

# A Librarian's guide to marketing promotions



# Introduction

This guide has been created for academic librarians who would like to promote library collections, resources and services.

It has been developed based on extensive interviews conducted with academic librarians around the world. The guide has been crafted by the librarians' experience, best practices, insights into the audiences and stakeholders, and their input on what works for them and what doesn't. The librarians have provided first-hand examples and useful information during development and were instrumental in reviewing and refining the content which you now have in your hands.














































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## Target audiences

Students	Researchers	Faculty
		
		
		
		
		
		
		
		
		
		
		
		
		
		
		
		

\*These promotional ideas are also valuable library services and can be useful ways to highlight new marketing initiatives.

# Target audiences

It is important to remember that everything you do and say in your marketing needs to appeal to the people you want to attract.

The target audiences are:



## Students

Undergraduate to early master's students



## Researchers

Advanced master's; Ph.D., research faculty, and tenure-track faculty in their research roles



## Faculty

TA's, non-tenure track teaching faculty, tenure-track faculty in their teaching role



# Format

Each marketing promotion idea displays **audience**, suggested **effort**, **objectives**, **description** and proposed **frequency**. There are 16 different ideas.

The **audience** is described on the previous page:






Ideas are listed alphabetically and include **location** suggestions where the marketing activity could take place:



The suggested **effort** reflects how much work could be involved in setting up the marketing initiative. In most cases, most of the effort focuses on starting the initiative; the momentum carries it along, though with ongoing work. Every idea suggests low, medium or high effort, shown as one, two or three stacked books.



-  The **objectives** are what you want to achieve with that promotion idea.
-  The **description** is how you can realize those objectives.
-  The **suggested frequency** should be tailored to your own needs and resources.



# Goals and objectives

In this guide we cover the following key marketing principles:

1. Define strategic marketing goals
2. Identify SMART objectives
3. Create a tactical plan to achieve the goals
4. Review the results against the objectives; evaluate and improve
5. Keep branding consistent



# Goals and objectives

## 1. Define strategic marketing goals

The goals are your big picture targets, often set on an annual basis. They may be part of a longer-term plan, or a fundraising and development campaign.

A suggested number of goals is three to five. For example:

- Increase awareness of the library's under-utilized resources
- Make the library the first place students, researchers and faculty members go for information
- Increase faculty involvement with the library

The goals, and how they have been met, are an essential part of reporting on the library's value to your audiences.



# Goals and objectives

## 2. Identify SMART objectives

SMART objectives are:

- Specific
- Measurable
- Attainable
- Relevant
- Time-based

By using these five criteria, you'll ensure that each activity stream is focused and effective. You'll be able to assess your progress, and to see what is working well and where you need to adjust.

For example, SMART objectives for the marketing goal to “increase awareness of the library’s under-utilized resources” could be:

- By the end of February [time], write and conduct a survey of all three audiences [specific] to explore which resources they are familiar with, and which are unknown [relevant, attainable]. Track the completion of the surveys and the response rate [measurable]. Repeat survey annually. Use subsequent surveys to measure effectiveness of promotional efforts during the preceding year. Did awareness of the promoted resources increase [measurable]?
- Set up separate e-newsletter templates for students, faculty and researchers [specific, attainable] by the end of April [time], and send one newsletter to each audience [specific, attainable, relevant] per semester, starting in the fall term [time]. Track the completion of the templates and distribution of the e-newsletters. Use web and email-monitoring tools to track click rates/readership [measurable].
- By the end of May [time], create 10 signs [specific] in the library [attainable] to signpost online databases and physical spaces like the maker studio [relevant]. Track timely completion of the signs as well as any library patron comments received [measurable].



# Goals and objectives

## 3. Create a tactical plan to achieve the goals

This guide includes a range of marketing tactics, some of which will be more relevant to your work than others, depending on your specific goals. Select your tactics based on the time and resources available to you.

These 16 ideas, marked by audience and suggested effort, make it possible to mix and match. Within the provided marketing project planning template, see step 10 where you can outline a specific schedule and set major milestones.

*P.S. Don't worry if your plan changes as the work gets underway. That's normal. The planning process will have gotten you started in thinking about the steps and resources needed to achieve your goal.*



# Goals and objectives

## 4. Review the results against the objectives; evaluate and improve

Marketing inevitably involves experimenting to find the right solutions to solve your specific issues.

It is essential to measure the effectiveness of your marketing efforts, to ensure you are using your resources successfully.

