



**25TH ANNUAL  
INNOVATIVE USERS GROUP  
CONFERENCE**

*APRIL 2-5, 2017*



# A New Era For Library Marketing: How Sierra Helps It Happen

---

Ted Fons, Third Chapter Partners  
Maisam Nouh, The Ferguson Library  
Don Yarman, Delaware County District Library



# Ted Fons

Third Chapter Partners  
Principal Consultant



# A New Era for Library Marketing

## Top Trends in Marketing

1. Increased focus on customer experience
2. Engaged and effective measuring
3. Lean on marketing technologists and data scientists
- 4. Personalized everything**
5. Better video content

## The Top 10 Trends Driving Marketing In 2017



**Daniel Newman**, CONTRIBUTOR

1 research, analyze and discuss all things Digital Transformation [FULL BIO](#) ✓

Opinions expressed by Forbes Contributors are their own.



Shutterstock

Visibility is one aspect of marketing that won't change—regardless of the year.

Source: *The Top 10 Trends Driving Marketing in 2017* by Daniel Newman. Forbes Magazine.

<https://www.forbes.com/sites/danielnewman/2016/10/18/the-top-10-trends-driving-marketing-in-2017/#6df1e45a3ade>



IUG2017

# A Long Tradition of Personalized Service

- Library public service has always been personalized.
  - But what about the digital experience?



# Personalized Outreach Using ILS Tools & Data

## The Ferguson Library

**Save The Date!**

Dear Theodore,

The Ferguson Library is participating in [Fairfield County's Giving Day](#) on March 9. Giving Day is a 24-hour online event to "Give Where You Live" and celebrate our work, and the work of all local nonprofits.

**You're Invited**

We invite you to be a part of this fun, exciting event. Last year, \$1.25 million was raised for 410 local nonprofits! Generous donors contributed \$3,600 to the library, which helped us buy books for children and adults. Gifts of any size can make a HUGE difference.




**#FairfieldCountyGives**

Be sure to follow us on Facebook and Twitter to stay in the loop as Giving Day draws near. And don't forget to follow all of the action with #FairfieldCountyGives.



Name & Email Address




## Expiration Date



**Sam**, this is a gentle reminder that your Delaware Library card expires on:

**Monday, October 1 2018 12:00 AM**

Please renew immediately so you can continue to:

- Borrow Books**  
  
Save time on your next visit by renewing now.
- Renew Online**  
  
Continue to renew your borrowed items from home.
- Download Ebooks**  
  
Don't miss out on the thousands of Ebooks available to download.

The good news is that you can complete the whole renewal process online. No need to visit a branch for verification--you can confirm your contact information and your renewal will be complete within two business days:

**Yes, Renew My Card**

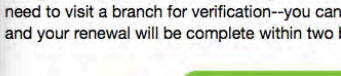

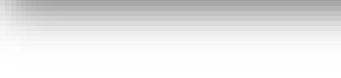

## SKOKIE PUBLIC LIBRARY

# NEW




Hi Alice,

Here is this month's personalized list of new titles based on the preferences you've shared with us. It can help you stay up to date on the things you love most at the library.

### FICTION

-   
[Quicksand](#)
-   
[I See You](#)
-   
[The Animators: A Novel!](#)
-   
[See more](#)

### TEEN GRAPHIC NOVELS AND MANGA

- 
- 
- 

Create Lists & Export



# Personalized Outreach Using ILS Tools & Data



You won't believe what's here for you!

Been a long time . . . since we saw you!

We haven't seen you for some time and we don't want you to miss out on everything Gail Borden Library has to offer. We have more of everything—more books, movies, programs and more—just for you.



Did you know the Main Library will be hosting towering skeletons, real fossils and expedition images starting this spring?

Dinosaur Giants: An Exhibit from the Sereno Fossil Lab will be at the Library from May 15 through September 24. This exciting exhibit features life-size dinosaur skeletons including the 33-foot-Jobaria that is two stories tall! [Here's a preview!](#)

What's more, you can get what you want faster than ever because we are closer to you—Gail Borden Library now two branches in addition to the Main Library to make it easier to get what you are looking for. Just check it out:

- Did you know that the new South Elgin Branch located at 127 S. McLean in South Elgin that opened in 2016 has a laptop dispenser?
- Did you know that the Rakow Branch located at 2751 W. Bowes Rd. in Elgin has a 24/7 external movie dispenser?

