Executive Summary

In this paper, the author draws from his extensive experience with in-house marketing of library services, a topic he has been speaking and writing about for more than 30 years. This includes programs in libraries of all types, with focus on academic and corporate libraries. He will talk about programs and strategies for in-house marketing to describe what works and how to do it.

These approaches will include: the foundation required to succeed with in-house marketing, partnering with internal groups to increase reach into user communities, use of stories and testimonials, positioning of premium/paid content, how centralized administration of resources leads to greater usage and awareness, how to segment and address potential groups of users, design of library websites and communications, activities that are fun and draw the attention of potential attendees, leveraging of vendor resources, and evaluation/measurement of promotional efforts.

Details on the development and execution of events and programming to entice and communicate with targeted groups and user segments will be provided, as well as how to build relationships that result in greater understanding and use of library services and resources.

Statement of the problem

Despite the dedicated work of librarians and information professionals worldwide, many users and potential users of library services and resources remain unaware of the deeper universe of knowledge available beyond open Web tools. Multiple studies have been done pointing to the need for information professionals to more aggressively promote the services they provide.

A large-scale Pew Internet survey - "How Americans Value Public Libraries in Their Communities" - issued in December 2013 and updated by Lee Rainie at the June 2016 ALA Conference in Orlando, stated that "Libraries are widely appreciated for their meaning to their communities, but makeovers are warranted to change perceptions that libraries are “elitist,” “stressed,” and that staffers are “behind desk ‘walls.” Further - "Libraries still equal “books” to many, and that libraries are being judged in comparison to other services and offerings in the world such as Genius bars, Amazon recommendations, and personal shoppers. Amenities and atmosphere matter – segmenting spaces is appealing.
The 2013 study goes on to say - "Among Americans ages 16 and older who have ever used a public library, 23% said they feel like they know all or most of the services and programs at their public library, while a plurality (47%) said that they know some of what it offers. Another 20% said they don’t know much about their public library’s service, and 10% said they know nothing at all. These findings are generally consistent with the results of our November 2012 survey."

It is more than safe to say many individuals don’t know what we do or what we can do for them. Outreach must be an on-going constant effort, not a project.

**Background**

I have been very fortunate during my career. After beginning my chosen profession as a Reference Librarian at San Jose State University, where I also received my library degree, I was hired by the DIALOG Information Retrieval Service in April of 1979.

My first “professional” position was as a Business and General Reference Librarian at SJSU. During my graduate program, I served as a Student Assistant in Catalog Maintenance, and then as Graduate Assistant for Media for the Library School. All reference librarians also participated in the bibliographic instruction (BI) program.

My graduate thesis was to create a BI program in the “slide/tape” audiovisual format, that dealt with the acquisition and selection process. The training was delivered to fellow students Magazine Index via a combination of 35mm slides and cassette tape (how quaint) which was often viewed in libraries by a tool called the Caramate.

My thesis adviser allowed us to then use the production to do A/B testing of the slide/tape vs. traditional lecture – her lecture. While the retention and content testing metrics were a draw – the lecture took 90 minutes and the slide/tape took less than nine minutes! There were other benefits, such as the students being able to watch the slide/tape whenever they wished, and repeat it easily if they wanted to.

During my time at SJSU, I was asked by my thesis advisor to work with a team doing a marketing project at the early Information Access Company, the creator of InfoTrac. My adviser worked with IAC in a consulting role. IAC was taking on the venerable H.W. Wilson Company by using early computer technology to index the same popular literature that was contained in the “Reader’s Guide to Periodical Literature.” The point of the project was to illustrate the value-added features of the computer driven approach in the tool, which was dubbed “The Magazine Index.”

This “slide/tape” presentation was delivered to prospect libraries via a mailing of a Kodak carousel of slides and a matching cassette tape. As IAC had no sales force in those early days, this delivery of the slide/tape served as an initial marketing and sales tool. It also needs to be noted the program included one slide that mentioned the Magazine Index was also available via DIALOG. This inclusion led to my meeting members of the DIALOG Marketing team.
Perhaps a month later, I was working at the Reference Desk at SJSU and I received a phone call from Fran Spigai, then Director of Marketing at DIALOG. She asked if I would come up to DIALOG, then located at the Palo Alto Research Laboratory of Lockheed Missiles & Space Company, to interview for junior marketing position. I responded, “you must have the wrong person.”

