

# Automating Data Interfaces To Improve the Patron Experience

## Using Marketing Automation for Library Card Renewals & Welcoming New Patrons

**Sufa Anderson** – Las Vegas-Clark County Library District

**Ted Fons** – Patron Point

# Agenda

- What We Were Trying to Achieve – Sufa
- How The System Works—the Big Picture – Sufa
  - Library Card Renewal Reminder
  - Welcome Email
- How Automation Helps – Ted
  - Renewals: Responding to patron renewals and the real-time interface with Sierra API
  - Welcome: Sending real-time welcome messages with Sierra SQL
- The Results: Stats and Overall Feedback – Sufa
- Other Topics: Improving Notices – Sufa
- Q&A

#GETCARDED  
with the  
VEGAS GOLDEN KNIGHTS



## Background: Las Vegas-Clark County Library District

- Service area consists of Las Vegas, and most of Clark County
- Serves 1.6 million people
- 25 branches
- 600,000 cardholders
- 6 million visits yearly
- 12.1 million circulations
- 2.8 million items
- 2 million computer use sessions

# What We Were Trying to Achieve...

# Goals



## Library Card Renewal Reminder

Library cards expired yearly

Alert patrons of *upcoming* expiration



## Welcome Email

Online registration

Registered in branch

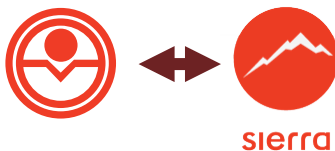


# How The System Works...

The Big Picture

# Library Card Renewal Reminder

## Step 1: Synchronize Sierra & Patron Point



- Name
- Email
- Expiration Date

## Step 2: Configure Patron Point

- Segments
- Campaigns
- Create Emails

## Step 3: Send Emails

- 30 Days Before Expiration
- 7 Days Before Expiration
- 7 Days After Expiration
- 30 Days After Expiration

Las Vegas-Clark County  
**LIBRARY  
DISTRICT**  
www.lvccd.org

**Greetings Alanna:**

Your library card is your passport to the world! This is another reminder that your library card expires on:

**Tuesday April 9, 2019**

Please renew immediately so that you can continue to:

**BORROW**  
Borrow in person from our vast collection of books, audiobooks, magazines, DVDs, CDs, and paperbacks.

**ACCESS**  
Access learning opportunities such as foreign languages, professional development, multimedia skills, and more.

**STREAM OR DOWNLOAD**  
Stream or download digital items from the comfort of your home including books, comics, magazines, music, movies, and TV programs.

The good news is that renewing your card is as simple as your next trip to the library! Just present a valid picture I.D. and proof of your current address (driver's license, utility bill, etc.) to the Customer Service Desk of any of our [25 convenient library branches](#). Your renewal will be processed immediately so that you can continue enjoying all of our fascinating, FREE products and services.

If you have recently renewed at one of our branches, we thank you!

But in case you haven't had a chance to do so, we encourage you to renew your card as soon as possible so that you can continue to enjoy uninterrupted access to the wonderful world of discovery that we provide.

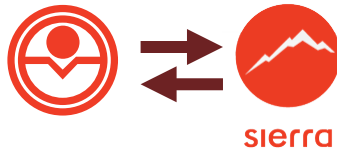
Thank you for being part of the Las Vegas-Clark County Library District family!

**Dr. Ronald R. Heezen**  
Executive Director

www.lvccd.org

# Welcome Email

## Step 1: Detect new patrons in Sierra



- Name
- Email
- Patron Type

## Step 2: Configure Patron Point

- Campaign
- Create Emails

## Step 3: Send Emails

- Within 30 minutes of registration

The top of the email features the Las Vegas-Clark County Library District logo in the upper right corner, which includes the text 'Las Vegas-Clark County LIBRARY DISTRICT' and the website 'www.lvccld.org'. To the left of the logo are three circular images: a man reading a book, a group of children at a table, and a woman holding books.