All three branches have great programs for all ages along with books and movies.



Zip Code



You won't believe what's here for you!

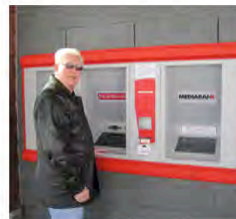
Been a long time . . . since we saw you!

We haven't seen you for some time and we don't want you to miss out on everything Gail Borden Library has to offer. We have more of everything—more books, movies, programs and more—just for you.

What's more, you can get what you want faster than ever because we are closer to you—Gail Borden Library now two branches in addition to the Main Library to make it easier to get what you are looking for. Just check it out:

- Did you know that the new South Elgin Branch located at 127 S. McLean in South Elgin that opened in 2016 has a laptop dispenser?
- Did you know that the Rakow Branch located at 2751 W. Bowes Rd. in Elgin has a 24/7 external movie dispenser?

All three branches have great programs for all ages along with books and movies.




Did you know the Main Library will be hosting towering skeletons, real fossils and expedition images starting this spring?

Dinosaur Giants: An Exhibit from the Sereno Fossil Lab will be at the Library from May 15 through September 24. This exciting exhibit features life-size dinosaur skeletons including the 33-foot-Jobaria that is two stories tall! [Here's a preview!](#)



# Combining Self Registration & Patron Welcome


EVENTS BOOKS, MOVIES, MORE

---

HOME > ABOUT > LIBRARY CARDS

## APPLY FOR A LIBRARY CARD

Library cards are free. With one, you can borrow materials and use our online services. Just complete this application and show back the card when you pick up your card.

Be sure to bring one piece of identification with your current Skokie address. Acceptable licenses or state I.D. with photo.

Library privileges will be available and we verify your identification.

If you are younger than 16, a parent must pick up your library card. Your parent must provide their own name and identification with their own name.

If you have had a Skokie Public Library card, please come to the front desk.

Age\*


- Adult
- Youth (Youth is younger than 16 years)

First name\* (Matching Photo ID)


Middle name or initial

Last name\*

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





Hi Alice,

Your Skokie Public use, listen to, learn

### MOVIES



Get the newest for free; from big laughs, TV documentaries, movies, and even between—our deserves an O

### GAMES



Level up with v for (almost) eve and age rating. Assassin's Cre we've got RPG sports, dancing puzzles, and m



Hi Alice,

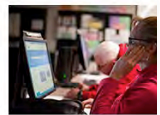
If you're looking for somewhere spot for you.

### SEATING AREAS



The second floor is the place to go for studying, reading, serious work, or quiet contemplation. On the first floor, you can meet friends to chat over chess or relax in a more social setting.

### COMPUTERS



The Computer Common and Classroom offer internet access, Microsoft Office, scanning stations and printers for teens an adults. The Lab is available to serve kids through junior high age.



Hi Alice,

You'll never be bored seven days a week. H

### STORYTIME



Regular exposure to and books gives young children the best start learning and loving re We make read-aloud t with options for babies and convenient times y our schedule.

### DANCE



Dancers grace our sta stunning shows in a ve dance styles, including modern, ballet, hip hop and tap. You'll also experience dance tradt costumes and music.



Hi Alice,

What's that big blue bus rolling by?

It's the bookmobile!

For more than 60 years, our bookmobile has brought books, movies, and friendly staff to every corner of Skokie. It's a full service library on wheels, making stops around town five days a week. You can't miss our newest vehicle—it's 40 feet long and covered with charming characters designed by local artist Jay Ryan.

Pick up reserved items and browse a wide selection of titles at a location convenient for you. You'll be greeted by smiles and helpful folks who'll remember your name and tastes and offer outstanding reading and watching recommendations with a personal touch.

This is the last in our series of welcome emails—unless you told us that you had kids. If so, look for a few more messages with more details our services for children and families.

Please enjoy everything the library has to offer you, and make good use of our staff and our resources. Reach out with questions any time. We'll see you soon!

