Overview

In the first module we set everything up. We talked about what marketing truly means in libraries, about brand versus branding, and about how important it is to market strategically. You reflected on your own library's communication styles. From here on in we're going to get a little more specific—and a little more practical.

The key to good library marketing is to market in campaigns. By this I simply mean sending out the same message, tailored across different platforms, for a concerted period of time. This focus provides the hook, one which makes parts of your audience think "this is for me"—and if you have a good "Call to Action" as part of your marketing, it means they take the next step and **act** on your messages.

There are good marketing models out there we can learn from—for example, SOSTAC, which is worth a look—but to my mind none of them quite work for libraries. Because of this, I have developed the CAPE marketing campaign framework, which asks the questions that I see as absolutely essential and turns what we do from merely promotion into proper strategic *marketing*. We'll start this week's reading by introducing the CAPE campaign framework, and then we'll look at different ways to understand our users. We'll explore the growing movement around User Experience (UX) in libraries to help us gain true user insight. Once we better understand our audience we will divide them up into smaller groups, in order to tailor the messages to those groups. Finally, we'll look at how to simplify those tailored messages for maximum impact, without losing the nuance of what we want to say.

One last thing before we start. The CAPE document can be used as a marketing plan of sorts, but it is designed to work for a *specific piece of marketing*, rather than for an overall marketing strategy for an institution or for a year-long marketing plan. In other words, whereas the marketing plan might cover the whole of 2018 for your institution and show all your goals and audiences, a campaign document would focus on one sizable marketing push—for example, launching a new service or promoting a particular range of classes.

A marketing plan document can be useful, but very few institutions have them (and an even smaller subset ever actually look at the plan once it's been written!). In my experience, it's better to have a more agile document that can be used to plan three or four or five big campaigns a year, than having a larger document that sits on a network drive as 30-page PDF that rarely informs our practice. I don't want to make it sound like I'm against marketing plans. I'm not. However, I do think campaign documents see a greater return on our investment the vast majority of the time. I've worked with a lot of libraries on their communication, and the most tangible impact comes from marketing in campaigns. For this reason, it's a campaign doc we're working towards completing as part of this course, rather than a marketing plan. I hope that makes sense, but it's not a completely clear-cut distinction! So if you have any questions or queries, please let me know in the forum or just send me an email, and I'll try and explain further.

Okay, without further ado let's take a look at the CAPE format, so you can see if it would be useful and applicable at your own place of work.

The CAPE Campaign Framework: Context, Aims, Promotion, and Evaluation

In the *Week 2* section of the Supplementary Material page you'll find a blank Word document version of the CAPE campaign format. By the end of the course we'll aim to fill this in for your next big piece of marketing. For now, I'd like to take you through it section by section in this brief video.

To recap, the CAPE planning doc has four sections, each of which asks three questions.

Context

1. How does this campaign relate to the wider library strategy?
2. What do we already know about our users, and what can we find out?
3. What are our capabilities and resources?

Aims

1. What do we want to achieve?
2. What are the specific objectives?
3. Which segments is this campaign aimed at?

Promotion

1. What are the key messages?
2. What are the platforms?
3. Who is doing what, and for how long?

Evaluation

1. What are the outputs?
2. What are the outcomes?
3. What will we do differently next time?

We'll focus on the Promotion next week, but now we're going to focus on the context and aims.

Context: How does this campaign relate to the wider library strategy?

You all work for different institutions, and the chances are each of them has an overall strategy document. It may be a simple vision statement, a more detailed proposition more akin to a workplan covering the next three to five years. Perhaps you've just reached the end of one "strategy cycle" (2013-2017, for example) and are waiting on a new one for 2018.

Whatever you have, they'll all be different, so it's hard to generalize in this area. However, a few key things remain true across the board. One is that good marketing doesn't exist in a silo: it supports the wider aims of the institution. Another is that you're more likely to get managerial buy-in, time, support, and potentially even a marketing budget if you can demonstrate how your marketing supports the organization's existing aims and targets. A third is that it's always better to explicitly link what you're doing with the vision of your library director than to leave it to the director to join all the dots on his/her own! So, the first section of the document allows you to set up your campaign in such a way that it clearly helps the library achieve one or more of its existing goals.

It's hard to give examples of this, but let me share with you verbatim what I put in this section for a campaign at my own library:

> *It will enhance Program A (student experience), Program C (information flow) and Program E (user engagement, understanding and performance)—and to an extent Program B (research excellence) — of the Information Strategy.*

Obviously, you'd need to be familiar with our strategy to make total sense of this, but hopefully this gives you an idea of the intended use for this part of the document. Looking back, I could have gone into a bit more detail. (This particular project was already green-lit, but if I was trying to get something off the ground I'd have sold the benefits a bit more.)

