



Library
MARKETING
and
COMMUNICATIONS

Strategies to Increase Relevance and Results

CORDELIA ANDERSON

ALA
Editions

CHICAGO 2020

alastore.ala.org

CORDELIA ANDERSON has twenty years of experience in marketing and communications. During her tenure as director of marketing and communications for Charlotte Mecklenburg Library, she implemented many innovative marketing and communications strategies that earned her team the inaugural *Library Journal* Marketer of the Year Award and two John Cotton Dana Awards. Cordelia now runs her own consulting company, working with clients such as libraries, educational organizations, nonprofits, and government agencies. She is a popular public speaker, presenting at many meetings and conferences. The inspiration for this book came from Cordelia's keynote address at the 2018 Library Marketing and Communications Conference.

© 2020 by Cordelia Anderson

Extensive effort has gone into ensuring the reliability of the information in this book; however, the publisher makes no warranty, express or implied, with respect to the material contained herein.

ISBN: 978-0-8389-4799-9 (paper)

Library of Congress Cataloging-in-Publication Data

Names: Anderson, Cordelia, 1974- author.

Title: Library marketing and communications : strategies to increase relevance and results / Cordelia Anderson.

Description: Chicago : ALA Editions, 2020. | Includes bibliographical references and index. | Summary: "This book addresses the relevance question that libraries face today and explains how libraries can rise to the occasion by implementing strategic marketing and communications planning to tell their stories effectively"—Provided by publisher.

Identifiers: LCCN 2020018486 | ISBN 9780838947999 (paperback)

Subjects: LCSH: Libraries—United States—Marketing. | Libraries—Public relations—United States.

Classification: LCC Z716.3 .A58 2020 | DDC 021.7—dc23

LC record available at <https://lcn.loc.gov/2020018486>

Book design by Kim Thornton in the Chaparral and Freight Sans typefaces.

Ⓢ This paper meets the requirements of ANSI/NISO Z39.48-1992 (Permanence of Paper).

Printed in the United States of America

24 23 22 21 20 5 4 3 2 1

alastore.ala.org

CONTENTS

Preface: The Importance of Telling Your Story | ix

Introduction: Understanding the Relevance Question | xi

1	Public Relations, Marketing, and Promotion	1
2	Starting with Research	11
3	Developing a Marketing and Communications Plan	23
4	Customers and the <i>Marketing Funnel</i>	35
5	Fixing the Funnel	51
6	Branding Libraries	61
7	Storytelling	75
8	Marketing and Communications Partnerships	91
9	Advocacy Planning	99
10	Reputation Management and Crisis Communications	115
11	Staffing and Organizational Structure	129

Conclusion | 149

Index | 153

PREFACE

The Importance of Telling Your Story

FOR SOME LIBRARIES IN THE U.S. AND ABROAD, FUNDING CUTS ARE A very current reality. Especially today when financial uncertainties caused by the COVID-19 pandemic have caused budget shortfalls in communities all over the world.

According to the *Washington Post*, “More than 2,100 U.S. cities are anticipating major budget shortfalls this year, and many are planning to slash programs and cut staff in response . . . illustrating the widespread financial havoc threatened by the coronavirus pandemic.”¹ Universities are facing a similar challenge. A second *Post* article references a “financial crisis seizing all levels of higher education,” causing impacts such as salary cuts, furloughs, and departmental reductions.²

Even before COVID-19 became an international crisis, threats to library funding were not uncommon. In early 2020, the White House proposed to eliminate the Institute of Museum and Library Services (IMLS) for the fourth year in a row. According to a statement from the American Library Association, “The administration’s new budget not only brushes aside IMLS, it decreases funding for other library-eligible education programs.”³ Also in early 2020, libraries were seeing reductions in funding from local sources. For example, in Maine, the New Gloucester Public Library faced a potential loss of 28 percent of its operating funding from the Town of New Gloucester in fiscal year 2021.⁴ In Pennsylvania, the Memorial Library of Nazareth and Vicinity was cutting staff and programs due to cuts in funding from participating municipalities.⁵

While the events described above are recent, cuts to library funding are nothing new. In 2010, I was the director of marketing and communications for Charlotte Mecklenburg Library when our primary funder, Mecklenburg County, proposed a 50 percent cut to library funding. The county was facing a revenue shortfall due to the 2008 recession, but the proposed cut to the library was far deeper than nearly every other county-funded service. The reason? County officials

didn't understand what the library did for the community. They thought the library was popular, but not as essential as other services.

One of the main reasons that libraries face funding threats is a lack of understanding among decision-makers about the vital importance of libraries. The question of library relevance, fed by an overall lack of knowledge of what libraries do, is deep and pervasive. These sobering headlines about library funding cuts underscore the fact that not all libraries have succeeded in telling their stories and communicating relevance in a way that ensures their sustainability.

