



U

U

G

2018

ORLANDO

Using ILS Data and Web Services for High Impact Marketing

Ted Fons
Patron Point

Maisam Nouh
The Ferguson Library



What Ted Will Talk About

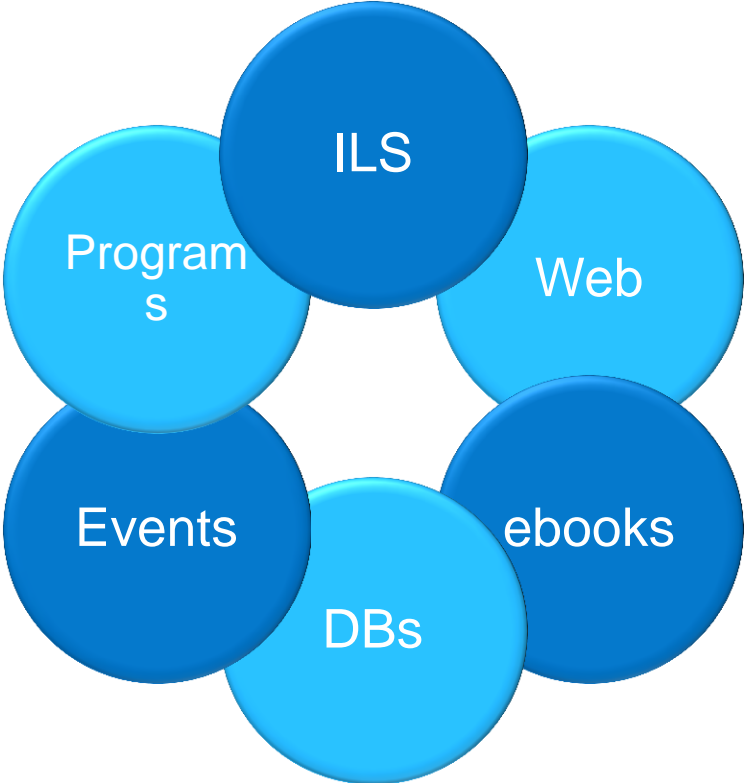
- ILS Data in a marketing plan with Patron Relationship Management system
 - ◆ What is Patron Relationship Management?
 - ◆ ILS Data elements we use
- Examples of ILS data in action
- Operational Overview
 - ◆ Sierra & Polaris & Patron Relationship Management system
 - ◆ Interfaces & Automation
 - Patron Welcome: Patron Self Registration
 - Patron Renewal: Real-time integration with Sierra APIs
 - Monthly data feeds & Create Lists
 - Automating data feeds: SQL
 - ◆ How they all fit together



ILS Data In A Marketing Plan



Patron Relationship Management & Library Data



Personalized & Targeted Communication



Email

Web

Blog

Newsletters

Social



ILS Data Elements We Use

Welcome

- ◆ First Name
- ◆ Email

Renewal

- ◆ First Name
- ◆ Email
- ◆ Expiration Date

Fine Forgiveness

- ◆ First Name
- ◆ Email
- ◆ Total Current Fines
- ◆ Last Activity Date

Promote

- ◆ First Name
- ◆ Email
- ◆ Program Registration

Engagement

- ◆ First Name
- ◆ Email
- ◆ YTD Checkouts
- ◆ Last Activity Date
- ◆ Ebook downloads

Anniversary

- ◆ First Name
- ◆ Email
- ◆ Birth Date
- ◆ Address
- ◆ Phone

Read

- ◆ First Name
- ◆ Email
- ◆ Format Preferences
- ◆ Subject/Genre Preferences



Examples of ILS Data In Action



Examples of ILS Data In Action

The Ferguson Library

Ted, this is a gentle reminder that library card expires on:

Saturday, March 31 2018 12:00 AM

[How To Renew](#)

Renew now so you can continue to:

Borrow Books



Save time on your next visit by renewing now.

Renew Books



Continue to renew your borrowed items from home.

Download Ebooks



Don't miss out on the thousands of ebooks available to download.

We encourage you to renew your card as soon as possible. We want you to continue to enjoy uninterrupted access to everything we offer.

