Collaborative Marketing for Electronic Resources: A Project Report and Discussion

Marie Kennedy (Marie.Kennedy@lmu.edu)
Loyola Marymount University

Abstract

This article reports on the design and findings of a project concerning the feasibility of a collaborative model to benchmark the marketing of electronic resources in institutions of higher education. This international project gathered 100 libraries to move in lockstep through the process of a typical marketing cycle that included running a brief marketing campaign and reporting findings to each other. The findings show good reasons and strong support for this kind of model.

Keywords: Collaboration; Marketing; Electronic resources

Introduction

Connecting patrons to relevant resources is a concern for libraries as more collections are removed from traditional shelves and placed in virtual spaces. The traditional marketing techniques of placing a "new-books" shelf near the front door or the positioning of ready reference volumes in a study area of a library does not apply to the electronic resource world because there are no physical volumes to view. How, then, do libraries effectively connect patrons to the most applicable electronic resources for their information needs?

In an era in which libraries need to prove that their activities are fiscally responsible, it is vital to understand library potential in marketing electronic resources to patrons. Two recent articles on library marketing plans for electronic resources show that generally libraries do not plan for marketing in ways that produce actionable knowledge for further marketing efforts.[1] An analysis of these articles indicates that libraries do not choose appropriate strategies for marketing their electronic resources nor do they have a means to fully assess the strategies. Without a clear understanding of whether or not their marketing campaigns have been successes or failures, libraries are not positioned well to move forward in new marketing cycles.

Designing a marketing plan before beginning marketing activities should lead a library to state clearly the goal for the plan. This would then lead to choosing a strategy to achieve that goal and to deciding how to measure a campaign in reference to the goal. The content analysis described in Kennedy's 2010 article concerning 24 published articles about marketing plans for electronic resources demonstrates that only three of those libraries were clear about these steps. With only three examples, there is little to provide insight into what works, what changes might be recommended, and effective ways to move marketing forward. At best, it seems, libraries that are conducting marketing are doing so independently, without a body of evidence and professional experience on which to draw.

Research question

Libraries understand the need to market yet generally fail to develop a plan to do so. The literature suggests that this is due to marketing not being a priority for library administrators and librarians not knowing how to design a marketing plan.[2] The result of this uneven attention to marketing of electronic resources is that no "best practices" can be identified from the literature, which means that a path for success in marketing electronic resources is not evident. That libraries have no generally accepted processes to follow for marketing their electronic resources is especially problematic in today's environment with pressures to justify how monies and staff time are spent. One wonders if

there may be a way to educate quickly and widely on the steps of designing a marketing plan, and then a way to use the data generated from that process to determine the effectiveness of a marketing strategy. Perhaps a collaborative approach to marketing may serve as at least one "best practice" for marketing electronic resources.

This article describes a distributed project designed to determine if "best practices" for marketing electronic resources can be devised collaboratively. The project is intended to answer the question, "Is a collaborative model of benchmarking the marketing of electronic resources feasible?" A five-month international project was conducted with college, community college, and university libraries to test the model.

Literature review

A literature review, noted earlier, demonstrated the gap in our collective published knowledge about marketing electronic resources. More specifically, Kennedy's 2010 article found 24 case study documents published from 1994-2009 specifically about marketing electronic resources. Of those, two were reports from college libraries, five were from medical libraries, two were from public libraries, and 15 were from university libraries. The analysis discovered that more than half of the libraries did not document a clear assessment plan as part of their cycles of marketing. Kennedy conducted further analysis related to assessment and found that only three of the 24 libraries had designed their marketing plans so that their measurement and assessment matched the stated goal for marketing. (See Figure 1 for model developed to demonstrate efficacy in marketing.)[3] It is clear from the research that libraries do not consistently perform well in designing marketing plans for electronic resources. Other research affirms that libraries more generally do not plan well for marketing of any kind.[4]

In examining the literature related to this type of marketing and hoping not to 'reinvent the wheel,' the author discovered that the 'wheel' – a defined set of guidelines for how to effectively market electronic resources in a library setting – does not exist. As a result, the author turned to the wide body of librarians themselves to assist in determining if it is feasible to collaboratively construct the 'wheel.'

Methods

The project was designed as an international working group of college, community college, and university libraries all moving inlockstep through the process of a typical marketing cycle, running a brief marketing campaign, and reporting findings to each other. All participating institutions performed these steps at the same time, beginning in October 2011 and completing the project at the end of February 2012.