In the years after my library's budget was cut, we shifted to a more strategic approach to telling our story. My colleagues and I used public relations strategies to rebuild our reputation, storytelling strategies to communicate our impact, and marketing strategies to grow our customer base and increase engagement. The lessons learned in 2010, and the ensuing focus on strategic marketing and communications, contributed to a resurgence in funding and status for Charlotte Mecklenburg Library that continues to this day.

It is more critical today than ever before that libraries embrace strategic marketing and communications strategies to raise awareness and answer questions about relevance. This book is designed to help libraries do just that.

NOTES

1. Tony Romm, "More Than 2,100 U.S. Cities Brace for Budget Shortfalls Due to Coronavirus, Survey Finds, with Many Planning Cuts and Layoffs," *Washington Post*, April 14, 2020, <https://www.washingtonpost.com/business/2020/04/14/cities-budget-cuts-coronavirus>.
2. Nick Anderson, Danielle Douglas-Gabriel, and Susan Svrluga, "Rising Expenses, Falling Revenues, Budget Cuts: Universities Face Looming Financial Crisis," *Washington Post*, April 23, 2020, <https://www.washingtonpost.com/education/2020/04/23/rising-expenses-falling-revenues-budget-cuts-universities-face-looming-financial-crisis/>.
3. American Library Association, "ALA Takes FY 2021 Budget Cuts Seriously, Urges Members of Congress to Visit Libraries," news release, February 10, 2020, <http://www.ala.org/news/press-releases/2020/02/ala-takes-fy-2021-budget-cuts-seriously-urges-members-congress-visit>.
4. Ellie Fellers, "New Gloucester Library Facing Budget Cut," *Lewiston Sun Journal*, February 10, 2020, <https://www.sunjournal.com/2020/02/10/new-gloucester-library-facing-budget-cut/>.
5. John Best, "Memorial Library of Nazareth and Vicinity Slashes Staff and Programs," *Lehighvalleylive*, February 18, 2020, <https://www.lehighvalleylive.com/news/2020/02/memorial-library-of-nazareth-and-vicinity-slashes-staff-and-programs.html>.

INTRODUCTION

Understanding the Relevance Question

I'VE WORKED IN LIBRARIES FOR FIFTEEN YEARS, AND ONE THING MOST library professionals would agree on is this: *Our community doesn't know nearly enough about the great services and programs we offer.* Libraries know this is a problem, but they often don't agree on what the solution is.

This puts the staff who perform library marketing and communications duties in a difficult situation, as they have to respond to internal suggestions on how to tackle this issue while balancing their own ideas on how to solve the problem. They are often doing so with little to no resources, working in environments where printed collateral is often seen as the primary tool for communicating what they offer. These challenges are compounded by the fact that many libraries are reluctant to embrace contemporary digital marketing strategies.

The first time these observations hit home for me was at a marketing and communications meetup at ALA Annual in Chicago in 2013. There were probably twenty-five to thirty people at this gathering in the special collections room at the Chicago Public Library. After brief introductions, we started going from person to person and talking about the challenges we all faced in our jobs. The more people who spoke, the more it occurred to me that many of our challenges were universal, and universally frustrating. Not only did it feel like group therapy, it pointed to a larger problem, which was that the marketing and communications professionals at libraries often felt thwarted or limited by a lack of understanding and support among library staff and leadership.

For example, staffing size varied wildly from library to library, and didn't seem to correlate to the size of the organization, its customer base, or its budget. Libraries of comparable size could have as few as two or as many as ten staff members dedicated to marketing and communications; and their job duties varied widely. Some libraries had multiple staff positions dedicated to designing and printing flyers and brochures, while others were mostly focused on media relations. Some

had completely separated public relations and marketing; others had combined them, and still others included web services in the mix. All in all, only a handful of the marketing and communications leaders in that room felt confident with the level of staffing and support they received. The overwhelming majority felt undervalued, stuck in “reaction” mode, and not heard by their coworkers or leadership.

What I realized from that first meeting was that some days, managing marketing and communications for a library can be a very frustrating and stressful exercise—even for the most talented, dedicated, and hardworking professionals. This was my first real “aha” moment. If I was feeling this way, and so were my colleagues from across the country, from libraries large and small, there must be a larger, more systemic issue. Not only did I feel good knowing I was not alone, but a spark was lit inside of me to understand why this was, and to try to fix it.

But before I could do that, I needed to understand the sources of the frustration. So I listened: in that meeting, and at every meeting I attended after that where library professionals were gathered. After many years of asking and listening, first as a library marketing and communications professional and then as a consultant, here are the primary challenges I identified.

- The science and strategies behind the professions of marketing and public relations are not well understood, especially in the world of libraries.
- A lack of respect for the professions of marketing and public relations has led to a lack of support. Many library professionals have a perception that these jobs are fun, creative, and easy. In fact, anyone could do them. This causes the people working in library marketing and communications roles to feel undervalued and demoralized.
- There is a disproportionate effort directed at promoting programs and events, leaving little time or budget left to market collections, services, online resources, and facilities.
- A deep love of print has led to an over-reliance on print collateral to promote library services, collections, and programs. This translates into an overabundance of flyers, posters, promotional bookmarks, and signs—all of which require time and effort, and all of which are based on strategies from a century ago.

