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KING COUNTY LIBRARY SYSTEM & UNIVERSITY OF WASHINGTON

VIRTUAL REFERENCE SERVICES: MARKETING GUIDELINES

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KING COUNTY LIBRARY SYSTEM AND UNIVERSITY OF WASHINGTON
VIRTUAL REFERENCE SERVICES – MARKETING GUIDELINES

SECTION I. INTRODUCTION

A. Overview

Digital reference or virtual reference is a service offered by the King County Library System (KCLS) and the University of Washington (UW). While this service has been available for some time, few users are aware of its existence. These institutions wish to gain awareness and increase usage for virtual reference services by marketing their respective programs with a thoughtful strategy and execution plan. By building a brand for their programs, KCLS and the UW hope to increase usage of eAnswer and Q&A Live, respectively, by existing users, and turn new users into loyal customers of virtual reference services (VRS).

The Marketing Guidelines presented herein provide the considerations for creating a marketing strategy and plan. Because the enclosed material is based on the efforts to date of KCLS and the UW, in some instances, we have used examples from these institutions as illustration. It is the hope, however, that other institutions will find this document useful in marketing their own virtual reference programs. To learn more about the KCLS and UW programs, visit www.kcls.org and www.lib.washington.edu.

These Guidelines have been written using a conversational tone. Throughout this document, we refer to the "leadership team" – this refers to the individuals who will be responsible for leading the marketing effort for VRS. Where we have used marketing terms, we have included definitions to familiarize the reader. Girvin, Inc. worked with, and created the Guidelines for KCLS and the UW under a grant provided by Washington State Library.

SECTION I. INTRODUCTION

B. How to Use the Marketing Guidelines

There are many ways to promote VRS. The purpose of these Guidelines is to provide KCLS and UW reference staff, as well as other potential readers, with the considerations necessary to develop a strategic marketing plan for effective resource allocation and decision-making. Included in the Guidelines are considerations for brand development, target audience identification and the creation of marketing tactics. Although the basic concepts for marketing a service such as virtual reference have been offered, these Guidelines are by no means, a stand-alone comprehensive document. Unique circumstances for each institution must be weighed against the program's goals and objectives to determine how best to apply these Guidelines.

The Guidelines have been structured under major category headings in a sequence that lays the foundation from strategy development to tactical implementation.

SECTION I. INTRODUCTION

C. What is a Brand?

A "brand" is more than a catchy name, colorful logo or clever ad. A brand includes all of the associations a user makes with the service or product. Successful brands do more than offer tangible benefits. They appeal at a deeper level, evoking an emotional response that endures beyond the initial contact. They express, at every opportunity, the value of the service. Branding is focused on making this emotional connection and communicating a value so that compelling relationships are created with users.

A strong brand makes a promise to the user, then consistently delivers on that promise. It does this through consistent communications via any or all user "touchpoints," which include the name, logo, advertising, Web site, brochures, public relations, communications with staff and more. Therefore, whether a patron visits a Web site, sees a flyer or chats with a librarian online, the experience or message is the same. Consistent communication is achieved. Brand awareness and loyalty increase. The program flourishes.

Why Brand? Branding provides the backbone for developing a cohesive marketing strategy. The process of branding, simply put, involves figuring out who you want to speak to, what you have to say and what you have to do to look, feel and sound like you mean it. Building a brand requires alignment among those responsible for delivering the service and offers the following for those who are committed to the effort:

- Effective use of resources – Every marketing effort and dollar is leveraged to build and reinforce the same message.
- Internal clarity – A well-defined brand provides staff with a sense of purpose and strategic direction.
- Distinct identity – Branding helps get the message through to the intended audience.
- Effective education tool – For those who are not familiar with VRS, a strong brand helps communicate what the service is about, sets user expectations and spreads the word.

SECTION II. PROGRAM GOALS AND OBJECTIVES

A. Define Goals and Objectives

As with any significant endeavor, one of the most important initial tasks to ensuring a project's success is to define goals and objectives. Defining goals and objectives provides a clear vision for the program, a way to ensure decision-making aligns with strategy and a tool to later benchmark the success of the program. For example, one important consideration in establishing goals is to have internal clarity about the intention of the program – should virtual services be positioned as a place to go for help with reference and search strategies or as the place to go for results and answers? This may be an important distinction considering the popularity of online search engines and users' expectations for quick answers at their fingertips.

Many people use the words goals and objectives interchangeably. For the purposes of these Guidelines, however, we will define goals to be broader in nature. "Goals" relate to the overall vision the team has set. "Objectives," on the other hand, will be defined as measurable, achievable milestones. Ideally, goals and objectives are linked and based on common foundations.

For example:

A **goal** of the KCLS eAnswer program is to provide online patrons with greater access to reference services.

An **objective** for the KCLS eAnswer program is to increase usage of live chat sessions by 5% each quarter.

Development of goals and objectives should start with the leadership team. Further input and feedback may also be obtained from staff members – this type of participation can help garner internal support (we will discuss this in later sections). It is important to keep in mind – while developing goals and objectives – prioritization is essential. A list of twenty goals can be confusing and overstretch resources. A list of three to five goals though, can be both targeted and manageable. In launching a new program, objectives may be difficult to establish without past experience as a baseline. Be conservative when establishing quantifiable objectives and be ready to refine them as necessary.

SECTION II. PROGRAM GOALS AND OBJECTIVES

A. Define Goals and Objectives (continued)

It is also important to map objectives back to target audiences (see Section III). This ensures that program initiatives impact current and desired users in a meaningful way.

For example, if the leadership team agrees that the goal is to build awareness of VRS among online patron audiences (defined as people who use the library and are comfortable online), some program objectives might include:

- to increase use of online databases by ##%
- to build user visits to ## within a ## month period
- to have a ## of testimonials by ## number of weeks
- to see a ##% response to specific marketing messages on the library's Web site

In contrast, if the team is focused on attracting new users within the community (defined as people who are comfortable online but are not currently library users), some objectives may include:

- to increase new users with newly issued library cards by ##% (for UW, this may be an increase in freshmen usage by ##%)
- to decrease disconnects by ##% (improving the initial experience)
- to increase brand recognition by ##%

Defining distinct goals and objectives for the virtual reference services program will provide a clear direction for the program and for those involved. It also provides a benchmark for gauging progress and success. Setting goals and objectives is an important part of strategy, planning and the overall development process.

SECTION II. PROGRAM GOALS AND OBJECTIVES

B. Internal Support

One of the most critical factors to any project's success is the support of internal staff and other relevant parties. To gain strong internal support, acceptance and approval needs to occur at the onset of the project, then be maintained through the program's duration. The following are a few questions to ask:

- Does the staff understand what the program is and what you are trying to deliver?
- Are the goals and objectives clear and achievable?
- Does the staff understand their role and how they can contribute?
- Does the staff have an opportunity to provide feedback on a periodic basis?

The more staff members are involved, the more likely they will have a sense of ownership. This is very important, as many of your staff members will have direct contact with your target audience. Consider who should be involved, how input will be obtained and how it will be used. Communicate this to your staff so that expectations are clear. Keep in mind that because staff members are likely to have the most interaction with patrons, their feedback may greatly enhance the program experience.

Internal promotions and other ideas for obtaining and maintaining staff support and enthusiasm are discussed in a later section.

SECTION II. PROGRAM GOALS AND OBJECTIVES

C. The Brand Family

Brands that are related by a parent organization have relationships similar to a family. When we use the term “brand family,” we refer to the relationship of various products/ services provided by an institution to the institution itself.

Creating a unique brand for a new or unknown service requires time and resource commitments, and the biggest challenge might be one of education for both internal and external audiences. We also believe it requires serious contemplation. Will packaging the service under its own unique brand expedite user understanding of the offering and its value? Or should an institution leverage its existing reputation in the community by promoting the new product or service under its parent (KCLS or UW) brand? Where should you spend your resources and what will bring the most value to the target audience and your organization? These are just some of the questions the leadership team will need to answer when developing the program brand.

For example, if your goal is to provide existing online patrons with greater access to reference services, you may choose to have the new service leveraged and marketed under the “parent brand.” In this scenario, the service becomes by virtue, a “sub-brand” of your already established brand. The service lives under the parent brand name and is always associated with it in both communications and visuals, such as marketing messages and logos. This keeps the service married to a library already well-known in its community and adds value to or “updates” the parent brand by expanding its benefit to the target audience. (An example of a sub-brand that stays close to its parent brand is: RealPlayer by RealNetworks.)

SECTION II. PROGRAM GOALS AND OBJECTIVES

C. The Brand Family (continued)

At the other extreme, the service can be marketed as a stand-alone brand, a distant cousin with few to no associations to the parent brand. If your goal is to provide access to new online audiences unfamiliar to or otherwise unassociated with the library, this may be a good way to gain recognition. To this end, the service may adopt its own graphic standards and communications and could even be given a separate domain name with a completely different look and feel from the parent brand. The advantage here is that the service is free to succeed and/or fail in its own right and does not carry a lot of legacy "baggage" from the parent brand. Because of this, it may be easier to create excitement and to attract new users who would not otherwise turn to the library system for assistance. Be careful here however, as excitement can be short-lived. The result of choosing this direction will be an additional brand to support with distinctive communications and graphics. (An example of a stand-alone brand owned by a separate entity is: mLife, offered by AT&T.)

Making this brand distinction before you launch your service or continue to invest resources will help to clarify your messaging to your target audience, making it easier for users to understand and validate the service.

SECTION II. PROGRAM GOALS AND OBJECTIVES

C. The Brand Family (continued)

Sub-brand Strategy	
Advantages	**Disadvantages**
• Easier to launch because the brand leverages credibility of the parent brand.	• If the program launch fails, it may negatively impact the parent brand.
• The program is less costly to support because the brand shares already-established attributes with its parent.	• The link to the parent library may have regional limitations and limit future growth.
• Because of its close ties to the parent brand, resources invested in the new brand helps to build overall library awareness.	• If staff members are not educated about the brand benefits, the program may be perceived as taking resources away from branch libraries and reflect negatively on the parent brand.
• Public interest and media attention are easier to attract when the parent brand is well known.	• Some public and media audiences may not perceive the parent brand to be a technology innovator or leader and may thus be skeptical of the program.
Stand-alone Brand Strategy	
Advantages	**Disadvantages**
• Failure of the program has minimal impact on the parent brand.	• The new unknown brand is more costly to launch and support.
• The new brand may have more flexibility within the parent organization, in terms of how the service is positioned.	• More upfront education may be required – the service may be confused with other non-reference related services (such as other resources, department services, etc.).
• The new brand may have the ability to expand to non-library areas (i.e., the service may become an online resource for county records, bus info, etc.).	• Marketing resources may only support the program and may not add value to the parent brand.
• The service may be more easily "licensed" to other agencies.	• It may be more difficult to distinguish the service from popular search engines such as Google and Ask.com.

SECTION II. PROGRAM GOALS AND OBJECTIVES

C. The Brand Family (continued)

In deciding which strategy to use, you must determine the level of importance your service holds in relation to other programs that are offered and the commitment required. Below are questions to help determine the best solution:

- What is the intended life of this program?
- What resources are available – short and long-term – to support this program?
- What are the intentions for the program – to increase virtual reference usage or to ultimately drive more patrons to the library?
- How will you distinguish this program and its benefits from other services currently offered?

The brand family system can be reinforced in a number of ways; one of which is through the design of the Web site's navigation. For example, KCLS offers diverse services such as TeenZone, Good Reads and ESL support. Determine where VRS will live among the other offerings. Is it a service offered in conjunction with another service? For example, use eAnswer to get homework help. Or do you wish to position eAnswer as a starting point for finding other KCLS programs?

For academic institutions such as the UW, it is important to consider how VRS will be positioned relative to other services and campus schools. Is it a service of the liberal arts school or is it a university level initiative? To whom are you targeting this service? If the program were targeted primarily to new students, would a sub-brand that is closely tied to the university provide the best solution for strong recognition and credibility? Because university Web sites are usually more complex, consider where the service will be found. (Considerations for navigational structure is further discussed in Section VII.B.)

Determining how the program will be branded and how it relates to established service offerings will guide the planning and development for naming, logo and other marketing initiatives.

SECTION III. PROGRAM AUDIENCE

A. Identify Users for the Program

There may be a large number of likely users for VRS. In developing the program, it is important to first identify the potential universe – who they are, what they are interested in and how they might use the service. Find ways to generally describe the groups. Age-related descriptions may be used – for example, children, teens, adults and seniors. Other types of groupings may also be used such as students, professionals, homemakers and retirees. Begin with the existing patron population and expand from there.

Identifying the universe of potential users provides the leadership team with an unconstrained view of the marketing potential for VRS. Developing the universe also helps the leadership team decide where they will want to narrow their focus so that marketing efforts can be targeted.

In this process, the team should consider including a diverse group of staff members from various functional areas, such as those involved in reference services, programs and events development and community relations. The deeper the understanding of likely users, the better the chance the program can be tailored for maximum appeal. This list can be developed in a brainstorming session. Some institutions may even have patron/user audiences and descriptions already identified. The following are questions to help the team define the universe of potential users ("patrons" are defined as current library members who may or may not use VRS, "users" are defined as those who utilize VRS):

- Who are our current patrons and how are they defined?
- How do patrons currently access the materials they are seeking?
- Do they seek reference assistance and if so, how?
- Of this group, how many are likely to use online technologies without outside assistance? (Be realistic in identifying patrons who are already predisposed to using technology. Patrons who are not comfortable using technology will require more education and support.)
- What users, besides current patrons, may have a need for reference services?
- How are these non-patrons currently conducting reference research?

