

- Funding influence
- Quality of current service
One-Day Workshop

Exercise Instructions

Team Instructions: 15 minutes

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

Product/Service

Needs

Customer

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Two-Day Workshop

Exercise Instructions

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

- Brainstorm a list of customers of the library
- Place the customer in order of who should be addressed first in the promotional campaign
- Brainstorm the needs (from the customer’s point of view) of each customer
- Put each customer’s needs in order of priority to the customer
Two-Day Workshop

Customers and Needs

Sticky Wall

<table>
<thead>
<tr>
<th>Customers</th>
<th>Needs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer #1</td>
<td>Need 1</td>
</tr>
<tr>
<td>Customer #2</td>
<td>Need 1</td>
</tr>
<tr>
<td>Customer #3</td>
<td>Need 1</td>
</tr>
</tbody>
</table>

ALA, ACRL and 3M Library Systems
Questions:

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

Take a minutes to jot NOTES for your library on PM pages 67-68.
Chapter 3:
Marketing Planning Process

Box 2: Library Strategic Plan

1. Customer and Market Research
   Customer Needs
   Customer View

2. Library Strategic Plan
   Vision and Mission
   Products & Services Implementation

3. Promotion of the Library
   Messages
   Vehicles
   Campaign Implementation

4. Providing Products/Services
   Delivery
   Interaction
   Adjustments

Customers
Met Needs
Unmet Needs

ALA, ACRL and 3M Library Systems
Key Elements of a Strategic Plan

- Strategic Intent – what kind of library do you plan to be?
- Vision – what the library will look like in the future
- Mission – the task of the leaders, the role of the library
- Values – the beliefs and day-to-day behaviors
The GAP

Current Products and Services

Desired Products and Services to meet customer needs

Decisions about the Library and Products and Services

Goals

ALA, ACRL and 3M Library Systems
Strategic Plans Lead to Desired Change

<table>
<thead>
<tr>
<th>Goals</th>
<th>Measures</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facilities</td>
<td>Cost</td>
</tr>
<tr>
<td>Development</td>
<td>Staffing</td>
</tr>
<tr>
<td>Staff Dev.</td>
<td>Time invested</td>
</tr>
<tr>
<td>Acquisitions</td>
<td>Increased use</td>
</tr>
<tr>
<td>Processes</td>
<td>Satisfied customers</td>
</tr>
<tr>
<td>Marketing/promotions</td>
<td>More inquiries</td>
</tr>
<tr>
<td>Legal/regulatory</td>
<td>Speed</td>
</tr>
<tr>
<td>Product/Service</td>
<td>Increased funding</td>
</tr>
</tbody>
</table>

ALA, ACRL and 3M Library Systems

PM p. 27-28
Product/Services and Benefits

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

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

Services
- Research assistance
- Instruction
- Copy/Scanning services

Find best resources
Manage software
Access to data

ALA, ACRL and 3M Library Systems

PM p. 28
Marketing That May Be Seen, Heard, and Felt By All

- Goal: library can be used successfully by all customers
- Marketing plan should reach all customer groups
- Promotional campaign language should address learning skills or style needs
# Example: Product/Services and Benefits Map

<table>
<thead>
<tr>
<th>Customer</th>
<th>Needs</th>
<th>Products/Services</th>
<th>Benefit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate students</td>
<td>Course materials</td>
<td>Online copies of class packets</td>
<td>Have what they need when they need it</td>
</tr>
<tr>
<td>Graduate students</td>
<td>Reference and research assistance</td>
<td>Online reference guides</td>
<td>Easy, convenient access</td>
</tr>
<tr>
<td>Faculty</td>
<td>Research assistance</td>
<td>Acquisition/consortial agreements/document delivery</td>
<td>Ability to use library well</td>
</tr>
<tr>
<td>Community Members</td>
<td>Collections</td>
<td>Certain topics, new titles</td>
<td>Fast access</td>
</tr>
</tbody>
</table>

ALA, ACRL and 3M Library Systems  PM p. 30  52
Exercise Instructions

Team Instructions: 20 minutes

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

Customer: __________

<table>
<thead>
<tr>
<th>Need 1</th>
<th>P/S</th>
<th>P/S</th>
<th>P/S</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>B</td>
<td>B</td>
<td>B</td>
</tr>
<tr>
<td></td>
<td>B</td>
<td>B</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Need 2</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>B</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Need 3</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>B</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Need 4</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>B</td>
</tr>
</tbody>
</table>

ALA, ACRL and 3M Library Systems
Questions:

• What are some examples of your customer and their needs
• Do you have questions?