This was the first of many such gatherings I would attend over the years, and

even as time passed, the themes and sentiments remained alarmingly similar. The approach to marketing and communications didn't seem to be getting any better. Meanwhile, I would participate in industry events where I became increasingly outspoken about best practices in library marketing and communications. When I spoke, heads would nod; but after the event, people would come up to me and say, "I agree with everything you're saying, but I can't do that at my library." "Why?" I would ask. Their answer invariably boiled down to lack of staffing, budget, time, and support within their organization.

At the same time, my peers began coming to me and saying, "My boss wants me to do what you're doing at Charlotte Mecklenburg Library." So we began sharing our processes and methodologies. One library paid to send their new marketing and communications director to Charlotte to shadow me and my department for three days. After that, we hosted a summit of forty library marketing and communications professionals from across the country. But even with all the sharing and success stories—not just from my library, but others across the country—they would go back to their libraries and find themselves unable to implement the strategies. That was when I realized that maybe I was speaking to the wrong audience.

In my experience working in the library industry for fifteen years and getting to know senior leaders as well as marketing and communications leaders, one thing has become clear. Library marketing and communications professionals cannot be effective unless their leadership views their function as strategic, mission-critical, and worthy of investment.

That is why the intended audience for this book includes directors and senior management at public, academic, and special libraries in addition to marketing and communications professionals. The main reason that I am speaking to directors and senior management is the serious threat all libraries are facing: relevance. By relevance, I mean the perception that libraries are no longer relevant or needed in our current era. I will delve deeper into this perception throughout this book, referring to it as the *relevance question*.

This is an uncomfortable topic for many library professionals, so they tend to avoid it. But that is shortsighted. If libraries don't face the relevance question, if they refuse to put in place strategies to grow usership, if they remain too humble to tell the story of what they do, they will continue to shrink in importance. This is not an outcome any of us want, but it is staring us in the face.

If that seems an overstatement, consider this: I have spoken at many library

conferences, with audiences ranging from forty to four hundred, and I usually start my talks by asking about the “Google question.” I ask the audience, “How many of you have been at a social gathering, told someone you worked for a library, and got this question: ‘Oh, you work at a library? How are libraries doing now that everyone can find what they need on Google or on a Kindle?’” Without fail, most of the hands in the audience go up.

I personally get this question all the time. Try explaining that you’re a consultant who works with libraries. “Libraries need consultants? Why?” For the exact reason that they asked the Google question. Because many people don’t know what libraries do or why they are relevant. Many people know what libraries *used* to do—they remember stacks of books, storytimes, and card catalogs. But they don’t know what libraries do *today*.

They don’t know about workforce development training, or makerspaces, or digital literacy, or how public libraries help combat the summer slide with summer reading programs. They don’t know because we don’t tell them. Or if we do, we don’t tell them enough, or we don’t tell the right audience, or we tell them in a format that doesn’t have an impact.

According to OCLC, “Awareness of library offerings and value continues to be a challenge—perhaps one that is only growing as people are more distracted and diverted into a fragmented communications environment. The Pew Research Center has consistently found in their household surveys that many Americans, including library users, are still unaware of the breadth of resources offered by the public library.”¹ This lack of awareness contributes to the relevance issue, and is a problem that is worsening, not getting better.

It felt like libraries experienced a brief reprieve in January 2020, when Gallup released a new report that said, “Visiting the library remains the most common cultural activity Americans engage in, by far. The average 10.5 trips to the library U.S. adults report taking in 2019 exceeds their participation in eight other common leisure activities.”² This was great news, and very validating to the professionals who work to bring library services to their communities. After this came out, I saw many library colleagues celebrating the good news and congratulating each other on social media.

Did this mean that the question of library relevance was finally answered? Sadly, no. A few days later, I was at a doctor’s appointment, and a nurse asked me what I did for a living. When I told her that I work with libraries, her face adopted a wistful expression.

“Libraries,” she said. “Those are a dying breed, aren’t they?”

It’s great that Gallup has found that libraries are still used frequently. Ten and a half visits a year is great, but that doesn’t mean those visitors fully understand all the things their libraries offer, or how critical libraries are to the communities they serve. If they did, we wouldn’t see library funding repeatedly threatened. The relevance problem persists.

If libraries don’t begin to see relevance as the biggest threat facing them, we will continue to see funding threats, shrinking usership, outdated perceptions, and other negative impacts. But if libraries *do* embrace this challenge, we can see the exact opposite: increased funding, growing usership, and a new respect for the vital role of libraries in today’s society. Which story do you want to tell?

