

Marketing from the inside out: How we marketed to staff to spread the word to our members.

Christine Busby

New Zealand Institute of Chartered Accountants, Wellington, New Zealand.

Christine.busby@nzica.com



Copyright © 2013 by **Christine Busby** This work is made available under the terms of the Creative Commons Attribution 3.0 Unported License:

<http://creativecommons.org/licenses/by/3.0/>

Abstract:

This paper discusses how the New Zealand Institute of Chartered Accountants Library marketed their services to staff members at the Institute, to enable the staff to market to members. By raising awareness of what services the library provides, the library team could ensure that more people would market their services to the 33,000 members they serve. The paper outlines the positive experiences that the library created for staff members, as well as meetings with various business units to discuss library services before summarising the quantitative results showing that the marketing is having an impact on use of the library services.

Keywords: Marketing, Engagement

INTRODUCTION

This paper discusses how the staff of the New Zealand Institute of Chartered Accountants (NZICA) Library used internal relationship marketing to build stronger connections with NZICA staff, in turn enabling more staff to market the library services to NZICA members.

It outlines the actions taken, lessons learned and evidence that the actions undertaken are having an impact on library services. While this is an individual special library, a number of actions could be adapted and performed in any special library within an organisation or other libraries that have both an internal and external market.

THE NEW ZEALAND INSTITUTE OF CHARTERED ACCOUNTANTS LIBRARY

The library is part of the Member Engagement team of NZICA. The Institute is a membership body governed by a board and executive management team. It is made up of around 150 staff who work in a range of areas such as professional support, advocacy, quality assurance, leadership training, continuing education, a disciplinary board and regional advisory groups. The majority of staff are based in Wellington, though there are also staff in Auckland, Christchurch, regional centres in New Zealand, Sydney and London.

As an indication of member engagement with the Institute, in 2012, 1,288 events were held in 43 locations, at which 51,807 attendees were hosted. Twenty five submissions were made to the New Zealand Government, and there were nearly 36,000 calls to the Customer Service Centre.

The NZICA Library is available for use by 33,000 members around the world. We provide a research service, access to databases, a monthly current awareness bulletin as well as access to a physical collection of approximately 7,000 books and course papers, 18,000 indexed articles and a growing collection of e-books. Print books are couriered to members in New Zealand, while articles can be accessed through databases, a cloud based storage system, or scanned and emailed. According to discussions with other special librarians in similar subject areas, our physical collection is heavily used. Over 200 books are issued each month. In 2012, 2,209 books were issued, as at the end of May 2013, we have issued 1,155 books. Members who live overseas can access our e-book collection and articles, as well as the research service.

The library staff is made up of a Library Manager, two Business Information Librarians, a Senior Library Assistant and a Library Assistant. There is only one full time staff member, though combined; we make up 3.5 full time equivalents (FTEs).

WHAT WE PLANNED

Marketing priorities were determined by examining the results of the Library and Information Services Survey performed in late 2011. This survey was sent to 3,000 members and we received a 15% response rate. The main message that came out of the survey was that not all surveyed members were aware of the range of library services they were entitled to.

Three areas were identified as priorities. These were:

- The Informed Professional (monthly current awareness bulletin)- awareness at 20.5%
- Ask a Librarian (research services) – awareness at 27.9%
- Access to Ebsco Business Source Corporate database – awareness at 26.3%

Members suggested using the CA Journal, branch newsletter, NZICA news, Institute website and library emails for advertising. The aim was to get each of these awareness levels to at least 30%.

The Informed Professional bulletin is now sent to all members, unless they choose to opt out. Previously, it was only sent to those who chose to receive it. There has been a lot of effort put into the presentation of the bulletin, and the statistics on this publication have continued to improve in 2013. The team is focusing on the content and presentation of this email, rather than advertising the existence of it.

We determined that face to face meetings of library staff and members would be an important way to let people know that the library is committed to working with them, as well as a way to deliver our two key messages; that the library exists and that it has qualified professionals who can provide research. While meeting individual members would be physically and financially difficult, by meeting regional staff, and attending large gatherings of members, we could ensure that many members found out about the library service, without the time and expense of targeting individuals.

