



Smart Investing@your library® Builds Nebraska Communities

**Marketing Customer Training
@ Your Library®
September 11, 2014**







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- *This program, administered by the Nebraska Library Commission and the Northeast Library System, is made possible by a grant from the FINRA Investor Education Foundation through Smart Investing @your library®, a partnership with the American Library Association.*
- *(Please also use this acknowledgement when publicizing the customer training at your library)*

FINRA & the FINRA Foundation



- Independent
- Regulates brokers/firms
- Writes/enforces rules
- Dispute resolution



- Monitors trading
- Educates brokers
- Educates investors
- Protects investors



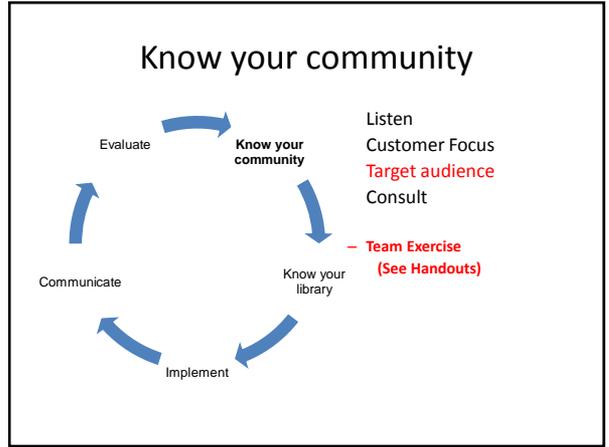
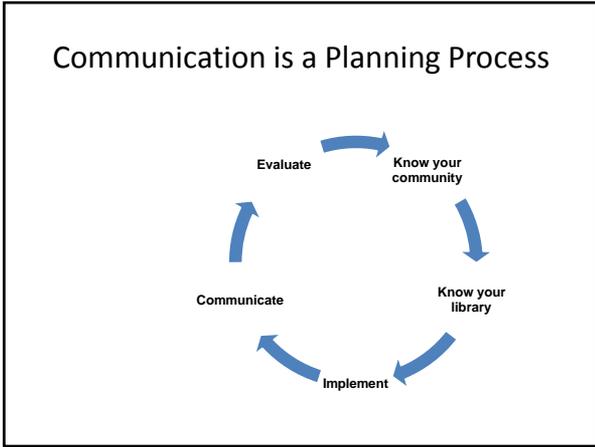







Steps for Communicating about Library Customer Training

- Assemble a Team
- Select Target Audience
- Plan Communication Efforts
- Implement Communication Strategies
- Evaluate Communication Effectiveness



Communication:
Getting the Word Out about Customer Training

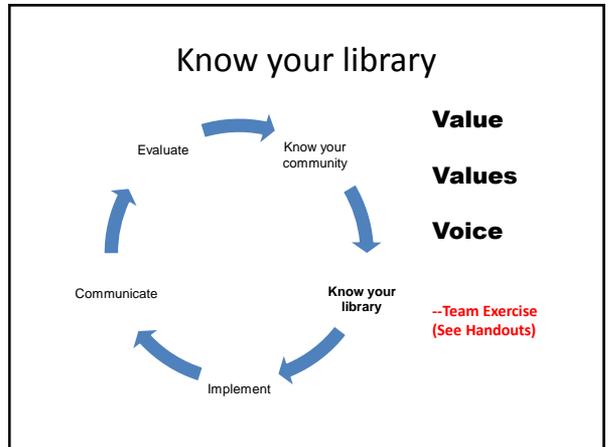
Know Your Community Exercise for Marketing Teams

Make a list of seven to ten organizations (clubs, agencies, groups, businesses, etc.) that are potential library partners or represent potential library customers in the target audience for the training.

Use your local newspaper, telephone directory, other local directories, or other appropriate resources for this assignment.

