

This is a repository copy of *Strategic Marketing*.

White Rose Research Online URL for this paper:
<http://eprints.whiterose.ac.uk/99894/>

Book Section:

Potter, Ned (2012) Strategic Marketing. In: The Library Marketing Toolkit. Facet Publishing , United Kingdom . ISBN 978-1-85604-806-4

Reuse

Unless indicated otherwise, fulltext items are protected by copyright with all rights reserved. The copyright exception in section 29 of the Copyright, Designs and Patents Act 1988 allows the making of a single copy solely for the purpose of non-commercial research or private study within the limits of fair dealing. The publisher or other rights-holder may allow further reproduction and re-use of this version - refer to the White Rose Research Online record for this item. Where records identify the publisher as the copyright holder, users can verify any specific terms of use on the publisher's website.

Takedown

If you consider content in White Rose Research Online to be in breach of UK law, please notify us by emailing eprints@whiterose.ac.uk including the URL of the record and the reason for the withdrawal request.

Potter, Ned (2012). **Strategic Marketing.**

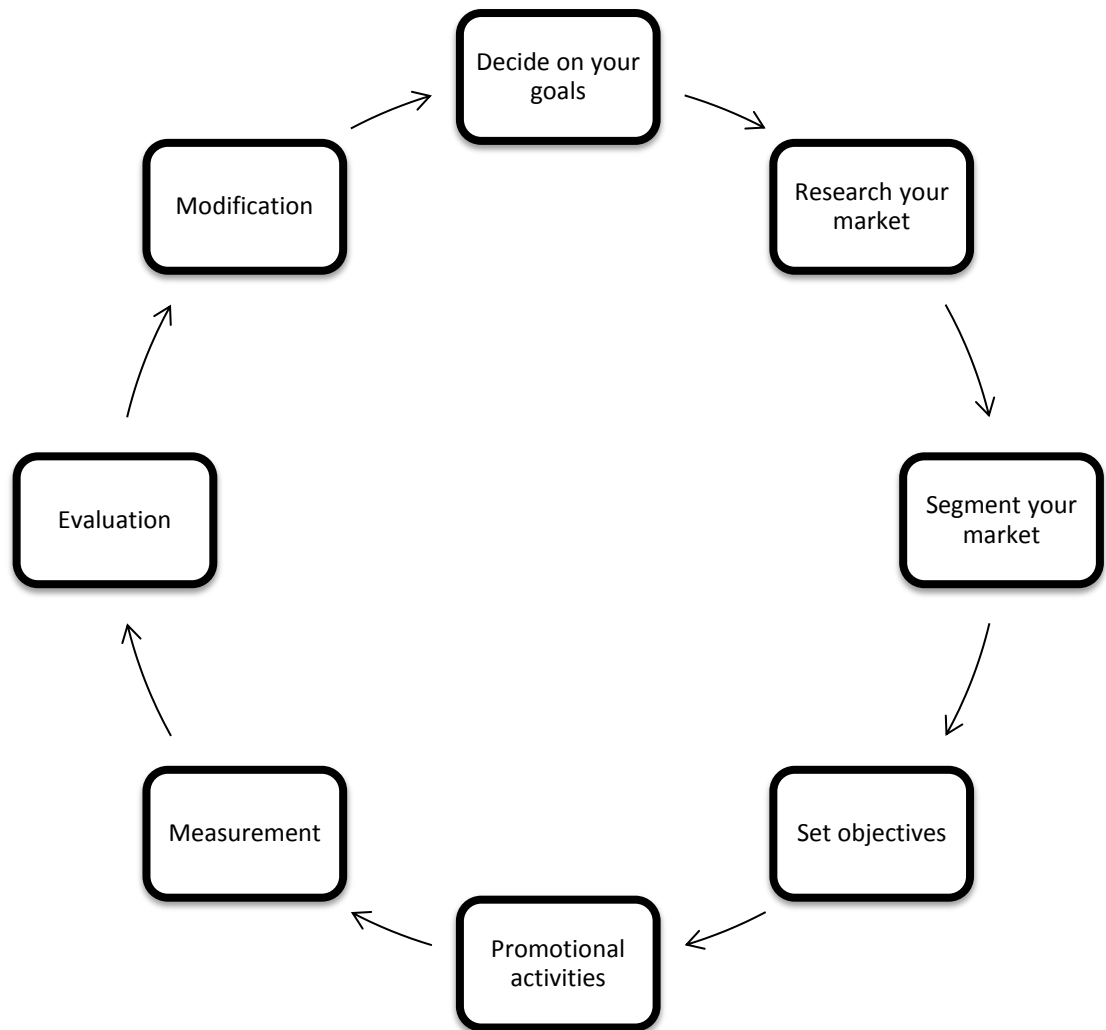
This is a preprint of a chapter accepted for publication by Facet Publishing. This extract has been taken from the author's original manuscript and has not been edited. The definitive version of this piece may be found in Potter, Ned; *The Library Marketing Toolkit*; 2012; Facet Publishing; ISBN: 978-1-85604-806-4; which can be purchased from <http://www.facetpublishing.co.uk/title.php?id=8064>. The author agrees not to update the preprint or replace it with the published version of the chapter.