Many of the strategies recommended in this book will require a change in mindset from traditional library practices. They will require actions and decisions regarding personnel, budgets, and operations. Because relevance is such a pressing issue, we need senior-level management to see the need for better marketing and communications. Only by telling the story of libraries in a compelling and meaningful way, to the right audience at the right time and place, will we see increased perceptions of relevance for libraries. And unfortunately, the marketing and communications leaders at most libraries do not have the power or authority to advocate for these changes on their own.

NOTES

1. OCLC and the American Library Association, *From Awareness to Funding: Voter Perceptions and Support of Public Libraries in 2018* (Dublin, OH: OCLC, 2018), <https://doi.org/10.25333/C3M92X>.
2. Justin McCarthy, “In U.S., Library Visits Outpaced Trips to Movies in 2019,” Gallup, January 24, 2020, <https://news.gallup.com/poll/284009/library-visits-outpaced-trips-movies-2019.aspx>.

Public Relations, Marketing, and Promotion

IN THE WORLD OF LIBRARY MARKETING AND COMMUNICATIONS, THE terms *public relations*, *marketing*, and *promotion* are often used interchangeably. In fact, they are very different functions serving very different needs, although they often must work in harmony.

You can find many different definitions, but I prefer the definitions used in the *Study Guide for the Examination for Accreditation in Public Relations: A Preparation Tool for Candidates* provided by the Public Relations Society of America.

Public Relations: “The management function that establishes and maintains mutually beneficial relationships between an organization and the publics on whom its success or failure depends.”¹

Marketing: “The management function that identifies human needs and wants, offers products and services to satisfy those demands, and causes transactions that deliver products and services in exchange for something of value to the provider. Targets customers.”²

Promotion: “Activities designed to win publicity or attention, especially the staging of special events to generate media coverage. Promotional activities are designed to create and stimulate interest in a person, product, organization or cause.”³

Generally, when I hear people who work in libraries using the terms *marketing* or *public relations*, they really mean *promotion*. And that is where I think a lot

of libraries are stuck. While the strategies used in promotion are good and can certainly contribute to good marketing and public relations, they are only half of the equation. True marketing and public relations are management functions, strategic functions. They require adherence and attention to the big picture. They need to be aligned with the organization's big-picture goals and bottom line.

Here are two more functions that often get mistaken for public relations, as defined by the *Study Guide*.

Media Relations: Mutually beneficial associations between publicists or public relations professionals and journalists as a condition for reaching publics with messages of news or features of interest (publicity).

Press Agency: Creating newsworthy stories and events to attract media attention and gain public notice.

Both of these activities can be very valuable when used as part of a larger public relations strategy. But when performed alone, without a larger strategy, they are tactical functions that may not deliver long-lasting or impactful results.

Marketing and Communications as a Management Function

I want to emphasize something stated in the first two definitions, which is that public relations and marketing are both defined as *management functions*. This is in direct contrast to what I often see at libraries, which is these functions operating as *tactical functions*—in other words, designing and approving flyers, writing press releases, making posters, and so on rather than sitting at the management table when important decisions are being made.

To truly be effective at marketing and communications, libraries need to come into the twenty-first century and begin treating their marketing and communications functions as management functions. The book *Effective Public Relations*, in its ninth edition, states, "Proximity and access are important factors influencing the role of public relations in management decision making."⁴ The book quotes a former gas and electric company CEO as saying, "The only way CEOs can get what they need from their public relations advisers is to have them at the table when the policies, strategies, and programs are being hammered out."⁵

When I read *Effective Public Relations* in preparation for my Accreditation in Public Relations from the Public Relations Society of America, I took note of the fact that the book treats public relations and marketing as very separate and

distinct functions. In many cases, the organizations referenced in the book are very large and complex and have structures that keep the two functions separate.

However, for the purpose of this book, I am intentionally combining the two into a function called *marketing and communications*. There are several reasons I am doing this. First, most libraries and similar organizations such as nonprofits and government departments already combine the two for a variety of reasons—usually limited staffing resources. Second, I think it is beneficial to pair these two functions together, because in the case of libraries, customers (i.e., the people libraries are marketing to) are also publics (i.e., the people libraries want to create mutually beneficial relationships with).

I will also shift from using the term *publics* to using the term *audiences* because that is more universally understood.

I think it is important to understand the distinctions between public relations and marketing as strategies, because they are different, and can require different tactics. But I'm also being realistic in acknowledging that most library marketing and communications departments are performing both public relations and marketing activities at the same time, and with the same audiences. This can be done very effectively, as we'll see later in the book, because the two strategies can complement one another. But first let's look at them separately.

Public Relations

It's important that library management understands how public relations works. Let's go back to that definition above. The emphasis is on *mutually beneficial relationships* between an organization and its audiences. Relationships are a two-way street, and they require listening as well as speaking. Figure 1.1 illustrates this—it provides a simple illustration of a sender-receiver communications model adapted from *Effective Public Relations*.