The marketing plan has five dimensions – with all five areas relying heavily on NZICA staff and building relationships with our colleagues, to ensure our marketing reaches a wide range of members.

The five dimensions are:

- Professional Development and the initial study programme required to become a chartered accountant
- NZICA Staff
- Regional co-ordinators
- Special interest groups
- Attending conferences

This paper will focus on the marketing to NZICA staff, both formally and informally, and conference attendance.

1 WHAT WE DID

1.1 Informal staff engagement

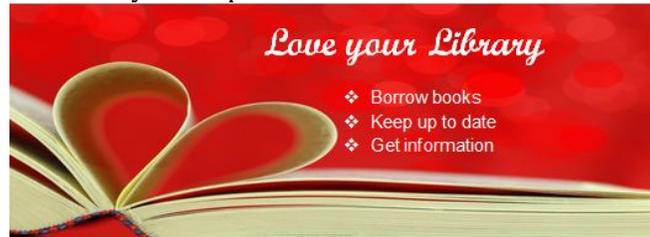
We decided that one way to get NZICA staff talking about the library to members was to ensure they knew all about us and had positive experiences with the library.

‘Love your Library’ Day

We started marketing to NZICA staff in February 2013, on Valentine’s Day. We planned a ‘Love your Library’ day, where staff could come to the library, see ‘what was hidden around the corner’ (the collection), have blind dates with books (books wrapped in brown paper), and eat morning tea provided by the library. This was a huge success, especially in comparison to previous attempts. Part of this can be attributed to a change in organisational culture that has meant people are more receptive to the idea of getting to know different business units and breaking down silos within the organisation. In the past, efforts to encourage staff to use the library have not worked well, as everyone is busy and cannot necessarily see the benefit in using the library themselves.

Posters were put around the office, and news items on the staff intranet, painted the library as romantic and mysterious. This piqued people's interest and was our theme for the day. The library was decorated with red balloons and streamers. NZICA staff are spread over two floors, so there are some staff members who were not aware of where the library was. The decorations made us easier to find.

This branding of 'Love your Library' has continued throughout the year, though it was based on Valentine's Day. It ties in with an organisational goal of "Feel the love", based on ensuring that members know they are important to the Institute.



We had ordered heart shaped chocolates to leave on people's desks with a bookmark the night before, with the intention of reminding them to visit the library. However the chocolates did not arrive in time, so all staff were visited at their desk at 10am, given another chocolate, and reminded to come and see us. By having a librarian visit staff at their desks, it was harder to forget about the event. It also meant that we could follow up the next day by leaving the chocolates on desks with a note saying "Your Library loves you all the time".

In the afternoon, at an unrelated staff meeting, the Chief Executive mentioned the library event and encouraged anybody who had not visited to do so. This meant another group of people came through that afternoon, demonstrating the support the library has from senior management.

We sent chocolates, bookmarks and posters to regional offices with a note letting them know we hadn't forgotten about them, and hoping that they would feel 'the library love' from a distance. There can be feelings from our regional offices that National Office receives more benefits, and that they miss out on events and treats. It was important to us that this was not the case and that they knew the library staff were thinking of them. The regional staff have the most direct contact with members, so it is important they think highly of the library.

The 'Love your Library day' is still talked about by staff, and the reputation of the "lovely library ladies" has continued. Plans are in place for another themed day later in the year, to ensure that people who were not able to attend the first event, or not working for NZICA at the time can get to know the library better – the people, the location, and the services.

While this was not directly beneficial to our members, the 'Love your Library' day provided an opportunity for NZICA staff to see how useful the library can be to them. This will in turn allow them to make well informed decisions, and members can be confident that NZICA staff have the resources they need to do their jobs, and represent the members well.

Book club

Four weeks later, we advertised a book club hosted by the library over morning tea providing a chance to discuss books that had been issued to staff at the 'Love your Library day'.