SECTION III. PROGRAM AUDIENCE

A. Identify Users for the Program (continued)

For KCLS, potential users may include school aged children, teens, adults (from professionals to those seeking recreational information), teachers, researchers and others within the community in which a branch library serves.

For the UW, potential users may include a broad range of users including UW students, students from other institutions, faculty, staff, continuing education learners, researchers and others in the greater Puget Sound community.

SECTION III. PROGRAM AUDIENCE

B. Define the Audiences

After the universe of users is identified, it is helpful to prioritize these groups. The universe of all likely users should be narrowed down to a few target audiences. "Target audiences" consist of the groups that the institution wants to actively pursue. The target audiences will be further delineated into primary and secondary audiences (to be discussed in Section III.D.).

Once target audience(s) are selected, it is helpful to profile them using demographic and psychographic characteristics. "Demographic" data includes information such as gender, age, geography, nationality and income. "Psychographic" data refers to lifestyle characteristics and includes informative descriptions such as smart, Web savvy, early adopters and self-directed.

Going even deeper with this type of psychographic exploration can help explain usage patterns and motivators. Do users ride the bus? What percentage are primary care givers? Stay-at-home moms? Are they interested in community events, politics or health issues? Are they magazine readers, news viewers, coffee drinkers or bird watchers? Using this type of characterization helps increase understanding of the user so that the marketing staff can better manage the brand with relevant and meaningful communications.

The chart on page 14 highlights examples to characterize the target audiences for KCLS and the UW. (**NOTE:** These examples are for illustration and may not be representative of how the institutions would characterize the audiences.)

SECTION III. PROGRAM AUDIENCE

B. Define the Audiences (continued)

KCLS Targets		
	Demographics	**Psychographics**
School children	• Middle grade to high school age • From ______ library's surrounding community • Mix of boys and girls • Ethnically diverse	• Comfortable using computers, technology and the Internet • Familiar with live chat – "talks" online frequently • Familiar with books and libraries • Smart, active and curious
Adult patrons	• 18+ years of age • From the greater Puget Sound area • Mix of males and females • Ethnically diverse	• Familiar with library services and resources • Comfortable with research • Computer and Internet savvy • Busy lives (i.e. they appreciate quick answers) • Primarily researching topics for personal use
The UW Targets		
	Demographics	**Psychographics**
Undergraduate students	• Between the ages 18-20 • From the ______ college community • Includes distance learners from surrounding five to six states • Ethnically diverse	• Very comfortable using computers, technology and the Internet • Have heard about or participated in live chat • Under deadline (i.e. they expect quick answers online) • Have diverse interests • Self-motivated

Once characteristics are defined for the institution, they will be instrumental when considering names, logos, marketing messages, promotions, Web site design and other initiatives.

C. Non-English Speakers as Targets

In defining audiences, special considerations should be given to non-English speaking audiences if they are to be included as targets. Because this group faces unique issues, which may include language limitations, unfamiliarity with library services/resources and limited online skills, and/or access, marketing to this group will require careful thought and planning. Some may already be patrons of the library, while others may not use a library at all. One of the first considerations for the institution in looking at non-English speakers is to determine who the largest group(s) may be and how they can best be supported. Here are a few questions to ask:

- Are there reference librarians who can conduct live chat sessions in other languages?
- How much translation will be needed on the Web site, during chat sessions and in marketing materials? Is the institution willing and able to support the translation requirements?
- Are there resources available online, including catalogs, databases, etc., that are useful to someone with limited English skills?
- Are there non-English speaking patrons who already use reference services? How successful are they at finding the information they need?
- Are there existing English as a second language (ESL) and outreach programs that can be leveraged to introduce VRS?

If non-English speakers are found to be a group that the institution wishes to pursue, consider promoting the program within existing ESL programs or other likely points of entry for this group of users. For example, to promote the program to ESL users, specific campaigns may be developed to position VRS as a method for finding relevant resources (i.e. pronunciation tapes, citizenship and TOEFL study guides and videos, as well as other educational, entertainment or business information). These campaigns may be translated to the relevant language for maximum appeal and impact.

SECTION III. PROGRAM AUDIENCE

D. Primary and Secondary Audiences

It is difficult, if not impossible, to create a brand that appeals to all people. Prioritizing the target audiences you have identified helps to develop a brand with a strong identity. The term primary audience relates directly to the target(s) previously identified. A "primary audience" is defined as the one group of users or potential users the institution wants most to reach and around which the overall brand will be developed. Selecting the one group will be a key decision for the team and probably one of the toughest choices the library will face. You will undoubtedly have many users to whom you want to market the service. Choosing a primary audience does not mean you cannot market to these individuals – these users are just not the primary focus for brand development (i.e. naming, logo/icon, tagline, Web site, etc.). For KCLS, selecting either school children or adult patrons as the primary audience will help create a more meaningful brand.

"Secondary audiences" relate to the other target audiences whom the library wishes to market to, but are not the focus for brand development. There can be many secondary audiences for which specific marketing messages and campaigns may be developed. For example, KCLS might wish to reach non-English speakers through a specific set of marketing messages and campaigns over a short duration; this group is considered a secondary audience. The overall brand, such as the name, logo and experience for eAnswer are not built around this group, but may be tested against this group during development to ensure compatibility.

Prioritizing user groups into primary and secondary audiences will help you develop a brand that is distinct and marketing initiatives that are targeted.

SECTION IV. SERVICE DESCRIPTION

A. Why a Service Description?

A "service description" quickly summarizes your offering to users and staff. The reason for creating a service description is similar to the need to set goals and objectives – it is for internal and external clarity. Staff members need to understand how to talk about the program and how to communicate it in a consistent manner. Library patrons and other users who are not familiar with live chat or VRS need a description that is easily understood. Once a service description is created, it may be used for both internal and external audiences in a variety of ways including training, Web site content, presentations, newsletters, promotions, etc. In an earlier section of the Guidelines, we discussed the importance of differentiating VRS from popular Internet search engine services. Having a good service description helps differentiate the service and manage users' expectations.

SECTION IV. SERVICE DESCRIPTION

B. Considerations for Service Descriptions

Libraries may elect to create a number of descriptions for various uses. An effective service description, though, should cover the following – what the service is, whom the service is for and what benefit the service offers to the user.

Here is a sample service description for UW:
Q&A Live is an exciting, new reference service of the University of Washington. This service allows anyone with an Internet connection to chat in real-time with reference librarians who are able to answer questions and help find resources. "Virtual" reference services either provide the specific answers you need or direct you to the appropriate online and hardcopy resources. With Q&A Live, users who are in need of reference materials can find what they are looking for faster and easier.

C. Online Description

For users, there are three different types of service descriptions that may be encountered on the library's Web site. Because online audiences often have needs different from their offline counterparts (and even their own offline selves), descriptions are narrowly defined for Web use. These descriptions are tailored to provide the quickest "read" and offer different amounts and types of information at various navigation levels. The Recommended Site Structure diagram on the following pages illustrates how these descriptions may be used at different levels of the Web site.

1. Contextual description:

If VRS are presented as one resource option among others, it is important to provide pertinent information about the service in the description so that the user can decide which option is best suited to their needs. The descriptions of all options should follow the same general guidelines. The contextual description should include:

- The service hours
- The types of questions that can be answered with the service
- How long it will take to receive an answer to a posed question

The contextual description should not include:

- Instructions for using the service
- Explanation of why the library is providing the service (this type of detail is not necessary at this level)

For an example of effective contextual descriptions, see:
http://newman.baruch.cuny.edu/e_ref/default.htm (attached as Appendix 1)

C. Online Description (continued)

2. Benefits description:

This description should appear on the service home page. The description should be user-focused and benefits driven, and can be the same description recommended in Section IV.B, but should be edited for appropriateness to the Web site. To edit for use on the Web site:

- Remove any references to online or the Web
- Use bullet points when possible for a faster read
- Provide a headline that can be easily "scanned" by readers

For example, the sample service description given in the previous sub-section may read as follows:

Find what you're looking for faster and easier.
With Q&A Live you can chat in real-time with reference librarians who can:

- Answer specific questions
- Guide you to online references
- Recommend traditional services

3. "Deep" description (optional):

If the library wishes to include in-depth information describing the service – its technology, purpose, mission, etc. – on the Web site, it is recommended that this information be placed on a separate Web page. This page can be linked from the service home page and other appropriate pages in the Web site. (Please refer to Appendix 2.)

SECTION V. PROGRAM NAME

A. Descriptive vs. Evocative Names

What's in a name? A name provides the verbal signature for a product or service. Often, it hints to the offering and sets the tone of the program for the target audience. In looking at how to name the program, two strategies can be considered – descriptive names and evocative names.

A "descriptive name" is straightforward and describes the product and/or service. For example, the search engine Infoseek is a descriptive name. It immediately communicates to the user that the service is about information seeking.

An "evocative name" on the other hand, is suggestive. It evokes a tone and personality but does not necessarily have direct associations or meanings attached to it. The search engine Yahoo! is an example of an evocative name.

In the examples above, both search engines offer similar services. However, Yahoo! has used its name to convey a sense of irreverence and fun to a youthful, hip and savvy audience. Infoseek on the other hand, set out to capture the business and professional user and chose a name and style of communication that appeals to a more serious and traditional audience. Each company has been successful at creating a name and using personality attributes to set the tone for the brand to reach strategic objectives. In naming the VRS, the team needs to consider the strategic goals of the program. Who is the target audience? What kind of name will resonate with the target audience? In deciding upon a descriptive or evocative name, there are advantages and disadvantages to consider:

Descriptive Names	
Advantages	**Disadvantages**
• Easier for users to "get"	• Limited growth & expansion opportunities
• Need less marketing dollars to launch	• May be difficult to find a name not already used by someone else
• Better fit with existing services	• More difficult to "own" (trademark registration, securing domain, etc.)
Evocative Names	
Advantages	**Disadvantages**
• Infinite potential to create meaning	• Requires more upfront education & support
• Better opportunity to differentiate the service from others	• May be too unexpected for some patrons
• Easier to give it some personality	• May not fit with overall institution brand

SECTION V. PROGRAM NAME

A. Descriptive vs. Evocative Names (continued)

The name for KCLS' virtual reference services has evolved since the inception of the program. The first name used, *Homework Help,* was a descriptive name and ideal for a target audience of school children but may not have described the live chat nature of the service. The next evolution of the name, *Ask a Librarian,* is also a descriptive name, but may not have differentiated VRS enough from phone, email and other forms of communication with reference staff. The name currently used, *eAnswer,* is still a fairly descriptive name although it can have different meanings for different users. While eAnswer is short and simple, KCLS needs to consider what expectations may be conceived by the user. Might the primary target audience of school children expect to receive the answers to their homework assignments rather than resource guidance? Is this the intention?

Deciding upon a descriptive or evocative naming strategy is an important consideration for the library. This will depend largely on whether or not the name must conform to the parent name (i.e., the name of the library) or school. In the following section, we provide further criteria for name creation.

SECTION V. PROGRAM NAME

B. Naming Criteria

Before the naming process begins, it is helpful to first establish the criteria that will help guide decision-making. Setting criteria helps ensure that the name aligns with the strategic goals of the library. It provides an objective benchmark for comparison. We suggest incorporating the following questions as criteria:

- Does the name need to work with the parent brand? If so, does it need to utilize part or all of the parent name or does it simply need to sound and look appropriate with the parent brand?
- Is the name based on familiar words? Does it suggest an appropriate meaning?
- How does the name sound? Is it likable?
- Is it attractive? Does the name look good in printed/online form?
- Is it easy to pronounce and spell?
- Is it memorable?
- Will it be relevant to the target audience?
- In what ways will the name be used? (Print, speech, signage, etc.)
- Does it align with the personality attributes you want to portray in the brand? (For example, if you want to position the service as young, fun and hip, does the name communicate these attributes?)

Domain/URL: Does the name require a pristine stand-alone domain or URL address that is not owned or used by another entity? For example: if eAnswer is selected, are the www.eAnswer.com and/or www.eAnswer.org URLs available? The desired answer is "yes," as this will reduce confusion when users look for your service.

Naming Convention: Is there a naming convention to which the program must adhere? For example: RealNetworks uses the word "Real" in many of its products – RealPlayer, RealOne Media, RealSlideshow, etc. If there is a system, does the convention need to utilize the parent brand name and/or structure or should it represent a stand-alone family of names?

Brandmark: Will the name be translated into a brandmark or logo?

NOTE: If the library wishes to legally secure and protect usage rights to a name, the institution will need to seek professional legal counsel for issues such as trademark registration. This document is not intended to be used in lieu of legal counsel.

SECTION V. PROGRAM NAME

C. Name vs. Tagline

While a name provides the verbal signature for a product or service, a tagline helps to strengthen the intended message. A "tagline" may be a short sentence or text that is used with the brand's name or logo. Nike's "Just do it" is an example of a brand with a well-known tagline.

A library may consider incorporating a tagline to help describe new virtual reference services, especially if it thinks users may be unfamiliar with the technology. A brand that incorporates a tagline may provide further information about the service and reinforce marketing messages in a quick manner. Here is a sample tagline for KCLS: "eAnswer. Your virtual librarian is waiting!"

In launching a new program, associating a tagline with a brand name may help to quickly build user awareness. A tagline may be incorporated as part of the logo/icon design or it can be used to headline a marketing campaign. Taglines should be short, reinforce your service positioning and have lasting appeal.

SECTION VI. LOGO AND ICON DESIGN

A. Logo and Icons

The brand identity for an organization's product and service is anchored by the way the name is represented visually. This way of treating the name is often referred to as brandmark, typographic treatment, logo or icon. For clarification, a "brandmark" or "logo" is generally the typographic treatment (the font, size and other characteristics of the type that spell out the name of the product or service) and may or may not include a graphic or symbol used in combination (or "lock up") with the type. An "icon" refers to the graphic or symbol used in conjunction with your brandmark.

