

**A Workshop for
The New Jersey Library Association**

Marketing as a Team Sport

Presented by Peggy Barber
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April 27, 2009
1:00 - 4:30 PM

Market-driven libraries . . .

- Know their markets.
- Treat everyone like a customer.
- Have everyone on the marketing team.
- Ask, ask, ask. Then listen.
- Innovate constantly.
- Don't fear the competition.

—*Mission-Based Marketing, How Your Not-For-Profit Can Succeed in a More Competitive World*, Peter C. Brinckerhoff, John Wiley & Sons, Inc. 1997

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Marketing as a Team Sport

Goal -To better understand the importance of marketing, basic principles and the role of staff

Agenda

- 1:00 **Introductions/Ground rules/Discussion**
Is your library mainstream or marginal? If you could have a marketing miracle, what would that look like?
Why market? What are your challenges?
- 1:30 **Marketing Basics**
Basic concepts and terminology-- *Marketing or Advocacy?*
Communication checklist
Building a Marketing Communication Plan
A powerful/logical outline that works for all types of libraries
Empowering staff to join the Team
- 2:00 **Start your plan**
Who should be on your Marketing Team?
Begin the Introduction- What is the context/situation? Why plan?
Draft a goal and measurable objectives
Consider positioning
What questions do you have about the process?
- 3:00 **Break**
- 3:15 **The most powerful strategy of all: Word-of-mouth marketing**
What it is
Why it's important,
WOM must haves
Motivating staff
- 3:45 **Delivering the message**
Turning customers into champions
Be part of the conversation
Delivery techniques- *Going Viral*
Scenarios- Library sales force in action
- 4:15 **Wrap-up/next steps**

Marketing Basics

Marketing is that function of the organization that can keep in constant touch with the organization's consumers, read their needs, develop products that meet these needs, and build a program of communications to express the organization's purposes.

—Philip Kotler/SidneyLevy, "Broadening the Concept of Marketing"
Journal of Marketing, January 1969

Key Elements

A four-step marketing program . . .

- 1) Research:** Analyze the situation and get the facts (primary and secondary research).
 - A. Describe the community including demographic characteristics and trends.
 - B. Describe the library, including staff, support, governance, circulation trends, etc.
 - C. Define your audience (market segments) and their needs.
- 2) Plan:** Set strategic goals, determine objectives, develop service strategies.
 - A. Start with the library's mission. (Become mission driven, market dependent.)
 - B. Develop services and delivery methods to meet identified needs and wants—also desires.
 - C. Develop a positioning strategy.
- 3) Communicate:** Public relations, advertising, advocacy, partnerships.
 - A. Develop a communications plan. Have a clear rationale. Formulate goals and *measurable* objectives that support the library's strategic goals. Identify your positioning, message, target audience(s), strategies for reaching them and evaluation measures. Establish a budget, timetable and assign tasks.
 - B. Focus on listening to key markets.
 - C. Develop tools such as a basic fact sheet for the library, campaign press kit, talking points etc.
 - D. Build a press/contact list—media and opinion leaders—and use it.
 - E. Develop a media plan with timeline for sending releases, placing stories and public service messages.
- 4) Evaluate:** Are objectives (measurable) being met?
 - A. Set up evaluation procedures.
 - B. Measure performance vs. plan and adjust for the variance.

Definitions

Advocacy: Persuasive communication designed to plead or make the case for a cause or point of view. Libraries and other nonprofit organizations use advocacy to win support for funding and other issues that affect their users.

Advertising: The placement and purchase of time or space for announcements and messages in the media.

Brand: Brand is another word for identity as conveyed in print and other communications. A logo is one way to convey identity.

Community relations: How a library interacts in the locality in which it operates.

Direct marketing: Promotion designed to go directly to a target audience—generally direct mail.

E-marketing: Reaching out to particular markets of users/potential users using the Internet as a communications and distribution channel.

Lobbying: A form of advocacy intended to influence the outcome of particular legislation. It is subject to IRS guidelines. A lobbyist is a professional communicator hired to persuade lawmakers, as well as shape public opinion.

Market: Potential users or customers.

Marketing mix: A mix of controllable variables that may be used to reach goals and objectives. Core variables include: Price, product, place and promotion.

Positioning: How you want users and potential users to perceive your product or service—what separates it from the competition.

Point of purchase: Promotional materials placed at the contact “sales” point to attract user interest or call attention to a special offer.

Public relations: All the ways that your library relates/communicates with the public, including community/campus outreach, customer service, the media.