Take NOTES on pp. 67-68.
Chapter 4:
Marketing Planning Process
Box 3: Promotion of the Library
Messages, AIDA and Platforms

Customers
Met Needs
Unmet Needs

1. Customer and Market Research
   Customer Needs
   Customer View

2. Library Strategic Plan
   Vision and Mission
   Products & Services Implementation

3. Promotion of the Library
   Messages Vehicles
   Campaign Implementation

4. Providing Products/Services
   Delivery Interaction
   Adjustments

ALA, ACRL and 3M Library Systems
Promoting the Library

Step-by-step information and exercises:

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

ALA, ACRL and 3M Library Systems
Levels of Messages

Broad Library Message:
Libraries bring you a world of knowledge.

Platform
We simplify the process.

Need: Tools
Need: Assistance

Platform
We help you find the best resources.

Need: Search Tools
Need: Reach

ALA, ACRL and 3M Library Systems

PM p. 31
Levels of Messages

Broad Library Message:
Libraries bring you a world of knowledge.

Platform
We simplify the process.

Platform
We help you find the best resources.

Need: Tools
Need: Assistance

Need: Search Tools
Need: Reach

ALA, ACRL and 3M Library Systems
Ideas for Broad Library Messages

ALA Key Messages

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

Stakeholders and key audience groups liked:

- College and research libraries are an important part of the learning community.
- College and research libraries connect you with a world of knowledge.
- College and research libraries are investing in the future, while preserving the past.
Second, Transform Benefits Statements into Messages

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

ALA, ACRL and 3M Library Systems

PM p. 34
Getting to the Essence of the Message

First Draft

• Save time, money and hassle by getting your class materials at your library
• We can provide you with collections to create new knowledge

Essence message

• Ready for class! Fast!
• The best collection anywhere on …

ALA, ACRL and 3M Library Systems
Tips for Selecting Messages

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

ALA, ACRL and 3M Library Systems
Message Examples

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

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

ALA, ACRL and 3M Library Systems

PM p. 33-38
More Message Examples

• We’re here for you …on your schedule
• Cappuccino & Computers
• Now more hours at our house and yours!
• Start here. Go anywhere.

• Sunrise research begins online
• Term papers @ your library®
• One-on-one help @ your library®
• Your secret weapon
• Just ask a librarian
Exercise Instructions

Team Instructions: 30 minutes

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

Customer #1

Need #1

P/S B

M-A M-I M-D

M-D M-Ac

P

P/S B

M-A M-I M-D M-Ac

ALA, ACRL and 3M Library Systems
Third, Categorize the AIDA Language of the Messages

AIDA helps you:

• Identify the amount of experience your customers have with the products/services you are marketing
• Adjust the language of the messages to match the experience level
• Decide if a series of messages is required

ALA, ACRL and 3M Library Systems
AIDA

Where is your customer…?

• **A = Awareness:** needs to be introduced to a new product or service

• **I = Interest:** needs more information to pay attention, be intrigued

• **D = Desire:** needs more information, motivation to decide to acquire the product or service

• **Ac = Action:** needs an invitation, reason to acquire the product or service
## AIDA: Customize the Message

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

ALA, ACRL and 3M Library Systems
Exercise Instructions

Team instructions: 20 minutes

• Look at the messages on your sticky wall, revise them using AIDA to match the message to the customer (see sticky wall layout, FG p. 24-26)
• Label each message A, I, D, or Ac
• Add messages to move people toward Action
• Answer questions:
  – Do these messages hit the customers’ needs?
  – Are these messages phrased in appealing language?
Fourth, Identify the Platforms Suggested by the Messages

Messages

• Save time and money by getting your class materials at the library.
• There are plenty of copies of class reading materials.
• Past tests will help you focus on what’s important.