Company and product/service brandmarks vary in their use of icons. For example, Microsoft's corporate brandmark is simply a strong, bold type treatment. Their product logos, however, may be associated with icons, such as the window pane graphic that represents Microsoft® Windows®.

SECTION VI. LOGO AND ICON DESIGN

B. Considerations for Program Logo and Icon Development

When you think about successful logos, who comes to mind? Maybe NBC with its peacock, Google with its colorful "o's," Nike with its swoosh or AT&T with its swirling globe? No matter whom you think of, the effect is that the logo was memorable and has therefore stuck with you. While you may not have the same resources as these companies, this is the type of impact you are hoping for with your target audience.

Creating a logo requires a commitment. Similar to advertising, a logo must be seen many times before it makes an impression and becomes recognizable. It may take years to build recognition. When you start down the path of creating a logo for your service, be sure that you are ready to commit the time and resources needed to establish your service in the minds of your potential users.

1. General considerations

Does the logo need to work with the parent brand? In other words, should you be able to use the VRS logo next to the library or university logos? Are there instances where you will want to use both? For example, the library logo could be an endorsement for the service, adding a credibility that legitimizes the offering or vice versa. Perhaps the service is an endorser to the library brand and should be used to build awareness for library services in general. A good example is the relationship between the National Geographic Channel and its program, GeoTrips. (See nationalgeographic.com/channel/geotrips.) While the National Geographic Channel logo can be used above the GeoTrips logo as an endorser, the complexity of the GeoTrips logo prevents it from being anything but center stage.

Should the VRS logo utilize components of the library brand? This is a serious consideration with pros and cons. By graphically positioning the service as part of the library family, you may maximize efficiencies. Your user will have less difficulty associating the service with the library and you may receive a positive reaction via a perceived improvement to the parent brand. On the other hand, will this get the program the necessary visibility on the Web site? Does the parent brand give you enough flexibility to be able to generate awareness for a service that is different than others offered by the library?

B. Considerations for Program Logo and Icon Development (continued)

1. General considerations (continued)

Will you benefit more from a specific or an abstract icon? A "specific icon" draws directly from your service or benefit, taking a vivid attribute and making it visual. Betty Crocker's spoon icon is a good example of a literal interpretation for a brand. The "abstract icon" uses an unrelated concept to increase awareness. Pink Elephant Car Wash and Nike's swoosh are good examples of brands that use seemingly unrelated icons (and, in the case of the car wash, an unrelated name) to attract attention. Brands with abstract icons are harder to establish, but can be very effective. Brands with specific icons offer instant association but can be difficult to execute for services with less tangible benefits. For example, an engineering firm may have a hard time picking an icon that can represent quality, ingenuity and efficiency.

2. Visual appeal

Does the logo/icon have visual appeal? The logo/icon should be pleasing to the eye and resonate with the target audience. The color palette should speak to the brand's personality. In choosing fonts, stay away from heavily stylized type that is hard to read online or in print. Make sure the logo/icon is visually appealing both in color and in black & white, as it may be used in environments where color is inappropriate.

3. Personality

Does the logo/icon map back to the brand image you want to convey? An effective logo/icon will have a strong look and feel and will say a great deal about the brand's personality. Does the service feel serious and professional or is it hip and casual? Special care should be taken to design a brand that reinforces your message, communicates your personality and strengthens your service position.

SECTION VI. LOGO AND ICON DESIGN

B. Considerations for Program Logo and Icon Development (continued)

4. Applicability across different media

How will your logo/icon be used? During the design process, consider the different ways your logo/icon may be used. Exploring possible applications will help you understand the issues that may arise during implementation across different media. Consider various media formats (printed marketing materials, Web site, signage, advertising, etc.), size applications – from smallest to largest (i.e. pens to signs) and how the logo/icon may be used in co-branding scenarios.

Below are specific considerations particular to the online medium:

Size – The size of the logo/icon on the Web site may be used to help show its importance in relationship to other services. For example, to show that VRS is one of many library offerings, it may be best to use a program logo that is roughly the same size as other services.

Resolution – Internet browsers display all graphics at a 72-dpi resolution. Make sure that when the logo/icon is reduced to 72 dpi it is still legible on screen.

Compression – Is there a background color on the Web site that needs to show through the logo? (For example, the enclosed area in the top half of an “e”). If so, the logo must be compressed as a transparent .GIF and should not contain any drop shadow effects.

Text – Is a tagline used with the logo/icon? If so, consider whether to include the tagline text as part of the graphic or as HTML text. If the tagline is included with the graphic, designers will have complete control over the font, color and size of the type. If HTML text is used, the designers will have less control over the size and font, but the tagline will be more legible, especially to users with visual impairments, since they are able to control the size of HTML text in their Web browsers. (In the development phase, consider whether the logo/icon can be used without the tagline and when this is appropriate. This type of usage guidance will make it easier for web designers to incorporate your logo/icon into their designs.)

B. Considerations for Program Logo and Icon Development (continued)

5. Extendibility

Does the logo/icon need to extend to other related offerings? A logo/icon may become a parent brand in its own right if it is extended to categories within your service or other library services. For example, if you were to break the KCLS service, eAnswer, into categories that make sense to your user (and your ability to track users), you may end up with a need for versions of your logo that are unique to each subject area. eAnswer Sports, eAnswer Nature and eAnswer History for instance, may need to have the same logo in different color schemes, with different icons or with a type treatment for each that distinguishes its subject area or benefit. It is critical to determine this before you begin design of your logo/icon so that as much or little flexibility can be built into the design.

6. Logo/icon placement

How "loud" should your logo/icon be? When you are first building awareness for your service, it may be tempting to be introduced with a splash, trumpeting your presence as loudly as you can. Resist! This is not to say that you should not launch your service and/or individual marketing campaigns with a great deal of fanfare, but the logo/icon should be developed with a certain amount of conservation. There will be instances in which your logo/icon needs to be prominent on your Web site and in other materials, usually on the home page, brochure cover, etc., and others in which the logo should be able to drop down and be an endorser as needed. On the Web site, especially while you are building awareness for the service, you may want to have the logo on each page, but be careful that it is not so colorful, cute or loud that it distracts or discredits your content. The deeper you get in the Web site, the bigger the focus should be on the conversation you are having with the user and the content you are providing.

SECTION VI. LOGO AND ICON DESIGN

B. Considerations for Program Logo and Icon Development (continued)

6. Logo/icon placement (continued)

In this vein, you will want to consider the logo's ability to play both roles – lead and understudy. Is your logo too colorful, posing a problem when the logo is used in restrictive environments? (This could be an issue when the logo is used in conjunction with other programs on community bulletins, in partner brochures or literature, etc. The way to get around this is to ensure your logo works well as a black and white graphic.) Also, explore the possibility and benefits of developing a logo that works in horizontal and vertical formats. Are there instances where you will benefit from having a long, thin logo versus a tall, fat one? National Geographic Channel with its trademark yellow frame icon is a good example. When used on screen, the logo is usually vertical with the yellow box on top. When used above a program name or in tight circumstances, the logo changes to a horizontal application with the yellow frame on its left side.

Below is a checklist for the creative process related to logo development:

- Make sure the logo will work online and in print.
- Make sure the logo can work in very small applications (i.e. pens, mousepads or other giveaway pieces) and in very large applications (posters, banners and signs).
- Have versions of the logo in both color and black & white. This will come in handy when you need to save money at the printer.
- Make sure the logo maps back to your brand. Are the colors appropriate?
- Does the font convey the right message (i.e., light vs. dark/bold, feminine vs. masculine, sophisticated vs. playful, age vs. youth, etc.)?
- Make sure the logo is different from your competitors. Be unique and true to your service attributes.
- If relevant, ensure that the logo can extend to new offerings you may have in the future.
- Make sure the logo works as both a primary and a secondary graphic. Does the logo/icon work as both a large brand-trumpeting element and also as a small, out of the way visual, secondary to content?

SECTION VII. WEB SITE – USABILITY

In order for the virtual reference service to be successful, users must be able to quickly understand where to find the service online and how to connect and communicate with a librarian once they have discovered it. In this section, we will discuss the many factors that combine to affect Web site usability. This includes copywriting ("copy" or "content" refers to the text/descriptions/words that appears on the site), information architecture, navigational structures and URL/domain name creation.

A. Writing for the Web

Studies have shown that Web site visitors do not read much copy on Web sites, so it is critical that copy is short and concise, and that important information is called out near the top of the page. It is not in your favor to make Web visitors scroll for information. The more concise you are, the better. Visitors to your Web site are only likely to scroll for information they really want, such as instructions for logging on, hours of operation or other very specific information. To ensure that service-related information gets read, we suggest the following process: write, edit and cut, review, edit and cut again!

The following thoughts for developing Web content may be useful:

- Overview/conclusion – Put the most critical information up front to attract and hold your reader's attention. Visitors scan pages quickly and if they like what they see are, more likely to stay on the page.
- Supporting/organizational content – Elaborate on what has been said in the overview and what is to be expected on the rest of the page. As you begin to explain, expand with further details. The goal is to intrigue your reader enough to keep them reading.
- Detailed content – As the visitor clicks deeper and deeper into the site, there is more and more opportunity to provide greater detail. A general rule of thumb, however, is to make your content as quick and easy to read as possible. Reading on the Web is not like reading a book or even a newspaper. Successful sites follow the age-old adage – keep it simple!
- Links – It is appropriate to provide links for any content that does not fit on the page where it first comes into play. Users are predisposed to clicking for subject matters that interest them. Give visitors a chance to explore topics with links to pop-up windows or other areas of the site where appropriate. This will keep your page from becoming long and unwieldy.

SECTION VII. WEB SITE – USABILITY

A. Writing for the Web (continued)

Other basic do's and don'ts:

- Do use a description of the information and/or a call to action for links; example: "Get directions to the location nearest you."
- Do not use links if the linked information can be found on the current page.
- Do not call attention to the Web environment (and away from your subject matter) by using self-referential terms such as: Click here, Click on this picture, Follow this link, or "Welcome to Company X's home on the World Wide Web."
- Be as concise as possible, especially at the tip levels of your site – the home page and the next level of pages that follow. Aim for an average of two to three paragraphs or 40 to 90 words per page.

Here are additional resources helpful to those writing copy for the Web:

Books:

- *Writing for New Media*, by Bonhim and Pohlmann
- *Wired Style*, by Hale and Scanlon
- *Designing Web Usability*, by Jacob Neilson

Web sites:

- www.useit.com, Jacob Neilson
- www.webmonkey.com, Hotwired/Lycos
- www.sun.com, enter "Writing for Web" under "search" (http://www.sun.com/980713/webwriting/wftw7.html is a good place to start)

SECTION VII. WEB SITE – USABILITY

B. Information Hierarchy and Navigation

If the VRS is considered a sub-brand of the library organization's brand, then the Web site will serve as a "gateway" to the service. A well-organized navigational structure will ensure that users are able to quickly locate the VRS from the institution's home page. Information hierarchy and navigation can also be used to reinforce the brand family.

General guidelines for Web site navigational structures:

- Primary navigation (the choices available to users in a navigation bar on the home page) should contain no more than seven sub-sections.
- Secondary navigation from each point of primary navigation should contain between 3 and 10 sub-sections.
- Headings for navigational categories should be created and used consistently. The names should be easy for users to understand and distinguish. Category headings such as "Services" and "Resources" are both descriptive and intuitive.
- Users should understand where they are in a Web site via visual or written clues within the navigation.

For example, on a page from the Denver Public Library Web site (attached as Appendix 3), the following navigational "clues" have been employed:

- The "About Us" tab in top navigation is highlighted blue, so the user knows they are in the "About Us" section.
- The horizontal blue bar directly below the top navigation is visually connected to the "About Us" tab and uses the same color. There is no border, so the user knows that the items in the blue bar are sub-sections of the "About Us" section.
- The text, "Mission & Organization" in the blue bar is yellow instead of white, which indicates that the user is in the "Mission & Organization" sub-section.
- Text underneath the blue bar, which reads "Home › About Us › Mission & Organization" reinforces the visual navigation. This string of text is known as a "breadcrumb trail" and is widely used on the Internet. The current page is shown on the right side of the trail, and working to the left of the trail, the user can determine that s/he is in the "About Us" section. It also gives the user a way to get back to previously visited areas.
- Directly below the breadcrumb trail, a large red headline reads "Mission & Organization" to further reinforce the content of the current page.

SECTION VII. WEB SITE – USABILITY

B. Information Hierarchy and Navigation (continued)

Finding a "home" for VRS.

Although the VRS may be accessible through links from many areas of the Web site, it is important that it have a permanent home in the navigational structure of the Web site. The VRS should fit naturally into an existing point of navigation. To choose the best home for the service, consider the following questions:

- Are there other reference tools on your Web site? If so, perhaps the VRS could be grouped with them.
- What other options would you like the user to see when they decide to use the VRS? All of these options should be grouped under a common point of navigation.
- What would best support the brand family and the associations you want to establish with other offerings?

Naming the point of navigation or category heading which houses VRS.

Web site users respond to navigational names that are concise, descriptive and distinct from one another. It may be that the VRS intuitively fits into an existing point of navigation, such as "Library Services." To determine if your navigation is appropriately named, take the opportunity during the site-testing period to ask potential users who are unfamiliar with the service to select the category in which they might expect to find the service. If it is necessary to create a new name, avoid names which have standardized uses unrelated to VRS, such as:

- "Help" – Typically, this contains instructions about how to use the Web site.
- "Contact Us" – Typically, this contains phone numbers and email addresses for general information.
- "Customer Service" – Typically, this contains information and instructions about how to resolve problems encountered by customers.