If you haven't already, get hold of a copy of your library strategy document, and start plotting how your marketing can help support it.

The second question in the Context section is all about our users, which brings us neatly to *Understanding Library Users*, the next chapter of this week's reading.

Understanding Library Users: Feedback, UX, and Ethnography

It is almost impossible to market well without first understanding our users. Again, this is part of what makes this *marketing* rather than just promotion: it's part of an ongoing dialogue with an audience, a demographic, a group of people. It's a cycle of learning more about them in order to better cater to their needs.

The second question we ask in a campaign is:

Context: What do we know about our users, and what can we find out?

At this point in the CAPE document I normally link to other pieces of work that have been done which help us understand the users of the library. There are many avenues open to us here. We can look at existing demographic data; we can listen in on social media; we can refer back to the results of previous marketing campaigns if they've been recorded properly.

In terms of new pieces of research to help us find out more, a popular approach is to run a survey. I favor using semi-regular surveys that focus on a particular issue each time, rather than a giant annual survey that people struggle to complete. Focus groups are also common in libraries and can be useful to hone in on specific problems or areas for improvement. It's always good to incentivize participation in these, and food seems to work well here—for some reason pizza seems universally popular across the board, from students to solicitors! The crucial thing with focus groups is *to ask each participant to bring a non-library user with them*. This ensures you get a more rounded selection of views, rather than a slightly biased group who are fans enough of the library to have signed up in the first place. From a marketing point of view this can be pure gold: you get a non-library user in the room, and you can ask them, "how *could* we reach you? What would entice you to join? What communication channels should we be tapping in to in order to teach people like you?" What an opportunity.

These traditional data-gathering exercises can definitely help improve our understanding of the users we wish to market to, but there is an emerging movement in libraries which I'd like to explore in more detail. **User eXperience** (or **UX**) in Libraries is something relatively new to the UK where I work, but both the Scandinavians and you guys in North America have been doing it for a while. UX has become an umbrella term to describe a suite of techniques, divided roughly into two parts: using ethnography to understand our users and using human-centered design thinking to make improvements for them.

This quote from UX specialist Andy Priestner encapsulates it well:

> *Ethnography is simply a way of studying cultures through observation, participation and other qualitative techniques with a view to better understanding the subject's point of view and experience of the world. Applied to the library sector, it's about user research that chooses to go beyond the default and largely quantitative library survey, with a view to obtaining a more illuminating and complex picture of user need. These are often hidden needs that our users do not articulate, find it difficult to describe, are unwilling to disclose, or don't even know that they have—which special ethnographic approaches are perfect for drawing out.*

As for "UX," until recently it has largely referred to design and usability of a website or software, but it is now enjoying a broader—and more useful—definition which encompasses user experience of spaces and services, too. UX in Libraries [endeavours] to weave together ethnography, usability, and space and service design techniques under one umbrella. (CILIP Update, May 2015)

To introduce some of these ethnographic techniques, you really need examples as well as just words, so take a look at the UX Case Study PDF (also available in the *Week 2* section of the Supplementary Material page), which will introduce you to some of the best and most useful aspects of User Experience in Libraries:

The UX approach is vastly different to other ways in which we collect feedback from library users, and it takes a while to get your head around, in my experience. However, once you try it out you realize just how much potential it really has to give you true insight into your users—and that is ***so*** important for good library marketing. As always, there's a choice of assignments at the end of this week's reading, and of course you can choose whichever of them suits you, but I'm secretly hoping a lot of you choose the UX option so that you can dip your toes in the User Experience water! It's one of the most exciting developments in librarianship I've seen in the years I've been part of this great profession.

Let's take stock of where we are in the CAPE process, then. One way or another we want to gain a true insight into the wants and needs of our audience—what happens next?

Context: What are our capabilities and resources?

It's essential to plan your marketing campaign around what can realistically be achieved. In this section of the document it's all about working out what is available. Is it just you working on this, and if so, how much time can you commit? Do you have a team involved? Do any of the other library staff need to actively participate? Are there materials which need printing? Is there a budget for that?

Once that's established, as library marketers we can move onto Part 2 of the CAPE cycle: the Aims.

Aims and Objectives for Library Marketing

The Aims section of the CAPE document asks three questions, and we're going to look at the first two together:

Aims: What do we want to achieve, and what are the specific objectives?

A question that comes up a lot is what is the difference between "aims" and "objectives"? In essence, the *aim* is where you want to go, and the *objectives* are how you get there. They're very closely related, but they're not the same thing.

