Strategic Marketing
For Academic and Research Libraries

Facilitation Slides
for the Train-the-Trainer Workshop
Hello, I’m …

• Name
• Background
• Current job
• Your role as facilitator
• Your prediction about the session
Team Assignments

• Organized into teams
• Work together to:
  – Learn to deliver the one-day workshop
  – Complete practice exercises in a team format
  – Help each other become good facilitators
The Materials

- **Participant Manual (PM)** – marketing process, information and worksheets
- **Facilitator Guide (FG)** – tips, examples, meeting/workshop outlines
- **Facilitation Slides (FS)** – Power Point slides
- **Academic Library Toolkit** – examples of libraries, librarians and campaigns
- **Campaign for America’s Libraries packet** – public relations examples and tips
Three Kinds of Workshops

• Self study materials for librarians to use in their own libraries: (FG pages 30-51)
  – Prepare the campaign alone
  – Work with a small leadership team
  – Work with a large group or whole staff

• Workshops for Librarians (FG pages 52-64)
  – One-day version
  – Two-day version

• Train-the-trainer for the one-day workshop (FG pages 65-69)
Train-the-Trainer Workshop

• Little emphasis on the content
• Get used to the flow and the tools
• Planning for leading key segments
• Discussion and tips
• Optional: actual practice leading a section of your own choosing
Questions?

- Content questions?
- Agenda questions?
- Things you would like included …
Flow of the One-Day Workshop

Teams brainstorm

Facilitator introduction of each chapter

Teams create Sticky Wall

Large group discussion

Teams report ideas

Individuals take notes
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
Strategic Decisions

Customers
Met Needs
Unmet Needs

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

Which customers and which needs?

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

Which products and services and benefits?

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

What is the best way to inform customers?

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

How to be sure we deliver what we promised?

ACRL Strategic Marketing Train-the-Trainer Workshop
Campaign Design

Customer ___________

Needs, P/S & B

Messages & AIDA

Platform

Vehicles

Need #1

P/S

B

Need #2

Platform

FG p.26


ACRL Strategic Marketing Train-the-Trainer Workshop
# Campaign Design Worksheet

**Customer:** __________

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*ACRL Strategic Marketing Train-the-Trainer Workshop*
Facilitation Tips

• Preparation:
  – Self
  – Room and materials
  – Participants
  – Sponsors and partners

• Presentation
  – Presence and role
  – Speaking style
  – Slides and notes
  – Examples
  – Flipcharts

• Facilitation challenges
  – Tricky terminology
  – Examples
  – Instructions
  – Time frames
  – Managing meeting hogs
  – Managing ‘criticism’
  – Managing bored people
  – Managing your own energy

FG pages 6-8
Campaign Design Tips

- Choose the workshop
- Term “customer”
- Other key terms
  - Products/services
  - Benefits
  - Library positioning statements
  - Messages
  - AIDA
  - Platforms
  - Vehicles

- Fun and high value points
  - Choosing customers to focus on first
  - Creating messages
  - Attaching vehicles
  - Sequencing

- Ground rules

FG pages 9-11
Sticky Walls

• Purpose: wall space to display ideas, rotate/combine ideas and create a plan of action. (FG page 20)
  – Use 5’ x 12’ nylon fabric
  – Spray 2 to 3 times with re-positional adhesive
  – Cut 150 ½ sheets of colored paper
  – Supply colored markers
  – Supply Post-Its™ of various sizes, colors
  – Attach to wall with Command Strips™
Lapboards

Purpose: work pad for individuals to create campaigns for their own libraries (FG page 22)

• Use hardboard or foam board 18” x 12”
• 4-5 sheets of 11” x 17” paper
• Small Post-Its™
Energy Toys

Purpose: to relieve tension and to stimulate creativity (FG page 23)

- Use hands and relax the brain
- Manipulate, rotate, shift, shape and combine
- Silly putty
- Colored pipe cleaners
- Small puzzles
- Koosh balls
- Logos or small building sets
- Small toys with wheels
Team Assignment #1

• Put up your team’s sticky wall- 10 minutes
• Suggestions:
  – Unfold already sprayed fabric
  – Attach Command Strips™, one every 12-18 inches
  – Affix to the wall, pressing the Command Strips™ firmly onto the wall
  – Locate the fabric on the wall so that people of various heights can use it comfortably
Team Assignment #2

- Teams work for 45 minutes
- Write ideas on flipcharts and complete one sticky wall
- 1-2 members document work for others
- 1 member serves as reporter
- Each team reports, 10 minutes only
Team Assignment #2

• Each is assigned one segment of the workshop
• Teams review their segment by:
  – Listing the PM pages on flipchart
  – Listing the facilitator slides to use on flipchart
  – Listing key content to stress on flipchart
  – Providing two good examples on flipchart
  – Completing a sample sticky wall for the segment
  – Listing facilitation suggestions on flipchart
• 1–2 members document work to share with others
• Prepare to do a “teach-back”
Workshop Segments

Chapters:  (do the red ones first, blue next, green last)

• 1 Introduction – model, Status Inventory
• 2 Customers and needs
• 3 Strategy and products/services & benefits
• 4 Positioning messages, messages, AIDA and platforms
• 5 Vehicles and campaign design
• 6 Implementing the promotional campaign
• 7 Delivering on promises
Team Reports

After each report, discuss:

- Content questions?
- Flow questions?
- Technique questions?
- Facilitation questions?
- Emphasis questions?
- Other questions?
Optional Exercise #3

- Teams continue – 3 hours
- Each member selects one segment of the one-day workshop to prepare and present to the rest of the team
- Individual preparation time
- Team members present to each other
- Feedback and suggestions
- Large group discussion: lessons, ideas?
Key Facilitation Tips

- Arrangements and roles
- Room set up & sticky walls
- Definitions – verbal and transparency examples
- Solicit participant ideas, experiences
- On balance, “ask” more than “tell”
- Trust the process, the slides will lead the way
Next Steps?

What steps will you take now to:

• Advertise the workshop?
• Advertise your availability?
• Collect helpful examples?
• Prepare for delivery?
• Share with and learn from others?