Alice Knapp
President, The Ferguson Library



Current Fines

Last Activity Date

We noticed that you haven't checked anything out in a while, and we want you back. We'll also wipe any late fees (up to \$6) from your library account.

What's the catch? There is no catch; just come to the library or the bookmobile by the end of November and check something out. Mention the code phrase "Welcome Back" when you check out. That's all there is to it.

If you normally use a self-check machine, just bring your checked out item and receipt to one of our customer services staff members, and they'll take care of you.

Just remember the code phrase:

Welcome Back

And welcome back!

Christie Robinson
Skokie Public Library

Skokie Public Library
5215 Oakton Street
Skokie, Illinois 60077
847-673-7774



Hours
Monday to Friday, 9 am to 9 pm
Saturday, 9 am to 6 pm
Sunday, noon to 6 pm



5215 Oakton Street • Skokie, IL 60077 • United States • [Click here](#) to unsubscribe.

[View this email in your browser](#)

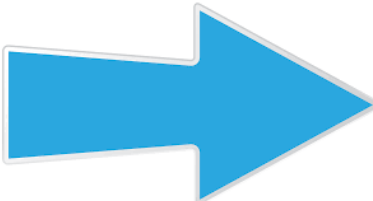
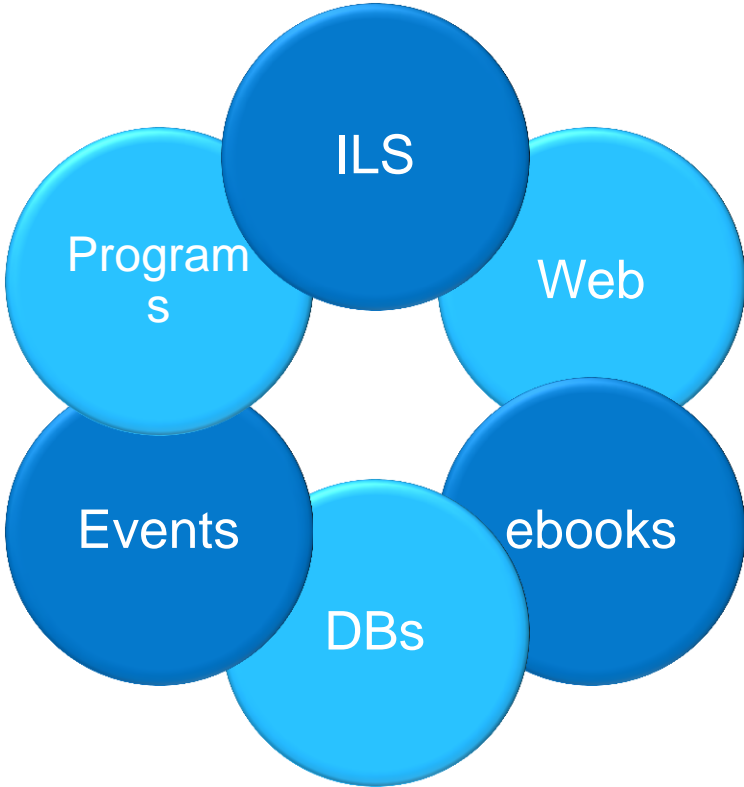


Operational Overview

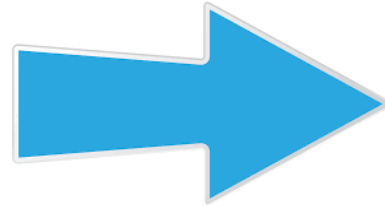
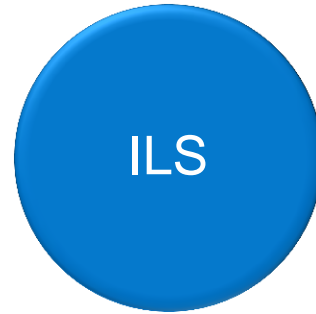
How It All Fits Together