The author proposed the project at a poster session at the Association of College and Research Libraries conference in 2011, and based on the number of signatures received from interested parties, it was decided to move forward. The author made a further call for participation via two e-mail forums, ERIL-L and academicpr, describing the project's focus on electronic resources and marketing and public relations. Over 100 participants committed to the project. The main communication mechanism was via a wiki, housed at http://benchmarketing.wetpaint.com. The wiki provided an open working forum for weekly assignments, data housing, and discussion threads. Though the project is now complete the wiki will remain publicly available online for reference.

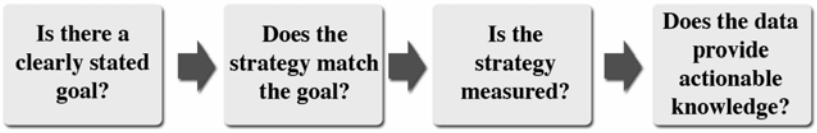

Figure 1: Efficacy Model

CC BY NC ND

Figure 2: Wiki Logo

Using a benchmarking framework, as will become clear, that is merged with a traditional cycle of marketing, the following steps were developed for a collaborative approach to identifying best practices in marketing an electronic resource: 1. decide what to benchmark; 2. plan the benchmark project; 3. understand your own performance; 4. study others; 5. learn from the data; 6. use the findings.[5] Since there is little published literature about marketing of electronic resources we assume a baseline of anecdotal information only. This project employed a working group to perform the same marketing technique at the same time so that data could be gathered and compared. It was hoped that a resulting body of fact-based information can inform marketing decisions concerning e-resources.

1. Decide what to benchmark

For this project we evaluated whether or not two e-mails sent to internal library staff with links to tutorials on how to use a particular electronic resource might increase confidence in their use of the resource. The marketing literature notes that as front-line staff are supported with information about products (or in the case of the library, information about electronic resources) they will share that information with patrons.[6] Our efforts for this project, therefore, focused on our own library staff.

By gathering data on the actual use of the electronic resource and summarizing the results of a survey we hoped to be able to determine if the marketing technique of sending e-mails with links to tutorials to internal library staff is generally effective. In the aggregate the data should tell us if this is generally a good technique to use in a college, community college or university library setting and if it can be considered a "best practice."

2. Plan the benchmark project

Each university participating in the project acted independently in the steps of the marketing cycle and shared their progress via a wiki. The project began in early October 2011 and finished at the end of February 2012, taking into consideration seasonal holiday scheduling. The brief timeline for the project was as follows: the first three months (October-December 2011) focused on preparation (steps 1-10 of the marketing cycle); one month (January 2012) focused on the e-mail campaign; the last one month (February 2012) focused on assessment and evaluation (steps 11-12 of the marketing cycle). See Table 1 for the extended timeline.

3. Understand your own performance

In an effort to define the process of marketing for each library, participants wrote about and shared the following as representing a typical marketing cycle seen in Figure 3.

Project description

For this project the description was determined to be, "to increase the confidence of our library staff in their use of licensed electronic resources." Brannon states, "The library [needs] to focus on staff education first. You cannot promote a product you don't understand. Patrons will trust confident, knowledgeable staff more, and find more satisfaction in their use of the library with proper assistance."[7] We supported this belief and developed a plan to focus on staff education about electronic resources. See the project wiki URL indicated above.

CC BY NC ND

WEEK 1 (October 5-11): Project description. WEEK 2 (October 12-18): Current market. WEEK 3 (October 19-25): SWOT analysis. WEEK 4 (October 26- November 1): Target market. WEEK 5 (November 2-8): Marketing goals and objectives. WEEK 6 (November 9–15): Marketing strategies. WEEK 7 (November 16-22): Action Plan. (holiday break) WEEK 8 (December 7-13): Draft your emails, set dates to send them in January. (holiday break) WEEKS 9-12 (January): Send email #1, send email #2. WEEK 13 (February 1-7): Generate survey for assessment. WEEK 14 (February 8-14): Gather usage statistics for January 2011-January 2012. WEEK 15 (February 15-21): Measurement. Report survey and usage stats results. WEEK 16 (February 22-28): Assessment.

Table 1: Extended timeline

Current market

Participants were asked to think about and describe their library's current target market, generally answered by the question, "Who are we serving?"

SWOT analysis

Participants were asked to conduct a cursory SWOT analysis that covers strengths, weaknesses, opportunities and threats, and that focuses exclusively on electronic resources. A hypothetical SWOT model was provided on the project wiki to help participants construct their own analyses.

Target market

For this project the target market was initially defined as internal library staff.

Goal

While marketing goals are generally defined more broadly, for this project the goal was narrowly identified as, "to raise the confidence in our library staff in their use of the electronic resources to which the library subscribes."