In order to communicate with your audiences, you need to know who they are and what matters to them. The only way to do that is to conduct research, which can be done in a variety of ways including the following:

- Surveys
- Focus groups
- Demographic research
- Community conversations
- Other feedback mechanisms (social media comments, webmaster emails, comment forms, etc.)



Figure 1.1. How public relations works in the sender-receiver model

Ultimately, you will use the data gathered from these research activities to answer the question “What’s in it for me?” for your audiences.

Library leadership has a role to play in maintaining these mutually beneficial relationships. It’s important for library leaders to be deeply familiar with who their audiences are, what they want, and how the library can continue to respond to their needs. All top members of leadership need to be externally focused, continually scanning the environment to ensure that the relationships with the library’s audiences are healthy and positive. Having a marketing and communications professional at the leadership table will help ensure that this happens effectively.

Marketing

Marketing is a term that gets thrown around in libraries a lot, usually as a synonym for promotion. But in order to see real results from marketing efforts, there needs to be an understanding that marketing is a strategic function. Marketing “identifies human needs and wants, offers products and services to satisfy those demands, and causes transactions that deliver products and services in exchange for something of value to the provider,” which means it starts with the *customer*.⁶ *Their* needs and wants. Not ours.

The type of marketing I generally see in libraries is: “We have decided to invest in this new product/service/program. Now let’s go market it to people.” That is a

one-way relationship. It starts with *our* needs and wants. “We want people to use the service, so let’s get them to use it!”

How do you know if the people you’re promoting this product, service, or program to even want it? You don’t. And that’s why many library marketing campaigns fail to yield meaningful results.

To determine the type of marketing that can be most effective in libraries, start with two questions:

1. Who is your target market—i.e., the people you want to use the library?
2. What are their needs and wants?

If you start by asking these questions, and then create or invest in services based on those needs and wants, you are tapping into something much more powerful: *a demand that already exists*. If you are truly meeting people’s needs and wants, you won’t have to work nearly as hard to get them to use your services. To visualize this, see figure 1.2.

So how do libraries do this? Again, you can start with research, by asking these questions. This is where public relations and marketing can complement one another, because just as you’re doing research to identify your audiences and answering “What’s in it for me?” for them, you’re doing research to identify their



Figure 1.2. How marketing works in the sender-receiver model

wants and needs. So again, here are some options for identifying the wants and needs of your existing and potential customers:

- Surveys
- Focus groups
- Demographic research
- Community conversations
- Other feedback mechanisms (social media comments, webmaster emails, comment forms, etc.)

Use the data gathered from your research to inform the types of products, services, and programs you offer. This may mean that you need to stop offering some services that aren't meeting a demand, while increasing investment in services that do.

I will give you an example. Several years ago, I was at a library social gathering. A fellow library employee was telling me how she had replaced her car's taillight herself by following a tutorial on YouTube. Another coworker, who worked in collection management, expressed disappointment to me about this. "She should have used Chilton's," she said, referencing an online resource that we paid for to provide online auto manuals. "But why?" I said. "If her need was met by YouTube, we can't force her to use the library resource just because we want her to."

This is not to say that Chilton's wasn't a good resource. In fact, there was probably an audience whose wants and needs *could* be met by this resource. If we had done our research, we might have found people such as auto mechanics, hobbyists, or vintage car owners looking for obscure or hard-to-find manuals. But our mistake in this case was that we weren't asking; we were telling. We were trying to tell our coworker that she *should* use a library resource that she didn't *need*. Not only is that approach illogical, it's ineffective.

Again, this is why marketing, along with public relations, should be a management function. Because only when marketing and communications can work with all areas of the organization, seeing with a bird's-eye view, helping conduct research and develop strategic programs and services to connect with audiences and customers, can they truly be effective.

Similarly, we can make our marketing easier for customers to understand by using program titles and descriptions that are meaningful to *them*. When I first worked at Charlotte Mecklenburg Library, we used to call our infant storytimes cute names like "Fiddlesticks" or "Wiggles and Giggles." While these names were

cute from *our* perspective, they had no meaning for our customers. They didn't tell the customers (i.e., parents and caregivers) who the programs were for or what would happen in them. They also didn't convey to funders and stakeholders the value of storytime as an early literacy activity. As a result, our target audience of parents and caregivers was confused about what Fiddlesticks was, and our stakeholders didn't see us as providing critical literacy support. In the early 2010s, we went through an effort to rewrite all program descriptions and titles to articulate the value to all audiences. And while we had to say farewell to Wiggles and Giggles, we did grow our reputation as providers of early literacy services, as verified in annual surveys of our community.

I've experienced this in my own life. My kids sometimes attend a local non-profit summer camp that has creative names for all the age groups, like "Dawn Seekers," "Pathfinders," "Rising Stars," etc. When I pick up my kids, I never remember which group they are in, and have to give their age instead. After years of participating in this program, I *still* don't know the difference between a Rising Star and a Pathfinder, and I probably never will. If they did their research, if they asked me what I thought, I would ask them to rename their groups something meaningful that I could actually remember. The same is true for libraries!