Chapter 2: Strategic Marketing

Do you have a marketing strategy? If so, you're already way ahead of a lot of libraries. As an industry we're getting better and better at promotion, but, as discussed in the Introduction, promotional activities are only one aspect of marketing. Market research, segmentation, measurement and evaluation are all absolutely essential parts of the process, without which you have a series of unrelated promotions rather than a true marketing plan. These unrelated promotions can work well, but strategic marketing works *better*.

Real marketing happens in a cycle which constantly repeats. The goal of the marketing strategy is to ensure each part of this cycle is planned properly, and addressed properly. It's all about coming up with a plan that knits together all your activities, links them to wider strategic goals, allows you to analyse what works and what doesn't and improve things on an on-going basis. The aim of this chapter is to demystify this process and make it as obtainable as possible for the modern, real-world library.

If you run a Google Image search for 'Marketing cycle' you get more than 22 million results. Clearly, then, there are plenty of models out there to choose from. Many are so complicated as to obfuscate their meaning for all but the most hardened marketing professional, and I don't want to put anyone off attempting strategic marketing. With that in mind, here's a diagram of the marketing cycle, as it applies to libraries, made as simple as possible:



As you can see, the promotional activities are around half-way through the process – if you start with promotion you’ve skipped a vital part (market planning), and if you stop with promotion you’re missing another vital part (measurement and evaluation). This diagram is important because it illustrates the cyclical nature of what we are attempting to do, and where the stages fit chronologically. I’m going to explain each of those stages in detail, and that will form the basis of this chapter; at the end, there will be an outline of a Marketing Plan to show how these fit together.

There are three case studies: Oriana Acevedo discusses marketing to multicultural communities, Alison Circle gives an expert view on measuring marketing activities, and first of all Terry Kendrick covers all aspects of marketing strategy and why it's important.

Case study 4: Key issues in strategic marketing | Terry Kendrick

Terry Kendrick is the guru of strategic marketing in libraries. His book *Developing Strategic Marketing Plans That Really Work* (2006) is a must-read, and he writes, speaks, and runs workshops on marketing libraries all over the UK and in no less than 26 countries abroad. He also brings a non-library perspective to the table, lecturing in Marketing at the University of East Anglia.

As a way of framing the specifics discussed in this chapter, I talked to him about all things marketing strategy.

Do you think that strategic marketing is undervalued in libraries generally?

I do. I think strategy setting is very well respected, I think libraries are very good at writing strategy documents - and I think they're actually quite reasonable at doing tactical programmes. The problem is that the strategic marketing planning part within those programmes isn't always so well bought into, because it's hard and it requires a lot of resources which aren't always readily available.

What are the consequences of marketing as afterthought? As in, the differences between making marketing a priority versus libraries who just do marketing if they get a chance once they've done everything else?

I think many libraries are driven by a series of pump-priming initiatives – so I think very few libraries use a full marketing approach. Many libraries feel the need to market what they've done as an initiative and then they're quite often disappointed by it because it's been done as a series of one-off activities without the coherence of a marketing plan. Is there evidence that marketing makes a difference? What I see in North America, in Canada in particular, where they're more marketing driven, is that it does make a real difference.

Is the first step to creating a marketing strategy understanding your own library or understanding the market your library is in?

I think the first step in creating any marketing plan is knowing what your ambition is. If you don't know what you want to be, the market doesn't matter and your capabilities don't matter either. I think it's very important to know what you want to look like, what you want to be – putting some numbers on that will focus the mind immediately. If you say you want to grow 30% over the next X amount of years, that'll certainly focus your mind on the marketing: where in the market will that 30% come from, which users will give us issues, visits, enquiries, database hits - whatever it is driving the performance measures in that organisation.

There is a difficulty using numbers though because I think perhaps libraries aren't used to planning like that - they find that quite intimidating. I think they want to do the promotional side of things rather than the harder side of the thinking – I think they're very good at DOING things, and it feels good to DO something, but to think your way through something is hard work, it can cause discord. And because there's not a culture of connecting marketing with the strategic planning those numbers

which should be used as part of the marketing plan are seen as irrelevant to that process - when in fact they're very important.

Tell me about the importance about the library brand fitting into the patron's lifestyle.

For most of the things we want to be associated with, we've got to feel good about them. We've got to feel that if we're seen there, then we're seen as 'okay' by the people whose opinions we value. People tend to have tribes and lifestyles and they live their lives in particular ways - it's not always the case that a library fits closely to that. If you have a lifestyle that for instance is fairly relaxed, you might want the library to be relaxed. The trouble is other life-styles might not be quite as relaxed so there'll be a tension there in the way you market your service, which is very difficult to do. Good marketers can deal with that – they can market to different user groups with different lifestyles, simultaneously. Libraries don't always understand the lifecycle of their users – what they're doing in their lives.