This was advertised on the staff intranet, as well as through discussions with library users. It was not as successful as the 'Love your Library day'. Factors impacting this included:

- some strong library supporters being absent that day
- it was on a Tuesday – not one of the more relaxed days of the week
- urgent requests coming in to a business unit that was going to attend
- less advertising before the event

People are always going to be busy though, and it is not always possible to attend every event.

The library will be hosting another Book Club on a Friday in June, the week after a long weekend. This will follow the same format of morning tea and a chance to discuss books or articles read. It is being marketed as “a sequel that is better than the original”. The changes we're making include the day of the week, the marketing of books to staff members, using posters in the lunch room, as well as posters around the building to advertise book club, not just on the intranet. The collection is more heavily used by staff than it was for the last book club, so more people are likely to contribute. Another change is that we have sent out a calendar invitation to this event, so that a reminder will appear in everyone's calendar, providing less chance that people will forget to come.

Early indications suggest this will be a popular book club event, with over a dozen attendees at this stage. Again, while this may not seem directly beneficial to our members, it is raising the profile of the library within NZICA and creating positive experiences for staff.

Promoting holiday reading

Another way we have promoted the physical collection to NZICA staff is by creating lists on our online catalogue promoting our lighter material as holiday reading. This was done prior to Christmas 2012, Easter 2013, and will be done again before the long weekend in June. This increases people's interest in the library and leads to more books being issued. While we usually provide brand new books to members first, in June we are trialling providing brand new books to NZICA staff first before we advertise them to members, to show the staff they are as important to us as our members.

Informal staff engagement

We are noticing more people are stopping by to talk to library staff. This is not necessarily about books or library services, but is contributing to strong relationships. Our communications team now checks with the library for content to go into a wider range of member emails than previously. We now feature in a recruitment newsletter after an attendee at “Love your Library” day raised the point that we may have valuable content. We have received more requests to purchase study texts, and circulation statistics have increased. We are invited to more events, and will be demonstrating library services to two member groups in June, both organised by NZICA staff.

On the 'Love your Library' day, we issued 28 books to staff members. Previously our average monthly loan statistics to “Non-members” in the twelve months from February 2012, to February 2013 were 14 books a month. Since 'Love your Library' day our monthly loans to non-members averages 28 books a month.

1.2 Formal staff engagement

Attending Executive Management meeting

In March 2013, the Library Manager and a Librarian attended an Executive Management Team (EMT) meeting, to deliver key messages about how the library can assist managers, and ensure that the Executive Managers understood the services the library provides to members. The library team planned an interactive session, handing out candy when EMT members could provide information about the library, before delivering the key messages. While the meeting went off on a tangent, as led by the EMT members, it was valuable and raised action points for library staff and further engagement with NZICA teams.

The library now provides a monthly technical service monitoring report for the technical services team, after their General Manager was made aware that this was a service that could be provided by the library, reducing that team's workload and saving them the budget required to hire an assistant to do the work. The Chief Operating Officer has engaged with the Library Manager multiple times since, requesting competitive intelligence and exploring the possibilities of information management for the Institute, and receiving training on information literacy from one of the Librarians.

It became clear at the EMT meeting that the library has some strong advocates in the Executive Management, including our Chief Financial Officer who pointed out that the budget allocated to the library is minor in comparison to other areas, but the member impact is massive, while the Director of Member Engagement reiterated that the library is a true member benefit. It was also an opportunity to point out that librarians are post-graduate qualified professionals who belong to the equivalent of NZICA in the library world – this raised the credibility of the librarians to these executives.

Meeting with Regional managers

In April 2013, the Library Manager and a Librarian attended a meeting of Regional and Sales Managers. The purpose of this meeting was similar to the EMT meeting – deliver key messages about how the library can help the managers, and ensure the attendees understand the key messages to deliver to members they meet. The regional managers have a number of opportunities to meet with NZICA members through local events and conferences that are not large enough to justify sending library staff. Therefore, it is important that they feel confident delivering key messages about the library. The sales team meet with executives to encourage members within organisations to join NZICA, and as the library is one of the benefits members receive, the sales team are well placed to advertise the library, providing they know about the library and advocate for it.