Operational Overview



Operational Overview: All Programs

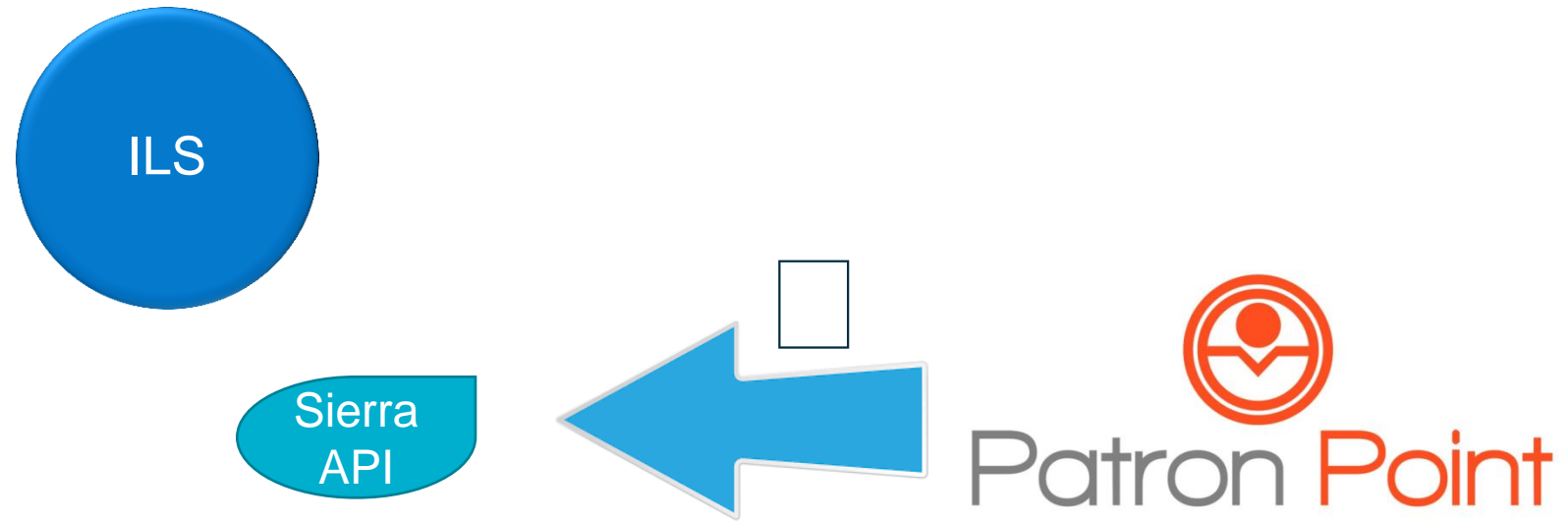


Monthly Data Feed

- Sierra library uses Create Lists/Export once a month
 - Just added option to automate with SQL server (April, 2018)
- Export includes new patrons and updated stats for existing patrons
- Patron Point does the work of loading into the system
- Polaris uses SimplyReports for query



Operational Overview: Automating Renew



Real Time Update for Card Renewals

- Patron Point uses Sierra APIs to find renewals every day after branches close
- This prevents sending more renewal emails after renewal



Operational Overview: Automating Welcome

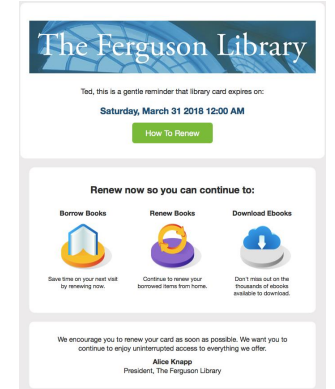


Real Time Update for Welcome

- Patron Point uses Sierra and Polaris self registration form
 - New patrons are sent automatically to Patron Point
- This allows us to start the welcome sequence in real time



Operational Overview: It All Fits Together



Patron Point



Using ILS Data and Web Services for High Impact Marketing

Ted Fons
Patron Point

Maisam Nouh
The Ferguson Library



The Ferguson Library

- The Ferguson Library is Stamford's public library system, consisting of:
 - ✓ Main Library, DiMattia Building in downtown Stamford
 - ✓ Harry Bennett Branch
 - ✓ Weed Memorial & Hollander Branch
 - ✓ South End Branch
 - ✓ Bookmobile.
- Our mission is to provide free and equal access to information, ideas, books and technology to educate and enrich the Stamford community.