Also, ensure that the new navigational name is distinguishable from the other points of navigation in the user's mind. For example, "Services" and "Resources" may have specific meanings for the library, but may be confusing to online users.

SECTION VII. WEB SITE – USABILITY

C. URL/Domain Name

The URL or Web address for the VRS Web site will depend upon the selected brand strategy. If the stand-alone brand strategy is applied, the Web address should directly reflect the service name. For example, San Francisco Bay Area libraries call their service "Q&A Café," and it can be found online at www.qandacafe.com. If possible, libraries pursuing the stand-alone brand strategy should secure .com and .org domains for their URLs.

If the sub-brand strategy is applied, the URL should be a reflection of both the parent brand and the sub-brand. In this case, the VRS would be housed within the library organization's Web site, but within this structure will have its own home page (Please refer to Appendix 2). The URL for this "landing page" should contain both the name of the library and the name of the service. For example, Denver Public Library's virtual reference service is called "Smartypants." The Web address that goes directly to the Smartypants landing page is www.denver.lib.co.us/smartypants.html. Ideally, it would be easier to remember www.denver.lib.co.us/smartypants (without the ".html"). The URL should also look familiar to users when printed in promotional material, so avoid using foreboding-looking URLs with long strings of machine-generated code or special characters, such as the following URL for the service home page:

http://vrlweb1.lssi.com/wcscgi/CDM.exe/mari?SS_COMMAND=CUST_SUP&Category=LIBONL_B

SECTION VIII. WEB SITE – SERVICE EXPERIENCE

It is important that users have a positive experience when they interact with the service. Many factors combine to affect user experience, including customization, "voice" and user interface. The following are guidelines for enhancing the user experience to encourage repeat visitors, a good reputation and word-of-mouth marketing.

A. Customizing the Experience

A customized experience can help the brand gain credibility as a knowledgeable and trustworthy resource. Imagine the following examples:

Example 1:
You are a college student who has used the virtual reference service many times before. When you arrive at the VRS home page, you see a personalized greeting, very little copy and are offered the choice to directly connect to the service, or to review instructions and technical information. Once you connect to the service and ask your question, the librarian greets you by name and responds in a professional and concise manner.

Example 2:
You are a college student who has used the virtual reference service many times before. When you arrive at the VRS home page, you see lots of copy describing what the service is, how to use it and the technical requirements. From this page, you can also connect to the service. Once you connect to the service and ask your question, you are sent a list of instructions explaining how to use the service. The librarian then asks you what grade you are in and which resources you have already tried.

In the above, Example 1 illustrates a more relevant user experience, customized for the specific needs of the repeat-user and college student. Because the Web site does not present information that the student already knows and the librarian asks relevant questions, Example 1 imparts a more positive user experience than Example 2.

SECTION VIII. WEB SITE – SERVICE EXPERIENCE

A. Customizing the Experience (continued)

Ideally, the user experience should be customized to fit the needs of the user – based on specific categories – and the target audiences, as defined by the library and described in Section III. Below are some ideas for customizing the service based on an audience matrix.

	Novice user	Experienced user
Grade school student	• Instructional copy suitable for younger audiences appears on service home page • A "homework help" option may appear • Librarian may ask questions about age or grade level	• An option to immediately begin chat session is prominent, a link to instructional copy is provided • A "homework help" option may appear • Librarian does not ask questions about other online resources already searched by patron (assume obvious paths have been tried)
Adult	• Instructional copy suitable for adult audiences appears on service home page • Librarian may ask questions about other resources attempted by patron • A pre-scripted message explaining how co-browsing works is pushed to the user before a screen is taken over by the librarian • Ask if the user knows how to read the "pushed" results page before continuing the session	• A link to instructional copy, with an option to immediately begin chat session • Librarian does not ask questions about other online resources already searched by patron (assume obvious paths have been tried)

NOTE: This represents a simplified model. A more targeted matrix should be developed based on the specific needs and target audiences of each library. The matrix should explore additional areas of audience-appropriate content.

SECTION VIII. WEB SITE – SERVICE EXPERIENCE

A. Customizing the Experience (continued)

There are various ways to determine and store user types and preferences. Each library should consult its technical staff to understand the feasibility of the suggestions below.

Suggestions for determining user level and age:

- Develop a short questionnaire for first-time users of the service.
- Librarians may ask simple questions such as, "Are you a student?" and "Have you used this service before?" to understand how to appropriately interact with patrons.
- Study ongoing trends. For example, librarians may determine, through experience, that most novice adult users are connecting in the middle of the day. Staff may be notified of this trend and cater the service to suit the needs of this audience during those hours.

Suggestions for storing user preferences:

- Tie user preferences to library card number and require library card number to use the service.
- Store user preferences in "cookies." Cookies are small files stored on the user's computer that contain information accessible to the Web browser. Information stored in cookies can be sent by the Web browser to the Web server, where it can be used to created personalized Web pages or passed on to librarians.

Both of the aforementioned suggestions for storing preferences would require some form of a user database. If a user database exists, and the library is interested in pursuing customization, methods for integrating the existing database with the Web site should be discussed with the library's technical staff.

SECTION VIII. WEB SITE – SERVICE EXPERIENCE

B. Session "Voice"

The session "voice" is the tone and manner in which the Web site and the librarians participating in the VRS communicate with the user. Voice guidelines should be consistent with the brand. For example, if the brand's personality is playful and energetic, the session voice and scripted messages should be upbeat. Also, voicing may change slightly and be individualized to suit the preferences of the user during an online session. For example, a librarian at the physical reference desk may use a different tone and manner with a seven-year old versus a 37-year old.

To ensure there is a level of consistency in tone, an overall service voice should be considered for the following areas:

- Instructional and descriptive copy on the service home page
- Librarian log-on names
- Librarian conversation style
- Pre-written, scripted messages which can be sent by librarians

Here are examples of different voices used by a librarian:

Friendly:	"Laura: Hi, I'm Laura, how can I help you today?"
Technical:	"lib24: Let's get started!"
Professional:	"Laura B.: How can I assist you?"
Teacher:	"Librarian: My name is Mrs. B, and I'll be the librarian helping you today. What would you like to know?"

For a service like virtual reference, a level of personalization will most likely increase user affinity. People want to know that there is a live person on the other end, not a robot or machine answering their question. It might make sense then, to use personal log-on names like first names (this can also help the library track staff log-ons). If privacy for the individual librarian is an issue, allow them to use made-up names. It will also further user affinity if staff members used the name of the logged-on user during their session. Something simple such as "Hi, I'm Laura, how can I help you, Bob?" may go a long way to increase user satisfaction.

B. Session "Voice" (continued)

Librarians should be advised that some users will treat the VRS in much the same way as other "chat" services and may use "chatspeak" abbreviations, such as "HTH" for "hope this helps" or "LOL" for "lots of luck." (Many chatspeak dictionaries can be found on the Web, see http://www.sega.com/help/community/chatspeak.jhtml for a sample.) We are not advocating a distortion of the English language, but sometimes it helps to understand lingo usage.

SECTION VIII. WEB SITE – SERVICE EXPERIENCE

C. User Interface

The user interface or "UI" refers to the visual elements that the user manipulates to interact with a Web page. This is another important contributor to the overall user experience.

Libraries will have differing levels of control over the user interface for the service, depending on their software vendor. The following are guidelines for creating intuitive UIs, which should be considered in vendor selection or whenever there is an opportunity to comment on the vendor's user interface.

1. **Utilize interface elements already familiar to computer users**
   Common user interface elements should be used whenever possible, since computer users have already learned how they work. Examples include scrollbars, text entry boxes and buttons, which are part of the interfaces (Windows, Macintosh and Internet Explorer) users already understand. For the VRS in particular, user interface ideas may be drawn from popular "chat" interfaces, such as MSN Messenger or AOL Instant Messenger. In these programs, message text scrolls from bottom to top, with the most recent posting at the bottom of the screen, which is the opposite of the text scrolling interface currently used in the 24/7 software. The result of this difference is that users who are familiar with MSN Messenger must re-learn the library's interface to use the 24/7 VRS.

2. **Group the "action areas" of the screen**
   Users tend to pay attention to the areas of the screen that appear to be changing and ignore areas of the screen that appear static, so it is important to place all functional interface elements near the "action area" of the screen. For example, in the 24/7 interface, the area where users type their responses is at the bottom of the browser screen, while the dynamic area (where new text messages appear) is near the top of the screen. The interface could be improved if the text entry box and dynamic area were closer together.

C. User Interface (continued)

3. Emphasize function with user interface

The VRS is a tool and should feel like one. If the service is treated as a sub-brand to a parent brand, its user interface should differ from the typical informational user interface on the parent site. For example, functional buttons within the VRS, such as “Send” and “End Call” should look significantly different than points of navigation within the overall site design, because the “Send” and “End Call” buttons perform functional tasks, while the points of navigation move the user to other places on the Web site.

4. All elements of the user interface should work together

The user interface consists of many parts working together to reinforce the application’s functionality. For example, while one user may clue in on the red “X” on the “End Call” button, another may focus on the text. In this case, the text reinforces the graphical clue and vice versa. The graphics, text and any instructional copy should consistently reinforce the same messages to the user. In the UW’s implementation of 24/7, text at the top right of the window reads “A Librarian will be with you shortly. Please wait for a greeting.” This instructional text is useful at the beginning of the session, but because it does not change (even after a librarian has signed on); it is detrimental to the UI.

SECTION IX. INTERNAL STAFF CONSIDERATIONS

A. Staff Buy-in

At the beginning of the Guidelines, we discussed the need for internal support by staff. Reference librarians who serve users day-to-day have significant influence over the success of the program. These staff members have the closest contact with users, understand their requirements and may provide important feedback for program refinement. Obtaining staff buy-in from the onset and maintaining active participation throughout will help contribute to the success of the program. Below are considerations for fostering continued staff support:

- Share program goals and objectives with staff early in the process. Solicit ideas and feedback.
- Recruit individuals who will be part of the "program team." A team mindset fosters a sense of belonging and ownership. An internal promotion may be used with "certificates" issued to participating reference librarians.
- Ensure training is thorough and provide resources for ongoing support (this can be with the software provider or other individuals).
- Establish bi-weekly or monthly staff meetings where development progress is shared with the team.
- Encourage ongoing teamwork and the sharing of ideas and knowledge.
- Consider a "mentor" program for new recruits.
- Maintain scheduled staff meetings where progress and new insights are shared by team members.
- Provide learning opportunities for enhancing skills. For example, during slower shifts, consider "adopting" a local grade school class for those hours of operation. To enhance database skills, consider a monthly "scavenger hunt" where librarians are given a set of questions to answer and small prizes are awarded to those who submit responses. It is important to note when creating internal promotions that they should not be too competitive so that an environment of knowledge sharing is maintained.
- Post monthly, quarterly or yearly numbers of calls taken, questions answered and topics covered in internal and external media such as newsletters.

SECTION IX. INTERNAL STAFF CONSIDERATIONS

A. Staff Buy-in (continued)

- Engage team members in the creation of marketing ideas and campaigns.
- Highlight special achievements.
- Do not limit "training" to only those directly on the team. Consider providing a general information session to all library staff to gain their support. Staff members from different parts of the organization may help promote the service.

Internal promotions such as launch parties with small giveaways, celebrations for reaching certain thresholds (the 100th question answered in the year), co-training exchanges with other institutions and monthly "virtual reference day" promotions help foster continued staff interest and enthusiasm. Keep things fun and create opportunities for reference librarians to increase their skills and knowledge. Encourage knowledge sharing among participants by building a team environment for those involved in the program and make participation something that is special and important through creative use of incentives and promotions.

SECTION IX. INTERNAL STAFF CONSIDERATIONS

B. Staff Feedback

Obtaining staff feedback is an important part of building internal support. Feedback from staff may be easy to elicit, but it is important to establish guidelines for how it is to be used. Only some suggestions may be feasible to implement, others may require additional resources and commitments not currently available. Here are a few guidelines to help ensure that all comments and suggestions are thoughtfully considered:

- Establish expectations – For example, while all suggestions will be considered and incorporated when possible, final decisions on the expenditure of resources and other commitments will be made by the program leads.
- Provide a venue for capturing staff feedback – Via email, staff meetings, anonymous suggestion box, etc.
- Maintain a comprehensive list of all feedback garnered – The leadership team may prioritize feedback to those that can be immediately incorporated and those that require further commitments and resources.
- Where appropriate, assign a responsible party to the individual comment. (If possible, delegate the responsibility for incorporating feedback to the staff member who originated the suggestion as this may further the sense of participation and ownership.)
- Share progress on feedback incorporation during scheduled staff meetings.

One of the most important aspects for receiving and incorporating feedback of any kind is to ensure that open communication is maintained with staff members. By establishing and sharing guidelines for feedback, expectations are managed for all involved.

SECTION X. MARKETING THE PROGRAM

A. Marketing Plan Development

The development of a marketing plan will be challenging, but it also presents an opportunity to flex your creative muscles and demonstrate what you know and believe about your service's benefits to your target audience. It is a chance to put into action the decisions you have made about program goals and objectives, target audiences and the kind of brand you are going to build. When your ideas are implemented, usage will go up and user satisfaction will be high. Your efforts will be highly rewarded.

What is a marketing plan? A marketing plan lays the roadmap for communications with your target audience and serves as both justification for your expenditures and a benchmark for your results. It allows you to clearly state your brand promise, how you plan to communicate the promise efficiently and effectively, and serves as a gauge to assess whether your organization is living up to that promise. In a perfect world, audiences who see and hear your communications understand exactly what they are getting and, if so inclined, will support and recommend the brand.