Are any aspects of marketing strategy true across the board, or should everything be 'on spec'?

There are a few key concepts. One of them is that every library should be looking at the value it can offer its users in the way they live their lives, the journeys that they're on during their busy days, and how it helps them get there. There's no point in having (and talking about) resources when there is little value in the resource – the value only appears when the resource is in use. If you draw attention to the resource without explaining the outcomes that come from using that resource,

you're actually setting yourself up to be cut because the danger with that is suddenly you draw attention to a pile of money being spent (for example on databases).

All libraries need to look at their value. The other thing that is key is not everyone perceives the same value in library services. So for every library doing marketing, it's key to undertake segmentation. Because it's the differences that matters rather than the similarities. It's no good looking for the one true way – but if you look at the value each segment attaches to the library, you've got the core of what marketing is about. Your planning should be driven by segments rather than the library as a whole, with an over-arching strategy for the library. What brings in the business and activity is the segments.

How do we ensure marketing is on-going?

As libraries follow certain initiatives (rather than whole-service planning) quite often lots of activities will happen which are unconnected. It's really important, structurally, to have somebody whose responsibility it is to look at the activities and find synergies to build on, particularly given that we know that one-off marketing activities will tend to be disappointing in their rate of response. Real results come from a certain amount of 'touches' to a particular user group over a period of time. It's really important that somebody is overseeing this. They don't have to be called a marketing specialist – marketing works best when it's an *orientation* for the library as a whole.

The worst thing that can happen is that if we send out some marketing which is successful, then people respond and come in to claim the 'offer' we're giving them

and they're met with a poor response – that does more than just negate the activity you've just done, it positively reinforces the library as something which sends you irrelevant messages or makes promises it can't deliver. So that next time they receive a message from the library their first thought is 'last time I received a message they made an offer they didn't deliver on' not 'let's open this lovely message from the library...'

Understanding the market is a key part of the process.

Yes - any activities a library does or any service it offers, it's unlikely these days that we'll be the only people offering the service that people want. It's really important when you make an offer to your patrons that you understand what other things will be in their minds, what other offers are they being made which are similar, what other ways of achieving the same things will people have. Sometimes there'll be obvious other ways like Google, sometimes it's less obvious – it may be a friend they know who can help them with the same thing, or a strong competitor might be literally doing nothing, as in: why bother? It's important to understand what our offer looks like compared with competing offers. If we don't know that we're likely to think that just marketing something will make it attractive. But who else is there, who are our rivals?

Can we make more of marketing the librarians rather than the library?

The more we can make the service look personal the better. An easy and quick way of doing this is to put pictures of librarians online and on promotional activity! I can understand the reluctance to do this, but we are after all a service not a product.

Services are created by people, and they depend on how well people respond.

Products are the same wherever you get them from. Services are different – people have skills, which is what makes us different from an information resource. Provided we have high quality skills, it's better to promote the people who deliver the service than it is to promote the products themselves – it's the people that add the value to the information.

Any tips for quick wins in library marketing?

Some of the quick wins in marketing are based around the key areas of segmentation and value. Many marketing activities will take quite a while to build up – if you try and look at the whole service at once you'll probably find the set of offers you have are either not strong enough or you won't have enough resources to fully implement them. So it's best to choose one group of people who you fully understand in terms of what they value, how they use your resources, what their outcomes are – take that segment and take it through a whole marketing planning cycle. It should be more manageable and should have impact relatively quickly – and everyone knows nothing succeeds like success. People don't want to necessarily do a large amount of marketing – those who don't, need to see those quick wins. There's a phrase about how you can lead a horse to water but you can't make it drink; the real trick is to make the horse thirsty *then* take it to the water... To make people thirsty for marketing within your organisation, you have to show them quick wins – because in these difficult times no one wants to work hard on something which won't bear fruit for three to five years; there are a lot of benefits in the long-term

view, but it takes a lot of nerve just to wait for them! So you need the quick wins to help get you there.

People always buy into marketing libraries – they really want to do it. But they go away... and it just doesn't happen. 6 months later they've written a big document outlining everything, but the priorities have shifted. Advocacy and marketing – they've got to be bed-fellows haven't they? What a marketing plan does is make sure the offer the advocates make is actually there if the advocacy works!

It's an important time because if you look around the world, libraries are being cut all over. It feels like something bigger is happening – not just in libraries. We have to be careful because it could be that the last 30 years of libraries not biting the bullet on marketing is going to finally cost us.

The marketing cycle in depth

Now we'll look at each stage of the marketing cycle individually.

Decide on your goals

In essence, this stage is all about asking the questions: where do we want to be? It is important to know what you want to achieve as a library (your 'mission'), and design the marketing strategy to help achieve that. This helps embed marketing within the wider culture of the organisation, and increases the likelihood of you being backed with meaningful resources.

