

Marketing plans made simple

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Why pursue a marketing plan?

Typically, definitions of marketing tell us what it isn't: it is not advertising; it is not publicity; it is not outreach. But marketing does allow us to understand our audiences: our readers, our users, our constituents—however we refer to the people we hope to serve. And as we learn more about the people we hope to serve, we can communicate the value of academic libraries in a shared language. We can describe the benefit rather than the feature. For example, rather than boasting of the quality of cataloging, we can offer the promise of finding what you're looking for easily and quickly. Thus, a marketing plan is an exercise in showing empathy for our patrons. It is an opportunity to connect with users, to share the value of library services, and to tell a story that resonates. People take interest in propositions that relieve pain points and thereby make their lives easier. A marketing plan helps us intersect with our patrons' needs. It helps us communicate value and evangelize.

Change management

With the cosmic changes the digital universe has brought to the place of libraries in the academic enterprise, adopting an entrepreneurial approach to change is essential for the successful organization. Successful organizations adapt their core competencies to support innovation (Thota and Munir, 2011). And that innovation should center on the expectations of users.

The most compelling reason to create a marketing plan is to help the library change, to help it grow as an organism and to ensure sustainability for the future. To envision change, we need first to understand the organization: its personality, its culture and its behaviour. In their theory of change management, Bolman and Deal established four frames—metaphorical lenses—through which organizations and their leaders picture themselves: structural, human resource, political and symbolic. The greater the number of frames through which the organization is viewed, the more comprehensive the understanding of its culture. Each "captures a vital slice of organizational reality" (Bolman and Deal, 2014, p. 9):

- **Structural frame:** this perspective highlights goals, strategy, roles and coordination. Structural leaders focus on coordination and implementation.
- **Human resources frame:** this view centers on relationships, group dynamics, reactions to authority, resistance to the task and response to leadership (Green and Molenkamp, 2005).
- **Political frame:** this understanding acknowledges the internal competition for power and scarce resources.
- **Symbolic frame:** this approach gathers rituals, ceremonies, stories and heroes. With the good will that academic libraries generate almost universally, the symbolic

frame will likely represent the most natural opportunity for communicating the need for change.

Part 1: executive summary

The executive summary begins with the mission of the institution or agency—its essential purpose. How will you go about creating a mission statement that resonates with your constituencies, rather than one they ignore? Employ a process that interviews a cross-section of the constituents—current students and faculty, employees, alumni/ae, trustees, administrators—and that allows them to assess and critique the current mission statement.

The results of the interviews may contradict your assumptions about what you are doing well and how the library should change. But according to John Kotter (2008), the interview process and its risks represent precisely how to avoid "dangerous complacency" and to express urgency in the need for change:

1. Listen to customer-interfacing employees to gain a deeper understanding of needs and transactions.
2. Use the power of video to send the message.
3. Don't protect people from troubling data; present it as an opportunity, not a problem.
4. Sent people out to bring back new information.

You can include the vision for the future—not only what the institution is now, but also what it intends to be. Achieving the difference between those two conditions is the work of the marketing plan, and those you interview may have solid ideas about what the future should include.

Part 1 includes the of contents with a short (ideally one-sentence) summary of each entry. The table of contents clarifies the analytical process that supports the plan.

Part 2: service description

Continue with an outline of the services you offer and a brief summary of how your audiences might use those services. Rather than describe features of the services, be sure to state what the benefits to the constituents of engaging with the library and its services are. In our efforts to quantify and embrace data-driven decision making, we may over-describe features in detail (numbers of volumes, hours of operation, types of programs) rather than show what the reader will be able to accomplish with those services (succeed in a course, become a life-long learner, acquire skills for graduate school).

Provide a few examples of initiatives that have been successful and met expectations. Offer them in terms of their benefits to constituents. For example, a discovery layer may aggregate, re-index and search thousands of sources, but how the discovery layer lets

information seekers assemble a sizeable set of results with one search resonates more fully with undergraduate students. Similarly, be sure to use language that communicates the value proposition of each of those services. Rather than state "We can search full-text databases and get relevant results," use the emphatic "Ask us! We'll get you the information you need, when you need it."

Part 3: situation analysis

The analysis of current conditions begins with strengths, weaknesses, opportunities and threats (SWOT). It is a tool for assessing the organization by identifying issues, suggesting solutions, and identifying opportunities (Harmon). It can appreciatively identify areas of strong performance and uncover areas in need of improvement. As with the interviews in advance of revising the mission statement, a wide selection of constituents, from employees to trustees, should construct the SWOT analysis so as to gather as many perspectives as possible.

You might begin the conversation with these questions from the American Library Association:

<p>STRENGTHS What are your library's strongest contributions to your community? What does your library do that no one else does? What do your users like best about your library?</p>	<p>WEAKNESSES In what areas does your library have fewer resources than you need? What else needs improvement? What do your users wish you did better?</p>
<p>OPPORTUNITIES What could you do if only your library had the resources to do it? What is happening in the world now that you would like to take advantage of? How can your strengths open doors to opportunities for your library?</p>	<p>WEAKNESSES In what areas does your library have fewer resources than you need? What else needs improvement? What do your users wish you did better?</p>

Part 4: target markets

Nearly all libraries have multiple constituencies, and you may regard each as a distinct market. An understanding of each target market forms the core of a strong marketing plan. First-year students constitute a market, as do doctoral students in art history, studio artists, external researchers, visiting scholars and faculty members. Each group represents a segmentation variable based on demographics, geography, behaviour and culture. Therefore, surveys and focus (interview) group questions need to be tailored to the characteristics of each target market.

