

## I. Introduction and Situation Analysis

This section of your plan essentially maps out the situation you're in when you begin your efforts. It should reflect the things that are challenging for your library as well as the things that are working very well. The point is to capture a snapshot of the present day, and use that as a baseline for identifying where you want to go next, and how your marketing plan will help you get there. In some cases, you may have a strategic plan that can be used as a baseline for the marketing planning. If you do not have one, the marketing planning will likely raise questions about your library's overall plans, not just marketing. This can be very helpful, and also sometimes frustrating. Stay focused, and remember that marketing cannot solve your organizational development problems, or determine your long-term programmatic plans, but it will raise those questions. Sometimes, this forces you to step back a bit. Don't be discouraged. Effective marketing is mission-driven. It is better to be asking these questions now, than to have implemented a marketing plan that doesn't meet the library's long-term goals. If you are part of a school district, college or university looking at the broader goals of the district, college or university, is often very helpful at the beginning of the marketing effort to ensure that you are including strategies and goals that support the bigger organizational mission in addition to the needs of your specific library. With the big picture in mind, your plan will help build the library's value with another important audience as well.

### A. Overview of current operating climate

- Assets, challenges, opportunities, threats
- Needs/opportunities and assessment of the basis on which to define your key needs and opportunities.
- Determine what additional information is needed.  
Stop here; gather data, return to plan.
  - Ask: What is your program/service mix, what do you have to offer, what is your focus, are there successes/failures in other areas that can impact your success?
- What do you know as a result of the information you have gathered?
- What inferences or assumptions will you make as you go forward?
- Make sure you do the analysis piece, don't just recite what you know.
- What does all this information mean?

### B. Organizational Mission

Effective marketing is mission-driven and supports the fulfillment of the organization's purpose.

- Mission Statement: Note it in your plan and keep it in mind throughout your work.
- Brand Definition: (Note: if you are in the midst of creating a branding plan, you should still capture what you know about your brand now. This will help inform your work going forward.)
  - Who are you?
  - What makes you unique?
  - What tone, personality, and image do you convey?
  - Ask yourself: How do I know this? What information do I have (see section A) that will support this. You need to be sure that you're not just "making it up."

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## II. Goals and Objectives

All effective plans begin with clear identification of goals. These drive audience identification, segmentation and prioritization as well as the strategies you will use to reach them. The goals sections should address the end results you seek. What is your vision for your library and its programs? What are you trying to accomplish through your marketing outreach? Are your goals long-term (over a few years) or short-term (next few months)? Make sure you clearly define your goals.

- If you are successful, what will be the results? (Think in terms of a **concrete, affirmative statement of the end result(s), (not the process)** e.g. *Library X will have sufficient resources to expand the collection, or Library X will be regarded as a valued resource by faculty, administrators and students.*
- Goals must be consistent with organizational objectives.
- Pick no more than five.
- Within each goal, define measurable objectives. How will you know you have succeeded?
  - Get specific about the smaller, more tangible and easier to measure items that will help show you've achieved your goals.

## III. Audience Identification, Segmentation and Prioritization

Your target audiences will be defined in large part by the goals you set. Start by identifying people you currently reach who can help you achieve your goals, then expand beyond that group to the next layers out. Prioritize based on those with greatest ability to impact your goals. Don't forget those on the "inside" as they are both an audience and a messenger.

- Identify groups and subgroups.
- Determine what you know about your audience's knowledge of you, their behavior, what opportunities there are to reach them, what they need that you provide.
- Ask: Who are they, what do they know, what do they care about, what do they need to know to do what we are asking them to do?

## IV. Key Messages

Based on your goals, determine how you will talk about your library/program. What makes you unique or different? What does your audience need to know? Ask: What? So what? Now what? Use your answers to these questions to form your messages. Think of these answers as themes that you can adapt to different audiences.

- Choose no more than three, with supporting points.
- Ask: What is your argument, what key things do you want people to believe, adopt, accept and act upon? Are these effectively AND concisely conveyed?
- Once you have defined the key three message themes, you can determine specific customized messages for audience groups/subgroups.

## V. Strategies

Marketing strategies are broad, yet focused, **approaches** to achieving your goals. If your goal is to increase awareness of a program or service, a strategy might be to "attract attention of the media," another may be to "engage internal stakeholders." Start shaping strategies by thinking about what you are already doing, then decide what is missing. Keep in mind that your strategies are about **how** you will achieve goals, they are not the **tools** you will use. For example, a poster is a tool, while "reaching audiences in key locations" is a strategy.

- How will we reach our goals? What will we do?

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- Test your strategies by asking “why?” The answer should mirror one or more of your objectives.
  - Stop and ask what you need to do to ensure your strategies will work?
    - (Informal check-ins with other staff, focus groups, discussion with advisory board or patron groups, etc.)

## VI. Tools and Tactics

Once you have determined your strategies, you can begin to think about the tools and tactics you'll need to implement them. Tools are “stuff” like posters, flyers, displays, etc. Tactics are activities/behaviors/events.

- Ask: How will we do it?
- Test yourself: If you have a tool or tactic that isn't supporting one of your strategies, the tool isn't relevant.
- People tend to produce more tools than they need, or the wrong tools because they haven't thought through strategies yet.

## VII. Budget

Ultimately, your plan will be shaped by the limits of your financial and human resources. That said, don't begin by thinking about what you can afford. Instead, determine what is needed to achieve success, **then** assess cost and prioritize the implementation of strategies based on the resources you either have, or can generate through partnerships or sponsorships and the strategies that give you the most bang for your buck. You will want to spend the largest part of your budget on the strategies and tools with the longest-term benefit. Make sure you have included:

- Total cost: in both staff time and hard costs.
- Identification the gap between what you have and what you need. This provides a good baseline for determining if there are partnership or sponsorship dollars available to pursue.
- Prioritization: Too often people cut the heart of their marketing program because they fail to prioritize.
  - Prioritizing requires you to go back, look at goals, and key audiences and ensure that the strategies, tools and tactics you decide on reach those most likely to take the action you want taken.
- As you make choices on your budget, think in terms of three categories:
  1. Must do or the plan won't work.
  2. Major value added, but if we can't do it the program still works.
  3. Nice, but not necessary

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## VIII. Timeline/WorkPlan

Once you have established your budget, set a realistic timeline for implementing your plan. This should serve as a workplan, detailing who has responsibility for what, and by when tasks are needed to be accomplished. Your work plan will allow you or the project manager to stay on top of deadlines, track progress and also serves as a final checkpoint to ensure that you have the human resources needed to do everything you've identified. If your plan is well-structured, detailed, resourceful and realistic, it will be easier to involve others in your work, and to engage volunteers in implementation as well.

- By month, what needs to happen?
- Who will do it?
- Be sure to allow enough time.

## IX. Evaluation

A critical final piece in the planning process is ensuring that you are measuring your effectiveness. Set clear measurements in your goals and objectives and make sure that someone is responsible for keeping track as defined in your plan. The evaluation piece is critical to your being able to show that resources spent are worth the investment, as well as to demonstrate to sponsors or partners the success that their investment helped create. Keep it simple, but concrete.

- How will you know your plan worked?
- What steps have you built into the process to ensure you meet your goals?