Marketing can achieve many goals. It could be that you simply want more people through the doors; that would appear to be the most obvious motivation to market your library. But there's more to it than that: are you trying to attract new patrons, or increase the frequency with which the existing patrons visit? You may also wish people to use more (or particular) resources once they're there. You may wish to increase the library's reputation within the community (or even within the information profession, in order to attract the best staff). For archives and Special Collections, the aim can sometimes be to *decrease* footfall in order to protect the physical originals, by marketing the digital surrogates.

For all types of library, perhaps the ultimate goal is to be the first thing that comes to mind when people need the services we provide. Whether it's an information need (most likely), or a community need, or a training need – people need to know we can provide it, and be convinced we can provide it better than anyone else.

Be brave with your goals. So many great ideas get bottlenecked by trying not to upset people. We are at a time when we need to inspire people, not protect their delicate sensibilities. Merely not failing is no longer enough. Think about how much of an impact a marketing campaign has to have on you personally in order to get you to try something new, and adjust your ambitions accordingly – because this is what we marketers should be aiming for, to *inspire* library use.

Market research and Segmentation

In the diagram above, 'Research your market' and 'Segment your market' are separate stages. However I'm going to cover them both together here, because they are so closely related and the processes can overlap.

There are two main aspects to market research. The first is analysing the market within which your library sits. The second is analysing yourself: asking, where are we now? Once you know where you are, you can start to formulate a strategy for getting to where you want to be. Both stages are summarised by Terry Kendrick's quote, above, 'It's important to understand what our offer looks like compared with competing offers.'

Analysing the market

Analysing the market involves several factors – in particular, exploring the community and demographics surrounding your library, analysing the competition which also serves these demographics, and looking inwards at your own services and existing offer.

Before going out and finding your own information about your community, make the most of existing data. Of course the library may have conducted market research in the past which could still be relevant, but beyond that there may be demographic reports from local government, national surveys of students at Universities, or company reports for business libraries. With all of these the aim should be to identify groups of patrons and get to know them properly: identifying what their needs are, and identifying whether or not the library is currently meeting those needs. This is the beginnings of segmentation, and only after this stage can you really begin to market to the people involved.

However, within reason existing patrons will continue to use the library regardless of the strategic marketing initiatives you employ – as such, analysing the market should focus primarily on finding out about *non-users*. How many potential users are out there, and how can you win them over? The 'User Feedback' section in the previous chapter details techniques you can use to understand users and non-users too.

An area of market research and strategy on which there is very little advice and coverage already available is marketing to multicultural communities. Oriana Acevedo is the Multicultural Consultant at the State Library of New South Wales in Australia and has run successful campaigns in this area; she details them in this second case study of the chapter.

Case study 5: Marketing to multi-cultural communities | Oriana Acevedo

What are the first questions we should be asking ourselves, when planning marketing to multi-cultural communities?

What do you know about the community? How large is the group, what language(s) do they speak? What is the age breakdown of the community? What are the literacy levels? What are the cultural dynamics of the community (e.g. are women likely to speak)? How do they travel to work – e.g. do they drive / use public transport? Does the community you are targeting have any knowledge or experience of a free public library as a concept?

It is important to start with the community needs, build library services and collections from their perspective; don't just market existing collections to them.

How do we meet these challenges?

It is not about having a unique multicultural marketing strategy. Everyone needs to think about it as part of their role (building collections, developing programs, communication, customer service, organisational capacity and marketing).

Some key points:

- It is very difficult to market from the outside into a community, we find it is important to join in with existing networks and form partnerships
- Identify multicultural workers within the community (eg. Migrant resource centres, Health workers) and work with them
- Choose models from the community for advertising material
- Marketing materials need to be representative of the people in the community (eg. older, younger, professionals, stay at home ...)
- Use speakers from the community (for video / media / events)
- Target the multicultural media (eg. Vietnamese health collections via Vietnamese community radio and newspaper)
- Advertise in places the community frequent (eg. public transport billboards, bus stops, churches and religious venues)

You ran the successful Mylanguage project.

Mylanguage is a national internet portal designed to deliver information and complement library services to multicultural Australia using a number of innovative web-development techniques and scripting languages.

The marketing of the MyLanguage involved banners, bookmarks and YouTube videos in multiple languages.

In June 2008, on behalf of the national partnership, the State Library of NSW recruited over 30 native speakers, representing a wide range of languages, to participate in the filming of video clips. 34 individual videos, each of approximately

1.5 minutes in duration, were individually scripted by the native speakers to emphasise library services in a culturally appropriate manner.

Within the first year the portal has been visited almost 10 million times. By August 2008 it was getting over 1.5 million hits per month.

Do you have any more practical advice as to how other libraries can market to diverse communities?

- Radio interviews talking about the services (on community radio)
- Be proactive in networking with the community
- Be very positive / certain in your approach to a community
- Projects take about two years to become effective and raise awareness in multicultural communities – be patient and don't give up.