*For example, after workshops, events, talks and orientation you can measure the effectiveness of your promotions based on attendance and participation. Use the results to tweak how you promote your activity next time.*

Monitoring your marketing results means that you can use real evidence to do more of what works, adjust the initiatives that were only satisfactory and stop doing what didn't work. Don't fear negative results; it's only by trying new things, evaluating, and learning from the experience that you can improve your marketing effectiveness.



# Goals and objectives

## 5. Keep branding consistent

A final point on any form of marketing is the importance of consistent branding.

Use your university's design style guide. Within the guidelines of your institution, augment it with your own library design look. The written and visual styles you use should suit the tone of voice and personality of your library and of the institution. These styles need to communicate consistent messages to your audiences to help them recognize both the library's identity and its key role in the institution.

It is essential you use those styles consistently over time and across all marketing tactics, so when any member of your community sees a poster, for example, they can easily associate it with the library.

Make the most of the design resources provided by your institution communications office, any in-house design department and students. External design agencies could also be used for more complex items if budget allows.



# Marketing project planning template

The provided template guides you step-by-step through defining the details of individual marketing promotions and includes key steps such as:

- Defining the purpose of the promotion
- Specifying the critical success factors (how will you measure the promotion?)
- Creating a schedule and highlight major milestones
- Assessing risks (what could go wrong?)
- And more...



Click [here](#) to download the marketing project planning template.



# Marketing promotions

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# Booklets and factsheets

## Audiences



Students



Researchers



Faculty

## Effort



## Location



At library



Around campus



Online



### Objective

Provide more in-depth information about what your library offers. Can use infographics (p.15) and feature on the website (p.25).



### Description

These are medium to long form pieces of content that help your audiences have a better understanding of what's available to help them. Topics could include how-to guides on the most-used databases.

These can range in effort and it can be a good idea to have them professionally designed and printed to add to the presentation of the documents. They can also be available digitally as PDFs or uploaded directly onto relevant pages of the library or university website.



### Frequency

Reviewed and revised once every academic year.

# Events and talk series

## Audiences



Students

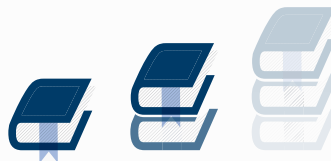


Researchers



Faculty

## Effort



## Location



At library



Around campus



Online



The events should be interesting and appropriate for your audiences, within your geographic context.



### Objective

Raise the library's profile as a contributor to campus life. Showcase that the library goes beyond the traditional role by enabling interesting discussions.



### Description

The events and talk series don't need to be held in the physical library and in fact, it can be even better if they aren't. The aim is to encourage visits from students, researchers and faculty who wouldn't normally come to the library. The type of event will depend very much on the library facilities, time of day and rules, for example if there can be a live music performance, food and drink.

An ongoing exhibition, perhaps based on a topic from outside the library, can offer an opening event which attracts visitors. Exhibitions and talk series at the library are an opportunity to show diverse subjects from within and outside the university. You could invite local politicians or journalists to talk about current affairs, local business people to talk about what's happening in the economy, or prominent sports people to talk discuss their health and well-being programs.

Tip! Have handouts and brochures available to promote your services. Ask attendees to fill out a sign-in sheet so you can follow up with them—thank them for attending and solicit requests, etc. (But don't be a spammer.)



### Frequency

One per semester per audience.

# Flyers and posters

## Audiences



Students



Researchers



Faculty

## Effort



## Location



At library



Around campus



Online



### Objective

Attract attention to workshops (p.26) and events (p.12), to drive attendance. Distinguished from brochures and handouts which explain and promote services. Can also feature infographics (p.18) instead of promoting a specific event.



### Description

Advertising for all workshops and events. The important information includes date, time, location and a description of the workshops or events, contact details to get more information. Consider adding ADA accommodations if available. Flyers are handouts, while posters are affixed to a wall or notice board. Include videoscreens/digital posters in the library and elsewhere on campus. Find out if there is a campuswide network to feed this content to many locations. All materials should follow your pre-determined brand consistency (p.9), to ensure they are instantly recognizable as library collateral.

Infographics serve as eye-catching content which can be used on flyers and posters in the library itself or distributed around campus.



### Frequency

Distributed about two weeks before every event.

Tip: If running a series, try to set the schedule events well in advance and possibly post the full schedule at the beginning of the term or include a “save the date” for the next upcoming event.



# Giveaways

## Audiences



Students



Researchers



Faculty

## Effort



## Location



At library



Around campus



Online



### Objective

Provide students and researchers with useful items, reminding them about the library.