Publicity: Communications intended to promote your products or services that do not involve paid advertising, e.g. news releases, public service announcements, fliers, posters.

Strategic marketing plan: The entire marketing process including research, design, development and distribution of products/services, communicating the value and evaluating the success of these efforts.

Target audience/market: A segment of the population selected as the focus of a marketing effort in order to accomplish the stated objectives.

Tchotchke: Yiddish word for knickknack. Commonly used in the PR biz to refer to small giveaway items like key rings, pencils and magnets.

Word-of-mouth marketing: Organized, conscious, consistent approach to getting others to deliver your message for you.

Adapted from the Section on Management and Marketing: Glossary of Marketing Definitions, IFLANet, developed by using Peter Bennett's Dictionary of Marketing Terms.

Communication Checklist

Use this list to help you answer the following questions:

- *Is this library welcoming?*
 - *What is our message?*
 - *What is our style?*
1. **Accessibility**—Can people with disabilities easily use the library building and website?
 2. **Brand/Identity**—Does the library have a clear and consistent image—in print, in person, online? This includes consistent use of logo, full location info (including URL).
 3. **Customer service**—Is the library's commitment to excellent customer service reflected in the courtesy and helpfulness shown to customers? Are there ID tags for staff? Can staff members articulate the library message? Are they encouraged to share their favorite books and other materials with users? Does front-line staff provide feedback on customer wants, complaints, compliments?
 4. **Décor, decoration**—Is the library too light or too dim? Is the library clean, clutter free? Is there effective use of posters, banners, art and other promotional tools such as screen savers?
 5. **Display**—Are books and other materials displayed face out? Are there "shelf talkers?"
 6. **Local ownership**—How well does the library reflect the community, including its diversity? Is there a bulletin board? Displays of local art? Are there opportunities for the users to give feedback on library service/interact with other users? Share their comments on books?
 7. **Message**—Does your library have a key message that expresses its mission? Does everyone on the staff know it? Are library policies clearly and widely communicated?
 8. **Media**—Does your library have a presence in relevant media? Is someone assigned to work with the press? Does your library initiate stories, interviews and placements of public service announcements/advertising?
 9. **Outreach**—Does the library have a life outside the building? Does it have a presence in the life of the community?
 10. **Programming**—Does the library actively offer and promote programs and/or training sessions? How are programs promoted?

- 11. Print materials**—Are there too many? Too few? What is the message? How is it communicated on bookmarks and flyers? Letterhead and business cards? Newsletters?
- 12. Signage: Internal and External**—Is the library easy to find? Is it easy to find what you're looking for? Is the library mission visible? Does signage reflect awareness of diversity?
- 13. Telephone**—Does a person or a machine answer the phone? If it's a machine, does your telephone greeting help or harm your image? Is it clear? Easy to follow?
- 14. Website**—Is the image/message consistent with other library communications? Does it take advantage of the unique qualities of the web? Is the website treated as a branch library?
- 15. Body Language**—What is the unspoken message being delivered by staff?

What other ways are you communicating?????

Marketing is...

- All about people, not stuff.
- Listening, not just telling.
- Organized, focused, consistent.

Marketing Communication Plan Outline

Use this outline as a map for developing your plan.

1. Introduction (Briefly explain *why* you are proposing this plan. Identify Strengths, Weaknesses, Opportunities and Threats (SWOT). Include relevant research, observations.)

2. Communication goals (The dream. Big picture. No more than 3.)

3. Objectives (3–5 doable, measurable outcomes.)

4. Positioning statement

Example: *"The library is the best first stop for expert help in connecting children and youth to learning and discovery."* (State Library of North Carolina campaign)

5. Key message What is the most important thing you want people to know/do? In 10 words or less.

Example: *Your library is the very best place to start.*

6. Key audiences (External and Internal. Be specific. No more than 5.)

7. Strategies/tactics/tools (How will you deliver the message? Core strategies include: Media publicity, displays, programming, special events, website/email, partnerships, direct mail, outreach (parades, presentations, etc.) word of mouth. Develop an action plan and budget.)

8. Evaluation measures (How will you know what worked and what didn't? Refer back to your objectives.)

Introducing Word-of-Mouth Marketing

The very best way to get the word out is to tell people. Really. If every staff, Friends and board member told 10 people about this incredible resource, and those 10 people told 10 more people, and those 10 people told . . .