**Greetings Kylie:**

Thank you for signing up for a new library card! You have one more step in order to complete your sign-up process. In the next 30 days, please visit the service desk of your nearest library and bring with you a valid picture ID and proof of current address (driver's license, utility bill, etc.)

You will then be given your new library card, which will unlock endless possibilities to:

- BORROW**  
Borrow in person from our vast collection of books, audiobooks, magazines, DVDs, CDs, and paperbacks.
- ACCESS**  
Access learning opportunities such as foreign languages, professional development, multimedia skills, and more.
- STREAM OR DOWNLOAD**  
Stream or download digital items from the comfort of your home including books, comics, magazines, music, movies, and TV programs.

Your new library card is your passport to a wonderful world of discovery, where you will enjoy all of our fascinating, FREE products and services, either on our website at [LVCCLD.org](http://LVCCLD.org) or by visiting one of our 25 convenient [library branches](#).

And if you take just a minute to [register your library card](#) on our website, you will have the power to renew items, place holds, track your borrowing history, manage your account, create reading lists to share, and write reviews on anything in our catalog! Also, be sure to check out our website's new Events Spotlight on the homepage, where you can search all of our cultural and educational programs.

We look forward to you joining the Las Vegas-Clark County Library District family!

**Dr. Ronald R. Heezen**  
Executive Director

[www.lvccld.org](http://www.lvccld.org)

At the bottom right of the email, there are three social media icons: Facebook, Twitter, and Instagram.



# How Automation Helps

Library Card Renewal Reminder

# Renewal Reminder: Avoid Surprises & Keep Patrons

Expiration Date



30 Days  
Before



7 Days  
Before



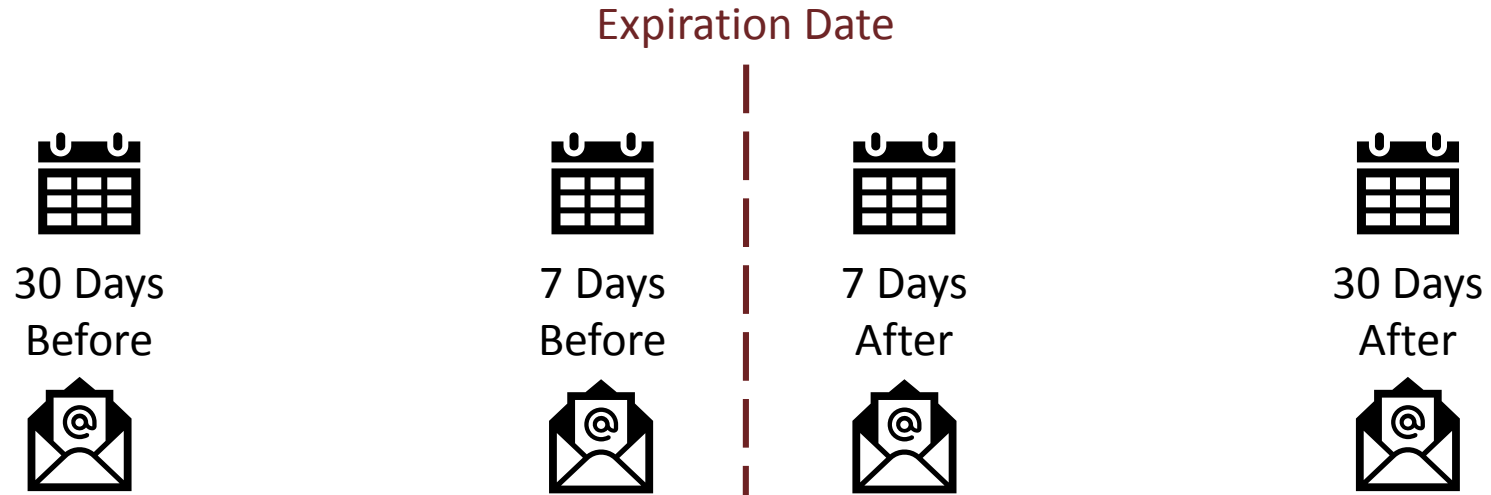
7 Days  
After



30 Days  
After



# Implementation Problem: Patrons renew in the middle of the card renewal campaign



Solution:



