Practice as a Marketing Tool:
Four Case Studies

DUNCAN SMITH

ABSTRACT
Marketing is frequently viewed as a set of strategies and techniques that belong to administrators or to individuals outside of librarianship. In addition, marketing is viewed as a set of highly specialized skills and tools which reside only with experts. Marketing is also a stance which, rather than being separate from practice, is an essential element of good practice. This article examines the experiences of four librarians who adopted a marketing stance as they attempted to improve not only their practice but also their institution's services. The role of marketing in assisting the profession in defining a role for itself in today's information society is also examined.

PRACTICE AS A MARKETING TOOL
Kennedy (1993) opens his book, Preparing for the Twenty-First Century, by invoking the ghost of Thomas Robert Malthus. He argues that Malthus's examination of the issues facing late eighteenth-century England are metaphorically linked to the issues facing the global community in the late twentieth century. Malthus was concerned that England's rapidly increasing population would overwhelm England's resources and result in the collapse of English society. Kennedy goes on to explain why Malthus's vision of England—an England faced with "increasing starvation and deprivation, mass deaths through famine and disease, and a rending of the social fabric"—never occurred (p. 5). Kennedy argues that three developments allowed England to escape the future that Malthus had predicted for it. These three
developments were a massive emigration of people from the British Isles, significant improvements in British farming output, and a vast leap in productivity due to Britain's successful entry into the Industrial Revolution (pp. 6-7). In essence, England escaped Malthus's vision because a declining population placed fewer demands on existing resources, and significant gains occurred in both the effective utilization of existing resources and the development and exploitation of new technology-oriented resources. While England was able to avoid the future that Malthus predicted for it, not all portions of the world were as successful. Kennedy points out that, at the beginning of the Industrial Revolution, England and India had similar per capita levels of industrialization. By 1900, however, India's level of industrialization was only one-hundredth that of the United Kingdom (p. 11).

For Kennedy, Malthus provides a nice frame for discussing the challenges facing today's global community. Kennedy sees those challenges as dealing with the world's population explosion and increased illegal migration, the robotics revolution and global labor demand, technology, and shrinking national sovereignty (p. 17). Kennedy's discussion and elaboration of these issues and their interconnectedness is too lengthy and well-developed to be condensed here, but, at the risk of over-simplifying his argument, his basic concerns can be reduced to the following two questions:

1. How does the world best use its existing resources to equitably meet the needs of the most people?
2. How does the world best use developing and newly discovered resources to equitably meet the needs of the most people?

Just as Malthus provides a frame for Kennedy, Kennedy provides a frame for libraries and librarians in today's information age. Like the countries and regions of the world contained in Kennedy's book, libraries and librarians are struggling with a population explosion in the form of users. This population explosion places an increased demand on limited human and material resources. At the same time that libraries are experiencing an increase in the demand for traditional library services, information technology and a changing information infrastructure are forcing libraries to consider developing new services for new clienteles. In essence, libraries are faced with a "Malthusian dilemma" all their own. Like the challenges outlined by Kennedy and Malthus, these challenges are ones which deal with how to equitably allocate resources to ensure that the needs of the most people are met.

The nature of this Malthusian dilemma is discussed by Childers (1994) in his recent study of public library reference service in the state of California. Childers conducted focus groups and individual
interviews with a variety of library personnel to develop an accurate picture of the reference service that was being provided by California’s public libraries. His findings indicate that reference service in that state has been severely degraded over the past ten to fifteen years. The main reasons for this degradation are a decline in the human and material resources needed to provide reference service coupled with an increase in demand for these services. In addition to these two factors, the introduction of information technology resources into the service program of most of the state’s public libraries has made reference transactions so complex that a large number of library patrons are no longer able to help themselves. Childers also found that these challenges had not been equally distributed across the state. Some jurisdictions were better off than others, but it was not unusual for there to be libraries that were “haves” and libraries that were “have nots” even within the same jurisdiction. This imbalance is reminiscent of the imbalance Kennedy found among the various regions of the world in terms of resources and the demands placed on those resources.

Kennedy's choice of Malthus as a metaphor for framing his discussion of the issues facing today's global society is an apt and effective one. He could, however, have also chosen to frame his discussion in terms of a marketing problem. At its core, Kennedy's book is about who has resources, who needs resources, and how these two groups might develop a means of transferring these. In her book, Marketing/Planning Library and Information Services, Weingand (1987) introduces the concept that marketing is an exchange relationship. She states that marketing is "an evolving process, one that is influenced by definitions, perceptions, environmental and cultural conditions and trends" (p. 3). She goes on to state that libraries have been involved in a culture of "selling." Libraries have tried to convince individuals to use library resources because the library's resources and services were inherently good for them. Weingand argues that, in a world of profound change and decreasing resources, librarians must examine themselves and their relationships with their users. She states that "the pragmatic manager of information services must reexamine the existing relationship between producer and consumer and, using current marketing principles, forge a new way of thinking and acting" (p. 5).