When Spigai asked why I said this, I replied that while “I had heard of DIALOG during library school, I had no experience in using it, nor had I even seen it being used by someone else. I don’t see how I can help in this job.” Spigai said – “are you sitting at a Reference Desk? Didn’t you produce the marketing presentation at Information Access Company?” Answering yes to both questions – Spigai said “we do want you, don’t worry about the specific product knowledge, we will take care of that after you start working assuming things work out.”

Why do I tell this story? Two reasons: (1) it illustrates that partnerships and relationships make a significant difference in what happens; (2) it was during my time at DIALOG that I first began to work with the concept of in-house marketing of library services.

During my interview process, the final screening was done by Roger Summit, who of course was the founder, creator, and first leader of DIALOG. When Summit asked me, what did I think I could do at DIALOG to help them, I replied by describing the bibliographic instruction I was doing at SJSU. My answer was something like – “if DIALOG is going to be successful in customer environments, the users and their affiliates would need to understand how the content related to their projects and problems, how the service would be able to provide this content faster and more effectively than any prior methodology, and ultimately would help their organization and themselves succeed in their business and project objectives.”

Summit said – “very good and told me to go back to Spigai for next steps.” Obviously, I was hired, but more important, the foundation of the value proposition for all my future work, and for the overall marketing of information services was established in my mind. Since that interview, I have been championing in-house marketing of library services for more than four decades.

The Foundation

To succeed with in-house marketing, you must be comfortable and confident about the value of the content and tools you are promoting to your constituencies. Especially critical today, you must be able to differentiate library services and resources compared to the methods your users are doing on their own – i.e., Google and the open web.

The good part is that all of you already know this. Perhaps you need reinforcement, encouragement, some specific ideas as to best methods, all of which we will attempt to accomplish today, but you already know what the foundations of our profession are based on.
Partnering with internal groups

According to Ryan Bailey, a Customer Marketing Manager for Elsevier, collaboration is a key element of successful library marketing. Ryan suggests a five-step approach which leads to successful events: (1) identify interest or need; (2) review and align resources; (3) plan collaboratively; (4) leverage the event platform for internal priorities; and (5) conduct a post-event survey.

For example, if you are doing a career oriented event, you would then look to points-of-contact within department or campus career centers/organizations. If you want to do an authorship workshop, look for faculty or department resources who are familiar with publishing, editing, or the peer-review process. If the goal is to increase engagement with students, then look to student groups or events where a cooperative event would match with their own goals and further the outreach agenda of the library.

Last year, I had the pleasure of working with Sue Wainscott and Marian Mason from University of Nevada Las Vegas. Sue is the Engineering Librarian at the UNLV Lied Library and Marian is the Engineering Career Services Coordinator the Howard R. Hughes College of Engineering. Marian organized a three-day event called "Prep-A-Palooza Career Workshops" which included 16 presentations. Topics included interview techniques, getting a job via federal agency, resume writing, job search techniques, internships, executive perspectives and insights, salary negotiating, and how to succeed in your first 90 days on the job. The library talk focused on career oriented research including available engineering resources. Of course, pizza and giveaways helped draw a large early evening crowd.

On the corporate side, I’ve had success working with organizations in the Aerospace/Defense segment. One of the most innovative librarians I’ve ever met developed an annual event working with the Office of Intellectual Property Management of her company. Every year, the library staff and the IP office team would review every patent granted to an employee that year to determine which patent had the greatest commercial impact or potential for the organization. The three top patents were recognized at an event called the "National Inventors' Day Celebration." The award reception was held in the Library, and all inventors and patent holders were invited. Breakfast refreshments were served, puzzles relating to patents and trademarks were offered, and a selection of patent and invention prototypes were on display.

Late last year, at another Los Angeles area aerospace firm, I was invited to speak at event organized by the Library and Innovation Advocacy team. During set-up, I spoke with one of the "Innovation Advocates" from the team, and he described the relationship between his team and the Library. The two teams work together on what could be called knowledge management initiatives to identify and support technical projects that could have broader commercial impact for the firm. It is even possible for these projects to secure some internal funding for their work, outside of the normal external client funding.

