

Against the Grain

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Marketing Touchpoints- Putting Marketing Planning In Its Place

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are considering new analytics. This was a helpful session providing a wide array of techniques for assisting campus authors.

Seasons of Change: Digital Preservation in an Ever-Changing Digital Environment — Presented by **Robert Boissy** (Springer Nature), **Shannon Keller** (New York Public Library), and **Heather Staines** (Hypothes.is) — <https://sched.co/GB4G>

Reported by **Mallory Kasinec** (Boston University, Fineman & Pappas Law Libraries) <mbbreon@bu.edu>

The NASIG Digital Preservation Task Force was created to raise awareness, deliver best practices, and educate a wider range of information professionals about digital preservation. In this session, it was reported that the team has successfully created three preservation guides, and will soon be releasing official results of a survey designed to get an idea of how NASIG can facilitate and support digital preservation efforts. Early survey findings suggest that while libraries used to be the main entity in charge of preservation, in the digital arena that is not so; uncertainty as to who is in charge of digital preservation indicates a need for libraries, publishers, consortia, and authors to collaborate. Another major takeaway from the survey was that while financial concerns are the number one barrier to expanding digital preservation initiatives, institutional priorities may need to be addressed simultaneously or beforehand in order to garner institutional buy-in. The panelists also touched on **LOCKSS**, **CLOCKSS**, **Portico**, and the **Keepers Registry** from publisher (preservation) and library (access and use) points of view. A lively discussion of pre-arranged and audience questions closed out the session.

On the Winds of Change- Repositories, Researchers and Technologies (the 18th Health Sciences Lively Lunchtime Discussion) — Presented by **John Felts** (Carolina Coastal University), **Jean Gudenas** (Medical University of South Carolina, moderator), **Ramune K. Kubilius** (Northwestern University, Galter Health Sciences Library & Learning Center), and **Anthony Watkinson** (CIBER Research) — <https://sched.co/GB2n>

Note: This sponsored session took place off-site and registration was requested, but was open to all.

Reported by **Ramune K. Kubilius** (Northwestern University, Galter Health Sciences Library) <r-kubilius@northwestern.edu>

Moderator **Gudenas** introduced the sponsored but no holds barred session. **Wendy Bahnsen** of **Rittenhouse**, sponsor of the boxed lunch, gave brief greetings.

Kubilius highlighted trends observed since the 2017 conference (handout is attached in the schedule: <https://sched.co/GB2n>), and moved on to describe a 21 question survey she and two co-authors conducted December 2017-January 2018 of medical institutional repositories (IRs) in **AAHSL** (Association of Academic Health Sciences Libraries). The survey response rate was 41.7%. 16 % of respondents do not even have IRs; 40% manage their own IRs. Content varies (theses & dissertations predominate; 3 respondents each reported all original content or none). Many institutions have IR managers; library staff are involved in IR work; collections staff do not predominate. (An article more comprehensively describing survey findings is in progress.)

Watkinson shared medical participants' responses from a three year (2015-2018) longitudinal study, "Early Career Researchers: the harbingers of change?" conducted by **CIBER**, commissioned by the Publishing Research Consortium. There are differences in U.S. and international early career researchers under age 35 regarding support, knowledge, or attitudes about libraries and publishers. Many have knowledge, awareness or interest in OA, sharing, transparency, and social media, but feel that for their careers, they need to follow the rules of their academies. (Year 1 and 2 reports are in the PRC site: <http://publishingresearchconsortium.com/>).

Felts highlighted the RA21 (Resource Access for the 21st century, <https://ra21.org>) initiative. IP authentication has been in place since the 1970s, but an IP address doesn't uniquely identify users, resulting in publisher shutdowns of sites when "bad actors" are at play. Libraries mismanage IP registrations and IP Registry (Publisher Solutions International) is one initiative to better manage this area. Will RA21 meet its goals to improve remote access, improve usability, provide personalization, and a secure, single-sign on solution? That remains to be seen.