Best regards,

Christie Robinson



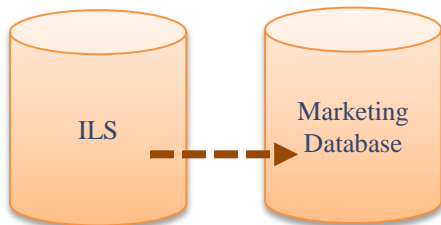
IUG2017



# ILS Features & Data Powers Programs

## Create Lists & Export Feed of ILS Data

- ✓ Name
- ✓ Email address
- ✓ Address (including postal code)
- ✓ Expiration date
- ✓ Patron Type
- ✓ Last Activity Date
- ✓ Year To Date circulation
- ✓ Plus many more...



**Delaware County District Library**

Sam, this is a gentle reminder that your Delaware Library card expires on:

**Wednesday, March 1 2017 12:00 AM**

Please renew immediately so you can continue to:

<b>Borrow Books</b>	<b>Renew Online</b>	<b>Download Ebooks</b>
Save time on your next visit by renewing now.	Continue to renew your borrowed items from home.	Don't miss out on the thousands of Ebooks available to download.

The good news is that you can complete the whole renewal process online. No need to visit a branch for verification--you can confirm your contact information and your renewal will be complete within two business days:

[Yes, Renew My Card](#)

We encourage you to renew your card as soon as possible. We want you to continue to enjoy uninterrupted access to everything we offer. If you recently renewed your card in-person at one of our branches, thank you; enjoy our services!

Sincerely,

*George*

George Needham, Director

**Delaware County District Library**

Oh, no, Sam! Your library card expired on:

**Wednesday, March 1 2017 12:00 AM**

But don't worry, if you renew immediately, you can use your card again to:

<b>Borrow Books</b>	<b>Renew Online</b>	<b>Download Ebooks</b>
Save time on your next visit by renewing now.	Continue to renew your borrowed items from home.	Don't miss out on the thousands of Ebooks available to download.

And you can complete the whole renewal process online; no need to visit a branch to renew. We'll complete your renewal within two business days and you'll be able to do everything above again. If you recently renewed your card at one of our branches, thank you; you do not need to complete the online renewal.

[Yes, Renew My Card](#)

We encourage you to renew your card as soon as possible so we can restore your library benefits. We want you to continue to enjoy uninterrupted access to everything we offer.