### Description

Branded items that are useful in everyday student and researcher life: pens, pencils, erasers, highlighters, notepads, sticky notes, keyrings, lanyards, backpacks, laptop and tablet sleeves, stickers, mugs, reusable coffee cups and so on. Guides to the library could be pre-loaded on USB sticks. The items provide an opportunity to inject humor: a coffee mug could say, “XX Library: Drinking in knowledge.”, a pad of post its imprinted with “Just Say Know.”

If you change the merchandise each year, it can become collectable, which helps build loyalty. On the negative side, costs can be high without a clear return on investment.



### Frequency

Review and order once per year, adjusting items and quantities as needed.

# Infographics

## Audiences



Students

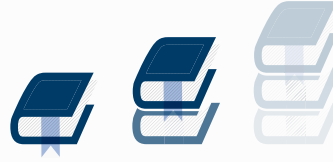


Researchers



Faculty

## Effort



## Location



At library



Around campus



Online



### Objective

Visualize the value your library provides by showing usage and other statistics.



### Description

Publicize the most prominent statistics relating to the usage of your library. The details will depend on the activity you track. Ideas include:

- Number of users
- Growth of collection
- Queries made
- Articles accessed
- Requests from surveys which the library has fulfilled

The infographic could show change from one year to the next. It is good practice to keep consistency by measuring the same statistics for each time period.

An infographic could be used on a handout to promote services by conveying social proof, with the appropriate caption, e.g.: “Everybody’s using the library. If you’re not, find out what you’re missing.”

The design could be outsourced, or the entire infographic research and design could be an assignment for students.

# Library ambassadors

## Audiences



Students

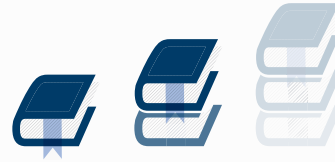


Researchers



Faculty

## Effort



## Location



At library



Around campus



Online



Understanding how students socialize will help make this successful.



### Objective

Encourage students, researchers and faculty to use the library through peer-to-peer sharing.



### Description

Students who show an early enthusiasm for the library are invited to become Library ambassadors. These ambassadors would learn more in depth about the workings of the library and how to make the most of the resources available to enhance learning.

You would give the ambassadors guidance on how to spread the word about the library: through events, meetings, social media (p.23), or simply by word of mouth. Your role is to encourage the “Library club” (or whatever the ambassadors name it), provide the relevant resources and shape the direction so it remains true to the original intentions. A reading circle and student reviews of resources and materials could be included in the ambassadors’ activities. The mix of ambassadors should reflect student diversity.



### Frequency

The frequency of meetings or events should be led by the ambassadors.

# Networking event

## Audiences



Students



Researchers



Faculty

## Effort



## Location



At library



Around campus



Online



### Objective

Position the library as a supporter of networking, a good place to meet new people and an effective space to share knowledge.



### Description

Networking events can be structured around specific subjects or departments or be more general to mix up groups of people. Successful networking opportunities may be planned in conjunction with events and talk series (above). Hold a social time before the scheduled presentation, or a reception afterward. They will appeal to researchers who may want to take a break from their work and socialize in person at a free event.

The setup can be simple, with limited costs to the library.

Beyond events, consider encouraging informal networking and knowledge sharing by providing comfortable seating areas with reading materials, sweets and coffee. Having a jigsaw puzzle, chess game, or other activity may draw community members and encourage them to interact.

The newsletter (p.18) for researchers, as well as flyers and posters (p.13), social media (p.23) and the website (p.25) are all ideal places to market networking events.



### Frequency

This depends on your resources and willingness to organize and market events, and the researchers' desire to come along: you could start with one per semester.

# Newsletters

## Audiences



Students



Researchers



Faculty

## Effort



## Location



At library



Around campus



Online



### Objective

Provide an overview of new staff, services, and resources. Include what's happening at the library, such as upcoming workshops (p.26), events and talk series' (p.12).



### Description

Consider separate newsletters focused on specific audiences, so the information is relevant. For example, you might have one each for students, researchers, and faculty, or even more specific if circumstances warrant. Keep in mind that everyone receives too much information by email, so provide just the essentials. Avoid “tl;dr” syndrome! Consider making the newsletter opt-in and have an easy way to unsubscribe.

Newsletters can feature blog posts (social media, p.23). Events listings can include links to a booking system like Eventbrite.

The newsletter should be coded and tested carefully so it displays correctly in different email clients (e.g. Outlook, Gmail) without unintended line breaks or distorted images. A service like MailChimp is useful for templates, deliverability and managing the various email lists.



### Frequency

This will depend on the level of the library's activity and news: ideally monthly or as few as 1–2 per semester.

