Marketing Plan Template:

The process for creating a marketing plan

Created by the Wisconsin Public Library Systems Marketing Cohort

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Introduction

Except for the shelves of books, today's libraries would be mostly unrecognizable to the patrons of 30 years ago. Libraries today are far more than simply depositories of books, videos and CDs. While lending materials is still a large part of what we do, library patrons are turning to libraries more and more for the products and services that make their daily lives more livable and manageable.

One of the challenges for libraries is finding effective ways to promote what you do, and development of a comprehensive marketing plan is an excellent starting point. A marketing plan provides focus to your marketing efforts to ensure that you use your limited resources effectively and efficiently. It helps keep you and your staff focused on the big picture of what you do—your vision and mission—and saves you time promoting individual events or projects.

The tools you choose to use in your library marketing are not as important as the message you send. People need to know more than what products and services you offer, and how to access them. They need to hear why the library is still important and valuable to your community, and how the library is striving every day to address the needs and wants of the community.

The marketing plan is the guide that provides order to your messaging and efforts. By segmenting your audiences you can more easily focus your marketing efforts for the most effective reach. Your marketing plan may be a two or three year plan, but it should be reviewed regularly to ensure that it is meeting your library's current needs. Development of a plan will require an initial investment of time that will be determined by its complexity, scope, and number of target audiences. It is an ongoing process. It's not a "one and done."

It's also important to remember that developing a marketing plan doesn't mean you will stop doing any marketing that doesn't fit under one of your goals. The Marketing Plan helps you prioritize your efforts and resources to make sure you are accomplishing the goals you set. It's all about managing your resources and being efficient. You may scale back on other things, but you will certainly still do them.

The information contained within this marketing plan guide is designed to provide you with an easy-to-follow structure for the creation of your own plan. With that in mind, here is what you will and won't find in this document.
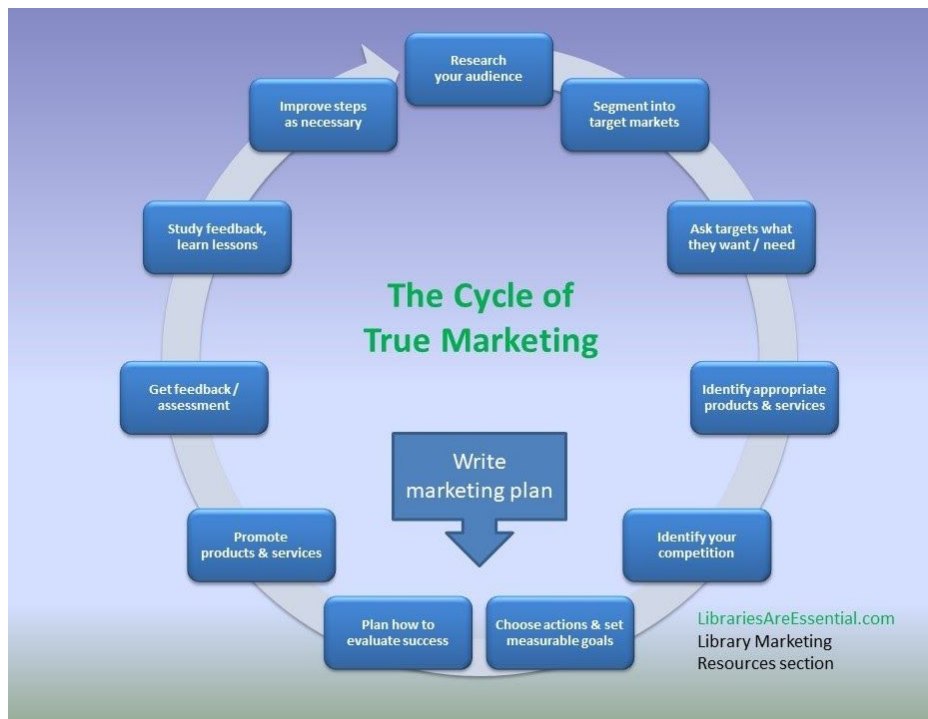
What you will find:

- A framework for you to follow and adjust to suit the unique needs of your library and community
- A sample marketing plan, budget and calendar to serve as a guideline to create your own
- Links to resources that expand on the information presented

What you will not find:

- Language and descriptions that contain marketing jargon and lingo
- An exhaustive overview of promotional tools and media you may use in your marketing plan

Because this is a state-wide project, questions and consultation about surveys, local marketing firms, training on creating marketing calendars, ideas of where to post publicity materials (etc) can be directed to your library system office. These documents were developed and inspired by Kathy Dempsey's work in library marketing and her development of The Cycle of True Marketing (see graphic). This project was undertaken as a way to create a marketing plan template that any library can use, the complexity of which is determined by many factors. Realizing that not all libraries can manage the same complexity of plan, this project addresses three levels or steps of commitment. Your library could use different levels or steps for the various parts of this project.