We delivered information through infographics, These demonstrated how popular the library is, with statistics on visitors to the catalogue and circulation, and pointing out that while not all members are happy to engage with NZICA, the library service has a good reputation and can be a selling point in meetings with members.

The infographics worked as a quick way to display information as they are a visual representation of statistics and data without the person needing to spend time reading a long document.

While we got some value out of this meeting, and the attendees engaged with us, again, it went off on tangents rather than the way library staff had planned. Follow up emails asking for suggestions on how the library can provide services to people in regions have not been

responded to; however there has been ongoing engagement in terms of research requests from regional managers, and invitations to events.

Formal staff engagement

Meeting with these two groups did not run as planned. No matter how we prepare for a meeting, if those who are running the meeting choose to discuss something different, that is what happened. This means that the attendees were engaged with the library and wanted to talk more about their concerns and ideas rather than hearing the key messages the library provided.

Lessons we have taken from our experiences at these meetings are:

- Don't hand out infographics or documents at the start of a meeting – people want to look at them, and will focus on them rather than what you are saying
- Be prepared for the meeting to not go as planned. People will discuss what they want to, rather than what you want to – the fact they are able to talk about the library is positive
- Send follow up documentation to ensure that key messages are delivered. While discussing them is more valuable, if that doesn't work, written documentation is also useful.

1.3 Engagement with members at Conferences

NZICA holds conferences for members to receive “CPD hours” - compulsory hours required to ensure that members are maintaining and improving their skills. The conferences are 1-2 day catered events where speakers present on topics of relevance to accountants and business owners. Examples of conference themes include fraud and forensic accounting, tax, and public sector accounting.

In October 2012, library staff attended the Tax Conference. No books were loaned, and only five attendees talked to the staff. The library team left that conference feeling that there was not much point attending conferences if nobody was interested in talking to us, or hearing about what we could offer.

After the tax conference, it was decided we needed to try attending another conference. This time we needed an incentive to get people to talk to us, we would create relevant reading lists, and take a more positive attitude, more exciting books, and ensure we were located close to the catering. We hypothesised that if we were based by the food, people would be interested in us, as they can stay by the food and still engage with library staff.

We attended the Public Sector conference in March 2013, for accountants mainly in government departments. We had chocolates to hand out, interesting looking books that matched the speakers and topics, and a commitment from the conference organisers that we were in a location that people had to walk past to get to food. This meant that while people were lined up to get meals in the breaks, they were staring right at the library table so we could engage them in conversation, and hand them copies of articles and promotional fliers while they waited in line.

We attended the registration period before the conference started, a time before people had caught up with friends or colleagues, and were waiting for the first presenter. This was the perfect time to approach them with a bowl of chocolates and offer them one. The conversation opener is essentially “Hi, I’m x from the NZICA Library – would you like a chocolate?” which is enough to start the conversation. From there, they can come over and visit the stand later in the day if they choose, or ask any questions immediately. This led to people visiting the stand and referring to conversations with the librarian who gave out the chocolates. If nothing else, they were made aware that the library staff had attended the conference.

Currently, we’re mainly attending conferences in Wellington, where two staff can attend – one to attract attention with chocolates, while the other stays with the display. When travelling out of town, only one library staff member is attending, in order to reduce costs. So far, this is working, however if there were to be a large scale conference out of town, this would be re-evaluated. We have requested budget allocation for the new financial year in order to attend more conferences that are out of Wellington. There is an increased cost in needing to be there for registration, as this is often first thing in the morning; however the return on investment from engaging with members at registration is worth it.

What we have learned is that attending a conference works best if we have support from the NZICA staff members organising the conference. This means that they will ensure the convenor mentions us in the introductory speech, that we can get a prime location for our table, and that they will introduce us to speakers and attendees. Post-conference, we are able to create a list of resources that were mentioned during the conference, or that are relevant to the topics of the papers, and they send this to attendees. The most successful conference we have attended was Women in Business forum, where we attended all of the sessions, enabling us to discuss the topics with members on the breaks, and purchase any items that were mentioned that were not in our collection. We have gone on to have over 20 reserves on individual book titles, based on our experience at that particular conference. This was strongly assisted by us having a strong relationship with the person running that conference, reiterating that the effort spent building relationships with NZICA staff does have a flow on effect to NZICA members.