An additional full case study from Oriana, covering the MyLanguage Project in more detail, is available on the website: www.librarymarketingtoolkit.com/p/case-study-mylanguage-internet-portal.html

Now we'll move onto the second part of analysing your market – you've explored your demographic, so now you must ask: who are your competitors? It's helpful to actually draw up a list and consider for each one what the library can do better than they can. If the answer is 'nothing' then your resources may be better invested in other areas. The library's competition includes *anything* the user could do instead of visiting the library or using its online resources. So whilst this covers the obvious competitors such as the internet in

general (in particular Amazon for materials, and search engines for information) and bookshops, even things like 'doing nothing' are vying for our users' time.

Competitive benchmarking is a really useful way of analysing the market. It involves creating a list of user requirements, rating how you deliver services to meet these compared with your competitors' and, crucially, rating how *important* each of these requirements is to the user. Delivering the least important requirement much better than any of your competitors may not be enough... For example, the library used to be the go-to place for information, and now it has been usurped by the internet. Librarians often cite the unreliability of information found online as a reason to continue using libraries instead, but the fact is a lot of people don't actually *need* good quality information from highly respected sources. For many, basic information found via Google and Wikipedia is perfectly sufficient. This isn't true across all demographics, but it is true across some – the key thing is to only market 'providers of good quality information' to those that value it.

Analysing yourself

Now you have defined the market, you can seek to define your library's place within it. By this stage you've already decided on your goals; you know what your ambition is and later you'll decide exactly how to achieve it. For now the task is look at what you do well and what you do less well, see where your existing users are coming from and identify areas for growth, and see what you can offer potential new users.

As discussed above, user feedback is clearly a very useful piece of the market research puzzle – if your goal is to increase use of resources by existing patrons, it should form the basis of your analysis and your plans. However, if the goal is to increase the number of

patrons using the library in total, an understanding of non-users is absolutely essential to give you the kind of knowledge to help enable such a shift. At this stage your analysis should be about what the library already offers non-users which they don't know about (but would use if they did), and what the library could *potentially* offer non-users to meet their needs in the future.

Finally, a really useful avenue of feedback comes from lapsed users. People who previously had the time and inclination to visit the library but no longer do so can offer absolutely vital insight into what wasn't working for them, which in turn can lead to better customer retention in the future.

Any number of textbooks detail how to go about performing a SWOT analysis on your library - to identify the Strengths, Weaknesses, Opportunities and Threats - so I won't go into that here. One thing to stress, though, is that when considering your institutions' assets it is worth looking beyond just the books and other information resources. It could be the library space or the location, which would mean you should market the library as destination. It could be the courses and community groups you run. It could be that your staff are your main asset, in which case don't be afraid to market *them*.

It's likely that each of these will be assets for different groups of users or potential users – this is where segmentation becomes so important.

Segmentation

Segmentation is the formal term for one of the Seven Key Concepts discussed in the 'Introduction': creating different offers for different groups of patrons and would-be patrons. The process is two-fold: firstly it involves deciding how best to divide up the groups

of people to whom you are marketing, and secondly developing different value propositions for each of them. In essence this means showing each of the many 'faces' of the library to each different group as appropriate, marketing the aspect of your service provision that most appeals to them. It is an instructive process, allowing you to really explore what you have and how it can be beneficial to different groups, and sometimes it exposes holes in the library provision. Sometimes you find out that don't really have anything to offer a particular group, but that group falls within the library's remit and so needs to be accommodated: in that instance, you may need to create some kind of new service that forms the basis of a brand new value proposition.

Perhaps the trickiest part is choosing how to segment your different target groups. I would recommend a hierarchy that begins with two major groups, users and non-users, and then sub-divides each of these into smaller segments; beyond that, every library will be different and segmentation is not an exact science. It could be that many groups appear in both categories – for example, in the academic environment you could have 'taught post-graduates' as a segment. Taught post-graduates may represent a major hole in your usage stats: it could be that the vast majority of them ignore the library entirely, meaning they're a big target for your marketing to non-users. However, those that currently *do* use the library still need a certain amount of attention, particularly if any of them can be cultivated into library champions to spread the word to their peers – and if your marketing works successfully and many more taught post-graduates start using the library, they will need to be marketed to in order to retain them.

To continue the academic library example in order to contextualise segmentation in the real world, other segments might include Research Students, Academic Staff, Undergraduates,

Distance-learners, Lifelong learners, Emeritus staff (all of whom could be further sub-divided into Arts and Humanities, Sciences and Social Sciences if the market research shows these groups behave differently in their use of the library), and Support Staff.

At the end of the process of segmentation, the aim should be to have several distinct groups to which you'll market the library. You should know roughly how big each group is and how important each group is – this helps prioritise your promotional efforts. You should know what each group's needs are, and whether or not they are currently being met by the library. This should lead to the formation of an offer - a different value proposition, focusing on the most appropriate strengths in the library service – for each segment or group.