Promotion

Libraries often use the term *promotion* as a synonym for public relations or marketing. Here are some examples of statements I've heard about promotion in libraries:

- "We need to promote this program."
- "We have a new database—we need to promote it!"
- "A new branch is opening—we need a promotion plan."

But promotion, as illustrated in the definitions at the beginning of this chapter, is not synonymous with public relations and marketing.

Think of it in a different way by imagining this scenario: You are sitting on a bench in front of a library. Would you rather have someone stand in front of you, talking to you through a megaphone about all the great things they can do for you without once asking what you need? Or would you rather have them sit next to you, ask you about your needs, listen to your response, and then suggest ways they can help?

Promotion is that megaphone approach. Going back to the definitions above, it's "activities designed to win publicity or attention." In other words, deliver your message to as many people as you can, as broadly as you can, and hope for the best.

I don't mean to imply that promotion is a bad thing. Promotion can be a very useful activity to support your larger marketing and public relations efforts. But promotion by itself is not strategic. It does not put your audiences (public relations) or your customers (marketing) at the center of the equation. It doesn't show that you have taken the time to learn about them, what they are interested in, or what motivates them. That's why I encourage libraries to shift from putting all of their efforts into promotion to taking a more strategic approach with engagement.

Engagement

Engagement puts aside the megaphone. It's the "sit down and ask questions" approach. It becomes a two-way conversation, like that communication model I shared earlier in the chapter. As I emphasized in the sections about public relations and marketing, it requires research and feedback gathering. It requires knowing something about your customer. But it yields much better results than promotion.

I'll give you an example. When I worked at Charlotte Mecklenburg Library, we used an email customer segmentation tool by Orangeboy, Inc. called Savannah. We found that when we targeted our messaging to customers based on the services they already used, they were much more likely to open the email and click on the link. Here are specific examples of targeted messages and audiences:

- We sent emails about programs and services available at a specific branch to people who used or lived near that branch.
- We sent emails about children's programs and collections to people who had checked out children's books.
- We sent emails about teen programs to people ages twelve to eighteen.

We also sent broad emails to our entire database of active customers, but the open and click rates were always higher with the targeted emails.

Similarly, when we advertised on Facebook, we always had better results when we targeted the message based on the audience's age, geographic location, or



Follow-up: Where Do Marketing, Public Relations, and Promotion “Live” in Your Library?

Take a moment to think about where these functions are located in your library today. Are they operating together or separately? Are there employees dedicated to these functions who have a good understanding of how they work? Make a note of these thoughts and save them for later.

interest. So, for example, we boosted a Facebook post about a Free Comic Book Day program to people interested in comic books, superheroes, and anime who were living in or around that branch. The number of clicks and comments on that post was much higher than a more generic post boosted to a general audience of the same size.

In the case of Facebook and Savannah, the research is built into the tool. You just need to be strategic in how you use that information.

Even if you don't yet have access to paid tools, engagement begins as a mindset. I recently spoke to a respected library leader who prefers to be identified as a “Library Champion, Community Innovator, and Placemaker.” I asked her, “As a trained librarian, what do you think libraries do really well, and not so well, when it comes to customer engagement?”

She replied, “For our field, customer service and community outreach has historically been a passive exercise.” In other words, not actively engaging with customers to learn what they are interested in or what their needs are. She added, “It is imperative that librarians consider public engagement and excellent customer service as a critical feature of everyone's job and everyone's responsibility if we are to remain vital and relevant into the future.”

The responsibility for shifting from promotion to engagement lies with not just your marketing and communications department, but all of your library employees. And that starts with taking a more strategic approach.

NOTES

1. Glen M. Broom, and Bey-Ling Sha, *Cutlip and Center's Effective Public Relations, 11th edition* (Upper Saddle River, N.J.: Pearson Education), 5, as cited in Universal Accreditation Board, *Study Guide for the Examination for Accreditation in Public*

Relations: A Preparation Tool for Candidates (Universal Accreditation Board: 2018), 16, <https://www.praccreditation.org/resources/documents/apr-study-guide.pdf>.

2. Universal Accreditation Board, *Study Guide for the Examination for Accreditation in Public Relations*, 18.
3. Universal Accreditation Board, *Study Guide for the Examination for Accreditation in Public Relations*, 18.
4. Scott M. Cutlip, Allen H. Center, and Glen M. Broom, *Effective Public Relations*, 9th Edition (New Jersey: Pearson Education Inc., 2006).
5. Cutlip, Center, and Broom, *Effective Public Relations*.
6. Universal Accreditation Board, *Study Guide for the Examination for Accreditation in Public Relations*, 18.