For each of the organizations you listed above, provide the following information:

- Name, address and telephone number for a contact person in the organization.
- Connection between *Smart Investing @ your library® Builds Nebraska Communities* library services and products and benefit to their organization.
- Possible activities that would communicate—or market—the library’s services and products to the organization. (For example, offsite demonstrations or training, speaking engagements, etc.)
- How would an association with this organization benefit the library?





Know Your Library Exercise for Marketing Teams

You all know your own library pretty well, don't you? Even those of us who have worked in our libraries for a very long time can sometimes learn something new by taking a systematic look at it. Select one (or more) of the following exercises:

Guided Visualization

Try to approach this with a fresh eye.

Photo Safari and Analysis

One way to really get to know your library is to try to see it through the eyes of a stranger by studying photographs of your library.

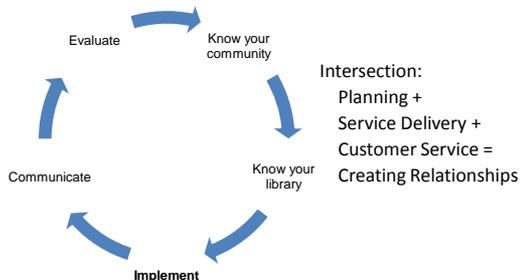
Mystery customers

Involve others in this assessment.

What's the point of these exercises?

- Assess the curriculum and the collection as to how they will meet the needs of the target audience.
- Determine what you need to learn to sell the product (training and resources) to the target audience.

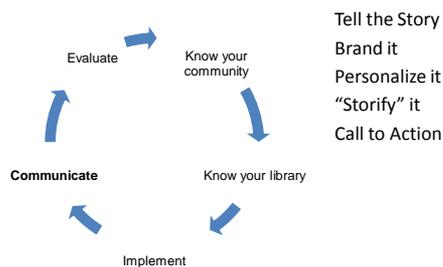
Implement

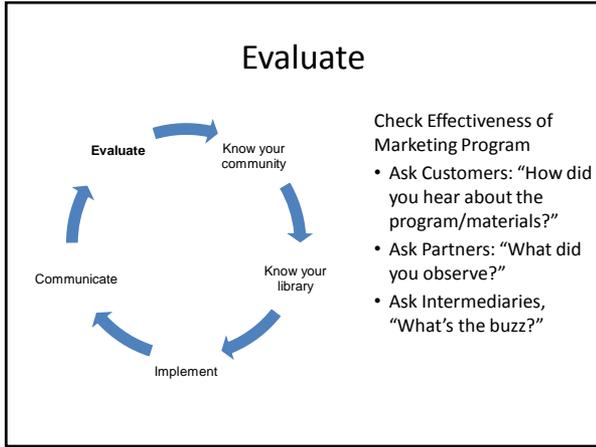


Event Planning Form

Event		Date	
Location		Staff Contact	
Planned Attendance		Sponsor/Partners	
Program			
For whom/Sponsors involved		Cost	Initial Service
Performance Contact info		Phone	Comp/Log/ID?
Access Set-up		Tables/Chairs/etc.	Format
Technical			
What is needed?	Sound/eq. needed	Who will provide and maintain?	Cost
	Projector/Laptop/Screen	Who will provide and maintain?	Cost
	Other	Who will provide and maintain?	Cost
Publicity/Advertising			
Who will create and distribute?	Poster	Date/Size	Cost
	Newspaper	Date/Size	Cost
	Library Website	Date/Size	Cost
	Radio	Date/Size	Cost
	Other	Date/Size	Cost
Refreshments			
What is needed?	Food	Who will provide?	Cost
	Drinks	Who will provide?	Cost
	Napkins/Plates/Cups/etc.	Who will provide?	Cost
Supplies			
	Special program needs	Who will provide?	Cost
Final Attendance			
General Public	Stakeholders/Partners	Total Cost	
Follow Up With Partners/ Stakeholders & Sponsors			
Thank you		Discuss opportunities for partnering:	
<input type="checkbox"/> None	<input type="checkbox"/> Call	<input type="checkbox"/> E-mail	<input type="checkbox"/> Volunteer
	<input type="checkbox"/> Training	<input type="checkbox"/> Funding	<input type="checkbox"/> Other

Communicate





Determine the Marketing Mix

Create Ambassadors. Create Word of Mouth.