Ideally, a marketing plan begins with a summary of the program's goals and objectives, target audience, service features and benefits, and the background for the program name and any other initiatives already underway (as described in Sections II – V). For best results, steps should be taken to gain consensus among decision-makers in the organization about the program's promise to users and marketing staff/partners should readily understand the summary before proceeding with marketing initiatives.

Once you have achieved consensus, identify those initiatives that offer the most potential for reaching your target audience. In this important step, consider any and all situations in which a user may come into contact or actively seek out your service. Are they likely to read a newspaper article about advances at the local library? Will they notice your service on the library's Web page? Would they see your information at the bottom of an email communication with the library or on an email announcement? Are there teacher's unions, student unions, PTA meetings or campus orientations at which users would be receptive to hearing about what you offer? Are they most likely to hear about your service from a friend who is already familiar with virtual reference?

SECTION X. MARKETING THE PROGRAM

A. Marketing Plan Development (continued)

After you have outlined potential avenues for reaching your target audience, we recommend creating a similar outline of your available resources. These two outlines will be compared and cross-referenced as you evaluate and prepare to recommend a budget to implement the marketing plan. Available resources might include staff who are skilled at customer surveys, communications, graphic design or technical development. They might also include materials or other marketing programs already in place that can be utilized to get your message out. Whether you have finite dollars to spend or a large budget, be creative in determining how marketing dollars can best be leveraged.

Here are some additional considerations:

- Allocate budget to items that can be used for multiple purposes and materials that will give you the greatest reach. For example, simple single page flyers can be used in a direct mail campaign, scanned and sent as an email PDF, combined with other materials and given to press to generate coverage, etc.
- Create initiatives that will give you the best value for your money. Perhaps a contest or drawing in which you have invested in a grand prize will be more interesting to a wider number of potential users than smaller giveaways handed out at events, etc.
- When identifying existing resources, determine which of these would be appropriate for marketing VRS. For example, does the library already collect email addresses of current patrons? If so, can they be used to promote VRS? Are there existing partners, vendors and alliances that can help promote the service?
- Be careful not to allocate a significant budget to any one initiative or area unless you know that it produces the results you intend. Testing is a key component of every marketing plan.
- In general, some marketing initiatives are inherently more expensive to implement than others and should be carefully considered. Mass advertising, like television, is an effective way to raise general awareness but may be harder to measure in terms of your return on investment. Online marketing formats (to be further discussed in Section X) are cost effective for testing different messages and promotions as they do not require printing and mailing costs, and content can be changed with relative ease.

SECTION X. MARKETING THE PROGRAM

A. Marketing Plan Development (continued)

Before you define a marketing budget, it is important to consider the aforementioned points and clearly define the initiatives that are best suited to delivering your brand promise to the target audience. By understanding early on what the potential user is most likely to respond to, you prevent the organization from spending money on ineffective activities. Allocating the budget too early may result in hasty decisions that reflect organization values rather than target audience motivations. It is better to first understand where you can be most effective and to consider various methods for reaching the audience before you finalize a budget. Once you know what you need to do to reach your target audience, you can begin to mix complementary initiatives and tailor activities to a budget that is reasonable for your organization.

The plan can be created with considerations to current staffing models so that the highest level of service is maintained. For example, if your staff is concerned that marketing will bring more users than the service can handle, include, in your plan, smaller campaigns to narrowly targeted segments of your audience. As you develop the plan, know that continuous refinement is a necessary part of the process as you gain new insights.

When you have determined the initiatives you feel will enable the organization to reach its goals and achieve its objectives, it is time to tie those tactics to a budget. Prioritize your initiatives and cost them out with internal staff and/or creative agencies and vendors. Balance the benefits and drawbacks as best you can to reach a decision about which initiatives to implement. At this point, hard decisions are often made.

The final step in the creation of a marketing plan is to develop an implementation schedule that covers a measurable length of time. This may be tied directly to a budget period or to a campaign. The schedule will help you and your team map out tactics and plan resource needs.

B. Testing and Measuring

Marketing is often a trial-and-error process that requires testing and refinement. When developing a marketing plan for a new service, you may not have much information about the user from which to base decisions. Testing and measuring affords you a way to gain user insights you may not otherwise receive. For an established service, incorporating ways to test and measure ongoing marketing initiatives allows you to observe what is working and not working so that you can allocate resources effectively.

Whether your program is new or established, there are a number of considerations to keep in mind with regard to testing and measuring marketing initiatives:

- Phased approach – Can the initiative be tested in stages so that what you have learned from one phase can be used to enhance the next? (For example: an email announcing the launch of the program can be sent to a small number of participants with three kinds of offers. The next email might be sent to a larger group and include a number of variations of the one offer that generated the best response in the first round…and so forth). A phased approach is best used to refine an initiative until an optimized solution or result is achieved.
- Results – Determine the type of response you hope to receive. Are you trying to measure something that is quantifiable such as the number of live chat sessions that occur after your campaign launches or are you trying to measure results that are broader in nature, such as overall awareness six months down the road? Determining the type of response you wish to gather helps you design the initiative around this need.
- Criteria for analysis – Do you have in mind what success looks like? What benchmark will you use to analyze test results? Is there a threshold to achieve? Do the criteria map back to the goals and objectives you have set for the program?
- Roles – Who will be responsible for collecting and reporting results? With whom will the results be shared?
- Testing elements – Testing can take on many forms and can be used to isolate specific elements of a campaign. For example, you may wish to test different marketing messages, offers or "call to action" statements (defined in the following sub-section), days of the week, seasons, graphics/design, lists (lists can vary in quality as much as they vary in quantity) and functionalities, to understand the effects of individual elements. Many Web-based services also go through extensive usability testing to ensure online tools are intuitive and easy to use.

B. Testing and Measuring (continued)

- Measurement tools – What tools can you employ to help measure response? Do these need to be designed into the initiative? For example, some marketers create special URLs and include these as links in email campaigns in order track response rates for specific campaigns. Below we provide two popular online tracking methods:

1. Web server logs

The general success of the Web site can be measured with tools that analyze the "logs" of the Web server. Web logs provide records of:

- the pages visited
- the domains visitors are coming from (for example, an AOL user comes from the domain "aol.com")
- the duration the visitor spends on each page
- the domain which "referred" the visitor to the page (for example, if a user searched for "KCLS" on the search engine Google, then clicked on the resulting link, the referrer would be "google.com")
- browser versions and operating systems that visitors are using
- the time and date of visits

Analysis of web logs can help determine where users are leaving your Web site. For example, you may see that only half of the users that visit the VRS home page are actually starting a chat session. This may indicate that the users don't understand the service description or that they are visiting the page during a time when the service is not open.

Visitor and referral domain information may also help you determine where online marketing efforts should be spent. For example, if a large portion of visitor and referral domains are from Yahoo, you may decide to include that channel in your online marketing efforts (online marketing is further discussed in Section X.I.).

Web log analysis can also help determine the number of people who are coming directly to the VRS home page (either by clicking on email links or by utilizing a "favorites" setting on their Web browser). This type of information may be used to develop trend reports to determine staffing needs.

B. Testing and Measuring (continued)

2. Testing the results of electronic campaigns

The effectiveness of online banner advertising can be measured in terms of "click-through rates," or the percent of times the banner is clicked on versus the number of times the banner is displayed. Usually, click-through rates are automatically collected by the banner ad administration tool. (See more about banner advertising in Section X.E.)

An email campaign's effectiveness can also be measured by click-through. In this case, click-through rates refer to the number of people who click on a link in the email versus the number of people who received emails. Email marketing click-through rates can be determined by email marketing software packages, or if such a package is not being used, by setting up a special "landing page" for the email recipients and counting hits on that page. (See more about email advertising in Section X.E.)

Testing and measuring is a critical component for effective marketing. Aside from helping to gauge success, it can also be very successfully used to "test the waters" and provide some control over usage. For example, if a library has concerns that marketing efforts would "open the floodgates," overwhelm staff and debilitate the service, then testing small discrete groups using a few communication channels would provide some level of control.

SECTION X. MARKETING THE PROGRAM

C. Marketing Messages

The way in which a library talks about VRS greatly influences how the service is perceived. Creating marketing messages helps ensure that communications are always consistent and that the story, when told, is always the same. Marketing messages are not meant to be used as final advertising copy, but to serve as a tool to help convey your main benefits regardless of the medium. They can be used as guidelines for Web content, marketing materials and in staff communications – individually or in conjunction, to promote VRS. They may even be used as the basis for scripted messages in chat sessions. Think of marketing messages as scripted messages which can be used by staff members in a variety of ways to tell the story in a consistent manner. In the beginning, messages for VRS might have to be more educational in nature to explain the service to new users. Above all though, keep it simple and put yourself in the shoes of the audience. Would a new user who has never heard of the program understand the messages conveyed on your Web site, in the library newsletter or in a press release?

In creating marketing messages, consider these factors: messages should describe – in an interesting way – what the service is, how it works and how it is beneficial to the user. These messages should be meaningful to target audiences. The tone and language used should be age appropriate and the content compelling. If your audiences are different from one another, you will want to create marketing messages specific to each group.

SECTION X. MARKETING THE PROGRAM

C. Marketing Messages (continued)

Below are sample marketing messages for KCLS and UW audiences.

KCLS Targets	Marketing Messages
School children	• eAnswer lets you use your computer to "talk" to and get help from librarians. – *Explains service* • You can use eAnswer at the library or on any computer with Web access. – *Explains how the service works* • eAnswer is easy to use and can get you the info you need to complete your homework or report faster. – *Describes benefit* • eAnswer can help you find the answers you need faster than using just the Web! – *Describes how it's different* • At home or school, you can access the whole library through eAnswer. – *Describes benefit*
Adult patrons	• Through eAnswer, librarians are available online, in real time, to help your search for information. – *Explains service* • eAnswer is available through any computer with Internet access; no special software or plug-ins are needed. – *Explains how the service works* • eAnswer can help you find information on a variety of interests from history to current events. – *Describes benefit* • eAnswer gives you a wealth of information beyond what's available on the Internet. – *Describes how it's different* • We have over 15 specialized databases available online for your research. – *Describes how it's different* • The entire library system is available to you through eAnswer, on your home computer or at any branch location. – *Describes benefit*

SECTION X. MARKETING THE PROGRAM

C. Marketing Messages (continued)

KCLS Targets	Marketing Messages
Non-English speakers *NOTE: Ideally, marketing messages would be translated into the native language of the target audience. However, be aware that this might lead the user to believe that the service itself is available in the native language.*	• With eAnswer, a computer and an Internet connection, you can talk to someone from our library and get answers to ESL and other questions. – *Explains service* • Practice English and get ESL information by using eAnswer. Our online librarians can help you find what you need. – *Describes benefit* • Many free ESL resources are available to you through eAnswer. It's a convenient and easy way to get ESL information online. – *Describes how it's different*
The UW Target	**Marketing Messages**
Undergraduate students	• Q&A Live lets you chat live with librarians and get real time answers to library related questions through any Web-enabled PC. – *Explains service* • Get instantly connected to the reference sources you need online. Conduct research faster and more efficiently through Q&A Live! – *Describes benefit* • For those new to the UW Library, Q&A Live is a great way to become familiar with virtual reference resources, whether on or off-campus. – *Describes benefit* • Through Q&A Live, librarians can help you refine your search strategy for better results. – *Describes benefit* • Q&A Live can guide you to specialized databases and other reference tools not available on the Internet. – *Describes how it's different* • Let a librarian lead you through online databases and search results, right on your computer screen. – *Describes how it's different*

C. Marketing Messages (continued)

Marketing messages may be used in promotions, such as direct mail campaigns, to help tell the story. However, messages for promotional campaigns need to be action-oriented. Promotions are created with specific desired results in mind and therefore require specific considerations. In addition to telling the story, promotional messaging needs to include an offer or call to action. An "offer" or "call to action" is the incentive or direct contact information that is presented to the audience to increase response. It answers the "what's in it for me?" question. An example of a quintessential call to action is the Publishers Clearing House letter. Recipients are urged to immediately return a completed application (and subscribe to magazine subscriptions at substantial savings) for a chance to win millions. A well-developed call to action should include something compelling for the audience and the method for responding. The method for responding should be easy and simple for the user to complete. Also, particularly when there is an offer for a giveaway, a response deadline can be very compelling.

Like marketing messages, promotional messaging should be catered to the audience you are trying to reach. Further information about incentives and campaign creation are described in the following sections. Below are a few examples of promotional messages that include call to action statements:

1. **Mailing to school-aged patrons**
   Use eAnswer to ask us a library-related question from now through October 21st and we'll enter you to win tickets to Woodland Park Zoo's Pumpkin Prowl on October 25th. See 1,000 lit pumpkins on display at the zoo. eAnswer can even help answer questions about where pumpkins grow, what the weight of the largest pumpkin on record is and more. Just log onto the www.KCLS.org and click on eAnswer today!

2. **Contest for incoming freshmen sent via email:**
   Get online and send us your toughest, strangest, most obscure reference questions through Q&A Live. Our librarians will work hard to get the answer AND we'll pick a winner from all questions received by October 31st. The author of the grand stumper question will receive a $100 certificate to the University Bookstore. Visit us today! www.u.washington.edu/Q&ALive

SECTION X. MARKETING THE PROGRAM

D. Campaign Creation

A good campaign ties all of your marketing communications and associated initiatives together, and reinforces the brand promise. A campaign can provide a framework for each marketing avenue you choose to pursue. Most importantly, an effective campaign can put you in the mind of your target user – and keep you there.