A

accounts, auto-expiration of, 44–46
 activities, 25–26
 advocacy messaging, 81
 advocacy planning, 99–113
 AIDA (awareness, interest, desire, and action), 36–37, 36*fig*, 37*fig*. *See also* marketing funnel
American Gods (Gaiman), 38
 American Library Association (ALA), on advocacy, 101
 analytics, 49
 Anythink Libraries (Colorado), 67–68
 assets, sharing, 95
 audiences
 advocacy and, 105, 107–108
 by category, 15–16
 documenting, 15–16
 identifying, 13
 as part of strategic plan, 20*fig*
 research involving, 3–4, 5–6, 13–15
 sender-receiver communications model and, 3, 4*fig*, 5*fig*
 authentication, 48–49
 auto-expiration of accounts, 44–46

B

barriers to storytelling, 84–88
 behavioral interviewing, 138
 beliefs, 66
 book drive example, 96
 bounce rates, 48–49

Branch Email Marketing Campaign, 139–141
 brand triangle, 71, 71*fig*
 branding, 49, 61–73
 “Branding of UK Public Libraries” (Hariff and Rowley), 67

C

CAN-SPAM Act, 147
 central stakeholders, 105, 105*fig*, 108–109, 108*fig*
 channels
 documenting, 18–21
 identifying, 13
 as part of strategic plan, 20*fig*
 research on, 14
 Charlotte Mecklenburg Library
 advocacy campaign of, 110–111
 Branch Email Marketing Campaign at, 139–140
 brand promise of, 68–69
 changing organizational culture at, 142–144
 crisis communications and, 124–126
 engagement and, 8–9
 expiration of accounts at, 56
 fines and fees at, 42
 local advocacy and, 100–101
 logo evolution at, 62–66, 62–66*fig*, 72
 online library card application and, 39–40
 partnerships and, 94–95

Charlotte Mecklenburg Library (*cont'd*)
 reputation management and,
 117–118
 ROI at, 82
 staffing at, 136–138
 titles and descriptions at, 6–7
 video project of, 78–80, 79*fig*
charts, 82–84, 83*fig*
Children’s Online Privacy Protection
 Rule (COPPA), 147
circulation statistics, 56–57
Cision, 116
citizen-led “yes” committee, 112
communications
 as management function, 2–3
 targeted, 8–9
communications partnerships, market-
 ing and, 91–97
community conversations, 3, 6, 14
community events, advocacy and, 108
community influencers, advocacy and,
 108
computer usage statistics, 57
Continuity of Operations Plan, 122
convenience sample surveys, 14
copies, responsibility for, 131
Cotter, Denis, 107
crises, types of, 120–122
crisis communications, 119–126
crisis response plan, 122–124
cross-promotion, 95
Crowder, Kim, 135–136
customer service, poor, 46–48
customers
 data on, 52–58
 marketing funnel and, 35–50
 stories from, 78–80

D

Daily Show with Jon Stewart, The,
 125–126, 141
“Data Is Clear, It’s Time to Move Beyond
 Storytelling For Library Advocacy, The”
 (Sweeney), 102–103
databases, 48–49

Democratic National Convention (DNC),
 124–126
demographic research, 3, 6, 14–15
Dietrich, Gini, 19
display policy, 133
diversity, advocates for, 135–136
documenting
 audiences, 15–16
 channels, 18–21
documenting findings, 15–21
documenting partnerships, 92–93
duties and responsibilities, aligning,
 130–134
Dysfunctional Library, The (Henry),
 141–142

E

educational campaign, 111–112
Effective Public Relations, 2, 3
email
 advocacy and, 112
 collecting addresses for, 46
email customer segmentation tool, 8–9
emerging crises, 120–121
emotions, storytelling and, 81–84
employees, brand promise and, 69–70
End of Marketing as We Know It, The
 (Zyman), 61
engagement, 8–9
environmental scan, 104
escape room facility example, 47
event planning, 131–132
EveryLibrary, 112
existing demand, tapping into, 5
“Expert Advice on How to Work Di-
 versity Into Your Library Marketing”
 (Crowder), 135–136
expiration of accounts, automatic, 44–46
external audience, 15–16

F

Facebook, targeted communication and,
 8–9
facts, storytelling and, 81–84
feedback mechanisms, 3, 6, 14, 20*fig*

finances and fees, 41–43, 107
fiscal disruption, 149
“flyer police,” 132–133
focus groups, 3, 6, 14
Fort Worth Public Library, 43
From Awareness to Funding: Voter Perceptions and Support of Public Libraries in
2018, 103
funding stakeholders, 15–16

G

Gaiman, Neil, 38
goals, 25
Google Alerts, 116
graphs, 82–84, 83fig

H

Harriff, Subnum, 67, 69–70
heart and head, speaking to, 81–84
Henry, Jo, 141–142
hiring and developing professionals, 130
Hootsuite, 116
humbleness, overcoming, 84–85

I

identifying
 audiences, 13
 channels, 13
identifying potential partners, 93–95
immediate crises, 120–121
impact, stories of, 76–78, 95
inclusion, advocates for, 135–136
influencing stakeholders, 105, 108, 109
infographics, 82–84, 83fig
integrated library system (ILS), 52
internal audience, 15–16
interviewing, behavioral, 138
isolation, countering, 150–151