Ferguson Library 2016-2017

■ In 2016-2017:

- ✓ 768,323 Items Circulated
- ✓ 721,29 people visited the Library
- ✓ 6,626 people registered for Ferguson Library cards
- ✓ 619,691 virtual visitors to our website and app users
- ✓ 68,900 people attended our programs
- ✓ Staff answered 115,583 reference questions.



Goals

- We hope to better understand who our customers are, so we can meet their needs and ultimately help them achieve their goals. Personalizing services will lead to increased use of the library.



Staff Time

- Sierra
- Overdrive
- Hoopla
- Zinio
- Kanopy
- WAM
- Constant Contact



Sierra

Store Record Type: Patron p

Range

Classic

Enhanced

JSON

Enhanced

Patron	Patron Type	equal to	Staff
OR			
Patron	Patron Type	equal to	Teacher
OR			
Patron	Patron Type	equal to	Adult
OR			
Patron	Patron Type	equal to	Temporary Adult
OR			
Patron	Patron Type	equal to	Visitor (\$25)
OR			
Patron	Patron Type	equal to	Nanny
OR			
Patron	Patron Type	equal to	SPS Teachers
OR			
Patron	Patron Type	equal to	Non Resident



Export fields in Sierra

patrons

Export Patron Information

Fields to be exported

Line	Type	Field
1	D	Record Number
2	Patron	Email
3	Patron	Name
4	Patron	Expiration Date
5	Patron	Birth Date
6	Patron	Patron Type
7	Patron	Home Library
8	Patron	Last Circ Activity
9	Patron	Current Checkouts
10	Patron	Current Item A

Append

Insert

Delete

Field delimiter |

Text qualifier <none>

Repeated field delimiter ;

Maximum field length (0-1000) <none>

File: Browse

patrons

Export Patron Information

Fields to be exported

Line	Type	Field
10	Patron	Current Item A
11	Patron	Current Item B
12	Patron	Current Item C
13	Patron	Current Item D
14	Patron	Total Checkouts
15	Patron	Total Renewals
16	Patron	Claims Returned
17	Patron	Money Owed
18	Patron	ILL Request
19	Patron	Gender
20	Patron	Patron Code 2
21	Patron	Patron Code 3
22	Patron	Barcode
23	Patron	Patron Message
24	Patron	Manual Block
25	Patron	Notice Preference
26	Patron	Address
27	Patron	Phone Number

Append

Insert

Delete

Export Patron Information

Fields to be exported

Line	Type	Field
28	Patron	Cell Phone Number
29	Patron	Mobile Phone No.
30	Patron	Created Date

28	Patron	Cell Phone Number
29	Patron	Mobile Phone No.
30	Patron	Created Date




Upload data

Shared with me > Ferguson ▾ 

Folders

 CC

 hoopla

 iii Patrons

 kanopy

 overdrive

 zinio



Automation

- API for card renewals
- SQL query to export data



Current and Future Projects

- **Patron Engagement Program**
- **Staff Picks**
- **Renewal Happiness**
- **Event Survey Program**
- *Lazarus Program (We Miss you, Come Back for expired cardholders)*
- *Patron Welcome Program (on-boarding new cardholders)*
- Event Survey (Automated surveys to get feedback on event quality)
- Rip van Winkle Program (Encouraging low-use or no-use current cardholders)
- Refer a Friend (Refer a friend to the library)
- Anniversary Date (Congratulations on your anniversary with the library)
- Rising Adult Program (Welcoming patrons transitioning from teen to adult)
- Newsletter program (Targeted content)



Patron Engagement Program

The Ferguson Library

Welcome Text

Thank you for joining The Ferguson Library. We are excited to have the chance to offer you the library's best offer, including an outstanding selection of books, movies, audio and more. You'll get personalized recommendations from our librarians, staff, and information about all our programs and events.

We are sending your temporary barcode number in case you need an account to identify yourself when using a hot spot or borrowing a book. When you receive it, you can immediately use www.fergusonlib.org to log in.

You're already where the fun is. If you prefer we have a table, the Library now you just need to stop by one of our locations so we can verify your address and give you your new library card. Please remember to bring a photo ID that matches your driver's license address. The address won't be long, it's a long drive home from work, so you'll want to get it done.