# Orientation

## Audiences



Students



Researchers



Faculty

## Effort



## Location



At library



Around campus



Online



### Objective

Help new students, researchers and faculty learn about the library and feel at home.



### Description

Keep in mind that a library will probably be bigger and have many more resources, including databases, than most patrons are familiar with, and they may feel intimidated.

To get beyond this challenge, you can make the orientation into a scavenger hunt, with patrons going from clue to clue. They would use the library's search tools to find the next clue, and quickly become familiarized with the various databases and resources they are likely to use within the Library. Prizes could be offered for completing the orientation.

Most or all of this could be digital and not depend on physical presence in the library.



### Frequency

Suggest prompting new students early, during the first two weeks of the academic year. For researchers and faculty, avoid busy times of year to increase engagement in orientation sessions.

# Public relations

## Audiences



Students

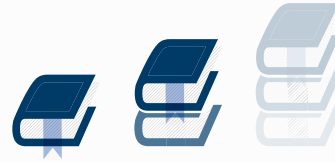


Researchers



Faculty

## Effort



## Location



At library



Around campus



Online



### Objective

Raise the library's profile among your target audiences and beyond.



### Description

Public relations, also known as media relations, provides information to your audiences through journalists. This gives your information credibility, and you can reach a wider and more diverse group of people.

Journalists want news—literally something new—and opinion. Once you have built a rapport with the relevant journalists, be they on student or external publications, it's important to provide a stream of relevant and useful information. Maintain a list of up-to-date journalist contacts. Local news outlets will often be easier to access than larger publications.

A news release will contain the date and location, then the main story in the headline and first paragraph. Following that are more details and one or two quotes, totaling 400–600 words. Provide contact details—yours or the university press office—and the boilerplate. Including images, and even a short video, increases the impact of your news release.

Tip: Make sure to coordinate with the university press office. Some will want every release to flow through them; others may want you to follow institutional style and other guidelines. Plus, they already have lots of contacts you can use!



### Frequency

Ongoing: it's important to be consistent, though you do need to provide news items of interest.

# Relationship building

## Audiences



Students

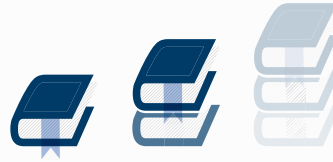


Researchers



Faculty

## Effort



## Location



At library



Around campus



Online



Relationship building needs to be culturally appropriate.



### Objective

Build direct, in-person relationships with researchers and faculty.



### Description

At an event (p.12) or workshop (p.26), it's important to make the extra effort to get to know researchers and faculty. The librarians interviewed for this guide said that one of the best ways to build relationships is at a lunch or dinner, possibly organized by a dean and attended by faculty and librarians. A good way to start may be to meet with a dean or department head and ask to be invited to both business meetings and social events of the academic unit.

Relationship building is a key activity of embedded librarians and subject liaisons.

Keep in mind that faculty and researchers are short of time and will appreciate the effort you make to go to them. Work directly with the faculty and go to department events, using the academic department channels.

When you attend, listen as much as you talk. Be alert for needs that lead to opportunities to promote your services and resources. Relationship building will help you understand the audiences' needs and how the library can better meet them. The trust resulting from it will have a direct, positive impact on showing library value. It does take time, but it will pay off.



### Frequency

Ongoing.



# Signage

## Audiences



Students

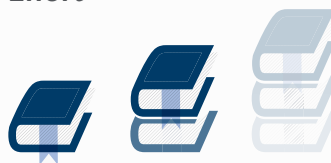


Researchers



Faculty

## Effort



## Location



At library



Around campus



Online



### Objective

Add visual interest and way-finding to the physical library and highlight key library resources.



### Description

Signage should enable library users to have a smooth, trouble-free experience in finding the services they need in the building. Also, be cognizant of campus signage—does it clearly point the way to the library?

Often, you'll have a good idea of problem points. Are there specific directional questions that staff report hearing frequently? It's also wise to ask your audiences what they have trouble finding. For example, put a whiteboard or poster pad out, and ask visitors to comment on their experience. Have test subjects draw a map of the library, from memory, to highlight how well their perception matches reality.

You may need the help of the Campus facilities office or an external design or signage provider for the production.



### Frequency

Change every semester or academic year to keep the interest of students and researchers.

# Social media

## Audiences



Students

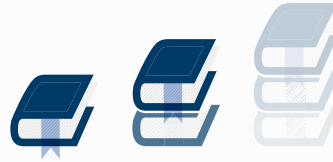


Researchers



Faculty

## Effort



## Location



At library



Around campus



Online



Social media platforms may vary by country, for example WeChat in China and VK in Russia.