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Basic: This step is the baseline, or a basic step your library would complete in this plan. This step is meant to be doable for a library of any size or if your library has never completed a marketing plan.

Intermediate: This is the next level of practice in the marketing plan. This level might require more resources and staff time.

Advanced: This is the next level of practice in the marketing plan. In addition to more resources, this will require a dedicated staff or team to successfully implement the plan.

Research Your Audience

This is the first part of the marketing plan. You need to find out who your community is, what their demographics are, what they like, what they don't like, what will make their lives easier, and whether they use the library. You don't want to try and guess what people want.

As a librarian, you can use research skills to find information about your community. What information has already been collected? Does your city council or county have demographic information? What kind of information can you find in the census data? (city blocks, children, education levels)

Surveys are a great way to find this information if the questions are well written and if your goals are clear. Focus groups can be useful, and you can do these on your own. However, they should be run by a group that is not employed by the library.

Basic: Research your library's demographics with information from your city council, county, the U.S. census, Wisconsin DOA or ILS circulation data (contact your system ILS administrators)

Intermediate: Conduct a survey (either online, administered through your library's website or print, at library events).

Advanced: Conduct focus groups. When possible, focus groups should be conducted by a group outside of the library, such as your local school district, UW-Extension, volunteers or Friends groups.

Segment into Target Markets

Now that you have information about your users and non-users, you want to target, or segment, your audiences.

In the public library, your audience is already segmented. You likely have a children's area, a teen area, an adult services area, etc. But you need to segment these audiences even further. Think of the needs of a three-year-old compared to a 10-year-old. They are different. By narrowing our audiences, we can understand what kind of language to use. What are some potential audiences?

- Small business owners
- People with disabilities
- Job Seekers
- Refugees
- Immigrants
- Tourists
- People who are homeless

- Educators
- Families with young children
- Teens
- 20 to 30-Year-Olds
- Older Adults
- Students
- Library Staff & Trustees

Basic: Based on your research, identify 3-5 target audiences. Focusing on these targeted audiences should address the needs of that audience, or the needs of your community. *No intermediate or advanced levels/steps here.*

Ask Targets What They Want/Need

It's time to ask your target audiences what they need using target marketing. Do you have a Teen Advisory Board that you can have an informal chat with? What about a parent group for toddlers?

Basic: Survey Your Audience. One of the best ways to find out what your audience wants is to survey them. You can start by surveying the people on your email list or by surveying people on your library's social media accounts. Ask them why they joined your list/your account and how your library can help them overcome an obstacle or meet a goal.

Intermediate: If you're looking for more in-depth feedback and ideas from your target audience, you should consider doing phone interviews or informal meetings with groups of people in the community. Use paid social media (Facebook ads) or media (TV, radio, billboards) to survey your audience.

Advanced: Hire a marketing firm to do the basic and intermediate steps for your library.

Identify Products and Services

What products and services at your library will address the needs and wants of each of your target audiences? Are they things that your library already has but your library isn't promoting effectively? Are they new services that your library should provide? Some examples of products and services are:

- Wi-fi or Hot spots
- Programs or Classes
- Printing/Faxing Services
- Collections or Library Materials
- Digital Preservation of Historical Items

- Electronic Resources
- Library of Things
- Computer/Computer Lab
- Meeting Spaces
- Reference Services

Basic: Identify existing library products and services for your target audiences.

Intermediate: Modify existing library products and services for your target audiences.

Advanced: Create new library products and services for your target audiences.

Identify Your Competition

Libraries shouldn't try to do everything for everyone. Looking at your competition can save you time and money. Instead of competing, you can also partner. You aren't just competing for services, but for time. Is the library out of the way for some people? Are there barriers for people visiting your library? What other things is the library competing with in your community? Some examples of competition are:

- The Internet
- Streaming Services
- Community Events/Entertainment
- Retail/Businesses
- Employment Centers

- Television
- Sporting Events
- School Functions
- Time

Basic: Identify/record examples of competing products and services of your target audiences. *No intermediate or advanced levels/steps here.*

Set Measurable Goals

The next step in the plan is to set 3-5 measurable goals for your products and services. This plan only addresses the marketing goals developed during this step, but you will still engage in other marketing efforts. The goals should be quantifiable and measurable.

Basic: Using the SMART method, identify goals for your products and services for your targeted audiences.

> S: Specific
> M: Measurable
> A: Attainable
> R: Relevant
> T: Timely

Examples: Increase Saturday storytime attendance by 10% in the next six months.
Increase circulation of Spanish language materials by 20% in the next year.
Gain five new groups to use your meeting space in the next year.
(See 5 Dos and Don'ts When Making a SMART Goal.)