Main Library - Downtown Building



1100 E. Bay Street, Sanford

Harry Bennett Branch



1211 W. Pine Road, Sanford

South End Branch



30 Westford Ave., Sanford

Wood Memorial & Holbecker Branch



1140 Wood Street, Sanford

Please take a moment to [fill in our online survey](http://www.fergusonlib.org). Sharing your feedback will help us make our services, programs, and website better for you. We make it our goal to get your feedback and use it to make our library better.

[Get Us Your Preferences](#)

Of course, if you have any questions, comments or feedback, please contact us directly by replying to this email.

Respectfully,
Alicia Kinsey
President, The Ferguson Library

The Ferguson Library

Welcome Text

Thank you for joining The Ferguson Library. We are excited to have the chance to offer you the library's best offer, including an outstanding selection of books, movies, audio and more. You'll get personalized recommendations from our librarians, staff, and information about all our programs and events.

We are sending your temporary barcode number in case you need an account to identify yourself when using a hot spot or borrowing a book. When you receive it, you can immediately use www.fergusonlib.org to log in.

You're already where the fun is. If you prefer we have a table, the Library now you just need to stop by one of our locations so we can verify your address and give you your new library card. Please remember to bring a photo ID that matches your driver's license address. The address won't be long, it's a long drive home from work, so you'll want to get it done.

Author Events



Want to meet your fave author at a book signing event? The library is the place. The Friends of The Ferguson Library also hosts a special author series with book signings, book talks, and more. Join us for a special event with author Jane Smiley and more.

Music & Movies



Enjoy classical concerts, jazz and more at the library's library and bookshop. We also have a special series of author events with book signings, book talks, and more. Join us for a special event with author Jane Smiley and more.

Kids



Regular programs to entertain and educate young children are held at our library. We have a special series of author events with book signings, book talks, and more. Join us for a special event with author Jane Smiley and more.

Tech Classes



Brush up your skills to improve your resume or stay current in today's ever-changing digital landscape. Whether you're looking for a basic class on Microsoft Word, you'll learn about digital photography or explore our Makerspace, you're sure to be inspired.

ESL & Citizenship



Practice your English or our Latin 101 Conversation Classes or take a course to prepare for U.S. Citizenship. The Library offers classes for all ages and abilities. We have a special series of author events with book signings, book talks, and more. Join us for a special event with author Jane Smiley and more.

Civic Involvement



Join our **Civility in America** Series and learn how to be a better neighbor. We have a special series of author events with book signings, book talks, and more. Join us for a special event with author Jane Smiley and more.

These are just some of the programs and classes we have to offer at The Ferguson Library. We hope you'll visit us again soon.

Respectfully,
Alicia Kinsey
President, The Ferguson Library

The Ferguson Library


Welcome Text

Thank you for joining The Ferguson Library. We are excited to have the chance to offer you the library's best offer, including an outstanding selection of books, movies, audio and more. You'll get personalized recommendations from our librarians, staff, and information about all our programs and events.

We are sending your temporary barcode number in case you need an account to identify yourself when using a hot spot or borrowing a book. When you receive it, you can immediately use www.fergusonlib.org to log in.


You're already where the fun is. If you prefer we have a table, the Library now you just need to stop by one of our locations so we can verify your address and give you your new library card. Please remember to bring a photo ID that matches your driver's license address. The address won't be long, it's a long drive home from work, so you'll want to get it done.

Books & Movies




There's been a lot of new books and movies in the store. We have a special series of author events with book signings, book talks, and more. Join us for a special event with author Jane Smiley and more.

Youth Services




We have a special series of author events with book signings, book talks, and more. Join us for a special event with author Jane Smiley and more.

Book Discussions




Our book discussions will give you a chance to meet new people and discuss your favorite books. We have a special series of author events with book signings, book talks, and more. Join us for a special event with author Jane Smiley and more.

Book-A-Librarian




Need help with a research project or looking for a new book? Meet one of our librarians. We're happy to offer our expertise to any number of subjects. The information is all yours.

Citizenship & ESL



The library offers both classes, English conversation groups and citizenship classes for new arrivals. Please bring your ID to the path to citizenship. The information is all yours.

Makerspace & Tech



See how a 3D printer works, sign up for a workshop in our Makerspace. It's the most exciting thing you'll see at the library. The information is all yours.