Word-of-Mouth “Musts”

- A plan
- A good product/*great* customer relations
- A clear, memorable and consistent message
- A prepared and committed "sales force"
- People who are willing to testify

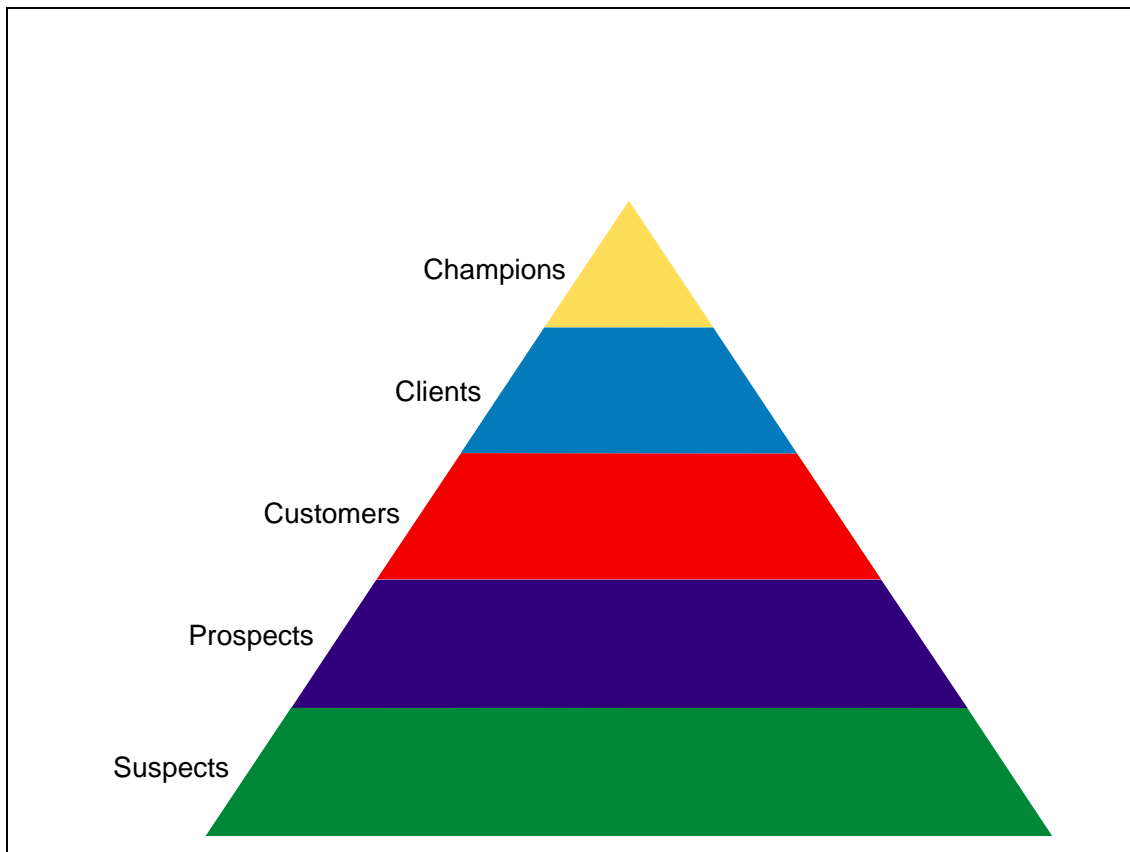
Sample Message

*Did you know you can use the library in your pajamas?
Our website is open 24/7.*

Tips

- 1. Don't just pass out bookmarks.** Encourage frontline staff to deliver the message when engaged with customers.
- 2. Feed the grapevine.** If someone indicates they are pleased with the service they received, ask them to “Please tell your friends.”
- 3. Send a message with your message.** Add a signature line to your e-mail correspondence with the library message.
- 4. Collect testimonials.** If you hear a compliment or "success story," share it with the sales team so they can share it with others. Invite testimonials from students and faculty.
- 5. Enlist “the library family”** as part of your marketing and sales team. Make sure all staff (not just professionals or full-time)—know the message, understand why it is important and the key role they play.
- 6. Seek out experts.** Reach out to community leaders, educators, the media and other referral sources to help deliver your message.
- 7. Wear the message.** T-shirts, buttons and other “props” are conversation starters and can help make your point.
- 8. Keep current.** Make a point of reading library updates so you can be a knowledgeable spokesperson.
- 9. Be alert** for new and creative ways of delivering the message.
- 10. Have fun!** Be enthusiastic. Encourage your "sales force" to be. Remember, it's not just what you say but how you say it.