Segmenting your existing users

Not all library users are the same, obviously, and it is tempting to divide them into obvious demographics: young and old, male and female, local and remote, and so on. But it may be more useful to divide them up by their information seeking behaviour, their motivations, because that crosses traditional boundaries of age and gender and location, and ultimately determines what kind of offer they would like to receive from the library. How you segment your market ties in closely with what your aims are – if, for example, one of your aims is to get existing users to use your resources in greater volume, then dividing them up into 'casual users' and 'power users' could be beneficial, as it will allow you to concentrate your marketing efforts into the former segment to try and make them more like the latter. In practice this might mean outreach to the casual users via email or postal mail-shots promoting the more advanced services which power users commonly enjoy, or starting a campaign on social media to get your followers to visit the building in person more often. Preaching to the converted (the power users) has its uses in marketing, but when resources

are limited segmentation provides a great way of ensuring they're used in the areas where the most potential gains are to be had.

Segmenting your non-users

If one of your aims is to increase the number of users your library has, then segmenting your non-users into different target demographics is terrifically useful. Once you break down the potential audience for your marketing, everything seems infinitely more achievable: rather than trying to achieve a blanket aim like 'get 500 extra members' you can start thinking like a marketer, and set specific objectives (more on which below) like 'I want 100 more users from the 65+ market, 200 more parents and their kids, 50 more remote users and at least 50 casual users who mainly come for the free Wifi but eventually start using other resources too'. When you have targets like these, the whole process of marketing becomes much more focused and specific: you create offers designed to appeal to each segment, and then you market to them and record the numbers and evaluate the campaigns.

Targeting the currently indifferent

The temptation will be to base most of your marketing around the 'existing users' segment – it's comforting and comfortable to market to those who already class themselves as avid library fans. I would argue that we have to be braver and put more of our resources into the non-user segment, most particularly in the public library sector. We have to target those people running from A to B, head-down, and show them we can help them on their journey.

At the moment, at both industry-level and sometimes at the level of individual libraries, we put much of our resources into retaining existing users or trying to convert people who are actively hostile to libraries. In fact, the former don't need as much persuasion to keep using

the library, and the latter are probably a lost cause not worth pursuing. It's the *currently indifferent* at whom we should be targeting much of our marketing – those who would find value in the services we offer if they a: knew the services existed and b: had the benefits clearly explained to them in language they understand. To use an election analogy, we currently spend too much money on the people who've already made up their minds who they're voting for. It's the floating voters and, perhaps even more importantly, the people who don't even realise there's an election taking place, who represent the best return on our marketing investment.

All of the processes described above allow you to set objectives (for example, to meet currently unmet needs in the future) and, later, to determine which messages you wish to market to each group via your promotional activities.

Set Objectives

Objectives are distinct from goals or aims because while the latter describes the overall ambition, objectives describe the specific methods of achieving it. We've asked where we want to be; now we must ask how we get there. Only at this stage, when you've researched the market, understood where you stand within that market, and segmented it into different groups, can now set the objectives for exactly what you want your marketing to achieve in each area.

As mentioned above, putting numbers on your objectives is a great way to focus the mind. It helps you understand not just what needs to be done, but *how* it can be done. You may not hit all your targets of course (new members, people through the turnstiles, circulation,

website use or whatever they may be) but this in itself is instructive and can be used to inform future campaigns.

Objectives should be as specific as possible, as measurable as possible, and preferably dated too. Of all sections of the marketing cycle, this one and the next are what constitute the action plan your library will follow.

Promotional Activities

Finally we get to the actual promotion itself. This book is essentially full of information about promotional activities so I won't go into detail here, but in short it is at this stage that you start to *implement* your marketing campaigns, be they online, on paper, or in person. All the work you've done on market research and segmentation by this stage should mean you know exactly who you are marketing to, and what you want to say to each group.

If there is one overarching rule here, it is to decide on clear messages. Many of the problems libraries have in marketing themselves stem from the fact that many people don't really understand what we do. We have to communicate our value to each segment as simply as possible. And remember, marketing is a conversation – your promotional activities should allow for two-way interaction.

+Measurement

I can't stress enough how vital measurement is – measurement is *what makes this marketing*. If you don't measure the impact of what you've done, you can't really complete the cycle by evaluating and then improving your offer. Ideally you should be able to measure the number of people who've been impacted by each marketing campaign you run, and the amount of times the campaign has had an impact. So for a website that would

be number of unique visitors, and number of page views; for a poster that would be the number of people who see it, and the amount of times it is seen. From this it should be possible to calculate how much it cost to reach each person in a particular way, and from there you can calculate which marketing methods, approaches, and campaigns represent the best use of your resources.

As part of a strategic marketing plan, you should aim to measure not just the marketing campaigns themselves but the changes in user behaviour that come about as a result.

For this stage of the cycle we have an expert view from Alison Circle.

Case study 6: Measurement in Marketing Columbus Metropolitan Library | Alison Circle

Alison Circle is Director of Marketing and Strategic Planning for Columbus Metropolitan Library. She has more than 20 years experience in marketing, including corporate and not-for-profit companies. She writes a marketing column for Library Journal and speaks extensively on the subject. In this expert view she picks up on many of the key themes in this chapter (including a working example of Segmentation), and explains the need to measure outcomes rather than outputs.