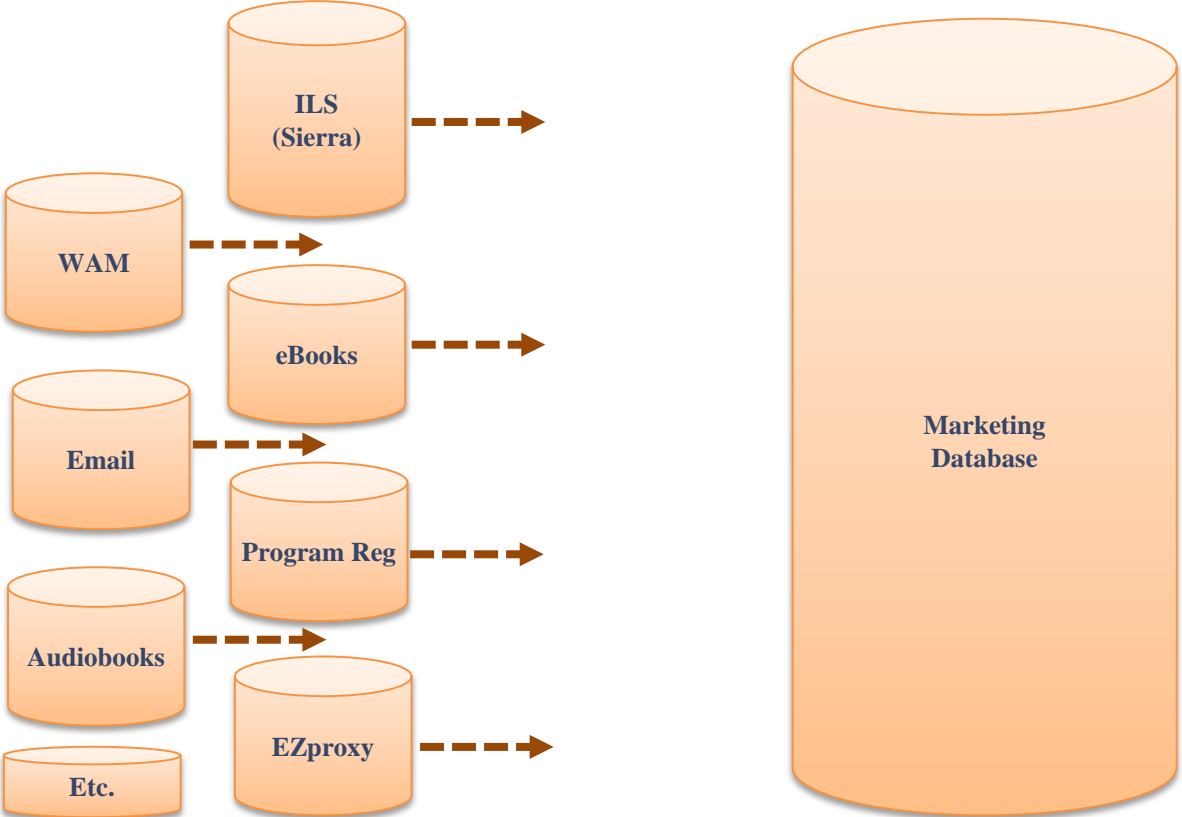
Sincerely,

*George*

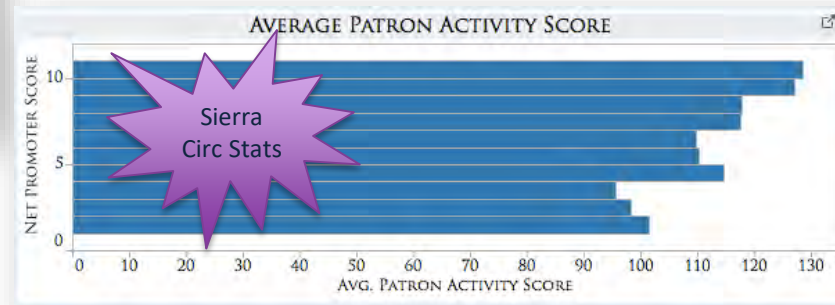
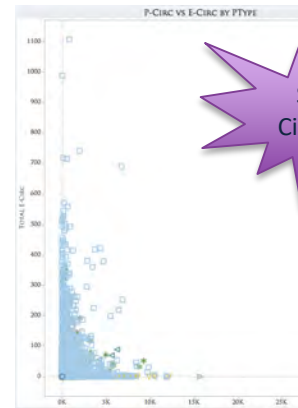
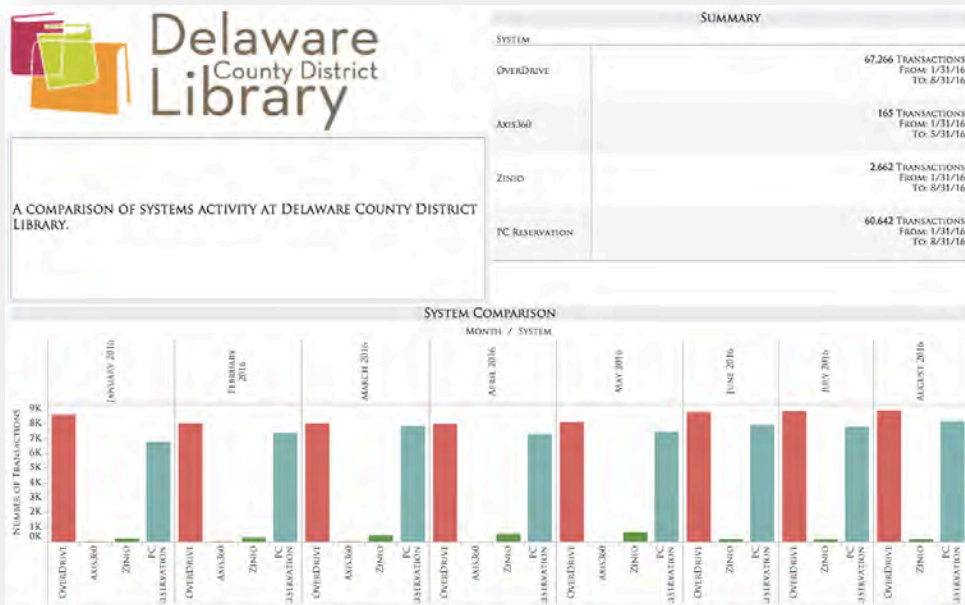
George Needham, Director