Strategy

For this project, the marketing strategy was determined to be an e-mail marketing campaign.

Action plan

Time, staff, and budget were considered for this project. The action plan was designed so that the e-mail campaigns to library staff would all occur at the same time, during the month of January 2012. Two e-mails were sent providing first a link to an initial tutorial and then a link to a second, more advanced, tutorial. They were followed by a survey on the effectiveness of the tutorials. See Appendix B.

CC BY NC ND

Figure 3: Marketing Cycle

Measurement

Measurement focused on two questions, did the usage of the e-resource go up, and did our staff learn something new and/or get a confidence boost in the use of the e-resource by viewing the tutorial? Each participating library gathered usage data for January 2011 and January 2012, compared the data, and reported if there was an increase in January 2012 statistics. Each library gathered responses to the three-question survey of the recipients on the tutorials.

Assessment

Each institution examined individually what was learned to determine what it would keep or reject during their next marketing cycle, as well as examined the successes and failures of the process at its own institution.

4. Study others

As already noted, the literature reporting the clear steps a library takes in the development of a marketing plan is sparse. Identifying and following clear steps in this project was aided greatly by the wiki. We shared all aspects of the project via this means and found it to be effective for discussion threads and other communications. The mechanism of the wiki removed time lags and offered a kind of peer review process by allowing commentary by other participating institutions to shape and mold our plans.

The pages on the wiki were publicly viewable but editable only by project participants. One of the requirements for participation was a willingness to "share what you learn" so that this step of the benchmarking process, studying others, could be carried out with few barriers. The resulting wiki will remain available even though

CC BY NC ND

the project is now completed and will serve as a historical reference to our work and its results.

Networking with other librarians was a key part of this project, and to facilitate this, a list and geographical map of participants were made available on the wiki to help participants easily contact each other. In fact, one of the early assignments was to contact three participants using the messaging feature of the wiki discuss and solve any problems that may arise during the project.

5. Learn from the data

For this project we hoped to learn from the data whether or not the marketing technique of e-mail and tutorials to internal library staff were effective in university and college libraries.

6. Use the findings

In addition to providing insight into the effectiveness of the emails and tutorials, each participating university or college also can see how its methods may be improved by drawing on the marketing experiences reported by the other participating institutions.

Findings and Discussion

The goal of this project on merging benchmarking with marketing was designed to answer the question, "Is a collaborative model of benchmarking the marketing of electronic resources feasible?" In this case, the benchmark was early use of electronic resources compared to subsequent use of electronic resources following an educational campaign among staff in the use of these resources. Over 100 institutions began the project. Many continued the project to completion but did not report complete data. As a result, the analysis includes data for 32 institutions. Despite the homogeneity in type of library (only institutions of higher education) there was a wide range in FTE for these 32 libraries, from 500-30,000. Of the resulting 32 institutions, three were community college libraries, four were college libraries, and 25 were university libraries. (See Appendix A for a list of participating institutions.)

The marketing cycle involved a first and a second e-mail to library staff, with the first e-mail including a link to a brief tutorial about an e-resource and the second e-mail including a link to an advanced tutorial. As the wording of the e-mails was not standardized, each library formulated its own emails to staff from its own institution. The project leader examined the structure of those e-mails to determine if there were similarities or differences in how libraries were choosing to communicate with their staff.

Evaluation of the e-mails

Sixty-four emails were obtained from the first and second mailings for the 32 institutions. Certain aspects of the e-mails were examined, such as whether or not the sender used an image in the e-mail, whether or not the tutorial was created by the vendor of the electronic resource or created by the local library, and whether the e-mail was in plain text, rich text, or HTML format. Of the 32 participants, 26 used images in the e-mail, six did not. Twenty-nine sent vendor-created tutorials to their library staff, and three created their own tutorials. With 29 using HTML, it was the most used format (being the default in the popular e-mail tool, Microsoft Outlook), with four reporting rich text, one reporting plain text, and one did not know the format.

Surveys Each library representative then sent a third and final email to each participating staff member that included a link to the survey. The intent of the survey was to gather information about the perceived effect the tutorials had on staff confidence in the use of the resource. While the surveys were constructed by each library using a template in Google Forms, and all libraries gathered their own data, all the surveys included the following language (see Appendix B for a screen shot of the survey):

> **Title**: Follow-up survey for electronic resources
> **Body**: This is a 3-question survey to find out about the tutorials that were sent to you via e-mail in January.
> 1. Have you ever used this e-resource before

CC BY NC ND

you received the e-mails with the tutorials? Yes/No
2. Did you learn something new about the e-resource by viewing the tutorials? Yes/No
3. Did your confidence in the use of the e-resource change as a result of viewing the tutorials? The Likert scale of 1-5 was used, with 1 being "No change in confidence in my use of the resource," and 5 being, "Significant change in confidence in my use of the resource."