Platform

• We simplify the process so you can excel!
Campaign for America’s Libraries: Platforms

@ your library brand

• Within your reach @ your library®
• 24/7 @ your library®
• Sound advice @ your library®

Platforms suggest logos, graphic design, and color schemes.

ALA, ACRL and 3M Library Systems
## Messages, Platforms, AIDA Examples

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

ALA, ACRL and 3M Library Systems

PM p. 39
# Messages Identification Worksheet

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

Team instructions: 20 minutes

• Review the messages on the sticky wall
• Identify platforms for groups of messages that share an underlying theme, write on a ½ sheet and place on sticky wall (FG p. 25, next slide)
• Phrase the platform in interesting language, consider AIDA for this language as well
• Answer questions:
  – Is there a nice linkage from need-p/s-benefit-message-AIDA-platform?
  – What are a couple examples of platforms (and their messages) fitting into a library’s broad message?

ALA, ACRL and 3M Library Systems
Questions:

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

Take NOTES on pp. 67-68.
Chapter 5: Marketing Planning Process

Box 3: Promoting the Library Vehicles and Campaign Design

1. Customer and Market Research
   - Customer Needs
   - Customer View

2. Library Strategic Plan
   - Vision and Mission
   - Products & Services
   - Implementation

3. Promotion of the Library
   - Messages
   - Vehicles
   - Campaign Implementation

4. Providing Products/Services
   - Delivery
   - Interaction
   - Adjustments

Customers
- Met Needs
- Unmet Needs

ALA, ACRL and 3M Library Systems
Partnering With Your Institution’s Public Relations Office

- Learn about branding or other requirements
- Share methods that work best in your setting
- Get general marketing and promotions advice
- Provide actual service with copy presentation and dissemination

ALA, ACRL and 3M Library Systems
Chapter 5: Marketing Planning Process

Box 3: Promoting the Library

Vehicles and Campaign Design

Step-by-step information and exercises:

• Vehicles: types and examples
• Campaign design issues

ALA, ACRL and 3M Library Systems

PM p. 41
First, Select the Best Vehicles

Choose vehicles that:

• Vary in format
• Reach the customer
• Carry the message appropriately
• In combination, serve as a campaign to move the customer through A,I,D, to Ac
• Attract attention
Vehicle Options

Advertising
- Paid for by the library
- Mass media: newspapers, magazines, TV, radio, billboards
- Catalogues, calendars
- Send clear, concise message and platform
- Help customer evaluate the P/S

- Show how P/S compare to competition
- Use creativity, humor, surprise, excitement to animate the message/platform
- Libraries: TV spots, radio, campus paper ads, banners, posters, demos, testimonials, tables, presentations, flyers, bookmarks, t-shirts, mugs, brochures, etc.

ALA, ACRL and 3M Library Systems
Vehicle Options

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

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

ALA, ACRL and 3M Library Systems

PM p. 43
Vehicle Options

Sales Promotions
• Activities to stimulate consumer purchasing
• Contests, trading stamps, premiums, rebates, discounts
• Library examples: free classes, free individual help, free mugs, apples for the faculty, learn from a celebrity, etc.

Public Relations
• To comm. a favorable image/promote good will
• To connect with key “publics”
• Via info. pieces, flyers, schedules, announcements
• Library examples: newspaper event schedule, announcements, issue papers, etc.

ALA, ACRL and 3M Library Systems
Vehicle Options

Publicity

• Messages conveyed through mass media
• Not paid for by org.
• Press releases, stories, letters to editor, pictures
• Library examples: letters to editor, releases, TV spots, notices in prof. publications, event news