Each market needs to be identifiable, measurable, sustainable, accessible and reachable. An elementary school student may be an avid library user, but if no other elementary school students make similar use of the facility, they are neither a measurable nor sustainable market for that institution. Rather than starting with the most difficult market segment to define (for example, late-registering summer session students), look for a readily identifiable segment (for example, fourth-year film majors).

Part 5: competitive analysis

Based on the identification of multiple threats in the SWOT analysis, identify two top competitors (for example, a lively student center that serves as a magnet for groups that study together, a writing center that hosts highly successful end-of-semester open houses). Remember, however, that understanding the competition is critical. You will not overcome the competition without understanding it first.

Part 6: service delivery

Thankfully, most academic libraries are direct-channel service providers. They have direct contact with their audiences and constituents and usually do not rely on intermediary distribution channels. Nevertheless, state how delivery occurs. Is a solid percentage of students asking questions via live chat, text messaging or e-mail? Does instruction take place via web conferencing as well as in person? Can books be mailed to online students who live outside the institution's geographic area?

Part 7: integrated marketing communications

In this section list the various media through which you plan to promote services and programs. The public relations effort may include print materials with introductory content and contact information. Events and programs may be promoted and targeted to specific audiences via news releases, online bulletins, carefully segmented e-mail lists, posters, blogs, broadsides and electronic (LED) displays. Use language and communication channels your constituents already know and use. Otherwise, your message will be lost. For example, if your students don't really know what an information literacy workshop is, announce it instead as a term paper clinic or as "Last-Minute Help." If first-year students dismiss campus e-mail but check Twitter frequently, concentrate your message to them through the latter channel

Design the graphic image of the library to be clear and recognizable. Use it consistently on all material, in print or online, such as worksheets in user education, online pathfinders and newsletters. Imagine a variety of distribution channels for print materials. If a semi-annual newsletter is of particular interest to faculty, consider distribution at a faculty meeting. If a calendar of workshops is of interest to graduate students, explore whether there is a graduate student center or lounge with a bulletin board. Many of the distribution channels offer high-impact, low-effort approaches.

Composing messages for social media requires a particular set of skills: writing concisely and briefly, using clear punctuation, employing the second person liberally and including visual material whenever possible. Equally important is knowing in which media to invest time. Focus groups and surveys will yield critical information about which constituents are reachable with particular media. The free tool Survey Monkey has an online social networking questionnaire that will serve as a prototype (<https://www.surveymonkey.com/r/LMWLMLS>).

Informal exchanges are effective as well. A good "elevator speech" to an influential dean or faculty member may yield the perfect contact in a department with which you were unfamiliar. Evangelizing and serving as an enthusiastic advocate are at the core of word-of-mouth public relations.

Part 8: integrated marketing communications budget

Develop a budget for the first year as well as for two subsequent years. Although much of the dissemination of marketing materials can be achieved at little or no cost, the human resource requirement can be a key expense. Larger libraries hire communication managers, and graphic designers, whether employed within the institution or engaged as consultants, are sound investments for creating well-designed and suitably branded templates for web-based and print material.

Other costs to consider are printing, sign holders, A-frame sandwich boards, digital displays, photography and promotional items, such as flash drives, pens, pencils, water bottles and mouse pads.

Part 9: establish measurable goals

Include an assessment component by setting achievable and measurable goals first. How many audience members for book talks would you like to attract? How many more assignment-based classes would you like to see?

Make it easy! Provide simple ways for target markets to provide feedback, whether through suggestion boxes, short online or written surveys, usability testing or interpersonal exchange. Look at data you are already collecting, such as circulation statistics and website analytics. Direct conversation, even if it is improvisational and yields anecdotal feedback, has the benefit of being contextual.

Creating change

You can view your marketing plan as a condensed, programmatically grounded strategic plan. Both are predicated on managing change to sustain a healthy, evolving organization. As a reflection of change theory, your plan may naturally incorporate all of John Kotter's eight steps for accelerating change (2012):

1. **Create a sense of urgency.** Be a champion of the plan.
2. **Build a guiding coalition.** Invite a small, committed set of constituents to participate.
3. **Form a strategic vision and initiatives.** Work toward a unified set of goals.
4. **Enlist a volunteer army.** Engage a larger group of advocates who will evangelize.
5. **Enable action by removing barriers.** Establish a budget with sufficient financial resources. Leave naysayers behind.
6. **Generate short-term wins.** "Pick the low-hanging fruit" first. Build on successes; addresses greater challenges later.
7. **Sustain acceleration.** If it works the first time, do it again.
8. **Institute change.** Position your library at the center of the academic enterprise.

Why pursue a marketing plan?

This chapter ends with its beginning question. A marketing plan is a vehicle for directing action toward measurable goals. It is the change agent's tool. But it need not be a Sisyphean task. Rather, your marketing plan can be the crucible that launches the library into a dynamic future.

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