Nine hundred and twenty staff received e-mails with tutorials and 920 staff received an e-mail with the follow-up survey. One hundred and fifty-three staff took the survey, a response rate of 17 percent. Forty-eight percent of the respondents had used the resource before receiving the e-mails with tutorials. Eighty-seven percent learned something new about the e-resource by viewing the tutorial. Of those who had used the resource before, 82% learned something new. On a scale of 1 (low) to five (high), the average confidence rank was 3.3.

Even from the limited survey results, we still are able to see clearly that, overwhelmingly, those who watched the tutorials and then took the survey learned something new and increased their confidence in the use of the e-resource. In a project such as this, a reasonable conclusion is that tutorials were successful in increasing staff confidence in using certain e-resources. It should be noted that what counts as "success" pertains to only those who responded to the survey. If this project is repeated, an effort should be made to gather more survey responses to understand the whole population of library staff who received the tutorials. To summarize, these results are not generalizable but are strong enough to pursue as an acceptable marketing strategy.

Usage statistics

One of the measurements for the project was to compare usage statistics gathered from January 2011 and the statistics gathered from January 2012. Since usage of e-resources follows similar trends year by year in an academic environment, it is more meaningful and appropriate to compare the same month one year apart than to compare concurrent months. For many of the libraries involved in the project, this was the first time conducting a marketing campaign. Dramatic increases in use were not expected, especially since we were marketing just to library staff. Surprisingly, though, 14 of 32 libraries reported an increase in usage (with 13 reported no data and 4 reported no change or decreased usage). While it cannot be concluded that the change in usage is directly related to the marketing represented in his project, there are some interesting correlations, and perhaps it is reasonable to assume that a future, larger marketing campaign could truly impact the usage of electronic resources.

Limitations and Future Research

The project designed to answer research questions posed in this article suffered the usual problems that large participatory groups have, such as the difficulty for each participant to stay on track with the rest of the group, attrition over the course of holidays, and any emotional investment needed by the leader to encourage participants to stay energized and focused on the agenda.

The project was comprised of sixteen weeks of activities, conducted over the course of five months, which is a long time for participants to engage fully in a project that was an "extra" on top of normal work responsibilities. During the course of the five months, participants went on vacation, had maternity leave, or used sick leave. As a result, many of the participants had weeks during which they were doing multiple assignments to catch up to the rest of the group. Because the course was so long and the assignments were flexible it was easy to accommodate this kind of catching up. However, a project like this could be more condensed and still be as effective.

The project began during the fall, a period with much holiday time. Several participants dropped out after Thanksgiving, a few at the beginning of the December holidays, and a few more at the New Year. Scheduling a project like this in the future would be better served in the

spring or summer, based on feedback from participants.

The project leader and author of this article believes that a "group of 100 people" is different than "100 people in a group" in terms of scope and manageability. If a project like this were repeated, it may be of benefit to work in smaller groups, perhaps with four groups of 25 participants. A smaller size would more easily facilitate conversation and would build helpful bonds within the group, a possibility that was difficult to achieve in a larger group.

In addition to the logistical constraints, not obtaining a large body of statistical data was somewhat disappointing. It was hoped that all 100 participants would contribute data and survey results, but at the end of the project only 32 presented full responses to the survey and completed usage statistics. Initial review of the results showed that the data were not normally distributed. A multiple regression was considered in order to learn if the independent variables such as e-mail idiosyncrasies and characteristics had an effect on a high confidence ranking by the library staff viewing the tutorials, but there were not enough data to construct such a test. It is hoped that if the project is replicated, as planned, there can be an appropriate amount of survey data to run the robust test.

The final limitation to note is that this research used only college, community college, and university libraries. It could easily be expanded to include public libraries and/or special libraries, or a project could to be devised for these types of libraries separately, to see if the outcomes of their marketing efforts with library staff have similar results.
This project did not set out to consider how the librarians leading the process at their respective institutions were affected, but the participants shared via the wiki their thoughts as the project progressed. Concerning the wisdom to begin marketing efforts among staff, this was reinforced by the wiki comment from username, *jsholman*: "I had never really considered the importance of marketing to library staff before, but I see now just how critical it is to make sure we market resources internally."[8] Participant *turkishvan13* commented on the timing for a marketing plan: "I do not have a plan in place BUT the summer could be ideal to go through the steps and be ready for the fall."[9] Before pursuing a similar project, this wiki could be mined for more evaluative comments like this to inform these and other aspects of design and execution.