Let's take a basic example. The aim of your marketing campaign might be similar to the Lancashire campaign to increase footfall that we looked at back in the Strategic Marketing section (in Week 1). It's good to put a number on these things, so let's say I work in a public library and I want 1,000 more members of the library in 2018 than we had in 2017. There's our aim. The objectives tell us how to achieve this, and perhaps they could be as follows:

- 500 extra children and their parents
- 200 extra senior citizens
- 200 extra entrepreneurs using our business space
- 100 renewals from lapsed former members

Suddenly this abstract idea of "a thousand extra people" becomes a focused, defined target—and it makes you think, "wow, how do we go about doing this?" Then you can start to plan: we'll try and find the entrepreneurs this way, we'll tempt back former members like this, and so on.

Think about the aims your marketing can help you achieve. The most obvious one—more people using the library—is above, but what else is there? Here are some examples to get you started.

1. More visits to a particular branch or building
2. More visits to the website
3. More use of a particular resource or set of resources you've put a lot money into
4. Increased social media reach and/or engagement
5. Increased digital downloads via the library
6. More people attending information literacy classes

There are so many more, and all libraries have different goals. As well as the very specific aims above, you may also be interested in slightly harder-to-measure outcomes—for example, improving the library's reputation or addressing a problematic area of user behavior. Whatever the case, having it explicitly documented with an accompanying roadmap of how to get there via your objectives is invaluable. You'd be amazed how much library marketing takes place without a stated aim (and as you'd expect, this marketing suffers as a result).

This feeds into our previous discussion, about how marketing works best with a *focus*, especially in library-land. We need a particular user group in mind for our marketing campaign—or a small number of groups—rather than trying to craft key messages for everyone, which simply isn't possible the majority of the time. The art (and science) of dividing our audience up for marketing purposes is known as "segmentation."

Segmentation - Dividing Your Audience into Smaller but Manageable Groups

Aims: Which segments is this campaign aimed at?

Segmentation is an absolutely crucial part of good marketing. In essence, it is taking the mass of our library users and potential library users (our "market," in marketing jargon), and dividing them into smaller sub-groups. We can then tailor our marketing messages for each of these sub-groups. These sub-groups are based on shared characteristics, and the type and number of them varies enormously between different organizations.

It's not always easy to get to grips with this area, so before going any further let's see a concrete example. Alison Circle is Chief Customer Experience Officer at Columbus Metropolitan Library (CML), and in 2012 she provided the case study on Segmentation for my book *Library Marketing Toolkit*. Here's a quote from it:

> *In an industry that promises "Open to All," in today's fractured marketplace we can't be all things to all people. So how did we begin? We started with research—a deep examination into the behaviour of our customers—segmenting our customer data into behavioural clusters:* ***Young Minds*** *(children);* ***Power Users*** *(avid readers and the mainstay of public library use);* ***Virtual Users*** *(computer users). We have 15 clusters overall; we chose three for our primary focus and drove all of our efforts toward these strategies. We were committed to doing a few things very well.*

I love that quote, there's so much marketing insight from Alison in less than 100 words! So CML divides their audience up by behavior and targets their marketing to each group. That's a great way of doing segmentation and indeed one of the most sophisticated. I'd recommend it, if you think you have the understanding of your users to be able to characterize them in this way. However, most libraries can't do that from the get-go, which is why it's more common to find segmentation done by *status*.

In a public library that might mean segments like Children, Teens, Local Adults, Remote Adults, Senior Citizens. For academic libraries it might be Undergrads, Postgrads, Research Postgrads, Staff, Academic Staff, and Distance Learners. The aim here is to have a manageable number of sub-groups; if we go too granular, we risk making marketing too complicated to get anything done! Any amount of segmentation helps though—even just dividing an audience into two and then thinking how to phrase our communications messages slightly differently for each group.

Let's take a public library example: let's say the opening hours are being extended and the library now closes at 10 pm. This is a big deal and great news all round. To a certain extent we can just shout from the rooftops, "now open till late!" and expect some kind of response. But if we're practicing segmented marketing, we can aim for more impact by very subtly adjusting the way we frame the message for each of our groups.

> To the parents we can say, "We're now open later, so your kids have somewhere safe and creative to go after school."

To those in the community without kids or with empty nests we can say, "We're now open later, so you can relax after work in our café."

To those without Internet access at home we can say, "We're now open later so can you can get online and find your next job at a time which suits you."

And so on. It's the same message, but we're making it more likely people will ***act*** on it by personalizing it for them, and we're focusing on the *benefits* of the change to later opening hours, not just the feature itself—something we'll talk a little bit more about next week.