# Integration With Library Systems

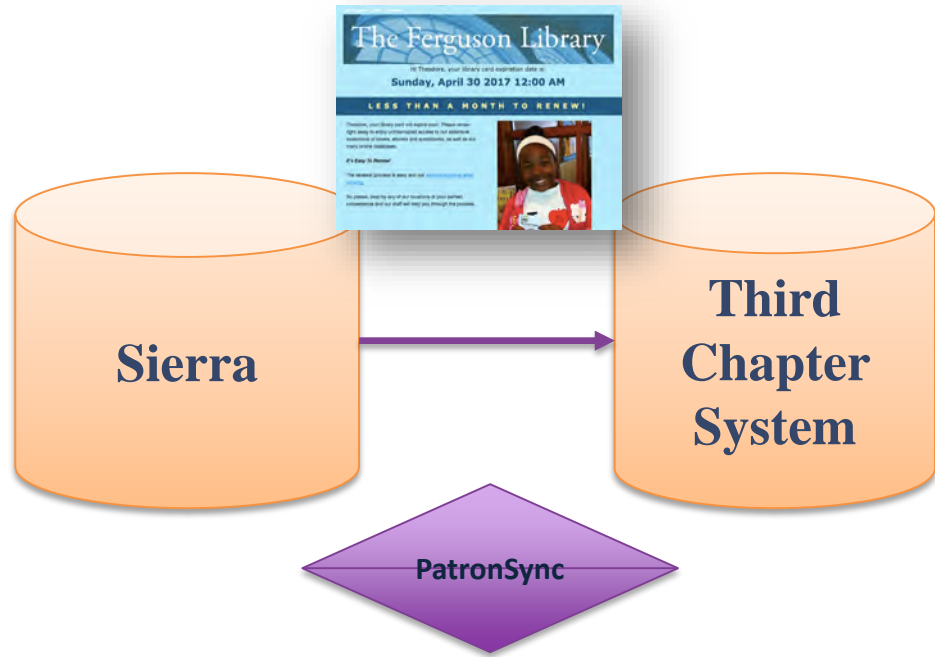


# ILS + Other Systems Provide Data for Reports



# Using Sierra APIs

- Technical Details:
  - Select expiring patrons by expiration date
  - Using an API query to:  
<https://ferguson.iii.com:443/iii/sierra-api/v3/patrons/find>
  - Locate patron by barcode
  - Determine most current expiration date
  - Update Third Chapter System by API



# Effective Marketing Programs

## Some Statistics

### The Ferguson Library

- Library Promoter Score Survey:  
46.3% Open Rate

### Delaware Public Library

- Renewal Happiness:  
52% Open Rate  
94% Conversion Rate

### Skokie Public Library

- New Titles:  
58.2% Open Rate
  
- Encore Survey:  
68% Responses from email

### Gail Borden Public Library

- Rip van Winkle:  
23.3% Open Rate



**Don Yarman**

**Delaware County District Library  
Deputy Director**



# Delaware County District Library

- North of Columbus, Ohio
- Four locations & outreach
- 2016 Circulation = 1.4 million
- 100 employees (68.75 FTE)
- 126,000 Residents
- 73,000 Patrons



# PatronPoint Project Goals

- Understand our current users.
- Reach out and engage them.
- Improve services.
- Expand registered patrons.
- Cultural Change
  - Rethink marketing and promotions
  - Restructure project management
  - Guide product/service selection






# How We Interface with Sierra

- Carefully & Deliberately
  - Create Lists
  - SelfReg scripting
- *What data we share.*
  - *Adults only; patron record data*
  - *Other activity (PCRes, OverDrive)*
- *Privacy concerns.*
- *Complaints?*



# Projects: Patron Welcome & Renewal Happiness



Delaware County District Library  
Delaware • Ostrander • Powell • Orange


Welcome to the Delaware County District Library!