Both the Library and Innovation Advocacy teams report to the Director, Engineering Learning and University Relations. He takes a strong proactive role in outreach to engineering and project teams to promote the work of his organization. The day’s event was part of that outreach.
An elaborate pizza and salad lunch was provided for more than 60 attendees. The speakers discussed how the resources of the two organizations helped impact their work. One exceptionally amazing point by a “library power user” struck me. He first talked about how mentors in graduate school and at his first job encouraged him to use library resources to fill-in or update information he needed to succeed in his job. He then outlined specific projects he had worked on, which specific library resources had helped him, and the outcome.

In one series of important projects around a core subject area, this engineer could point to over $500 million in income directly related to the deliverables that had come out of this work. That is what I call ROI!

**Use of stories and testimonials**

Despite stores such as those we just discussed, and many other examples of how library services or content have helped achieve client or organizational goals, many information professionals remain hesitant to “toot their own horn.”

While frequent library users believe in doing their homework at the start of a project, or to help solve a tough problem, there are many who do not realize how an upfront literature search can help save time. The cliché of “don’t reinvent the wheel” is often mentioned in this context, yet during the actual workflow, that is exactly what many professionals will do.

Telling the good stories will also help convince those in a similar context that they should take advantage of the resources and consultative power of the library. In fact, it is a best practice to collect these stories and to obtain permission from the involved researcher as to how you might use their story. Helping their colleagues, or even more important, convincing the budget folk that the library is a worthy investment are worthwhile in both corporate and academic environments.

**Positioning of premium/paid content**

We all know that library budgets pay for a broad range of content resources. There are powerful reasons why this content is selected and paid for, yet this thinking is often tightly held within the library and not shared to the broader organization. Sharing this information in the format of outreach is necessary. Communicating the details of the evaluative work that went into the selection of content tools can help users understand how they might use this resource.

In the corporate settings, many users are not implicitly aware of the background of a content resource. In the academic world, while faculty many even help with selection, students need to hear more about these resources on a constant basis.

Therefore, it is critical to emphasize the sources and credibility of information to remind users of the differences between open web content, authoritative news and trade publications, and peer-reviewed material. Today, as we all know, this is a bigger problem than ever before. Students
need to hear about this constantly, and even with audiences of professionals or faculty, it never hurts to remind attendees of the emphasis on quality that the history and practice of library acquisitions and peer-review assures. We are aiming for users to develop critical thinking skills about the authority of the content they are using.

Differentiation of document types is also useful. What is a Standard? What is a scholarly journal? What is a white paper? What are the content qualities of conference papers? While these distinctions may seem painfully obvious to information professionals, it is lost in the blur of “everything is a webpage” to those outside the profession.

How centralized administration of resources leads to greater usage and awareness

In a landmark study conducted by Outsell, “Information Management Best Practices: Fueling Your Enterprise Content Budget - Funding Models That Work,” then Outsell VP and Lead Analyst Mary Corcoran provided solid evidence that an enterprise-wide centralized content buying model is significantly better than users buying individual information ad hoc. Corcoran pointed to an average of 25% cost savings using centralized resources, plus a 40% increase in number of users.

The study does acknowledge that “Obtaining stakeholder buy-in and securing funding require time and effort…” Of course, this advocacy also serves as marketing to the individuals whose teams would profit from using these resources.

How to segment and address potential groups of users

One of the most fundamental of marketing concepts is segmentation. This involves customizing the outreach and messaging to the specific needs of groups/teams in the user base. On the top level, libraries are divided into types, and each has unique aspects that determine what the frame of reference and approach are for outreach. Academics live in the world of publishing and bibliography implicitly, while corporate and government professionals have a less familiar perspective.

Examples of segmentation can include academic departments or programs, leadership, and many more. You may choose to target specific departments or job titles, such as R&D teams, engineering, competitive intelligence units, patent and intellectual property groups, product management, sales and business development.