K

Kansas City Public Library, 106–107,
106fig
key messages
 advocacy and, 106–107, 106fig
 creating, 13

documenting, 16–18
 as part of strategic plan, 20fig
 research on, 14
knitting club example, 87–88

L

LaRue, Jamie, 76
leadership roles, 134–135, 145–146
“Levy Is More Than a Campaign, A,”
111–113
Lewis, Elias St. Elmo, 36
library card sign-up process, 38–40. *See*
 also auto-expiration of accounts
library director, role of, 144–147
Library Journal Marketer of the Year
 award, 78
Library’s Crisis Communications Planner,
 The (Thenell), 120, 124
local advocacy, 99–113
logic, storytelling and, 81–84
logos, 62–66, 62–66fig, 72
Loudon County (Virginia) Public Library,
107

M

maintaining partnerships, 96–97
management functions, 2–3
marketing
 definition of, 1, 35, 101
 description of, 4–7
 as management function, 2–4
marketing and communications plan
 building, 24
 components of, 24–28
 developing, 23–33
 library, 23–33
 one-time, 23–24, 31–33
 organizational involvement for, 27fig
 overview of, 28fig
 strategic, 12–21, 12fig, 20fig
 supplemental, 32–33
 template for, 29–30fig
marketing funnel
 customers and, 35–50
 description of, 36–37, 36fig, 37fig

marketing funnel (*cont'd*)

fixing, 51–59

holes in, 38–50

“Meaningful Partnerships” (Primis), 91

measurable objectives, 25, 104

media relations

advocacy and, 108

definition of, 2

Memorandums of Understanding

(MOUs), 93–94

Mid-Continent Public Library (MCPL;

Kansas City), 111–112

mind maps, 105, 105*fig*, 108, 108*fig*

Minnesota Public Libraries, 82

N

negative “what if” story, 75–76

Nordstrom, 47

O

ONE Access, 94–95

online reputation management,

115–116

online resources, 48–49

opt-out model, 147

OrangeBoy, Inc., 112

organizational culture, 141–144

organizational structure, 129–148

overdue fines, 41

P

partnerships, marketing and communications, 91–97

“Partnerships: A Critical Element for Libraries,” 91

PESO (Paid, Earned, Social, and Owned) method, 18–20

Phillips, Vick, 109, 118

photo shoots, 79–80

political arena, advocacy and, 109–112

positive “what if” story, 75

Potter, Steven, 112

press agency, definition of, 2

Primis, Blair, 91, 93, 97

program attendance, 57

promise, 67–72

promotion

definition of, 1

description of, 7–8

public relations

definition of, 1, 101

description of, 3–4

as management function, 2

Public Relations Society of America, 1,

115–116, 135

R

RASCI, 139–141, 140*fig*

relationships, advocacy and, 101–102

relevant stories, 87–88

reputation management, 115–119

research

documenting findings from, 15–21

involving audiences, 3–4, 5–6, 13–15

methods and examples of, 13–15

starting with, 11–21

responsibilities

aligning duties and, 130–134

managing roles and, 138–141

return on investment (ROI), 82

roles and responsibilities, managing, 138–141

Rowley, Jennifer, 67, 69–70

S

Savannah, 8–9, 112, 139–141

sender-receiver communications model, 3, 4*fig*, 5*fig*, 102*fig*, 107

Sharp, Katharine, 64

Shorr, Many, 43

Singleton, David, 78

SMART objectives, 25

Smith, Pam Sandlian, 67–68

social media outreach, 112

social media policy, 116

Spin Sucks (Dietrich), 19

spokespersons, 116

Sprout Social, 116

staffing, 129–148

Staley, Jim, 112

Stark County (Ohio) Public Library, 41
statistically representative sample surveys, 13–14
statistics, 56–58
story/storytelling, 66–67, 75–89
strategic marketing and communications plan, 12–21, 12*fig*, 20*fig*
strategic mindset, 11–12
strategies, 25–26, 107–109
Study Guide for the Examination for Accreditation in Public Relations, 1, 2, 115–116, 120
success, creating culture for, 141–144
“Super Supporters,” 103
supplemental plans, 32–33
supporting statements, 18
surveys, 3, 6, 14, 53–56, 53–56*fig*
sustained crises, 120–121
Sweeney, Patrick “PC,” 99, 102–103

T

tactical functions, 2
tactics, 25–26, 107–109

target market, 5
technology, impact of, 150
Thenell, Jan, 120, 124
third-party sites, 48–49
titles, descriptive, 6–7
too many stories, 85–86
transactions, 36, 37

V

vendor data, 49
videos, 77–80, 79*fig*
visuals, storytelling and, 82–84, 83*fig*

W

website statistics, 57–58
workarounds, inconsistency in, 51
wrong stories, 86–87

Y

Yi, Hyong, 111

Z

Zyman, Sergio, 61