- Staff
- Customers
- Intermediaries
- Others?

Work together on Communication Strategy Menu
Make it easy
Make it fun

Communication Strategy Menu

Strategy	Library Customer Target	Ideas for Our Library	Target Date	Persons Responsible	Results
<p>Outreach Share the message directly. Go where the customers are. Partner with organizations. Speaking engagements Interview shows Sponsorship of community events/activities Offsite seminars Offsite workshops Service club membership Other club memberships Offsite delivery of library services Offsite demonstrations Offsite displays Other</p>					

Marketing @ your library *

Communication Strategy Menu

Strategy	Library Customer Target	Ideas for Our Library	Target Date	Persons Responsible	Results
<p>Word of Mouth Create Word of Mouth: Talking Points and Fact Sheets</p> <p>Online and Social Networking: Creating the Buzz: Library/Partner Website Library/Partner Facebook Library/Partner Twitter Library/Partner YouTube Other</p>					

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Strategy	Library Customer Target	Ideas for Our Library	Target Date	Person Responsible	Results
<p>Paid Advertising Radio Television Outdoor billboards</p> <p>Direct Mail Letters Newsletters product/service announcements Flyers Postcards "Special customer" offers Brochures Direct response Coupons Bill stuffers Other</p>					
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Strategy	Library Customer Target	Ideas for Our Library	Target Date	Person Responsible	Results
<p>Collateral (not as powerful as people) Print: Newspaper Magazines "Shoppers" (free or classified ad magazines) Yellow Pages Special directories (regional, seasonal, Chamber) Trade or industry directories (e.g., <i>Thomas' Register</i>) Cooperative ad support from your library vendors Flyers Posters Handouts Other</p>					
Marketing @ your library *					

Strategy	Library Customer Target	Ideas for Our Library	Target Date	Person Responsible	Results
<p>Public Relations News releases Articles in magazines, journals, etc. Open houses, coffees, etc. Other</p> <p>One-On-One Selling Presentation materials Personal letters Customized proposals Telemarketing Library personnel training Other</p>					
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Strategy	Library Customer Target	Ideas for Our Library	Target Date	Person Responsible	Results
<p>Sales Promotions Discounts Loss leaders Coupons "Buy one fine, get one free" Other</p> <p>Specialty Advertising Credit Card Flash Drives Matchbooks Key-chains Novelties Calendars Datebooks Bookmarks Other</p>					
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Resources to help with team marketing efforts.

- "MEDIA TRAINING GUIDE FOR SMART INVESTING@YOUR LIBRARY PROJECT LEADERS" at <http://smartinvesting.ala.org/wp-content/uploads/2011/08/How-to-Work-with-the-Media-2.0-Training-Guide.pdf>
- "A Blended Approach to PR in a Web 2.0 World" at <http://smartinvesting.ala.org/pr-webinar/>
- Tools to Connect at <http://smartinvesting.ala.org/building-awareness/>
 - Multimedia Downloads: Multimedia for Publicizing Programs at <http://smartinvesting.ala.org/building-awareness/media-tools/>
 - Scripts, Documents & Plans: Tools & Documents for Publicizing Programs at <http://smartinvesting.ala.org/building-awareness/pub-tools/>

Left out Merchandising?

Why? Because you already started...kits distributed with materials and resources.

What is merchandising?

Systematic process of effectively positioning, presenting, and displaying library products

- Traffic-way,
- Point of Purchase
- Point of Use

Attention to place and presentation!



Questions



Northeast Library System
Supporting the Success of
Individual Librarians



Nebraska Library Commission



Thanks for Participating and Thanks to

ALA American Library Association

IOWA STATE UNIVERSITY
Extension and Outreach

FINRA Investor Education FOUNDATION

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Nebraska Library Commission

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