# Renewal Reminder: The Problem & the Sierra API Solution



- Use API Credentials
- Check to Sierra API
- Get Current Expiration Date from Sierra
- Update Expiration Date in Patron Point



# How Automation Helps

Welcome Email

**Goal: Send Clear, Friendly Welcome  
Message No Matter How They Register**



## **Welcome Email**

Online registration

Registered in branch


# Problem: Patrons register through different methods, online and in person



Solution:



# Solution: Interface with Sierra SQL




**Greetings Kylie!**

Thank you for signing up for a new library card! You have one more step in order to complete your sign-up process. In the next 30 days, please visit the service desk of your nearest library and bring with you a valid picture ID and proof of current address (driver's license, utility bill, etc.)

You will then be given your new library card, which will unlock endless possibilities to:

- BORROW**  
Borrow in person from our vast collection of books, audiobooks, magazines, DVDs, CDs, and paperbacks.
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Your new library card is your passport to a wonderful world of discovery, where you will enjoy all of our fascinating, FREE products and services, either on our website at [LVCCLD.org](http://LVCCLD.org) or by visiting one of our 25 convenient library branches.

And if you take just a minute to [update your library card](#) on our website, you will have the power to renew items, place holds, track your borrowing history, manage your account, create reading lists to share, and write reviews on anything in our catalog! Also, be sure to check out our website's new Events Spotlight on the homepage, where you can search all of our cultural and educational programs.

We look forward to you joining the Las Vegas-Clark County Library District family!

Dr. Ronald R. Heezen  
Executive Director

[www.lvccld.org](http://www.lvccld.org)




- ✓ Get new patrons
- ✓ Get Patron Type




**Welcome Aboard Linda!**

With your new library card in hand, you will find endless possibilities!

Your new library card will enable you to:

- BORROW**  
Borrow in person from our vast collection of books, audiobooks, magazines, DVDs, CDs, and paperbacks.
- ACCESS**  
Access learning opportunities such as foreign languages, professional development, multimedia skills, and more.
- STREAM OR DOWNLOAD**  
Stream or download digital items from the comfort of your home including books, comics, magazines, music, movies, and TV programs.

Your new library card is your passport to a wonderful world of discovery, where you will enjoy all of our fascinating, FREE products and services, either on our website at [LVCCLD.org](http://LVCCLD.org) or by visiting one of our 25 convenient library branches.

And if you take just a minute to [update your library card](#) on our website, you will have the power to renew items, place holds, track your borrowing history, manage your account, create reading lists to share, and write reviews on anything in our catalog! Also, be sure to check out our website's new Events Spotlight on the homepage, where you can search all of our cultural and educational programs.

Thank you for being part of the Las Vegas-Clark County Library District family!

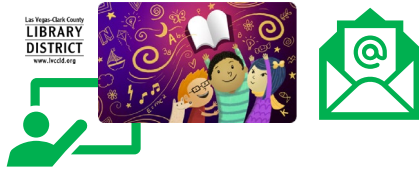
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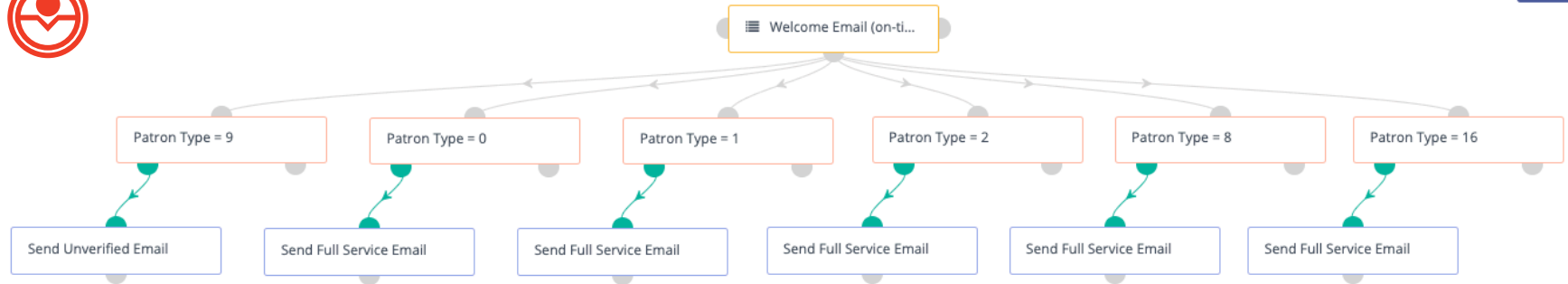