These are just some of the programs and classes we have to offer at The Ferguson Library. We hope you'll visit us again soon.

Respectfully,
Alicia Kinsey
President, The Ferguson Library



The Ferguson Library

Welcome Ted!

Thank you for joining The Ferguson Library. You are about to enjoy free access to everything the Library has to offer, including an outstanding selection of books, movies, audio and more. You'll also get personalized service from our wonderful staff, and information about all our programs and events.

We are sending your temporary barcode number in a separate email so you can identify yourself when placing a hold or borrowing an ebook. When you have it, you can immediately [set your personal identification number](#).

You've already taken the first step. If you joined us from outside the Library, now you just need to stop by one of our locations so we can verify your address and give you your new library card. Please remember to bring a photo ID that includes your name and current address. The process won't take long. We're looking forward to meeting you in person!

Main Library, Dimattia Building



[1 Public Library Plaza,
Stamford](#)

Harry Bennett Branch



[115 Vine Road,
Stamford](#)

South End Branch



[34 Woodland Ave.,
Stamford](#)

Weed Memorial & Hollander Branch



[1143 Hope Street,
Stamford](#)

Please take a moment to [tell us more about yourself](#). Sharing your preferences will help us provide you with occasional staff picks for new materials, upcoming programs, and services that match your interests and will help you get the most out of your library.

[Tell Us Your Preferences](#)

Of course, if you have any questions, comments or concerns, please contact me directly by replying to this email.

Welcome again,

Alice Knapp
President, The Ferguson Library



The Ferguson Library

Welcome Ted!

As President of The Ferguson Library, I want to warmly welcome you to our library community. Because there's so much going on, it might take a little while to get familiar with everything we offer. To help you get started, we'll be sending a series of emails over the next two weeks that cover all the basics. We're pretty sure you're going to find yourself saying, "I didn't know I could do that at the library!"

In the meantime, here are some of the best ways to find out more.

- [Our website](#) is a great place to start. [Search the catalog](#), [check your account](#), and keep up with [our events calendar](#).
- You'll receive [our newsletter](#), Focus on Ferguson, in your mailbox every month, as well as a weekly events update.
- Connect with us on social media using the links at the bottom of this message.
- If you have questions, call us during library hours at [\(203\) 964-1000](tel:2039641000) or stop by and see us.
- Or, reply directly to these emails and I will make sure you get the information you need.

The next email will introduce you to some of the resources and services we have to offer.

Welcome again,

Alice Knapp
President, The Ferguson Library



The Ferguson Library

Hello Ted!

Whether you want to check out a DVD or experiment with virtual reality, the Library is the place! We work hard to select books and other materials that we know you'll enjoy, as well as offer the services and resources you and your family are looking for.

Books & Movies



[Borrow best-sellers or classics in print, ebook or audio.](#) You can listen to audiobooks on CD or Playaway or download eaudio to your phone or other device. Graphic novel fan? We have those too. Or check out a TV show, documentary or feature film on DVD or download it from Hoopla, one of our subscription services. [It's all free.](#)

Youth Services



[We have many resources for kids and teens,](#) including a large collection of picture books right on up to required summer reading for high school students. We also offer online tutoring through Tutor.com and many research databases. Does your child need suggestions? Our Youth Services librarians do a great job of pairing young readers with the right book.

Book Discussions



Our knowledgeable staff can suggest books you might enjoy and also assist with your [book discussion group.](#) We're happy to find titles and provide guides to help you lead your discussion. Book groups also get extended loan.

Book-A-Librarian



[Need help with a research project or putting together a resume?](#) Book an hour of one-on-one time with one of our librarians. We're happy to offer our expertise on any number of subjects. For information call [\(203\) 351-8221.](#)

Citizenship & ESL



The Library offers ESL classes, English conversation groups and [citizenship resources](#) for new arrivals or those looking to start on the path to citizenship. For information call [\(203\) 351-8228](#)

Makerspace & Tech



See how a 3D printer works, sign up for a workshop in our [Makerspace,](#) try out virtual reality in our Immersive Tech Lab. The Library is the place to try new things!

This is just a brief overview of the wealth of resources we have to offer at The Ferguson Library. We hope you'll visit us again soon.