Marketing’s specific tools and techniques are discussed in more detail elsewhere in this issue of Library Trends. The major focus of this article will be on an examination of four case studies of pragmatic managers who have reexamined their relationships with either their existing or potential user groups. These case studies are offered as a way of examining how these managers framed the marketing problem
which faced their institutions. These four examples provide an opportunity for us to engage in what Schön (1987) calls "reflective practice." Schön argues that the thoughtful examination of one's practice and the practice of one's colleagues is an essential part in both the growth of a profession's individual practitioners and the profession itself. He states that: "When a practitioner becomes aware of his frames, he also becomes aware of the possibility of alternative ways of framing the reality of his practice" (p. 310). The four librarians represented in the case studies both knowingly and unknowingly used a marketing stance to alter their own and their library's relationship with their users. As part of their daily practice, these librarians focused on user behavior, redefined their product and its delivery system, created a new institution, and repositioned an existing one.

**FOCUSING ON USER BEHAVIOR**

An excellent example of focusing on users and their behavior is provided by Virginia Rankin (1992) in her article "Pre-Search Intellectual Access to Information." Rankin states her commitment to provide not only physical access to information but intellectual access to it as well. She has observed that the students who use her library frequently copy entire encyclopedia articles word-for-word. The result of this activity was an overemphasis by students on a few resources at the expense of others more relevant yet not as well known. A more important result of this activity was that students did not view the learning process as engaging. Rankin's students frequently viewed research as something that was more suited to a photocopy machine than a person. In her experience, the common reason provided for this behavior is that students are just "too lazy to stop and think." For Rankin, this common explanation by nonstudents for this student behavior is not acceptable. Rather than engage in a process of blaming her users for not being properly motivated, she chose to "reframe" this common problem. Rather than laziness, she feels that students engage in this behavior because they have not learned to make distinctions between information that is useful and information that is not. As a result of this assumption, she developed a three-step process to assist students in developing the skills and means needed to make the distinction between relevant and irrelevant information.

Rankin defines the presearch as "the process that helps students to relate research to prior knowledge of a topic first and then develop questions about the topic to organize their search" (p. 168). The remainder of her article describes her experience using the presearch with one group of students. One of the many library assignments Rankin assisted students with was a report on diseases. Each student
had been assigned a specific disease and asked to write a report on it. After she had dealt with this assignment twice, she asked a few of the students using her library a few questions about their assignment. She discovered that they could not answer some fundamental questions about their assigned ailment. For example, a student working on tuberculosis could not tell Rankin how a doctor would know if someone had tuberculosis. Rankin points out that this student had been working on her assignment for four days and had several pages of notes.

Rankin concluded, as a result of her informal interviews, that what her students needed for this assignment was a framework. She then developed a series of activities designed to assist her students in developing this framework. These activities included making lists of words that relate to diseases, learning how to gather ideas for frameworks from a general encyclopedia article, developing lists of questions about diseases in general, and practice in the art of note taking. One ingenious strategy involved distributing folders to students with envelopes glued into the folders. Each student wrote one of the questions they were interested in on each of the envelopes. After a student made a note card on information they had located, they had to place the note card in the envelope of the question it answered. If the student could not place the note card in one of the envelopes, the note card was discarded.

As part of her evaluation of the presearch process, Rankin asked her students for their feedback. As a result of this feedback, Rankin learned that her students were aware of changes in their behavior, that they had learned the importance of developing a framework for their research activities, and that these ideas and strategies would make future research projects easier.