# Solution: Interface with Sierra SQL



Apply Close Builder



# The Results: Stats & Feedback

# Results: Renewal Reminder Statistics

## ✉ Renewal : All Time Performance Report

### Overview

✈ 328,119  
Messages Sent

📬 322,366 (98.2%)  
Delivered

✉ 29.06% (93,680)  
Open Rate

🖱 0.36% (1146)  
Click Rate

Email	Delivered	Unique Opens	Unique Clicks	Total Opens	Total Clicks	Unsubs	Spam	Hard Bounces	Soft Bounces	Messages Sent
<a href="#">1_RHP_30Before_Final</a>	94301	33645 (35.7%)	435 (0.5%)	76303	490	206 (0.2%)	53 (0.1%)	2380 (2.44%)	844 (0.87%)	97525
<a href="#">2_RHP_7Before_Final</a>	87259	27682 (31.7%)	398 (0.5%)	56781	445	152 (0.2%)	32 (0%)	247 (0.28%)	800 (0.91%)	88306
<a href="#">3_RHP_7After_Final</a>	76008	18690 (24.6%)	187 (0.2%)	34521	221	181 (0.2%)	30 (0%)	110 (0.14%)	669 (0.87%)	76787
<a href="#">4_RHP_30After_Final</a>	64798	13663 (21.1%)	126 (0.2%)	24108	166	178 (0.3%)	28 (0%)	96 (0.15%)	607 (0.93%)	65501
Totals	322,366	93,680 (29.06%)	1,146 (0.36%)	191,713	1,322	717 (0.22%)	143 (0.04%)	2,833 (0.86%)	2,920 (0.89%)	328,119

# Results: Welcome Email Statistics

## ☑ Patron Welcome: All Time Performance Report

### Overview

✈ 30,592  
Messages Sent

📬 28,992 (94.7%)  
Delivered

📧 46.77% (13,560)  
Open Rate

🖱 6.16% (1787)  
Click Rate

Email	Delivered	Unique Opens	Unique Clicks	Total Opens	Total Clicks	Unsubs	Spam	Hard Bounces	Soft Bounces	Messages Sent
<a href="#">PWP: WelcomeSelfReg_Final</a>	12420	7449 (60%)	1313 (10.6%)	22993	1455	16 (0.1%)	3 (0%)	208 (1.64%)	78 (0.61%)	12706
<a href="#">PWP: WelcomeOffline_Final</a>	16572	6111 (36.9%)	474 (2.9%)	14087	520	35 (0.2%)	4 (0%)	1205 (6.74%)	109 (0.61%)	17886
Totals	28,992	13,560 (46.77%)	1,787 (6.16%)	37,080	1,975	51 (0.18%)	7 (0.02%)	1,413 (4.62%)	187 (0.61%)	30,592

# Results: Feedback

- Renewal
  - Patrons are appreciative
  - Patrons are not surprised their card is expired
  - Patrons email and indicate out of town, will renew upon return
  - Patrons email to indicate they have moved out of state
- Welcome
  - Patrons understand they need to come into the library to complete registration
  - Patrons are introduced to our website and other library services

# Other Topics: Improving Notices

A man in a blue shirt is standing on the right side of a whiteboard, writing the text "WHAT PROBLEM ARE WE TRYING TO SOLVE?" in red marker. The whiteboard is held up by two clips at the top. The background is a plain grey wall.