Conclusion

This project gave attention in a balanced way to all the steps of the marketing cycle in an attempt to determine if a collaborative approach to marketing could be achieved, and what advantages and insights could be obtained by all participants. The project revealed that the traditional marketing cycle used here was clear and easy to understand and that conversations on the wiki were effective in aiding collaboration, in sorting out issues and resolving problems as they arose. Collaboratively, the participating libraries, at least those contributing to data collection, found that marketing databases to staff by way of online tutorials had a generally positive effect on database use within most libraries. Most of the libraries that were fully engaged in the project were very positive about the marketing plan and its execution. Based on these successes, one could conclude that a collaborative model in marketing electronic resources improves usage and perhaps motivates libraries to actually adopt a clear and well-planned marketing campaign.

Endnotes

---

[1] Marie R. Kennedy, "Cycling Through: Paths Libraries Take to Marketing Electronic Resources," paper presented at Library Assessment Conference, October 27, Baltimore MD (2010), available at: http://digitalcommons.lmu.edu/librarian_pubs/3; Marie R. Kennedy, "What Are We Really Doing to Market Electronic Resources?" *Library Management* 32, no. 3 (2011): 144-158.

[2] Anita R. Lindsay, *Marketing and Public Relations Practices in College Libraries* (Chicago, IL: ALA, 2004).

CC BY NC ND

[3] Kennedy, "Cycling Through: Paths Libraries Take to Marketing Electronic Resources."

[4] Vikki Ford, "PR: The State of Public Relations in Academic Libraries," *College and Research Libraries* 46, no. 5 (1985): 395-401; Lindsay, *Marketing and Public Relations Practices in College Libraries*; Nancy J. Marshall, "Public Relations in Academic Libraries: A Descriptive Analysis," *The Journal of Academic Librarianship* 27, no. 2 (2001): 116-121.

[5] Robert J. Boxwell, Jr., *Benchmarking for Competitive Advantage* (New York: McGraw-Hill, 1994).

[6] Philip Kotler and Kevin Lane Keller, *Marketing Management*, 12th ed. (Upper Saddle River, NJ: Pearson Prentice Hall, 2006).

[7] Sian Brannon, "A Successful Promotional Campaign – We Can't Keep Quiet about Our Electronic Resources," *The Serials Librarian* 53, no. 3 (2007): 41-55.

[8] http://benchmarketing.wetpaint.com

[9] Ibid.

Appendix A: Institutions represented in the analysis

Institutions represented in the analysis
Belmont University (Courtney Fuson)
Bethel University (Carole Cragg)
Coconino Community College (Estelle Pope)
College of Saint Elizabeth (Amy Schleigh Hayes)
Columbus State University (Jacqueline Radebaugh)
Dominican University (Margaret Heller)
Duquesne University (Melodie Frankovitch)
Eastern Kentucky University (Laura Edwards)
Fontbonne University (Jane Theissen)
Francis Marion University (Tammy Ivins)
Georgia College (Jolene Wertz)
Ithaca College (Calida Barboza)
Langara College (Emma Lawson)
Loras College (Kristen Smith)
Mesa Community College (Janell Alewyn)
Midwestern State University (Andrea L. Williams)
Pennsylvania State University (Nancy Adams)
Rockhurst University (Jennifer Peters)
Roger Williams University (Susan McMullen)
Seneca College (Dan Michniewicz)
South Dakota State University (Linda Kott)
University of Baltimore (Natalie Burclaff)
University of Connecticut (Galadriel Chilton)
University of Dayton (Katy Kelly)
University of Evansville (Kathy Bartelt)
University of North Dakota (Lisa Martin)

University of Wisconsin-La Crosse (Jenifer Holman)
Washburn University (Lori Fenton)
Washington University-St. Louis (Rudolph Clay)
West Virginia University (Linda Blake)
Western Carolina University (Kristin Calvert)
Wilkes University (Kristin Pitt)

Appendix B: Survey screen shot

Follow-up survey for electronic resources

This is a 3-question follow-up survey to find out about the tutorials that were sent to you via e-mail in January.
* Required

Have you ever used this e-resource before you received the e-mails with the tutorials? *

- Yes
- No

Did you learn something new about the e-resource by viewing the tutorials? *

- Yes
- No

Did your confidence in the use of the e-resource change as a result of viewing the tutorials? *

	1	2	3	4	5	
No change in confidence in my use of the resource	○	○	○	○	○	Significant change in confidence in my use of the resource

Submit

Powered by Google Docs

Report Abuse - Terms of Service - Additional Terms

CC BY NC ND