During discussion, **Felts** mentioned a higher privacy threshold in health and that resonated with the audience: one participant raised clinical tool access challenges, and **Ralph Youngen** (**American Chemical Society**), co-chair of the RA21 Steering Committee, mentioned the importance of having a medical community focus group. 🐾

That's all the reports we have room for in this issue. Watch for more reports from the **2018 Charleston Conference** in upcoming issues of **Against the Grain**. Presentation material (PowerPoint slides, handouts) and taped session links from many of the 2018 sessions are available online. Visit the **Conference Website** at www.charlestonlibraryconference.com. — **KS**



Marketing Touchpoints — Putting Marketing Planning in its Place

Column Editor: **Jill Heinze** (Director, User Experience, University of Virginia Library, Charlottesville, VA 22904; Phone: 434-243-1368) <jill.ux@virginia.edu>

When it comes to any sort of large-scale planning exercise, there seem to be two kinds of people: Those who recoil in horror at the mere prospect of planning detracting from their "real work," and those who eagerly welcome the process with their fresh packs of sticky notes, markers, and flip charts. I confess that I fall into the latter Planning Enthusiast camp. I work best when I can connect my regular tasks to more encompassing goals, and I thoroughly enjoy stepping back to reflect on the bigger picture. (It's a special treat for me when someone throws a couple of two-by-two matrices into a strategy session!)

Despite my penchant for planning, I recognize it can become too much of a good thing. Like yours, my work queue is awash with tasks that just need to get done quickly, and one can only anticipate but so much even with a meticulously constructed plan. It's understandable, then, if the prospect of adding a marketing plan on top of a strategic plan, departmental goals, and performance plans seems unnecessarily onerous. The perceived overhead may also partially explain why so few academic libraries appear to have written and enacted marketing plans.

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However, if you're missing a marketing plan, you're missing a useful bridge between high-level strategy and daily decision-making. Establishing this connection can be efficient and painless when you know how it fits within the planning landscape and how it can be leveraged to turn lofty ideals into practical realities.

What's So Great About Marketing Plans

Marketing plans fit within the sweet spot between strategic plans and their resulting tactical action plans. I won't go into painstaking detail about marketing plan components in this article, but there is an abundance of resources on the topic.¹ These core elements may vary slightly depending on which template you use, but they generally consist of the following:

- **Business summary:** Often this includes a SWOT Analysis, mission statement, major initiatives, and sometimes and environmental scan
- **Target market description:** Details about the people you intend to use your services
- **Marketing mix elements:** The variables marketers can control to make their service offerings useful to their target markets, often referred to as the 7 P's of service marketing²:
 - Product (service description)
 - Price (what is exchanged)
 - Place (how the service is distributed)
 - Promotion (communications plan)
 - People (those who provide the service)
 - Process (the steps in the process of service delivery)
 - Physical evidence (the tangible aspects of the service)
- **Marketing goals:** What you want your marketing efforts to achieve
- **Budget:** Resources allocated to achieving goals

While at first glance this list might appear overwhelming, it becomes less so when you consider each element as it relates to other planning activities that many of us already do. If you have a strategic plan in place, for example, you almost certainly have a solid grasp of your mission and your major goals, which represent the bulk of the business summary portion. Ideally, those goals were conceived with an understanding of the broader environment, and the marketing plan gives you an opportunity to articulate that knowledge. Likewise, we all have some implicit or explicit ideas about the audiences we're serving and the relative importance of their needs, which addresses the target market section. Putting those assumptions in a written plan ensures clarity and exposes any hidden assumptions about users that could derail your goals.

The remaining items, primarily the marketing mix elements, are the actionable links between planning and execution — they specify in detail *how* you intend to realize your strategic plans and align your service activities with your missions.