Segmentation is built on knowledge of the specific targets. This knowledge can only come from developing relationships with the leadership, colleagues, and team members you are addressing. In all the most successful environments I have worked with, it has been clear that the information center management has close relationships with the groups they work with.
The “embedded librarian concept” fits in here, as do best practices such as getting out of the library and developing relationships with client groups.

Outreach guru and SLA award winner Jay Bhatt (Liaison Librarian for Engineering at Drexel University) says that "understanding faculty and students needs is crucial and sees embedding as a key tactic to help develop an in-depth understanding of needs. Bhatt calls his on-going efforts in this area "Being Connected," which "takes librarians out of their offices and places them in the locations on campus that allow close coordination with faculty and students."

Bhatt's takeaways include seeing expanding interdisciplinary requirements, the increased need for effective collaborations, and understanding key issues such as the necessity of staying current. In turn, these insights allow him to develop specific messaging and programs to meet the needs shown.

On the corporate side, we have seen that cooperating with the management of the teams who directly use an information resource can have big benefits. An illustration of this was my being invited to join the yearly kick-off meeting of the CTO of a major semiconductor and systems solutions company. All the global direct reports to the CTO were present. During the discussion, which included reviews of problems that were holding up progress on key projects, numerous topics were brought up that were candidate for a review of the literature.

During my talk, I used these topics for demonstrations of search strategies. Simply showing the titles, abstracts, and indexing for the top records, really opened the eyes of the attendees. Based on this response we then worked to organize a series of global webinars that followed this initial talk. These sessions provided general level information on the tools the researchers had access to, plus recommendations on integration into workflow, setting-up alerts, and team sharing of critical content. The insights gained from this experience enabled similar approaches at other corporate clients.

**Design of library websites and communications**

Library websites need to be informative, functional and intuitive. Consider offering shared Alerts on hot or key topics pushed out to target groups. Libraries are doing things like offering ORCID sign-up access and other knowledge management tools where authors/researchers can update their listings and network with colleagues.

Constant updating is a must. More news is better – consider subscribing to the vendor and industry social media pages that can provide copy your users will appreciate. Most popular lists are a good subject and researchers like to see what is happening in their disciplines. Set-up author affiliation searches and publicly congratulate organizational colleagues on their new publication. And be sure to “toot your own horn” by telling winning stories.

Today, at a minimum, you should be experimenting with social media. There are many choices: blogs, Twitter, Facebook, wikis, all the above. Where are your users “hanging out?” And don’t be afraid to show your personality.
Activities that are fun and draw the attention of potential attendees

Despite our best intentions, library training events don’t work. However, you can make training a component of every event. Make your event a fun break for busy people. Food always helps, as do things like quizzes and contests, online scavenger hunts, door prizes, raffles and other giveaways.

Simple awareness building, such as tables in a cafeteria, lounge, or other high traffic area can be very productive. These events build relationships, allow for informal interaction and questions.

And, don’t forget the “affinity based” events described above. Consider honoring a group or individual who recently won a competition or award, partnering with the Business School or other colleague/department.

Leveraging of vendor resources

The library and the vendor have an important common interest – both are interested in increasing awareness and usage of information center resources. You give vendors the forum, and they give you support, sponsorship money, literature, food, and giveaways! The vendors want direct access to your users, and are willing to pay for it.

In addition to onsite support, vendors will provide shipments of promotional or instructional literature, such as tip sheets and promotional posters, plus giveaways for use at your own presentations. Key thing, while vendors may offer this, it is important you ask for it when you need it. Remember to allow for lead time for the shipment.

Increasingly, vendors are producing tools, such as videos and tutorials, that can be shared via your own websites. Generally, there are no copyright restrictions on these materials when you are sharing with your users.

Virtually all vendors are now offering general or custom online webinars which can appeal to busy professionals. From their desk, they can access the webinar live, or in recorded format. Links to webinars can be provided on library webpages.

Another champion of outreach, Julia Gelfand (Applied Sciences, Engineering & Public Health Librarian at University of California, Irvine) points to her relationships with publishers and vendors as a major in-house marketing tactic. Gelfand sees benefits for both librarians and users in these relationships.