### Objective

Maintain an ongoing dialogue with students and researchers. Can be used to highlight workshops (p.26) and events (p.12), and as a channel for marketing promotions (p.10).



### Description

Social media channels—Twitter, Facebook, LinkedIn, Instagram and faculty and researcher blogs—are powerful tools for engaging directly with your target audiences. It is essential to find your voice: are you funny or serious, practical or theoretical, flamboyant or understated?

Social media works best by asking questions and taking part in conversations. Follow members of the community to increase relationships and engagement. It can be time-consuming, depending on the size of your networks and how active they are. You should limit the time you set aside for social media, so you can measure the effectiveness of your work and adjust the time spent accordingly. Assigning social media as the responsibility of specific staff members or student volunteers will ensure that it's covered consistently. Tools such as Hootsuite and Tweetdeck have free versions and offer easy to schedule posts and maintain social channels.



### Frequency

Ongoing, posting at least once per week and with daily monitoring for fast response times.

# Videos

## Audiences



Students

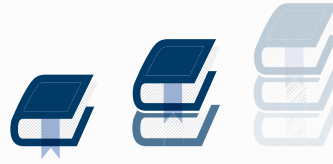


Researchers



Faculty

## Effort



## Location



At library



Around campus



Online



Videos should be culturally relevant and use the suitable language(s) for your institution.



### Objective

Highlight your library's services and activities in an engaging visual manner.



### Description

Your student audience is already consuming video as a medium. It's reported that the number one news source for millennials is YouTube. Reach them where they already are! Offer short and engaging videos, that you can show on TV screens in the library, as well as on the website (p.25) and share through YouTube and other social media (p.23). It is a good idea to feature people in videos, bringing your messages to life. They should be as natural on screen as possible. Another approach, not using people, is to animate infographics (p.15). Videos should be short (2 minutes, 20 seconds is the maximum length for Twitter), and present one self-contained topic.

If your university has a media, design or filmmaking department, those students could be commissioned to create the videos. Or they can be shot on smartphones or even drones.

Tip! Ensure video development meets necessary ADA regulations. See [www.ada.gov](http://www.ada.gov) for details.



### Frequency

Ideally one per academic year, and if possible one per semester.

# Website

## Audiences



Students

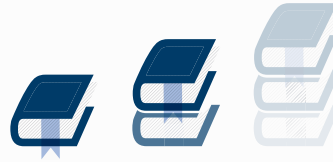


Researchers



Faculty

## Effort



## Location



At library



Around campus



Online



### Objective

Use the existing website to raise awareness of library resources, as well as workshops (p.26) and specific events (p.12).



### Description

The website is not only a powerful marketing tool; it is also a portal for all the library's resources. It is likely that significant budgets and time have already been invested in the website, and there is probably an immense amount of information available. Start with an analysis of the website from the user and/or library perspective to make sure questions are being answered at the point of need. For example, if someone doesn't find what they're looking for on the website directly, or in a particular database, is there an "Ask a Librarian" button or chat feature so they can get help?

The university and library websites should also be used to promote workshops (p.26) and events (p.12), and to feature social media feeds (p.23). Ensure there's a dynamic component to your site that refreshes news and promotional announcements. Keep a collection of current brochures, flyers, and other promotional materials on the site too. Follow the basic principles of good web design, make sure help is available, encourage feedback, and make sure that there's always a response to comments and questions.



### Frequency

Always for the "point of need" buttons and wayfinding. At least two weeks ahead of specific workshops and events. Remove outdated content immediately to an archive not accessible to the public.

# Workshops

## Audiences



Students

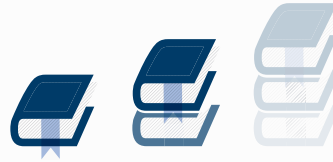


Researchers



Faculty

## Effort



## Location



At library



Around campus



Online



### Objective

Create topical, in-depth workshops that help all audiences with the issues they find most challenging. Also use in conjunction with other recipes to accelerate users' learning curve when rolling out a new resource.



### Description

Workshops, typically held in small groups or even one-to-one for a faculty member, are a powerful way to impart information to students, researchers and faculty, and to strengthen those relationships.

Food and drink could be provided to make the workshops more attractive and to run during breakfast, lunch or dinner times of the day.

Consider marketing via newsletter, flyers, posters, social media.



### Frequency

One per semester, per audience, and when warranted by new or enhanced services and products. Consider holding each semester, a separate workshop for students, researchers, faculty.

For more information about marketing promotions,  
visit [elsevier.com/librarians](https://elsevier.com/librarians)

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