So what is a campaign? We describe a "campaign" as a group of marketing initiatives that share a common theme or cohesive message, implemented and leveraged together to achieve a specific goal or objective within a specific amount of time. New products are often introduced to market with a launch campaign to raise awareness. Also common are campaigns designed to educate audiences, differentiate products and services, or to inform key audiences of changes, upgrades, and/or additional features and benefits.

To develop an effective campaign, you must first know who and how many people you want to reach, how frequently you want to communicate with them and which themes will work best for the type of audience you want to target. You may want to consider topics or issues that repeatedly come up when you talk with users, and use these to craft a theme that offers a clear solution or benefit. Themes might revolve around a problem that your service solves, a feeling it evokes or a season, event or other tangible timeline related to the service and/or the target audience.

Some questions to keep in mind while developing effective campaign themes include:

- Does the campaign communicate a benefit?
- Does the campaign communicate something new?
- Do the headlines, graphics and content all work to send a consistent message?
- Does the campaign require "mental work" to understand? (i.e., keep it simple!)
- Is the campaign extendable? (i.e., if it works well in a brochure, can it also work as an advertisement, an event or in an email newsletter? If PR is important, does it offer a credible story?)
- Is the campaign different from your competitors' campaigns? (Search engines and other resources may be competing for your user's mindshare. Does your campaign stand out among the noise?)

SECTION X. MARKETING THE PROGRAM

D. Campaign Creation (continued)

Here is a sample campaign idea for KCLS (targeted at school aged children): Create a campaign around an event such as a new exhibit at the local zoo, museum or science center. Find a local institution to partner with and create a theme around a specific subject. By identifying a campaign like this in advance, your internal staff will have plenty of lead-time to increase their knowledge on the topic and become online subject matter experts! For example, a campaign could be built around the new African Wild Dogs exhibit at Woodland Park Zoo. The campaign could promote eAnswer as the place to go to find more info about wild dogs and include:

- Leaflets or flyers with eAnswer info for distribution, by the zoo, to young visitors.
- Mailings by the library to area schools (using the same flyers/leaflets).
- A feature in the KCLS newsletter.
- Local advertising on billboards, in newspapers, etc.
- Stickers/bookmarks with wild dog imagery for distribution at branch locations to school aged children.
- Posters to be created in branch "study zones."
- A joint press release promoting the new zoo exhibit and eAnswer service.

A collaboration like this could generate a lot of interest and be cost effective (costs may be shared between KCLS and the zoo). It can increase awareness for both institutions and be an exciting way for kids to get exposed to VRS.

SECTION X. MARKETING THE PROGRAM

E. "On-Site" Promotion

An effective way to employ marketing resources is through the use of on-site promotions. "On-site" is defined as any property that the library controls and includes virtual resources such as Web sites and physical locations such as library branches. On-site promotions are effective because:

- Users are already "on-site" and have a predisposition to using library services.
- It does not require buying ad space from a third party (i.e. billboard, newspaper, etc.).

Here are some considerations for "on-site" promotions, both online and in the branch.

Virtual – Promotion on the parent library's Web site

Regardless of whether the library decides to proceed with the VRS as a stand-alone brand or a sub-brand of the library's brand, the parent library's Web site can provide virtually free marketing opportunities, such as:

1. **Banners**
   If the library organization's Web site is designed to include "banners" (like commercial site banner advertising), a banner featuring the service could be designed and rotated in banner slots throughout the site.

2. **Home page feature**
   If the library organization's home page is designed to include rotating "features" or areas of highlighted content, the VRS could be highlighted on the home page. Featured content is most effective when it changes periodically, so that visitors to the home page feel that the content is fresh. This is particularly important if the featured content is labeled "new."

   Banners and home page features for the service will be most effective if they contain a call to action, such as "Try it out!" or "Start now!"

E. "On-Site" Promotion (continued)

3. Opportunities to "interlink" to the service

"Interlinking" refers to linking within a Web site which is independent of structural navigation. Interlinks help users by providing contextual references to related pages, which may be in a distinct site section (see examples below). In addition to prominent "featuring," strategically placed interlinks could be very effective at driving traffic toward the VRS. Two strategies for interlinking include:

- Directing users from segmented pathways – If the library organization's Web site provides different sections for different user groups, such as "For Kids" or "For Undergraduates," these sections could contain interlinks to the service with appropriate messaging. For example, in the "For Kids" section, the message might be "Need homework help? Ask a librarian."

- Directing users from relevant tasks – With this strategy, the library may develop interlinks from areas of the site where users are performing tasks related to virtual reference. For example, on the online catalog page, an interlink might read "Having trouble finding the right reference book? Ask a librarian." Or from a section of the site containing online databases, the interlink might read "Need a guided tour of a database? A librarian is waiting to help."

4. Internal search engines

Some entities provide users with the ability to search for specific content on their Web sites. When this is available, typically a search box is provided for the user to type in a word or term which is then used to comb the site. Any relevant finds or "hits" are then presented to the user for review. Using internal search engines is an easy and effective way to promote VRS to users.

SECTION X. MARKETING THE PROGRAM

E. "On-Site" Promotion (continued)

4. Internal search engines (continued)

If the library organization's Web site has a search function, consider the following:

- Which search terms might trigger the virtual reference service as a result?
- With which other pages should the service appear?

Answering these questions will help clarify the methods for categorizing the service within the Web site's search indexing system. An indexing system provides the structure for how a word or term is "searched." Many Web sites, like search engines, use metadata to help flag the data or page that is linked to a search word/term. This metadata can then be used to create the links for users to easily search and find information related to the word(s) they entered into the search box. Indexing systems will be different depending upon the Web server software, so consult the Web site administrator when optimizing pages for internal search engines.

5. Default in-library terminal screens

There are several opportunities for marketing the VRS on computers in library branches. If in-library computer terminals default to a particular screen on restart, or after a period of inactivity, that screen could feature the VRS. Depending on the configuration of the library, it might make sense to have different "default" screens for computer terminals that are housed in specialized locations within the library or that are used for specialized functions. For example, computers near the reference desk might feature the service on their default screens, as might computers which are reserved for online database use.

In addition to the default terminal screen, if libraries use a screen-saver, the screen-saver could be used to help build awareness about VRS.

SECTION X. MARKETING THE PROGRAM

E. "On-Site" Promotion (continued)

Physical – Promotion of the service at branch locations

1. **Use staff to get the word out**
   Librarians and staff interact with many patrons on a daily basis. There are many opportunities to promote the service during such encounters. For example, a patron who goes to the information desk for assistance may be given a quick overview of the virtual reference service and its uses. Staff members may mention the service and offer handouts to patrons as they check out books or answer other questions.

2. **Look to other existing interactions**
   Does the library send out monthly newsletters? Are upcoming events posted for patrons to review? Are late notices mailed via post or email? Each of these "touchpoints" may be leveraged to promote VRS. A review of the library's current interactions with patrons – including a group brainstorming session may be useful for identifying touchpoints and helping to generate ideas for implementation.

3. **On-site demonstrations and events**
   Live demonstrations are a highly effective way to promote VRS both in a group and individual setting. Hands-on demonstrations can take place at a library or another location such as a local grade school, university campus event or a public venue/event (i.e., Seattle Art Museum, Pacific Science Center, Bumbershoot, EMP, etc). To increase the chances for success, try to identify when your target audience is most likely to be interested in or have a need for reference information. At the beginning of the school year? In conjunction with a local event such as Seafair? During the commemoration of a historical event such as D-Day? Once you have identified some good candidates, create a demonstration or event that is tailored to the audience.

F. Public Relations

Your audience demographics and psychographics play a key role in determining the need for public relations. Do library patrons and/or potential users read the newspaper, listen to the radio or talk with community leaders or other Web savvy friends about online resources? Could they be influenced to try a new service if they hear about it from a third party source? If you have determined that your audience can be reached via on- and offline news and entertainment media, investing in public relations is one of the most cost efficient ways to maximize dollars. For every dollar spent on public relations, it is estimated that advertising costs five to seven times as much. Plus, publicity appears as "news," which means it is more credible, and therefore more meaningful, than advertising. News carries with it the implicit third-party endorsement of the news medium that reports it. In other words, your target audience perceives the information about your library to be more objective and positive when it is endorsed by a credible third party source.

As users search for better, more efficient ways to find information online, they look to opinion leaders to recommend or validate Web sites and services. Opinion leaders are often industry analysts, editors, Web savvy friends, members of professional associations and other experts. Libraries, which may not yet carry an image of technology leadership, stand to increase response to their virtual services if they have opinion leaders on their side. The way to reach these opinion leaders is via a well-planned and executed PR program.

The key to a successful PR program is relationships. Do not be dismayed to find that it will take time to build rapport with editors and prominent figures in your community. The efforts are well worth the time and energy. Start by identifying the sources to which your target audience turns. Do they read the *Seattle Weekly* or *The Seattle Times*? Daily or just on the weekends? Do they listen to the radio via the Internet? NPR or the local rock station? Do they watch their local news station? In the morning or evening? Do they surf the MSNBC site regularly or hang out at seattleinsider.com? This information will help you to create a list of key editors or reporters at these top tier targets.

There are some caveats to public relations. You must be sure that an editor's experience on your site will be a positive one. If you are working out glitches or other trouble spots, postpone PR messages that invite this key audience to visit your site and try your service. Once you have garnered attention, the last thing you want to do is frustrate or fail to impress your media contact. It is important to understand your features and to be clear about your limitations. This is a group that needs to build trust in you before they can help you build trust with your target audience.

F. Public Relations (continued)

There are three ways to pursue PR opportunities which require a dedicated resource and a concentrated effort. First, you can devote an internal resource to the effort. This person may be responsible for creating a public relations plan, identifying key opinion leaders, writing stories, press releases or other communications and building editorial and community relationships. Perhaps most critical is the ability and passion to maintain awareness of what interests editors, analysts and community leaders so that all communications with this audience are relevant and productive. Secondly, you can share this responsibility with a public relations professional. There are many boutique or freelance resources available today in most communities that would be happy to take over those parts of the job that cannot be handled by internal resources. These professionals often operate without the overhead demanded by larger organizations and are therefore often more aggressive at pursuing press opportunities. Finally, you can hire a public relations firm, generally for a set payment each month, to pursue these opportunities for you. The advantage is that these firms often have a significant amount of resources from which to draw upon, including people and research.

Some guidelines to keep in mind:

- Many publications have long lead times. If it benefits the library and/or its VRS to have a story appear in a particular season or around a specific event, be sure to take into account that writers often must submit stories months in advance of publication. The lead-time varies for each news source. Press that appears monthly will likely require a much longer lead-time than a weekly or Internet news source. Many publications like magazines and business journals have editorial calendars which show topics and issues the publication will focus on in the coming year. These calendars provide a good way to plan for pitch ideas and advertising buys.
- Pitching the same story to everyone on your list may not be productive. Once you have built trusting relationships with your opinion leaders, you can determine if it is advantageous to offer exclusive information to one source. Also, most lists contain writers or leaders with a wide variety of interests. The “one size fits all” approach may not work to your advantage. It is best, whenever possible, to tailor your information to the publication or organization in which you would like it to be shared.

F. Public Relations (continued)

- Your pitches need to be interesting and newsworthy! Editors/reporters are often bombarded with thousands of story pitches on a daily basis. Make yours stand out. Use a strong headline. Before you submit a story idea, ensure it fits the focus area of the editor/reporter and will be interesting to the publication's readers.
- Verify that your claims are true before you make them public. The goal is to become a trustworthy source of information for your editorial and community contacts.
- If you are inviting your contacts to test your service, be sure that it is compatible with their operating environments and that you have ironed out any obvious bugs or glitches. You will want the experience to be as smooth and positive as possible.
- When you do receive press, community or other exposure, be sure to document the story and its source. You can then use positive excerpts in your communications with your target audience(s). Some examples:

    - Place a quote from an editor at the bottom of an email to new users.
    - Reference an article in response to a query about VRS.
    - Have reprints made of a favorable article and circulate them among internal staff to praise those who contribute to the service's success or simply to build awareness.
    - Use excerpts from key articles in newsletters and on the Web site to draw users.
    - Use positive reviews as an endorsement on advertising, direct mail or other communications.

SECTION X. MARKETING THE PROGRAM

G. Marketing Materials and Tools

Marketing materials and other tools are the various collateral and tangible items you may need in order to promote the program. They will most likely be used in conjunction with other marketing efforts as outlined in this section and include items such as brochures, leaflets, flyers, posters, direct mail pieces, newsletters and giveaways.

The key to deciding which tools to create is to select the ones that will best carry your message and have maximum impact. When selecting marketing tools, consider all the ways in which a potential user will come into contact with your service. The materials you choose should support a consistent, branded message that acknowledges the user's desire for a benefit and provide useful information related to the service. Identifying user actions by mapping back to demographics, psychographics and your own experiences will help you and your team to identify the tools to which your target audience is most likely to respond. Here are a few to consider:

- Brochures/leaflets – An informational message about the service in the form of a brochure or leaflet may be used for a variety of purposes. Brochures and leaflets can be handed out at community events, included in a patron mailing, distributed at local schools, used in conjunction with a campaign and in many other ways. Like other printed materials you may create, consider including information such as a service description, benefits, your contact information, hours of operation and URLs. The brochure or leaflet should have visual appeal and look professional.
- Flyers and posters – These relatively inexpensive materials can be used in a variety of settings, such as schools, community centers, parks, local businesses, and within your own library system. As an extension of an ad or billboard campaign, flyers and posters can be used to raise awareness, and to direct interested parties to your site for more information. Note that flyers tend to be removed within several days around high school and college campuses. Notice board space may very limited, so make your posters and flyers a reasonable size. University notice boards can be very crowded and material can become lost, but a strong design and layout can help ensure that your message is visible.