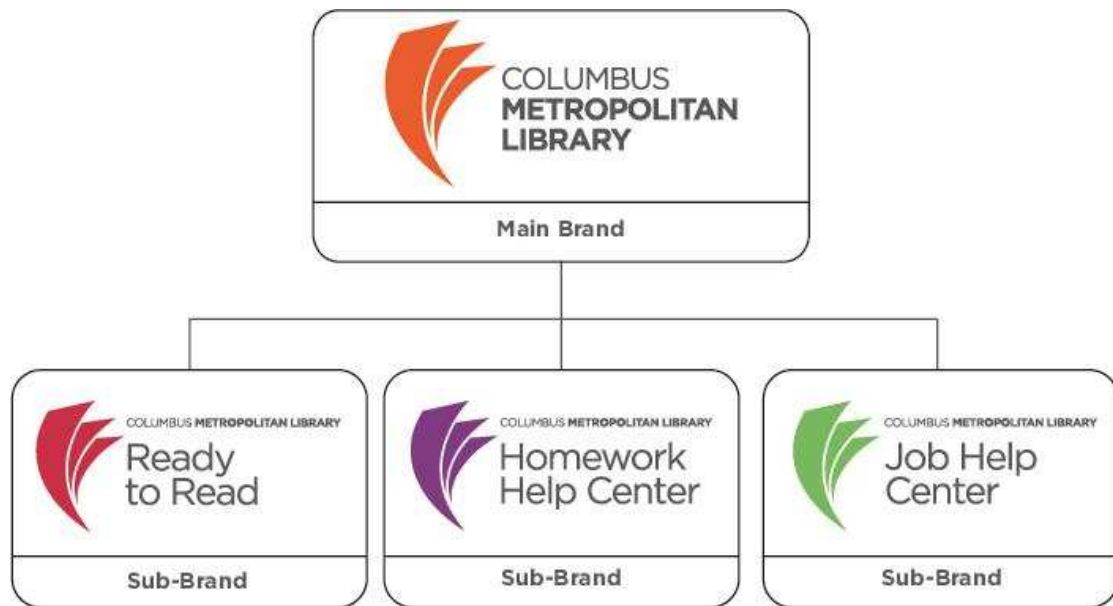
Columbus Metropolitan Library (CML) is recognized as one of the best libraries in the United States. An important driver to our success has been an early adoption of marketing practice. In an industry that promises 'Open to All,' in today's fractured marketplace we can't be all things to all people. So how did we begin? We started with research – a deep examination into the *behaviour* of our customers — segmenting our customer data into behavioural clusters: Young Minds (children); Power Users (avid readers and the mainstay of public library use); Virtual Users

(computer users). We have 15 clusters overall; we chose 3 for our primary focus and drove all of our efforts toward these strategies. We were committed to doing a few things very well.



Next we rebranded the institution. Previously, staff who wanted to start a program or service got a logo, but CML had grown too many brands and lacked structure or coherence. Our logo itself was stuck in a box. Literally. It was a blue square box in need of updating. Using our strategic plan to drive key programs, we created a brand architecture system to organize our services into a family of products.

CML's Brand Architecture:



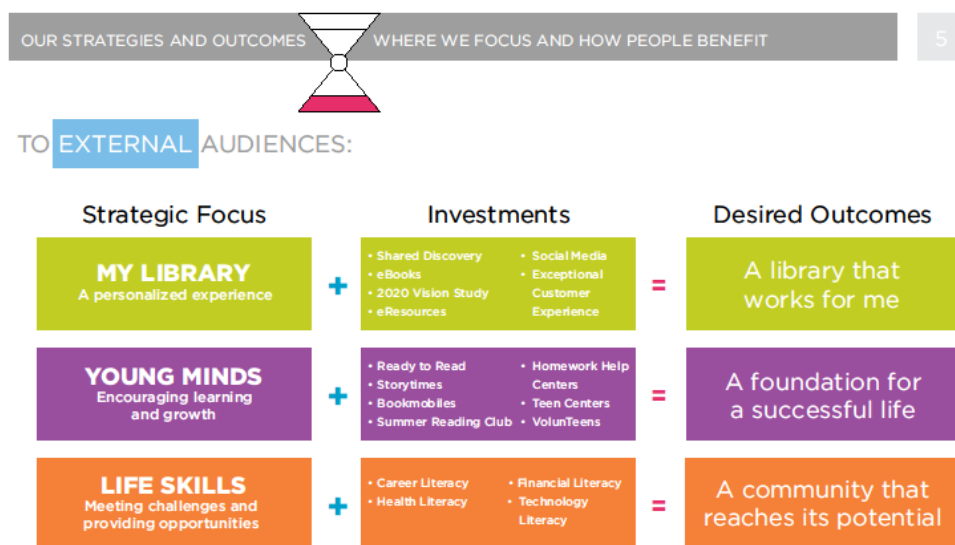
It was vitally important to bring library staff along through this change process. Staff were used to – and enjoyed – creating their own promotional pieces. As the organization centralized the marketing function and message development, it became critical for all promotion – large and small – to be coordinated centrally. To help accomplish this, CML turned to a book (naturally!): *Managing Transitions* by William Bridges (2009). This book gave CML the language and tools to recognize and address the process of change. For some staff, making posters was the fun part of their job, and we were taking that away. That loss needed to be recognized and addressed. I’m happy to say that we have made tremendous progress and (mostly) speak with a single voice. In a world crowded with noise, this has become more important than ever.