As Director of the Library, I'm pleased to welcome you to a community of friendly patrons and staff who all enjoy a place to learn and explore the world of information.

Because we want to communicate in a way that is most meaningful to you, we'd be pleased if you would [take a moment to tell us more about your preferences](#). Doing so will allow us to provide you with occasional information on new materials, upcoming programs, and services that match your interests. [Telling us your preferences will help you get the most out of your new Library](#).

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

Sincerely,




George Needham, Director

"A library outranks any other one thing a community can do to benefit its people. It is a never failing spring in the desert." — Andrew Carnegie

We use existing administrative information to share information with you about existing library services, new services, and other items that may be of interest to you. If you do not wish to receive regular updates from the Library, please click on the unsubscribe link below. If you decide to not receive these updates from the Library, don't worry: we'll still send you the usual messages on items you've borrowed or requested.

The Delaware County District Library [privacy policy](#).




© 2016 Delaware County District Library. All Rights Reserved.



Don't, this is a gentle reminder that your Delaware Library card expires on:

**Tuesday, January 1 2019 12:00 AM**

Please renew immediately so you can continue to:


<b>Borrow Books</b>	<b>Renew Online</b>	<b>Download Ebooks</b>
		
Save time on your next visit by renewing now.	Continue to renew your borrowed items from home.	Don't miss out on the thousands of Ebooks available to download.

The good news is that you can complete the whole renewal process online. No need to visit a branch for verification—you can confirm your contact information and your renewal will be complete within two business days:

[Yes, Renew My Card](#)

We encourage you to renew your card as soon as possible. We want you to continue to enjoy uninterrupted access to everything we offer. If you recently renewed your card in-person at one of our branches, thank you, enjoy our services!

Sincerely,




George Needham, Director

We use existing administrative information to share information with you about library services, new services, and other items that may be of interest to you. If you do not wish to receive regular updates from the Library, please click on the unsubscribe link below. If you decide to not receive these updates from the Library, don't worry: we'll still send you the usual messages on items you've borrowed or requested.

The Delaware County District Library [privacy policy](#).



# Implementing Online Renewal



Don, this is a gentle reminder that your Delaware Library card expires on:  
**Tuesday, January 1 2019 12:00 AM**


Please renew immediately so you can continue to:

- Borrow Books**  
Save time on your next visit by renewing now.
- Renew Online**  
Continue to renew your borrowed items from home.
- Download Ebooks**  
Don't miss out on the thousands of EBooks available to download.

The good news is that you can complete the whole renewal process online. No need to visit a branch for verification--you can confirm your contact information and your renewal will be complete within two business days.

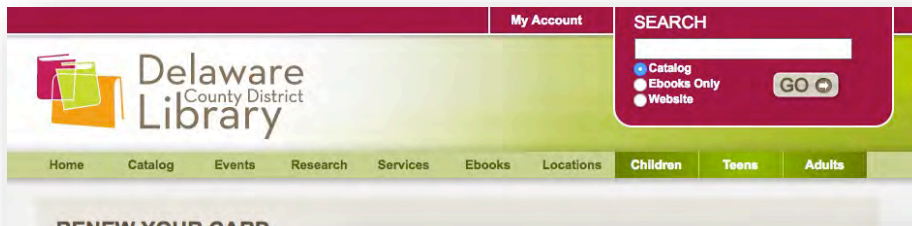
**Yes, Renew My Card**

We encourage you to renew your card as soon as possible. We want you to continue to enjoy uninterrupted access to everything we offer. If you recently renewed your card in-person at one of our branches, thank you, enjoy our services!

Sincerely,  
  
George Needham, Director

We use existing administrative information to share information with you about library services, new services, and other items that may be of interest to you. If you do not wish to receive regular updates from the Library, please click on the unsubscribe link below. If you decide to not receive these updates from the Library, don't worry, we'll still send you the usual messages on items you've borrowed or requested.

The Delaware County District Library [privacy policy](#).