Welcome again,

Alice Knapp
President, The Ferguson Library



The Ferguson Library

Hi Ted!

You'll never be bored when you have a library card. There is always something to enjoy, do or learn. Here are some of the types of programs we offer for children and adults.

Author Events



Want to [meet your favorite author](#) or [discover someone new](#)? The Library is the place. The Friends of The Ferguson Library also hosts a special author series with bestselling writers like David Baldacci, Jane Smiley and Wally Lamb.

Music & Movies



Enjoy classical concerts, jazz and more at the Main Library and branches. We also show [popular feature films, indies and documentaries](#). Like to talk about film? Join our film discussion group.

Kids



Regular exposure to words and books gives young children a leg up on reading. [Our full schedule of storytimes](#) and children's programs offers something for kids of all ages. We have an active teen program too, with volunteering opportunities for middle and high school students.

Tech Classes



Brush up your skills to improve your resume or stay current in today's ever-changing digital landscape. Whether you're looking for a basic class on Microsoft Word, want to learn about digital photography or explore our Makerspace, you've come to the right place.

ESL & Citizenship



Practice your English at our Let's Talk Conversation Groups or take a course to prepare for U.S. Citizenship. The Library offers [ongoing ESL education at all levels](#).

Civic Involvement



From our [Civility in America Series](#) to a new action group on racism, the community comes together at the Library to tackle important issues of the day. The Library is a safe space where all voices are welcome.

These are just some of the programs and classes we have to offer at The Ferguson Library. We hope you'll visit us again soon.

Welcome again,

Alice Knapp
President, The Ferguson Library



Staff Picks

The Ferguson Library

Take a look at our newest Staff Picks!
Enjoy some of the best new titles in your preferred subjects and formats,
available from The Ferguson Library

FICTION

 <p>Request it</p>	 <p>Request it</p>	 <p>Request it</p>	 <p>Request it</p>
--	---	---	---

FICTION RECOMMENDATIONS

NON FICTION

 <p>Request it</p>	 <p>Request it</p>	 <p>Request it</p>	 <p>Request it</p>
---	--	--	--

NON FICTION RECOMMENDATIONS



Renewal Happiness

The Ferguson Library

Maisam, this is a gentle reminder that library card expires on:

Saturday, February 8 2020 12:00 AM

[How To Renew](#)

Renew now so you can continue to:

Borrow Books



Save time on your next visit by renewing now.

Renew Books



Continue to renew your borrowed items from home.

Download Ebooks



Don't miss out on the thousands of ebooks available to download.

We encourage you to renew your card as soon as possible. We want you to continue to enjoy uninterrupted access to everything we offer.

Alice Knapp
President, The Ferguson Library



Event Survey Program



Thanks for attending the TEDx event at The Ferguson Library.

We would love to hear your comments so we can improve all of our events. Please take a minute to complete a very short survey.

[Our Very Short Survey](#)

Thanks for your feedback and suggestions!

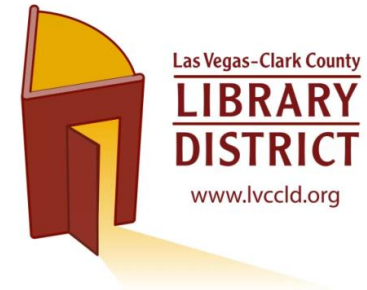
Alice Knapp, President, The Ferguson Library



The Future: What's Next With Patron Point & ILS Interfaces?

Sierra & Polaris

- ◆ Automation of data feed
 - Just completed project to automate the data feed using the Sierra SQL data server
 - ◆ Process runs from Patron Point's cloud-based system
 - ◆ Query and data processing in less than ten minutes!!!!!!
- ◆ Predictive Preferences
 - Just concluded internal project to use Sierra transactions to predict genre and format preferences for new titles email
 - Predictive system uses format and call number, not titles
- ◆ Hot Authors
 - Notify patrons of new titles from their favorite authors
 - ◆ Patron Point is looking for a partner for this service. Sierra or Polaris



Discussion

Ted Fons

Patron Point

ted@patronpoint.com

Maisam Nouh

The Ferguson Library

maisam@fergusonlibrary.org