ALA, ACRL and 3M Library Systems
# Linking Methods, AIDA and Vehicles

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

ALA, ACRL and 3M Library Systems

PM p. 45
<table>
<thead>
<tr>
<th>Promotional Method</th>
<th>Specific Vehicles</th>
<th>AIDA Application</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Selling</td>
<td>Presentations to faculty</td>
<td>A, I, D</td>
</tr>
<tr>
<td></td>
<td>Presentations to FIL</td>
<td>A, I, D</td>
</tr>
<tr>
<td></td>
<td>Presentations to C of C</td>
<td>I, D</td>
</tr>
<tr>
<td></td>
<td>Regular, informal meetings with B of T</td>
<td>I, D, C</td>
</tr>
<tr>
<td></td>
<td>Kiosk in student center</td>
<td>I, D</td>
</tr>
<tr>
<td></td>
<td>Staff greeters at door</td>
<td>I, D</td>
</tr>
<tr>
<td></td>
<td>Flyer about researcher consultant on call</td>
<td>I, D</td>
</tr>
</tbody>
</table>

ALA, ACRL and 3M Library Systems
Exercise Instructions

Team instructions: 10 minutes
• Brainstorm a list of vehicles you use (have used) on a flip chart sheet.
• Refer to examples on PM p. 45
• Purpose: Raise awareness of team about current:
  – Promotional methods
  – Specific vehicles that are used
  – The AIDA application
• Suggest alternatives

ALA, ACRL and 3M Library Systems
Exercise Instructions

Team instructions: 30 minutes

• Task: identify the vehicle(s) you think would best carry each message
• Use the brainstormed list, add new ideas
• Look at the sticky wall layout, FG p. 25
• Write vehicles on ½ sheets, place on sticky wall ‘under’-lapping the messages
• Answer questions:
  – Are these the most powerful vehicles?
  – Which message/vehicle combination shall we report out?

ALA, ACRL and 3M Library Systems
Messages and Vehicles

Sticky Wall

Customers

Customer #1

Need

P/S

B

Messages and Vehicles

M  M  M  M

V  V  V  V

V  V  V  V

V  V

V  V

ALA, ACRL and 3M Library Systems
Questions:

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

Take NOTES on pp. 67-68.
Second, Arrange the Vehicles into a Multi-year Campaign

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

Continuity Strategy:
- Messages via vehicles are spread out through the campaign
- Evenly dispersed demand for the product/service
- Good for routine, convenience items with high repeat purchase rate
- Library example: monthly ‘what’s new’ column

Flighting Strategy:
- Demand has distinct and identifiable peaks and valleys
- Stop-and-go pattern
- Heavy periods, then none at all
- Thursday grocery ads
- Library examples: commencement, term start up, finals and paper writing periods

ALA, ACRL and 3M Library Systems

PM p. 47
Campaign Strategies

**Massed or Concentrated Strategy:**
- Messages are bunched into specified periods with no messages in between
- Swimming pools, gas grills, snow blowers
- Library examples: “banned books”, freshman entry, graduation

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

ALA, ACRL and 3M Library Systems
Excellent Campaigns

- National spokesperson
- Media coverage
- Local coverage
- Library newsletter
- Information packets
- Events
- Legislative contact

ALA, ACRL and 3M Library Systems
Excellent Campaign

- Personal contact
- Information/websites
- Displays & kiosks
- Signs and banners
- Give-aways
## Sequenced Messages

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

ALA, ACRL and 3M Library Systems
## Campaign Design Worksheet

**Customer:** ________

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

ALA, ACRL and 3M Library Systems

PM p. 51
Exercise Instructions

Team instructions: 30 minutes

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

### Sticky Wall

**Need** | **Messages** | **Platform** | **Vehicles** | **Strategy:**
---|---|---|---|---
+ AIDA | | | | **Pulsing**

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>N #1</td>
<td>M</td>
<td>V</td>
<td>V</td>
</tr>
<tr>
<td></td>
<td>M</td>
<td>P</td>
<td>V</td>
</tr>
<tr>
<td></td>
<td>M</td>
<td></td>
<td>V</td>
</tr>
</tbody>
</table>

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>N #2</td>
<td>M</td>
<td>V</td>
<td>V</td>
</tr>
<tr>
<td></td>
<td>M</td>
<td>P</td>
<td>V</td>
</tr>
<tr>
<td></td>
<td>M</td>
<td></td>
<td>V</td>
</tr>
</tbody>
</table>

**JFMAMJJASOND**

**ALA, ACRL and 3M Library Systems**
Questions:

• What are some examples you’d like to share?
• Do you have any questions about this section?
• Lessons?