To illustrate the utility of marketing planning, I'm borrowing from the detailed, five-year strategic plan produced by the **Portland State University Library (PSUL)**.³ Per PSUL's site, one of the library's goals is to, "Support student success with library services, collections, and spaces that meet students' educational, research, and informational needs in equitable and inclusive ways." The related Objective and Action Item that support this goal are: "Objective 1.4: Continue to offer excellent direct user interactions at service points in the Library. Action 1.4a: Assess, analyze, prioritize, and refine services." Most likely, staff in the relevant units have adopted this mandate in various forms and created sub-goals to achieve it. It's in this act of translating the broad strategic goals into concrete frontline actions where marketing plans prove their worth. Using the PSUL example, a marketing plan would help staff define and critically evaluate their primary user base, those users' point-of-service needs, and how library services could be designed, delivered, evaluated, and communicated to achieve 'excellence' in the minds of users. In this way, marketing plans are not isolated exercises, but important extensions of strategic plans that orient an organization's activities around market-centered outcomes.

Why Marketing Planning Fails

You may be asking, if marketing plans are so helpful, why doesn't everyone use them? The marketing literature yields some insights into these planning pitfalls, the sources of which have changed over time. According to a literature review by **Simkin**, hostility to marketing and lack of senior-level buy-in seem to be declining in organizations.⁴ Instead, the most formidable barrier is insufficient internal communication about marketing goals. As **Simkin** asserts, "Information and debate are central to effective marketing analysis, strategic thought, program development and implementation. [Marketing] recommendations must be clearly conveyed and readily actioned. Good communication is pivotal to this process."⁵ Another common shortcoming according to this research, is the lack of non-marketing personnel in the planning process.⁶ Their considerable on-the-ground knowledge is indispensable for effective planning and timely understanding of customers' needs.

Other research by **Sashittal** and **Jassawalla** focused on small and midsize industrial firms. These smaller firms are characterized by their habit of on-the-fly decision-making and little formal planning. In these firms, marketing can fail to take hold when the dual needs to plan and improvise are unbalanced. As the authors observed, "Entirely emergent strategies without clear anchors to the deliberate strategy leave the firm directionless and in a constant firefighting mode. On the other hand, we find that strict adherence to the deliberate strategy in changing environments tends to spell failure."⁷ In addition, like **Simkin**, **Sashittal** and **Jassawalla** identified poor communication as problematic, "Very few marketing goals are accomplished unless managers can influence team and organizational members to take actions commensurate with the emerging plans and engage key market constituents."⁸

Anecdotally, I have hunches about why even the most enthusiastic marketers fail to see marketing planning through to fruition in their libraries. Paramount among these reasons is a historical and practical library tradition of favoring a production orientation over a market orientation. In other words, libraries tend to be structured according to functional units that produce specific deliverables. For example, much library work entails purchasing, cataloging, and making resources available, as well as delivering instruction and research consultation services. Communications functions, where they exist, usually reside in their own unit. All of these activities intersect with each other to create user value, but they are often managed separately. Achieving a viable marketing plan requires high-level leadership to recognize the ways in which independent functions interact to contribute to an overall service and end user value proposition.

Improving the Odds of Marketing Planning Success

It's true that taking on marketing planning means committing to another planning activity, which demands resources and sustained effort. The potential return on this investment is a more purposeful use of limited resources to earn users' enthusiastic library support. Generating a willingness to adopt marketing planning is not necessarily an easy task, but it's not impossible. Both the literature and my experience with colleagues over time point to some prerequisites and tactics that can help you give your marketing planning efforts the best chances of adoption:

- **Reframe the marketing planning exercise.** Rather than suggest adding another planning task, encourage colleagues to think of marketing planning as a natural extension of the strategic planning process. Connecting the strategic and marketing plans clarifies how individual teams can help achieve overarching library goals and could even substitute for other unit-level planning exercises so that there is little or no net increase in planning time.
- **Start with one service.** Generally, it's advisable to have a marketing plan for each service offering, but to get started with a plan, try selecting one service as a pilot. This service should be closely linked to the strategic plan and accountabilities may span multiple units. Starting small will allow you to discover implementation blockers and how to overcome them for larger-scale adoption.
- **Talk the talk.** Marketing plans often introduce a new vocabulary and mindset among library staff. The idea of thinking about planning in terms of target markets and the marketing

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mix can be alienating. When staff surface new ideas for services and communications, try prompting them to think through marketing details like defining their intended market and articulating their market's needs. You can invoke these and other marketing concepts to instill them in your organization while using familiar, comfortable terms.