Lessons from attending conferences:

- Ensure there is support from the organisers
- Have somebody on your team who is willing to approach attendees and start a conversation
- Be there in time for registration. This is the best time to talk to attendees, as at lunchtime there may be enough time for them to leave the conference
- Provide reading lists to follow up with members
- Let members take books away that day

2 WHERE WE ARE NOW

We have a lot of qualitative evidence proving that our marketing to NZICA staff is effective in raising the awareness about the library. People stop by for a chat, library staff are invited to be involved in more member activities and there is a general feeling that the library is a positive, proactive unit of the institute. Quantitative evidence of marketing can be

difficult to prove – without asking every person why they decided to talk to us we have to assume that it is helping.

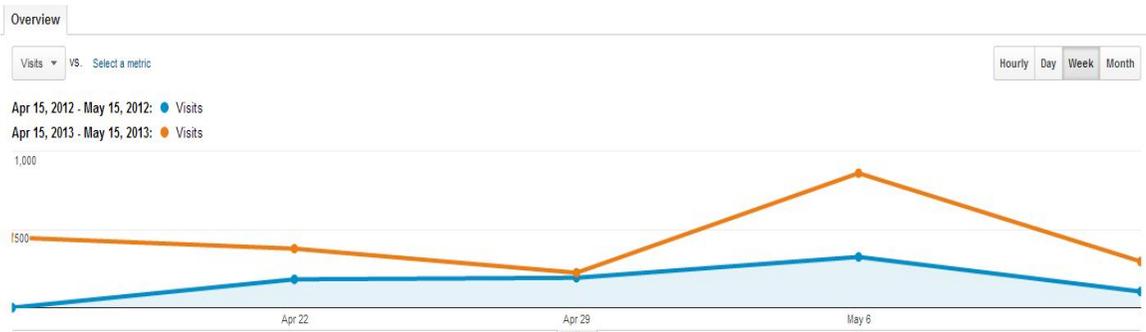
In terms of staff members passing the message onto NZICA members that they should use the library, again, this is difficult to prove. We will be performing a survey in September 2013 to determine how people who use the library have heard of us, whether it was from other members, other marketing, or because an NZICA staff member recommended us.

However, in saying that, there is an overwhelming feeling that this marketing has been successful. Usage statistics are rising, feedback has been overwhelmingly positive and people are now thinking of the library when it comes to projects and events. While the library has always been viewed positively by NZICA, there is more of an awareness now of how the library can help staff members within their roles. As mentioned previously, we are invited to more events and to contribute to more publications. We have also received direct feedback from members advocating for us to attend conferences and saying that they will be using the library, as a result of meeting the librarians at conference.

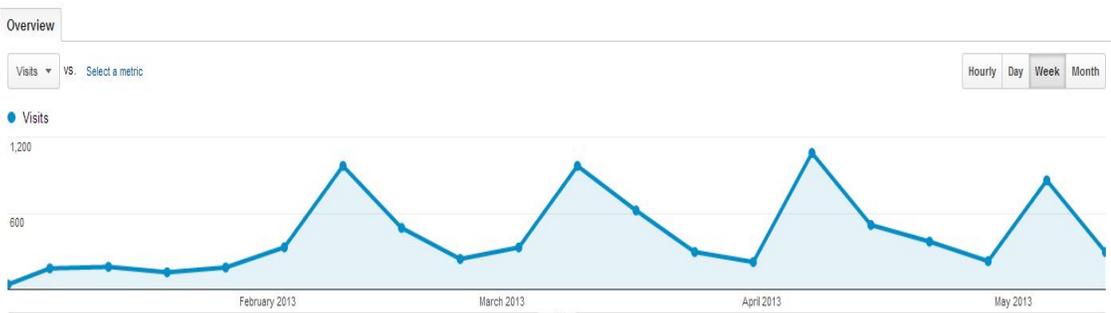
One of the Librarians has been recognised with an “NZICA Best Award” which is delivered to staff members who demonstrate the behaviours and values that NZICA encourages, based heavily on the ‘Love your Library’ day.