One of my favourite behaviour quotes is from Jack Welch, business icon, who said: ‘If you can’t measure it, it’s a hobby.’ And that means going beyond counting (outputs), to measuring behavioural change (outcomes). It isn’t enough to know how many kids signed into the Homework Help Center. In today’s marketplace we need to show the

value of the Homework Help Center: did kids' grades improve? Are we driving up graduation rates? Gathering this information is hard work. But 'gut instinct' or 'feelings' can no longer drive business decisions.

I'm thrilled to say the payoff of our approach has been great. With this framework, we are able to tell the library's story; it led to our designation as National Library of the Year.

What's next? We've updated our strategic plan to drive deeper change and deliver on our lofty vision of 'a thriving community where wisdom prevails.' And while you won't see our customer clusters in this new plan, the thinking behind customer segmentation continues to be the backbone of our strategy.



Evaluation

Once you've measured your marketing efforts, you can evaluate what worked and what didn't – this relates directly back to your goals from the very first stage, and your objectives later on. The process enables you to market better the next time around: either doing more with the same resources, or potentially being able to achieve the same with less. For those of us trying to embed marketing into the wider culture of our institutions, evaluation also serves the essential role of providing evidence of the return on our investment in the promotional process (or ROI). In order to continue to be allowed to spend funds on marketing, we must prove we are spending them wisely.

To evaluate a marketing effort, it is not sufficient just to look at the numbers. You must ask the question: did people do what we tried to persuade them to do with our marketing? So for example, perhaps you pushed your Facebook site over the summer, and got 500 extra likes / followers. The figure of 500 is the measurement, so what is the evaluation? If the aim was simply to get more followers then of course you have been successful, but if your aim was to affect behavioural change, with liking the Facebook page the first step on a process which ends with a new user signing up for a library card, then you must evaluate whether your 500 likes achieved this or not.

Every marketing effort should feed into the next, when properly evaluated. Mistakes won't be repeated, strengths will be built upon, new techniques and technologies will be accurately assessed for their usefulness.

Modification

It is absolutely crucial not to leave out this last stage! You've planned and run and evaluated your marketing, you know what worked and what didn't, and you can see where things can be changed and improved. So act on it, and modify your approach so it works better next time around.

Remember, the changes you implement shouldn't only be based on your experiences last time around, but should take into account the changing environments and cultural landscape in which your library sits.

Developing a marketing plan

So what does all this mean in practice, in the real world of day-to-day library life? Ultimately all of this should be fodder for a strategic marketing plan: a document which tells the library how to proceed. Preferably in as brief and straight-forward a way as possible so the plan doesn't inhibit action. Considering all of the above, a strategic marketing plan might be based around a structure like this:

1. Executive Summary

An overview of the entire marketing plan

2. Goals

Where you want the library to be within the time-frame of this marketing plan; what you want the marketing efforts to achieve; and how these relate to the overall strategic plan of the library

3. Internal campaign details

Marketing works best as a collective effort across the library - this section should

detail how the goals, objectives and promotional methods will be conveyed internally

4. **Market Research**

A breakdown of the community of patrons and potential patrons; analysis of your competition including competitive benchmarking; analysis of your own library services

5. **Segmentation of the market**

The division of your market into groups based on behaviour, motivation and needs; analysis of how the library currently meets each group's needs; prioritisation of each group; and the proposed offer for each group

6. **Objectives**

Specific methods for achieving the marketing goals, preferably involving targets for growth based on increases by segment. This is really the action plan

7. **Promotion: methods and activities**

The nuts and bolts of your marketing campaign – the key messages, and the platforms by which they'll be delivered

8. **Methods of measurement**

Details of how the success or failure of the marketing will be measured and recorded

9. **Framework for evaluation**

How and when the campaign will be evaluated; information from previous campaigns' evaluation if applicable

10. **Areas of responsibility**

Which departments and / or individuals will be responsible for implementing which areas of the plan

11. Cost analysis

How much the marketing campaign will cost, in terms of both financial outlay and staff time

12. Modification

The final section to be completed at the end of the campaign – how will any of the processes above be improved or changed next time around

More information, links, and further reading including sample marketing plans, are available online: www.librarymarketingtoolkit.com/p/strategic-marketing.html