- **Improve or establish internal communication channels.** Marketing literature clearly identifies the need for solid communications that span all levels in the organization. Does your library have the means to enable cross-unit conversations throughout the hierarchy? Are staff able to easily share user needs they encounter to inform service improvements? If not, try initiating some communication improvements to establish this important prerequisite for marketing work.

In addition to more faithfully fulfilling the spirit and goals of a strategic plan, I find that marketing conversations nearly always offer an opportunity to be more rigorous in my planning thought process. The mere act of filling out a couple of sentences for each marketing plan element surfaces questionable assumptions and logic problems that should be reconciled, even if the plan never gets widely adopted. If

nothing else, use a marketing plan to prompt internal conversation, and you're likely to find tremendous value and inspiration in viewing your library services with a market-oriented perspective. 🐾

Endnotes

1. See the guided marketing template at <http://www.ala.org/aboutala/sites/ala.org.aboutala/files/content/publishing/editions/webextras/fisher09096/Worksheet04.pdf>.
2. For additional details and resources, see https://en.wikipedia.org/wiki/Marketing_mix#Modified_and_expanded_marketing_mix:_7_Ps.
3. <https://library.pdx.edu/about/strategic-plan/>
4. **Simkin, Lyndon.** "Barriers Impeding Effective Implementation of Marketing Plans—A Training Agenda." *Journal of Business & Industrial Marketing* 17, no. 1 (2002): 9.
5. **Simkin,** 14.
6. **Simkin,** 15.
7. **Sashittal, Hemant C. and Avan R. Jassawalla.** "Marketing Implementation in Smaller Organizations: Definition, Framework, and Propositional Inventory." *Journal of the Academy of Marketing Science* 29, no. 1 (2001): 65.
8. **Sashittal and Jassawalla,** 61.

Optimizing Library Services — Food for Thought: Leveraging Library Services to Address Food Insecurity

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Introduction

In June 2018, the **University of California (UC), San Diego Library** held an inaugural Food for Fine\$ drive, collecting non-perishable food items benefiting the year-round campus food pantry in exchange for fine forgiveness. The drive has continued twice annually, in December and June, intentionally timed to coincide with students moving out of their dorms and residences at the end of the school year. Steadily gaining popularity among the

student community, each instance evolves in response to observations and feedback.

Complementing the Library's myriad de-stress and wellness activities, this campaign supports students' basic needs and raises awareness about often hidden food scarcity issues on campus. Providing an incentive for library users to give back to fellow students sets an example for collaboration and generosity and encourages students to consider alternatives to food waste, both in the immediate and long terms.

Literature Review

Food drives, often called Food for Fines, have long been popular in public libraries across the nation for patron relations and retention, resumption of borrowing privileges, and return of overdue items. Some offer one-for-one exchange of grocery items for forgiveness of fines associated with a single overdue item, while others specify a per-item credit value. Beyond non-perishable food, some public libraries have accepted pet supplies (Library Administrator's Digest, 2013); paper, cleaning, and hygiene products (Library Adminis-

trator's Digest, 2014, p. 5); and contributions to Ethiopian relief (Simpson, 1984, p. 29) for credit toward fines. Many libraries report positive exposure for the library and positive user response to such initiatives (Library Administrator's Digest, 2010, p. 17-18). Opponents criticize such initiatives for reducing an important source of library income and as labor intensive activities not directly related to the library's primary mission (Library Administrator's Digest, 2014, p. 5).

With greater awareness of the growing prevalence of food insecurity on college campuses, academic libraries have begun to tap into the opportunities this kind of programming affords. See examples in the Resources section.

Some Food for Fines policies vary across participating academic libraries, while others are more universal.

- All require donations in good condition, unopened, and not expired. Some refuse items in glass containers.

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