Pyramid



SUSPECT: individuals who don't think about the library; the library is not part of their life.

PROSPECTS: individuals who might become library users if someone encourages them to.

CUSTOMERS: individuals who use the library.

CLIENTS: individuals who use the library and often have a relationship with library staff.

CHAMPIONS: individuals who use the library, have a relationship with library staff, and advocate for the library to others.

SOURCE: Word-of-Mouth Marketing by
Jerry R. Wilson, John Wiley & Sons, 1991

Going Viral (Email/electronic media)

- Ask permission. Include information on how to unsubscribe.
- Choose the right time and the right audience.
- Don't send anything you wouldn't want to receive.
- Make it easy and fun. Email is easier to share than a letter.
- Be clear about why you are sharing. What are the benefits?
- Be relevant and respectful.
- Only communicate when there is a good reason.
- Ask them to share with a friend.
- Include a link.
- Put a "Share this with a friend" message on every Web page.
- Collect stories/feedback on your website.
- Use blogs to convey your personality, philosophy and perspective.

Inspiring & Motivating Employees

- Develop communication and customer service policies with clearly defined goals and guidelines. Keep them simple!
- Have a clear positioning statement for the library—one that all staff members understand and own.
- Model the behavior that you wish to inspire.
- Listen—and respond—personally to all questions/concerns/suggestions.
- Communicate on a regular basis.
- Remind them how important they are.
- Reward and encourage their efforts—even baby steps.
- Provide ongoing training and tools to support them—message sheets, buttons.
- Celebrate your successes. Have a party!

Sample Message Sheet (Winnetka (IL) Public Library)

Key Message

We're up when you are: 24 hours a day.
www.winnetkalibrary.org

Talking Points

- Our website is an online branch library with a wonderful array of resources ...
 - Encyclopedias,
 - Financial tools such as *Morningstar*,
 - Tumblebooks*, a cool online story time for kids
 - ...and so much more.
- The library pays for premium online subscriptions, so you don't have to.
- We give you a world of safe, reliable resources beyond the Internet, and you can use them all in your PJs.
- All you need is a library card.

We'll be glad to give you a personal tour of the website and find the best tools for you. Come in or call for an appointment. . .

Statistics

The library has more than 35 online subscriptions and close to four hundred online reference books that you can use from home 24 hours a day.

Stories/Examples

Resident Robert Leonard explained his use of the *Historical New York Times* database while researching and writing an article for *Coin World* magazine. He said, "In five hours, without leaving the house, I wrote it and emailed it to the editor. This database has value!"

During the middle of the night our most popular online resources are *Morningstar* and the genealogy subscription site *Heritage Quest*.

Really Good Resources

Books

How to Say It: Marketing with New Media: A Guide to Promoting Your Small Business Using Website, E-zines, Blogs, and Podcasts, Lena Claxton and Alison Wood, Prentice Hall Press, New York 2008. A readable and informative introduction to various types of online media and how to use them effectively.

Libraries, Mission & Marketing: Writing Mission Statements That Work. Linda K. Wallace, American Library Association. 2004. How many of your staff can say your library's mission statement? That's what we thought. This book is dedicated to the proposition that your mission statement is your library's ultimate message. You should say what you do and do what you say.

Mission-Based Marketing: Positioning Your Not-for-Profit in an Increasingly Competitive World, 2nd Ed., Peter C. Brinckerhoff, John Wiley & Sons, Inc., 2002. Brinckerhoff provides a clear, step-by-step guide for identifying and understanding your markets, considering the competition, needs vs. wants and lots more. Practical and interesting.

The Secrets of Word-of-Mouth Marketing. George Silverman, American Management Association, 2001. Silverman says traditional advertising doesn't have the impact it once did and makes a great case for an organized, strategic approach to word of mouth. This is good news and a practical strategy for libraries, since we couldn't afford traditional advertising.

Word-of-Mouth Marketing. Jerry R. Wilson, John Wiley & Sons, 1991. This basic WOM text includes the pyramid model about turning customers into champions--powerful advice for librarians.

Online

Campaign for America's Libraries: Check the ALA website www.ala.org
A wealth of messages, ideas and strategies for promoting the value of libraries and librarians using the first-ever international library brand.

PR Talk Discussion List

A lively idea exchange for library staff interested in marketing/PR related topics. To subscribe, visit the ALA website www.ala.org and search PRTalk.

Word of Mouth Marketing Association: <http://womma.org>

Word of mouth now has its own association with a great free newsletter. Sign up here.