While this could seem like a very specific example of how a library can market internally to reach an external market, it’s believed that the behaviour demonstrated in this example could be re-enacted by any library that has both an internal and external market. By managing stakeholder relationships, stakeholders become strong advocate for the library.

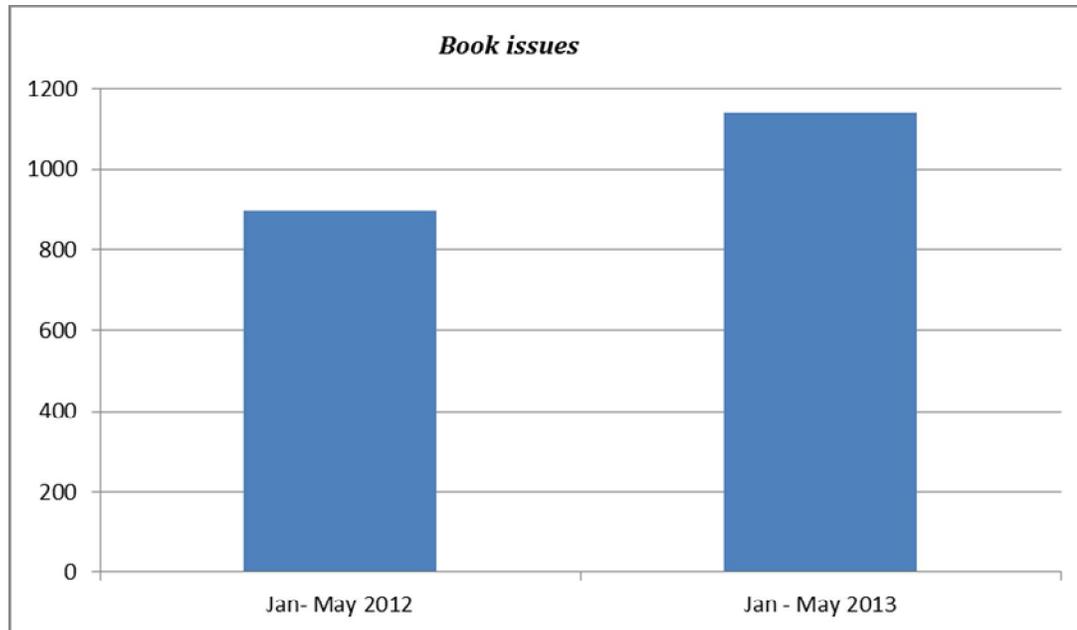
Visitors to the catalogue - 2012 compared to 2013



Visitors to the catalogue this year January-May 2013



The monthly peak is caused by the Informed Professional Bulletin going out – a regular reminder the library exists



3 NEXT STEPS

We've now made the commitment to continue marketing to NZICA staff, and to further our direct marketing by targeting more members. This means we will be attending more conferences, and we have applied for further funding to attend regional meetings and Special Interest group meetings, as well as conferences in Auckland, Christchurch and Queenstown.

Other promotional ideas that will be taking place are further articles in the monthly Institute journal, featuring e-books and other library services, in addition to the four pages a month that we already feature books and articles in.

While there has been a push for this marketing in the first half of this year, it is now standard business practice, to ensure that the library is known through the Institute as an excellent service for our members and staff. Other actions that we will complete this year include:

- More conference attending
- Travel to regions more for Special Interest Group meetings and local professional development
- Posters around office promoting good experiences with the library
- Meet with other teams to ensure we're meeting their needs
- More articles in the Journal – featuring e-books this month, will continue to features library services, as well as our new book pages that have been consistently provided
- Library quiz for NZICA staff
- Staff inductions

- Online training for members through screencasts

In summary, through strengthening our relationships with NZICA staff, our relationships with NZICA members are being improved and multiplied. Ensuring that we have our internal clients satisfied before expanding marketing opportunities to members has been an excellent way of testing key messages, finding out where we stand and what our priorities are.