G. Marketing Materials and Tools (continued)

- Direct mail/postcards – Direct mail is a very useful tool to reach existing patrons and new users. Direct mail can take the form of a simple letter, an invitation, a postcard or even a special promotion such as a folded poster or other giveaway. Keep in mind, however, that direct mail is only as good as your mailing list. If your mailing list has been tested and proven, direct mail may go a long way toward raising awareness for your virtual reference service. However, because direct mail requires testing, constant fine-tuning, a strong mailing list and frequency (similar to advertising, direct mail must be sent regularly to make an impact), direct mail can be a very expensive marketing tool.
- Newsletters – Libraries contain tremendous resources, and have an endless supply of information. Why not share this with a digital audience? Creating a unique, informative newsletter may help your service to be viewed as a gateway to information and not a "flash in the pan" Internet offering. A newsletter can serve as a monthly or quarterly reminder to use the service, and an update of new features and/or resource opportunities. If the library already has an existing newsletter, consider how the virtual reference service can be featured.
- Giveaways – Who doesn't like to get something free? An item or group of materials that tastefully represent your brand may help to grab your user's attention, putting your service on their radar as a starting point for brand awareness and continued communications. Giveaways are often appropriate for distribution at conferences and events, and as prizes for contests, rewards for submitting information and/or awareness builders handed out to key groups or opinion leaders. A kit designed for teachers, for example, may be sent to those who respond to a targeted email, direct mail or advertising campaign. This kit might include: a guide to online reference, a business card for a "personal" librarian, a poster to hang in the classroom and an activity kit for kids. A "welcome kit" for college freshman is another example, and could contain a guide to online resources, a business card for a "personal" librarian, testimonials from past freshman and a mousepad with the virtual reference service URL. (Provided in sub-section K is a list of ideas for giveaways to use as user incentives.)

When you develop marketing materials for your service, be careful about cutting too many corners. Rather than create these materials with a word processing program, you may want to enlist the help of a graphic artist to ensure a professional appearance and a consistency with other branded elements within your marketing program. Remember – every touchpoint with your target audience counts.

SECTION X. MARKETING THE PROGRAM

H. Advertising

Many people think of advertising when they think of marketing, and at first glance, it seems like an obvious choice for communicating your message. Print advertising (i.e. in magazines, on buses) can play a significant role in raising awareness of your organization and service, and is an excellent medium for creating and presenting exactly what you feel represents your brand (as opposed to PR, in which you rarely get to control what the communication looks like or says.) When focused on local markets and well-targeted media, advertising can be an effective way to gain exposure. For example, billboards are a great form of advertising for reaching specific communities because they offer repetition (which is necessary for advertising to sink in). A well placed billboard along a commuter path or other busy area can help you reach a large segment of your target audience. Billboards can also be a good initiative for a seasonal campaign, such as back-to-school, or a campaign that draws attention to current affairs (for resources on politics, science, or history).

However, advertising can be a very expensive medium, and if used without a carefully structured media plan, it can often be too broad in both messaging and reach. There are generally more associated costs (i.e. buying ad space, creating the design, producing the piece) than with other marketing or public relations efforts. Also, advertising must run consistently over time to raise awareness. Thus, if you have a limited marketing budget, and you have to run an advertisement a minimum of nine times to make an impact, you may want to reassess the appropriateness of this marketing vehicle.

Here are some considerations for your decision to use or not use advertising in your marketing plan:

- **Commitment:** People are bombarded by advertising. In our country, we see something like 30,000 ads per year! Research shows for every three advertisements seen, your prospective target will ignore two. In general, it takes nine exposures to an ad to impact the average viewer. All this to say that if you can not make a long-term commitment to advertising, we suggest not making the investment. If you decide to run advertising, you should plan to run the same ad in the same media often enough to reach your target audience many times.

H. Advertising (continued)

- **Strategy:** Before you design an ad, make sure that the creative team has completed and fully understands a "creative brief" or other strategic summary. You should never view graphics and/or messaging before the ad's objectives have been determined. (See sample creative brief at the end of this sub-section).
- **Media Selection:** Choose your media carefully. If you've identified newspapers (the city paper, the business paper, the community paper, etc), radio or magazines, make sure they match up to your knowledge of audience behavior and preferences.
- **Costs:** Consider size versus cost. For example, you do not have to have the largest ad to make an impact. And while you certainly do not want to be overlooked, running a half page ad frequently can have the same impact as a full-page, run less consistently… for half as much. Also, generally speaking, a great ad requires the talents of a graphic designer and a professional copywriter. Your ad should be consistent with your brand, attractive and compelling for your target audience. This carries associated costs that must be negotiated and included in your marketing budget.
- **Stamina:** Because your ad will run for a while, you are likely to grow tired of it. After you grow tired of it, friends, family and co-workers may also get tired of the ad and begin to lobby for a change. Ignore this! While you are growing weary of the same graphics and message displayed over and over again, your target audience is likely just beginning to notice you! This is not to say that if your ad has been in the marketplace for a long period of time and is not drawing a response, you should not change it. Simply, give it time. It takes time to make an impact and to build confidence among potential users.
- **Other uses:** It may be helpful to determine whether or not your ad, in the form of a reprint or circular, could be used for other promotional activities. An effective ad may make a good handout at tradeshows, conference and events, mailing pieces or even posters and signs. Perhaps the ad can even be modified to be used as a fun graphic in email communications or on your Web site.

SECTION X. MARKETING THE PROGRAM

H. Advertising (continued)

Other hints:

- Make sure you have a strong headline to grab your audience's attention. Even if your copy is brilliant, a bad headline can turn your user away. Try speaking directly to one user rather than a large group. A personal message may prove more effective than something that tries to accommodate everyone.
- Include testimonials when it makes sense. This can make your ad more compelling.
- Always include contact information.
- Magazines have different rules of thumb than newspapers. Be sure to review your media to see which ads really stand out. In general, two page ads ("spreads") are 25% more effective than one-page ads. A half-page ad is two thirds as effective as a full-page ad. A full-page color ad attracts 40% more viewers than a black and white one.
- Keep your paragraphs short for easy reading.
- Make sure your service is obvious. You may only have a moment to attract and hold the attention of your potential user, so make sure that at a glance, your service is clear.

Sample creative brief elements:

1. Positioning statement: To (target audience), (your service) offers (benefit). (The above statement is used by internal staff to summarize your market position – who you are offering the product/service to, what the offering is and what the benefits are. We have previously gestured to this in service descriptions.)
2. Your service description: (A clear, concise description)
3. Target audience: (Primary)
4. Competition: (Any services that may be vying for mindshare, traditional or online. Don't make the mistake of saying you have no competitors! They may not be obvious, but it is likely that your audience has choices in the area of research and search engines.)
5. Top service benefits: (The greatest benefit to the user)
6. Reader reaction: (If the reader gets one thing from the ad, what should it be?)
7. Call to action: (What should the reader do after viewing the ad?)
8. Point of differentiation: (How is your service different from competitive offerings?)

SECTION X. MARKETING THE PROGRAM

I. Online Marketing

Electronic marketing or online marketing can be a cost-effective way to build awareness. It is a great way to reach your audience in the very medium to which you are hoping to lure them. The use of a digital medium does not require printing costs and can be used effectively to reach a large number of potential users. Three types of electronic marketing may be considered: email marketing, banner advertising and search engine placements.

1. Email marketing

If the library has collected email addresses of patrons, with the understanding that the library may send unsolicited email, an email marketing campaign should be considered. It is important that patrons have "opted-in" to receive email from the library, otherwise this email will be considered spam and ignored. Email campaigns should include clickable links (include the "http://" as part of the URL to ensure that most email programs will support them) and should always include instructions and a link for unsubscribing from the email list. A promotion for the VRS could be included with a routine email, such as an overdue book notice or could be sent on its own. Including the announcement with a routine email reduces the overall amount of email the recipient is getting from the library and will be less likely to dilute the overall importance of library emails, while separate email messages are more likely to focus the recipient's attention on the promotion and are easier to forward (see section J, Viral Marketing below). The library should also decide if it will support plain text or HTML email formats or both. Plain text email is supported by a broader range of email programs than HTML, but HTML email can show images, and different fonts and colors.

2. Banner advertising

Banner advertising refers to the online ads you see on most portals like msn.com and aol.com. They come in many sizes and can incorporate special effects such as flashing or blinking. If a user is interested in the offer, s/he can click on the ad and be taken to the respective Web site. Buying space to place banner ads on other Web sites is generally not very effective for driving new users to your site (currently click-through rates for traditional banner advertising are around 0.25%), but it can be very effective at building general awareness. If you decide to use this medium to reach a local audience, consider placing banner ads on local entertainment or restaurant guides (i.e. www.seattleinsider.com) or on local newspaper sites. Instead of buying space on another site, a library may want to draw attention to its VRS by placing banners with well-targeted messages on its own home page or in an area where users routinely look for help.

SECTION X. MARKETING THE PROGRAM

I. Online Marketing (continued)

3. External search engine placement

There are many commercial search sites available to internet users, such as Google, Yahoo, MSN, Lycos and Ask Jeeves. Technically, search sites fall into two categories, directories and search engines. Directories, such as Yahoo, are search sites which categorize Web sites manually, and search engines, such as Google, use automated tools. The best way to place the VRS Web site on directories is to manually enter the site's information on the directory Web site. Search engines use a variety of methods to determine the placement of Web sites. These include:

- Meta tag information included in the Web page. Most search engines review the keyword and description attributes of the meta tag (metadata was previously described in Section X.E.4.)
- Site popularity
- Web site copy
- Web page title (which appears in the "title" tag in the page)
- Number of links from other Web sites

In addition, some search engines offer pay for placement services in which, for a fee, the Web site can attain a more prominent positioning. Google, for example runs a program called "AdWords," where customers can purchase search terms and a small advertisement for the customer's site will appear near the top right of the page when a user searches on the term.

Issues to consider for search engine placement:

- What are appropriate keywords?
- Do you want to focus your page for a local audience? (By including "King County" as a keyword, for example.)
- With which other Web pages do you want yours to appear in search results? Grouping your site as a choice among others can help build awareness.

If search engines are a major part of the marketing plan, a professional search engine optimization firm can be helpful for increasing placement (i.e. making sure your site is ranked high on the page listing results).

SECTION X. MARKETING THE PROGRAM

J. Viral Marketing

"Viral marketing" refers to word-of-mouth marketing that proliferates via the Internet, especially by email. It is a popular method used by marketers to generate interest, particularly for online offerings because a digital medium is easy to share with friends and a small effort can grow exponentially with significant results. Tell a friend and s/he will tell two and so on and so on. Viral marketing is nearly impossible to control, but it can be encouraged by:

- Using email to market the VRS, where the service is the only subject of the email – this type of email is easy for recipients to forward to their contacts.
- Including a function on the VRS Web site to "tell a friend" about the service.
- Considering incentives for referrals.

Do not discount the impact of viral and other word-of-mouth marketing. You cannot buy glowing recommendations, but you can certainly work to improve the chances that your service receives them. Your users know what works and what does not, what they like about your service and what needs improvement. Listen to them and respond positively to their feedback. Find ways to implement their ideas. Create programs to reward users for showing a friend how to use the service. Remember birthdays or send out greetings to celebrate library anniversaries. There are many ways to stay in touch with your target audience and to foster a good relationship that is beneficial to both parties.

K. User Incentives

Many marketers employ incentives as a reward to users for trying a new product/service or as a way to increase interest in a promotion. (We previously discussed the need for a call to action in Section X.C.) User incentives related to the specific types of calls to action that can be used and include giveaways, prizes, coupons and even cash. Because incentives involve a direct cost, careful thought should be given to determine the need for incentives and how to best use them to generate the desired results. The following are considerations related to the development of user incentives:

- Determine what specific action you desire – for users to click on a link, complete a survey, refer the service to a friend?
- Ask whether an incentive might be effective for this purpose.
- Determine your overall budget.
- Develop ideas that fit your budget and determine how to best leverage this resource against the number of users you want to reach.
- Keep the target audience in mind as you determine incentive levels. For example, perhaps $100 is well spent on making a number of stickers and bookmarks that can be given to school age children. But that same $100 may be better spent on a dinner certificate that can be raffled off for adult patrons.

Here are some sample incentive ideas:

- Customized bookmarks, post-its and paperclips (that may be used to flag a subject that the user wants to get more information about through VRS)
- Stickers
- Magnets
- Mousepads
- Notepads, pens
- Keychains
- T-shirts
- Raffle for concert/speaking/sporting event tickets or a trip/dinner at a restaurant
- Coupon for free coffee
- Coupon discounting lunch at a popular spot (Subway, etc.)
- Donation to a local school or charitable organization
- Gift certificates/cards to popular retailers (Target, Old Navy, REI, etc.)
- Discount at an online retailer (i.e. Amazon.com)
- An invitation to a special library event (i.e. enter your class to win a sleepover at a branch location)

SECTION X. MARKETING THE PROGRAM

L. Community Outreach and Events

Community Outreach

Libraries are recognized as an important part of any community. Public outreach at a local level therefore, can be an important and effective part of marketing VRS. Look for opportunities to promote the program, the library and improve community relations by marketing the service through local entities. Many neighborhoods have local schools, parks, historical societies, museums, community/senior centers, small business associations and civic leaders. Determine which of these groups might provide you with an opportunity to reach your intended target audience. Work with them and discuss how VRS might be of value.