No intermediate or advanced levels/steps here.

Write and Implement Marketing Plan

Now that you have worked on the previous steps, you can use this information to start writing your marketing plan, and carrying out your plan.

See [Sample Marketing Plan](#) (This is only an example. Your plan should reflect your community, library and the capabilities of your budget and staff).

Marketing Plan Template:

Introduction: This is an overview of your library. This could include vision and mission statements, service area, circulation stats, amount of staff members, etc. Include some of your research in this step.

Target Audiences: (This was done in an earlier step). Why were these target audiences chosen?
Needs of Target Audience: (This was done in an earlier step).
Identify Products and Services: (This was done in an earlier step).
Identify Competitors: (This was done in an earlier step).
Set Measurable Goals: (This was done in an earlier step).

Promote Products and Services:

Here is where you develop a strategy and select the promotional tools to target your audiences to achieve your stated goals. Include clearly defined messaging that is consistent throughout your promotions.

Each library will use these tools differently depending on size, budget, staff time availability, hours, and community resources. Basic to advanced implementation of promotional strategies will be dependent on these factors. Before you start promoting products and services, ensure that library staff and trustees are engaged with the plan. Be sure to identify the staff experts for specific products and services.

Suggested best practices include a marketing schedule or calendar that shows when and how your library will promote its products and services in the plan. The calendar can be as broad or as detailed as you would prefer, and can be entries on a calendar or in a spreadsheet. [(See the Calendar](#) in the Sample Marketing Plan).

Some of the promotional tools may include:
- Staff and trustee talking points
- Printed materials like bookmarks, posters and fliers
- Social Media (see "Further Resources" in Appendix)
- Press Releases & Editorials
- Library and/or System newsletters
- School Newsletters & Visits
- Community Events & Calendars
- Internal and External Cross Promotions
- Library Columns (local newspaper and/or organization newsletters)
- Email & Direct Mail (consider Mailchimp, Constant Contact, or other email service providers)
- Advertising (paid & free)
- Video & Audio
- TV & Radio
- Billboards

Budget:

The budget included with your marketing plan is an overall picture of what you might spend in staff time and money to market your products or services in your plan. You might want to keep a separate spreadsheet or document of what your library spends. By having an initial budget in your plan, it will ensure that you put some thought into where you want to spend your marketing dollars. (See the Budget in the Sample Marketing Plan. This does not include staff time).

Evaluation / Assessment of Marketing Plan Goals:

Evaluation and assessment are critical to your long-term marketing efforts. By evaluating your marketing plan, your library will be able to closely track the progress of its goals. Goals should be evaluated at regular intervals. Evaluations will also allow the library to adjust its goals, or adjust the budget. Your evaluation/assessment should cover the following:
- Evaluation Date of Your Goal
- Goal
- Measurement of Your Goal
- Recommended Action

After you write your plan and implement it, continue the marketing plan process by following the following steps.

Post Plan: Get Feedback/Assessment

Evaluating and assessing your marketing plan promotional materials will ensure you are able to improve the ease and effectiveness of future promotions. Once a marketing promotion has ended, it's time to gather the results. Data collection may vary depending on the promotional methods used.

Here is a sampling of four methods you could use to collect data. Depending on your needs, you can use one or more of these methods: (1) patron response and reaction; (2) social media analytics; (3) web analytics and (4) email analytics.

- **Patron Response and Reaction:** Patron responses through a variety of methods can help to determine what kind of reception your marketing efforts are getting. Online and printed surveys, patron feedback with staff and online commentary can indicate what kind of an impact your marketing is having. (See "Further Resources" in the Appendix.)
  - o **Basic:** Use face-to-face communication and ask questions like "How did you find out about our program?" or "What made you come to this event?"
  - o **Intermediate:** Use an online or printed survey (dependent on the patron's preference or aptitude) to rate how they thought event communication was presented.
  - o **Advanced:** Hire a third party or focus group to ask the questions and/or conduct an online or printed survey.
- **Social Analytics:** Use social platforms' built-in analytics. Key metrics can include Audience Size (likes, followers), Reach/ Impressions, Engagement (Clicks, reactions, comments, shares, retweets, etc.), and mentions.
  - o **Basic:** Browse your social media comments, likes, shares, etc.
  - o **Intermediate:** Review performance using your platform's built-in analytics tools.
  - o *No advanced levels/steps here.*

- **Web Analytics:** Make sure your website is set up to measure activity before the promotion begins. Analytics will vary depending on the platform the website is built with. Check with your library system to see if analytics are already being tracked.
  - o **Basic and Intermediate:** Set up Google Analytics (GA) on your library's entire web platform. At the very least, it should be set up on the promotion's campaign/landing page.
    - ⋅ Those not familiar with GA can take its Google Analytics for Beginners course.
    - ⋅ Try using a Google Chrome product app that can give a snapshot of campaign page interaction, such as:

- Page Analytics app (by Google): https://chrome.google.com/webstore/detail/page-analytics-by-google/fnbdnhhicmebfgdgglcdacdapkcihcoh
  - *No advanced levels/steps here.*

- **Email Analytics:** There are a variety of paid and free email marketing services providers, including Constant Contact and Mailchimp.
  - **Basic:** Use email analytics tools to determine opens, clicks, etc.
  - **Intermediate or Advanced:** Try A/B Testing (see how in this 90-second video)

Study Feedback, Learn Lessons

Once the data is gathered from the "Evaluate/Assess Promotional Materials" step, create an evaluation report and include any key metrics relevant to the plan. Measure the outcome against the goals you set earlier in the plan.

Basic: Record numeric data in a spreadsheet, charts, summaries, etc. You may already have access to this information in your annual report, door count and other metrics you could use to compare against your set goals.

Intermediate: Compare results to the goals that were set earlier. ROI (return on investment) is a concern for any project with a set budget. Measure the amount spent on the campaign against the outcome, and evaluate if this could have been more/less.

Advanced: Create a Marketing Dashboard to visually communicate performance over a period of time.

Improve Steps as Necessary

Now that you've studied the feedback, brainstorm how things could be done differently; or if performance was excellent, be sure to note why and then repeat or build on it for next time. Compile the information into a recap in an outline or presentation, and present it to the library director or board.
- Use data and feedback to determine what could be done differently (if performance was poor) or what should be repeated for continued success.
- Ask: how did attendance/ratings change – and why (or why not) did they change?
- If there is little interaction on social media, try engaging your audience with posts, event photos or video, questions, giveaways, etc.

- Did your marketing promotion expand beyond the reach of the intended audience and community.
    - If so, could this open up new avenues to expand outreach?
- Using this data and feedback, modify the marketing plan where needed to improve on the next promotion's measurement (if needed) and results.
- Practice makes perfect! Every time a promotion occurs, keep compiling the data. This is where spreadsheets, charts and tables can help visualize performance over time.

Congratulations! You have created a solid foundation for your library's ongoing marketing success by doing this work! Based on your plan results, your library can decide to adjust this plan, or build a new one.

Conclusion

A library marketing plan should define specific messages and phrases that you use repeatedly in the materials you create and disseminate within your community. Regardless of the message or target audience, these scripted messages should be repeated frequently to all audiences.

What tools you use to promote your library will vary widely based on the audience and where they turn for information. Knowing who you are talking to and where they get their information will enhance your marketing efforts and result in more robust usage of the products and services you are promoting. The key is to wisely target your efforts. Your library's marketing plan and the process of writing the plan should be manageable, and unique to the needs of your library and community.

Remember, the marketing plan is the guide that provides order to your library's messaging and efforts to achieve your stated goals.

For further assistance, [contact your public library system](#).

APPENDIX

Marketing Plan Template - (this document)

Sample Marketing Plan (Contact Jamie to receive a copy as a Word Doc at jmatczak@wvls.org)

Marketing Calendar Sample (Contact Jamie to receive a copy as an Excel Doc at jmatczak@wvls.org)

Marketing Budget Sample (Contact Jamie to receive a copy as an Excel Doc at jmatczak@wvls.org)

Further Resources
- An Introduction to Creating a Library Marketing Plan (webinar on this template)
- Libraries Are Essential
- Researching library demographics
  - U.S. Census
  - Wisconsin DOA
- Developing Surveys and Questions
  - Library User Survey Templates & How-Tos
  - Resources & Tools to Create Surveys & Analyze Outcome Data
  - How to Write Good Survey Questions
  - How to Write Good Survey & Poll Questions
  - 10 Commandments for Writing Good Surveys & Questions
  - How to Write Good (Even Great!) Survey Questions
- Conducting Focus Groups
  - How to Develop Questions for a Focus Group
  - 53 Focus Group Questions for Any Purpose (HubSpot Blog)
  - How to Run a Focus Group for Your Business (HubSpot Blog)
- SMART Goals
  - 5 Dos and Don'ts When Making a SMART Goal
- Feedback/Assessment
  - Web Analytics:
    - Google Analytics for Beginners
    - Page Analytics App (by Google)
  - Email Analytics:
    - A/B Testing 101 (90-second video)
- Social Media: Social media is constantly changing, and we recommend the following blogs to stay up-to-date.
  - Social Media Examiner
  - Social Media Today
  - Super Library Marketing
- Email Marketing Service Providers
  - MailChimp vs Constant Contact: Which one is better?

Contact Information for Public Library Systems Marketing Cohort

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