WHAT PROBLEM ARE  
WE TRYING TO SOLVE?

## Notices: Formatting and Delivery of Statement of Charges

## Problems: Formatting and delivery of Statement of Charges Notices

- Problem 1: Large volumes of email blocked by MS Exchange
- Problem 2: Formatting of default SoC notice is not modern and doesn't match library branding
- Problem 3: Maximum number of items on statement means more emails

Solution:  ↔  SQL



## Problems: Formatting and delivery of Statement of Charges Notices

- Problem 1: Large volumes of email blocked by MS Exchange
  - Solution 1: Modern marketing automation system
- Problem 2: Formatting of default SoC notice is not modern and doesn't match library branding
  - Solution 2: Use full HTML email editor and library's branding
- Problem 3: Maximum number of items on statement means more emails
  - Solution 3: Remove the limit of number of items on statement; reduce number of emails by at least 1/3

Solution:  ↔  SQL

sierra

# Improving Notices

Can't see this email? [Click here](#) to view this message in browser window.

Las Vegas-Clark County  
**LIBRARY**  
**DISTRICT**  
[www.lvccld.org](http://www.lvccld.org)

Las Vegas-Clark County  
Library District

Accounts Payable  
7060 W. Windmill Lane  
Las Vegas, NV 89113

03-13-19

Dear Jasmine [REDACTED] s your statement of charges:

Inv #	Description	Amount
406826	Overdue	Chasing gold : the incredible st \$ 3.75
705312	OverdueX	Olive Kitteridge / Elizabeth Str \$ 4.00
894183	Overdue	Microsoft Office online / Marty \$ 0.50
894185	Overdue	Toxic friendships : knowing the \$ 0.25
472141	Replacement	You wouldn't want to be at the B \$ 26.75
15816	COLLECTION AGENCY REPORT CHARGE	\$ 10.00
	TOTAL	\$ 45.25

Please make your payment online at [www.lvccld.org](http://www.lvccld.org) or at your local library.

Connect With Us



Can't see this email? [Click here](#) to view this message in browser window.

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**LIBRARY**  
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Las Vegas-Clark County  
Library District

Accounts Payable  
7060 W. Windmill Lane  
Las Vegas, NV 89113

03-13-19

Dear [REDACTED] this is your statement of charges:

Inv #	Description	Amount
843696	Overdue	The complete idiot's guide to me \$ 2.00
843701	Overdue	The happy life : the search for \$ 2.00
843702	Overdue	The Amityville horror / Jay Anso \$ 2.00
119412	Overdue	7 things your teenager won't tel \$ 3.75
119413	Overdue	Why boys don't talk and why it m \$ 3.75
119414	Overdue	The everything guide to raising \$ 3.75
119415	Overdue	Why girls talk and what they're \$ 3.75
119416	Overdue	What every 21st-century parent n \$ 3.75
119417	Overdue	The art of being kind / Stefan E \$ 3.75
119418	Overdue	America bewitched : the story of \$ 3.75
155133	Overdue	Ghost files : the collected case \$ 4.00
	TOTAL	\$ 36.25

Please make your payment online at [www.lvccld.org](http://www.lvccld.org) or at your local library.

Connect With Us



## What's Next? Other Notices

1. Hold Pickup Notice
2. Courtesy Notice
3. Overdue Notice
4. All Bills and Fines
5. Interlibrary Loan

Fines, Recall, Bills: Replacement, Bills Adjustment, Hold Cancellation, Manual Fines



**Sufa Anderson** – [andersons@lvccd.org](mailto:andersons@lvccd.org)

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& Welcoming New Patrons