My Account SEARCH  
Catalog  
Ebooks Only  
WebSite GO

Home Catalog Events Research Services Ebooks Locations Children Teens Adults

### RENEW YOUR CARD

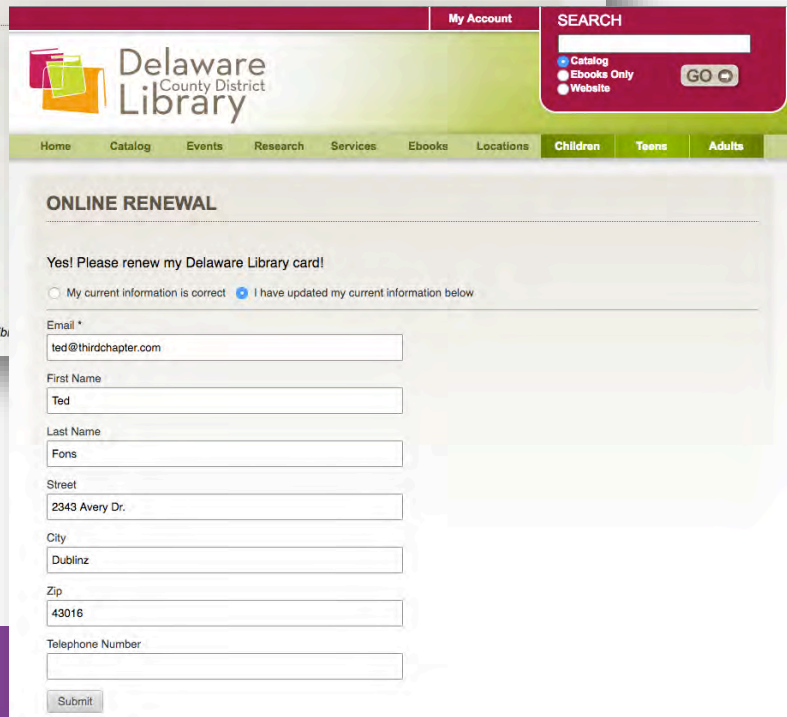
Yes, I want to renew my Delaware Library card:

**Renew**

No thanks. I don't need a Delaware Library card:

**Cancel**

*Please remember that you are eligible for our lib*



My Account SEARCH  
Catalog  
Ebooks Only  
WebSite GO

Home Catalog Events Research Services Ebooks Locations Children Teens Adults

### ONLINE RENEWAL

Yes! Please renew my Delaware Library card!

My current information is correct  I have updated my current information below

Email \*  
ted@thirdchapter.com

First Name  
Ted

Last Name  
Fons

Street  
2343 Avery Dr.

City  
Dublinz

Zip  
43016

Telephone Number

Submit

Sierra



# Rewards

- Data Clean-Up
- Staff Mindfulness
- Fresh Eyes on Services
  
- *More effective uses of existing data.*
  
- Friction-Free Feedback



# Patron Reaction

I think you are doing a great job in serving the public... Thank you for asking.

Your email actually made me feel rather guilty, because I realize I haven't been to the library since I got my card about 3 years ago... It was a nice friendly reminder that I need to stop in and take advantage of the services you offer.

Love the helpful staff when I call for a book.

I get about 60-70 emails to my personal account a day and maybe read half on an average day, but yours was one I chose to read!

Services are great but the hospitality is greater.

Thank you for providing our area with a top notch library.



# Future Programs

*Pretty much everything Maisam is going to talk about, plus...*

- Materials Marketing
- Digital Users Conversion (both directions)
- Promoter Score → Levy Success



# Maisam Nouh

The Ferguson Library

Technology/Cataloging Librarian



# 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.





- **In 2015-2016:**

- ✓ 808,071 Items Circulated
- ✓ 820,864 people visited the Library
- ✓ 816,983 virtual visitors to our website and app users
- ✓ 68,997 people attended our programs
- ✓ Staff answered 131,000 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.



# Current and Future Projects

- **Patron Engagement Program**
- **Staff Picks**
- **Renewal Happiness**
- *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)



# Thank You

---

## Discussion Time



# Contact Information

---

## Ted Fons

Third Chapter Partners  
Principal Consultant  
ted@thirdchapter.com

## Maisam Nouh

Delaware County District Library  
Technology/Cataloging Librarian  
maisam@fergusonlibrary.org  
Phone: 203-351-8414

## Don Yarman

Delaware County District Library  
Deputy Director  
yarmando@delawarelibrary.org  
Phone: 740.548.9913 x222