Librarians become better acquainted with content, platform, and product access, as well as obtain help in teaching and use of resources. They gain more detailed competitive and market intelligence via improved knowledge of the product, ease of use, and costs. She sees this as a two-way communication – librarians share challenges with products, about library’s collection trends, such as Open Access. In return, vendors obtain critical customer input that can influence future product development.
Library users learn about sourcing and related products and the vendor presence puts a human face behind abstract content tools. Vendor presentations provide insider tips on searching and often reveal special insights about content. Users are better able to understand the relevance of vendor offerings to their own career and studies, and gain insight into how publishers take a product to market. Understanding these details can turn complication into relevant benefits.

Gelfand has taken advantage of virtually all positive aspects of these relationships. These include topical research focus groups, expanded networking, broader professional identity, increased knowledge of vendor resources, student and faculty society membership programs, opportunities for internships and jobs. Other vendor offerings include conference attendance, scholarships, awards for competitions, plus food and giveaways to improve attendance at events.

Gelfand has had remarkable success by building relationships with local student chapters of professional and honor societies and by taking advantage of user-based celebrations and recognitions. These include anniversaries, the annual naming of Fellows by societies, local events and competitions, such as the Solar Decathlon and hybrid car events. She also looks to leverage campus honors for teaching, research, grants and faculty publishing occasions. Gelfand is tireless in looking for new campus and community partnerships.

Working with Gelfand and the IEEE Student Branch, an event was organized celebrating the 125th Anniversary of the IEEE. The theme was "How IEEE has contributed to my career," and was advertised as "Honoring Fellows, Editors, Faculty, and Students." The event was held at the University Club and there were two cakes, food, and numerous giveaways. More than 70 attendees enjoyed the event which featured talks by seven IEEE Fellows. Total faculty attendance was 19!

**Evaluation/measurement of promotional efforts**

Ultimately, the objective of in-house marketing is to increase the visibility, awareness, and recognition of the library. Increasing user knowledge of the depth and range of library tools and services is part of this too.

Those in management or finance often want to see metrics that backup the achievement of these goals. Libraries should look to measure and track virtually everything they can count to help put numbers to these goals. Has usage gone up? Are more people using library services? Has attendance increased at events? Are the information professionals dealing with more research requests?

Is the library reaching new individuals or contacts? Are you finding new library advocates and advisors, or “friends of the library?” Tracking job titles or department names is useful for follow-up and additional outreach. Collecting business cards may be useful here. How about a raffle and fishbowl at outreach events?
Another worthwhile follow-up is to do a post event survey – even to those who did not attend. Surveys often have many benefits including an implicit messaging and outreach impact that goes beyond just obtaining comments and feedback about the event.

**Trends and recommendations**

The impact of pervasive access to online search tools means that physical visits to the library are decreasing while online usage is increasing. Research happens away from the library so live reference services are being cut and information desks, and even libraries, are closing. Physical space is expensive and, especially in corporate environments, other departments want to use that space. It is more important than ever before to communicate the value of the library.

How can we communicate value? First, as discussed in the Foundation section above, it is essential to trust and have confidence in our core functions and body of knowledge. Despite the popular and media view that libraries are not relevant in today’s information age, exactly the opposite is true. We facilitate precise access to “humankind’s recorded knowledge,” which did not begin in 1998! We “know the best stuff” and our detailed selection and evaluation processes assure this continues. We know all the “insider tips” on use of both web and premium content online tools, including precise search strategies in an age of searching 2.3 words in a Google search box. These points need to be shared and communicated on an on-going basis.

Remember to think from the perspective of the user – I like to remember the acronym” WIIFM” – “What’s in it for me?” Look to answer real questions and solve actual problems. It is important to move from the old model of being reactive to the new model of proactively anticipating user needs. Think outreach at every opportunity and always have your “elevator speech” ready. I believe you cannot over communicate. Always look to be initiating and building strategic relationships that expand the insight and impact of the library. Tell your good stories.

Perhaps it is best to see outreach as messaging that connects individual and organizational goals and needs to library resources. When you represent the “best stuff,” as libraries do, how could this be bad?

**Endnotes**


Jay Bhatt, "Understanding research needs of faculty and students" (paper presented at the annual meeting of the American Society for Engineering Education, Seattle, WA, June 14 – 17, 2015).