Take NOTES on pp. 67-68.
Chapter 6:
Marketing Planning Process
Box 3: Promoting the Library
Finalize and Implement the Promotional Campaign

Customers
- Met Needs
- Unmet Needs

1. Customer and Market Research
   - Customer Needs
   - Customer View

2. Library Strategic Plan
   - Vision and Mission
   - Products & Services
   - Implementation

3. Promotion of the Library
   - Messages
   - Vehicles
   - Campaign Implementation

4. Providing Products/Services
   - Delivery
   - Interaction
   - Adjustments

ALA, ACRL and 3M Library Systems
Chapter 6: Marketing Planning Process

Box 3: Promoting the Library
Finalize and Implement the Promotional Campaign

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

ALA, ACRL and 3M Library Systems
Analysis Tools

• Finalize the plan with a dose of reality
  – A, B or C plan? PM p. 53
  – Cost Analysis Worksheet, PM p. 54
  – Strategic Benefits Analysis Worksheet, PM p. 55
  – Funding and Resources Survey Worksheet, PM p. 56

• Mobilize the resources to implement
  – Influencers and Catalysts Preferences Wkst., PM p. 58
  – Promotional Campaign Implemen. Plan, PM p. 59
  – Assessing Campaign Success, PM p. 60
Two-Day Workshop

Exercise Instructions

Team Instructions: 20 minutes

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

ALA, ACRL and 3M Library Systems
Finalize with a Dose of Reality

A, B, or C Plan?

• A plan: include all the good ideas

• B plan: include the best ideas

• C plan: include the best bare minimum ideas

Cost Analysis Worksheet

• For plans A, B, and C, What are the costs…?
  – Time
  – Supplies/materials,
  – Equipment
  – Space
  – Political Will
  – Expertise
  – Staffing
  – Other
Finalize with a Dose of Reality

**Strategic Benefit Analysis Worksheet**
- For plans A, B, and C, what dollars are generated or saved through...?
  - Measures reached
  - Goals achieved
  - Vision fulfilled

**Funding and Resources Survey Worksheet**
- Considering the current and future budget sources what is the likelihood of funding ...?
  - Current priorities
  - Future priorities
  - Appeal
  - Likelihood of funding rating
  - Partnerships

ALA, ACRL and 3M Library Systems
Mobilize the Resources

Influencers and Catalysts Preferences Worksheet

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

Promotional Campaign Implementation Plan

• What steps must we take to successfully sell and implement our plan?
  – Needed information
  – Documentation
  – Influence steps
Mobilize the Resources

Assessing Campaign Success

- Customers
- Goals
- Measures
- Time frame
- Adjustments
Chapter 7:
Marketing Planning Process
Box 4: Delivering Products and Services

1. Customer and Market Research
   - Customer Needs
   - Customer View

2. Library Strategic Plan
   - Vision and Mission
   - Products & Services Implementation

3. Promotion of the Library
   - Messages
   - Vehicles
   - Campaign Implementation

4. Providing Products/Services
   - Delivery
   - Interaction
   - Adjustments

Customers
- Met Needs
- Unmet Needs

ALA, ACRL and 3M Library Systems
Delivering Products and Services

- Refine the promotional plan - realities may require some adjustments
- Organize and staff for success - to deliver new P/S, help staff grow
- Deliver on promises and learn - stay close to your customers
- Integrate the campaign into the Library routine - make this part of what you pay attention to routinely
- Monitor and adjust the campaign as needed - are customers getting what they need?
- Celebrate and reinforce the vision - talk about progress, stay on course

ALA, ACRL and 3M Library Systems

PM p. 61
Appendix

- Marketing that May Be Seen, Heard and Felt by All – PM p. 62-63
- ALA/ACRL Marketing Toolkit – PM p. 64-65
- Resources – PM p. 66
- Notes – Planning My Library’s Campaign – PM p. 67

PM pp. 62-68

ALA, ACRL and 3M Library Systems
Remember:

The leader determines the outcome:

- Knowledge
- Commitment
- Energy
- Plan
- Follow through
## Program Options

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

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

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

ALA, ACRL and 3M Library Systems
Tips for Success

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

ALA, ACRL and 3M Library Systems