For example:

- Would area schools benefit from a hands-on demo?
- Would special interest groups like gardening clubs or campus groups/clubs be interested?
- What community events can the library participate in? Founders Day, science fair, spelling bee, arts & craft fairs, etc.
- Does the library already have an outreach program that can be used to promote VRS?

This type of an initiative does not require a significant investment, and even initial discussions with community leaders can generate a fair amount of word-of-mouth awareness and goodwill.

SECTION X. MARKETING THE PROGRAM

L. Community Outreach and Events

Tradeshows and events

At the local, regional, state and national level, chances are there are hundreds of trade shows and/or events in which you can participate. These venues are ideal for making personal contacts and creating long term relationships that offer value for years to come. Participants often receive invaluable access to mailing lists and special seminars. In addition, tradeshows offer a great venue for news and announcements. The following are some guidelines for participation:

- Research shows or events that are relevant to your audience and include, in your marketing plan, those that have the greatest potential. In many cases, participation must be secured well in advance.
- Research speaking engagements at key tradeshows or events. Speaking engagements offer the lowest cost investment for you and are highly credible when well attended. You will significantly increase the likelihood of attendance if your speech topic is well positioned and advertised in event collateral, flyers, direct mail, etc.
- Plan your pre- and post-communications (i.e. take advantage of the opportunity to communicate with your target audience)! Event planners often offer guest lists to which you can mail or email an announcement of your participation in the show, and an incentive to come by and learn more about your service. You may also be able to encourage potential users from your own database to attend the event by offering a special demonstration, tutorial or contest. Likewise, communications should be sent to the audience that visited you during the event immediately following its close. This allows you to answer questions, provide additional information and to encourage a site visit.

SECTION X. MARKETING THE PROGRAM

L. Community Outreach and Events (continued)

Tradeshows and events (continued)

- Make sure your presence represents your brand. In other words, do not just show up at a table and smile. While your smile may be brilliant, having a service demonstration with an online librarian is the best way to “sell” your service. Consider also having a branded presence, including signage, literature and other materials that clearly communicate your features and benefits. When possible, highlight how the service can provide information related to the event or show.
- Be memorable. Tradeshows, conferences and other events are often crowded and filled with organizations vying for your attention. Having a theme, an attractive booth or a compelling giveaway can make or break an event. Some ideas to consider: Have visitors fill out an information card and be entered to win a T-shirt, a gift certificate to a book store or a donation made in their name to a local school. Create an entertaining display depicting “Then and Now,” a historical look at librarian/research services. Attract visitors by holding a quiz every hour, requiring participants to look up the answer with an online librarian. (This might require several demo stations.) Hand out mousepads, pens, bookmarks, keychains or notebooks printed with the VRS URL and a compelling design that complements your brand.

SECTION XI. METRICS FOR SUCCESS

A. User Feedback

There are many ways to obtain user feedback. User feedback should be gathered on a regular basis throughout the life of the program to ensure the program stays fresh and engaging for the target audience(s). One way to keep in touch might be to survey or interview regular users for comments about why they find your service important and/or relevant. The survey might be sent in the mail with a letter from a public figure, like a recognizable county official or even a celebrity or the survey might be administered online. An option to participate in an online survey could be presented at the end of the VRS. Alternatively, the invitation to participate in the survey could be included in the email session transcripts sent to users. Like other initiatives, you may need to use incentives (see Section X.K.) to encourage participation if you find your response rates are low.

As you become familiar with your repeat users, you may want to talk with them to gather more detailed feedback and to ask them for ideas and suggestions about how you can share your service with new prospects who are just like them. These user comments are invaluable for creating or enhancing your key messages and your literature about VRS. Just as valuable, these interviews lead to statements that can be used as testimonials (with permission, of course) and in future communications with your target audience.

A key question for all users is “How did you hear about this service?” Simply making this a part of every chat session (perhaps with the preface “Have you used our service before?” to keep from annoying repeat users) could prove to be an invaluable information source. It will certainly help you and your team to understand which of your programs is most effective, be it PR, advertising, word of mouth, etc.

SECTION XI. METRICS FOR SUCCESS

A. User Feedback (continued)

Sample Survey

Target: Library visitors with online access

Opening: To answer research and other questions, the King County Library System offers online access to librarians via live chat. So that we can provide the right level of service to library patrons, we'd appreciate it if you would take a moment to answer these questions. Thank you!

Questions:
How many people live in your home or apartment?
What are their ages?
How many of these have a library card?
How often do members of your household visit the library?
What is the primary purpose of these visits?
  Research
  To check out a book for leisure reading
  To read periodicals and newspapers
  To attend an activity or event
  To educate/entertain a child
  Other ____
Have members of your household visited the King County Library online?
If so, what was the purpose?
Was the experience...
  Poor
  Fair
  Good
  Great
If less than great, why?
What is the main benefit of visiting the library online?
Have members of your household used the live chat feature at the library Web site?
If so, how was the experience?

SECTION XI. METRICS FOR SUCCESS

A. User Feedback (continued)

Sample Survey (continued)

Would you use the live chat feature again? Why or why not?
Would you recommend the live chat feature to a friend or colleague?
What newspapers do you read?
What radio stations do you listen to?
Do you ride the bus to work?
What type of work do you do?
Do you have any other comments or advice?

Closing: We're grateful for your time. Thank you for talking with us!

In addition to administering surveys, a simple way to gather user feedback is to provide an email address for comments. This email address may be provided at the end of a chat session or when the transcript is emailed to the user.

Finally, a tried and true method for collecting feedback is to invite a group of users to beta test the VRS. "Beta tests" generally occur before a service or product is launched to the public. These beta users may be very willing to give their opinions in return for getting a sneak peek of the library's future.

B. Metrics Against Goals and Objectives

After completing the hard work of promoting your program, you may have a lot of great insights, testing results, tracking reports, etc. You have used these to refine individual marketing initiatives, but what else?

From time to time, it is important to step back and look at metrics against the goals and objectives outlined in your initial strategy. You may be able to more closely correlate some metrics than others. Most likely, it will be easier to look at results against objectives. Objectives have clear quantifiable numbers. Can you look at the results from different initiatives and come up with an aggregate figure? If you cannot, are you able to look at individual initiatives and determine how these have contributed to reaching your outlined objective?

Measuring marketing results against goals may prove more difficult. There are no hard, fast numbers to compare. It is a more subjective process. However, there are a few ways to help with the analysis. If you are unsure about whether the program is meeting the goals you have outlined, look to other related indicators such as general library awareness, patron satisfaction and usage of library resources. You may wish to ask the following questions in these areas:

- General library awareness – Does the library have better awareness? Are there more patrons and card members?
- Patron satisfaction – Are you noticing increased patron satisfaction with the library? Can parts of this be attributed to the VRS?
- Usage of library resources – Have you observed a general increase in the use of library resources overall? Can you attribute parts of this to VRS?

SECTION XII. REFINING THE PROGRAM

A. Sharing Successes and Lessons Learned

The team you have enlisted will be quite busy with the day to day tasks and duties associated with running the service. In the beginning, you may not have a lot of experiences to share. As the program grows though, consider ways to share success stories and other lessons learned.

- Use regularly scheduled meetings as a time where staff can tell others about an interesting question raised, how they were able to help and any other new discoveries. This can be a source of pride for staff members and create further enthusiasm for the program.
- Encourage inter-branch communications through larger gatherings and other liaisons.
- Success stories can be documented online or in print for staff review. Be careful that this does not become the primary channel for sharing information as in-person meetings are generally more effective for teambuilding.
- Success stories can be further shared with other library staff members who are not involved with the service as well as with patrons of the library.
- Identify institutions that have similar programs in place as another avenue for sharing information.

Staff members who are involved in the program want to sharpen their skills. Sharing successes and lessons learned on a regular basis helps keep momentum and enthusiasm high. It is also a way to get staff feedback to help refine program initiatives.

SECTION XII. REFINING THE PROGRAM

B. Benchmarks and Best Practices

Most libraries will need to go through a few marketing initiatives before they are able to get a feel for what works in their institution. We have previously discussed, in other sections of this document, the importance of testing, monitoring and refining the program. Creating and documenting benchmarks and best practices allows your team to apply to future efforts the processes and lessons learned which have the best chances for success. Look to the following considerations when creating benchmarks and best practices:

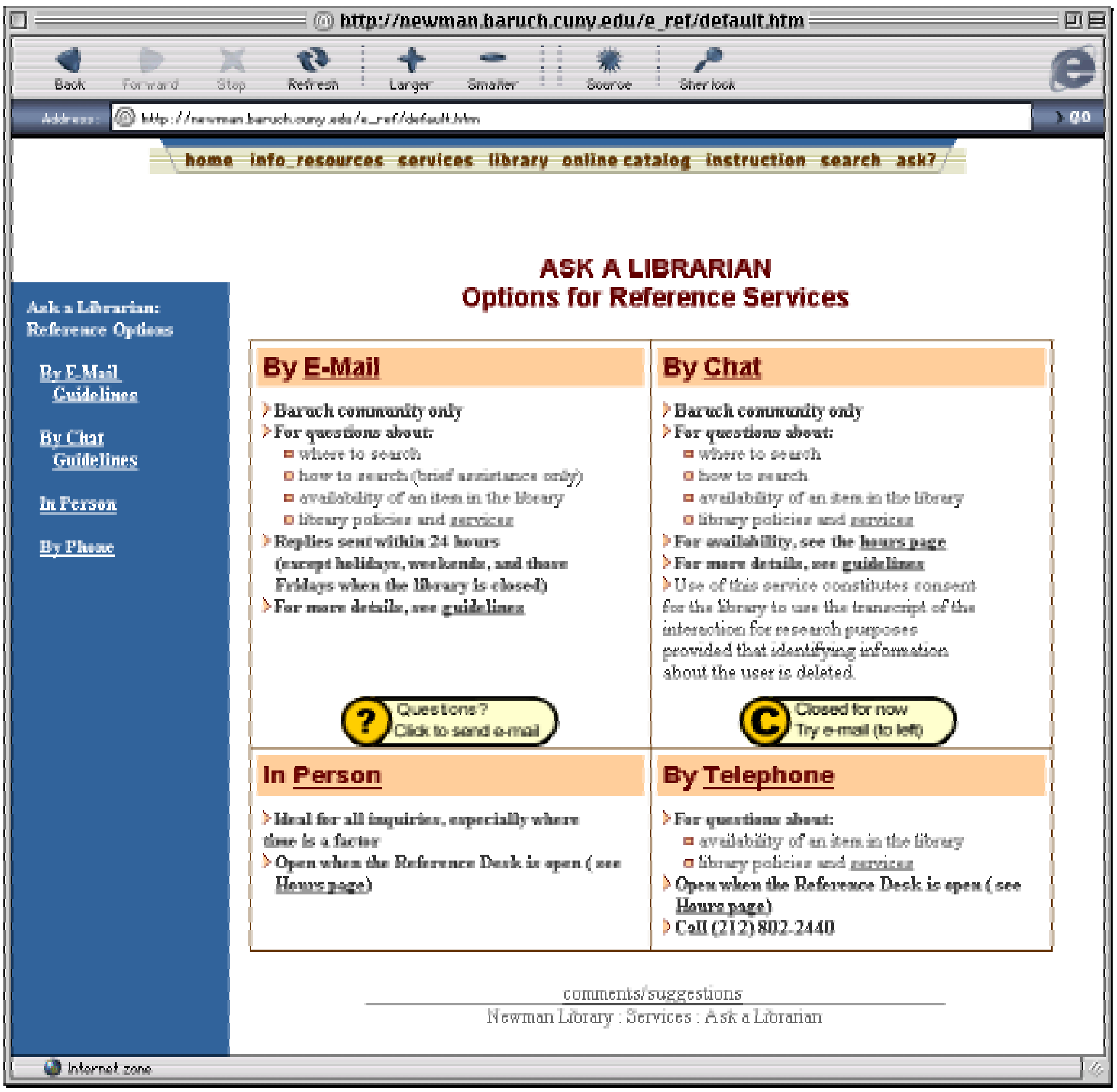
- Document them in a manner that is easy to update and use.
- Provide a subject description that is easy to reference.
- Include dates and contact names for each entry.
- Ensure benchmarks and best practices are updated, otherwise they are not very useful.

As the program grows and future initiatives are planned, refer back to these benchmarks/best practices and other lessons learned.

While many may think a brand springs into life from a single inspiration, in actuality, it takes hard work, focus and commitment. We believe VRS has the potential to greatly improve the use of reference librarians and online resources in an Internet age and we are eager to see your marketing program flourish. We hope these guidelines help you successfully market your services!

APPENDIX

APPENDIX 1


http://newman.baruch.cuny.edu/e_ref/default.htm
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ASK A LIBRARIAN
Options for Reference Services
Ask a Librarian: Reference Options
By E-Mail Guidelines
By Chat Guidelines
In Person
By Phone
By E-Mail
Baruch community only
For questions about:
where to search
how to search (brief assistance only)
availability of an item in the library
library policies and services
Replies sent within 24 hours (except holidays, weekends, and those Fridays when the library is closed)
For more details, see guidelines
Questions? Click to send e-mail
By Chat
Baruch community only
For questions about:
where to search
how to search
availability of an item in the library
library policies and services
For availability, see the hours page
For more details, see guidelines
Use of this service constitutes consent for the library to use the transcript of the interaction for research purposes provided that identifying information about the user is deleted.
Closed for now Try e-mail (to left)
In Person
Ideal for all inquiries, especially where time is a factor
Open when the Reference Desk is open (see Hours page)
By Telephone
For questions about:
availability of an item in the library
library policies and services
Open when the Reference Desk is open (see Hours page)
Call (212) 802-2440
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Newman Library : Services : Ask a Librarian
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