While Rankin might not view the process she describes in her article as marketing, it is marketing nonetheless. Weingand (1987) quotes Kotler's definition of marketing in her book. Kotler defines marketing in the following manner:

Marketing is the analysis, planning, implementation, and control of carefully formulated programs designed to bring about voluntary exchanges of values with target markets for the purpose of achieving organizational objectives. It relies heavily on designing the organization's offering in terms of the target market's needs and desires, and on using effective pricing, communication, and distribution to inform, motivate, and service the markets. (p. 5)

In her article, Rankin describes not only the presearch process but her process in coming to her conclusions about the presearch and its benefits for her students. Her process involves observing student
behavior and developing concepts about that behavior. She observes that students copy from encyclopedias rather than developing and expressing ideas in their own words. She rejects the commonly held assumption that students do this because they are lazy. In place of this rejected assumption, she postulates that students engage in this activity because they cannot distinguish between useful and irrelevant information. She conducts informal interviews with a few students and determines that this is, indeed, the case. As a result of her interviews, she also learns that students lack a framework for conducting research. Rankin then develops an intervention or service which assists her students in developing a framework for a specific research assignment. The outcome of this process is that library research becomes less costly for Rankin's students. Rather than being a time-consuming and boring process—something more suited for photocopiers—research becomes something that is personally relevant, efficient, and fun. These outcomes are verified by obtaining feedback from her service's consumers. The process Rankin employs for developing and implementing the presearch described in her article mirrors several aspects of Kotler's definition of marketing. Rankin changes and improves her practice by employing marketing strategies to plan and implement a service based on the needs and desires of her target market.

**Redefining the Product and Its Delivery System**

In "Reference Encounters of a Different Kind: A Symposium," Virginia Massey-Burzio (1992) describes a situation that is a microcosm of the universes described by Malthus, Kennedy, and Childers. At the time of her article, Massey-Burzio was head of the reference department at Brandeis University. Like most academic libraries during 1988/89, Brandeis University's main library was in the process of adding databases in the CD format. During the same time period, the number of reference questions received by this department increased 300 percent. This increase had to be absorbed with no additional staff. Like Malthus, Kennedy, and Childers, Massey-Burzio found herself in a situation where more users were making more demands on the same resources. A standard response to an increase in use would be to seek more staff. The acquisition of more human resources, however, was not possible at Brandeis. In an attempt to cope with this increasingly untenable situation, Massey-Burzio began a systematic analysis of her situation which resulted in her reframing the way she viewed not only her situation at Brandeis but reference service itself.

Massey-Burzio conducted an informal survey of academic reference librarians in the Boston area to develop a baseline for what
the question to staff ratio would be for an adequately staffed reference desk. The figure she arrived at as a result of this process was 2,500 questions per year per staff member. In order to bring the Brandeis reference desk into this range, Massey-Burzio would either have to add several more reference librarians or reduce the number of questions received. Neither seemed to be possible at Brandeis at that time. As a result of her findings, she began a detailed review of the literature to identify additional solutions to her problem. Her review revealed two very interesting trends. One was the fact that, while the tools and strategies used in providing reference service had grown and changed, the actual means of delivering that service had not. She also discovered articles which began to question whether or not the value of reference service resided solely with the provision of an accurate answer.

In a response to the situation at Brandeis and as a result of her literature review, Massey-Burzio and her staff decided to eliminate the reference desk in their library. In its place they created an “information desk” and a “research consultation service.” The information desk was staffed by graduate students who had been trained in providing ready reference service. These students became the reference department’s front line. They were responsible for determining whether or not a question was a directional or ready reference question or whether it was a research question. If the question was a research question, it was referred to the librarian who was on duty in the research consultation service office.

This means of delivering information service offered several advantages for the Brandeis community. First of all, it allowed for a more equitable and effective distribution of staff resources. The expertise of the reference librarians was channeled toward users with research questions and away from users with directional or ready reference questions. By segmenting the “reference question market,” the Brandeis staff was able to develop service strategies that more appropriately addressed the needs of users. Under the traditional reference desk model, all users and their questions were viewed as equal. Whether a user had a directional question or a research question, the user was treated in the same way. The user’s question was addressed at the reference desk with all the distractions and time constraints inherent in the traditional reference desk model of service delivery. Under the information desk/research consultation service model, users and their questions were directed into the service modality that was most appropriate for their needs. Finally, the research consultation service office was an environmental setting which was designed not only to increase the utilization of the library’s human resources but
to increase both the accuracy and quality of the reference transaction itself.

The research consultation service office is an office. It resembles the offices of other professionals like lawyers and doctors. It is a private setting in which a professional and client can engage in a confidential dialogue without being disturbed. Like a doctor's office, the research consultation service office also contain the basic tools and equipment needed to provide service: ready reference tools and a scholar workstation which provided access to all the functions of the library's online catalog as well as dial-up access to a wide range of online reference and information resources. This environment not only sets a more "professional tone" for the reference transaction, it creates a space in which the overall quality of the reference transaction could be improved. Several studies have pointed out that interpersonal communication skills play a major part in the provision of accurate answers to reference questions (Gers & Seward, 1985, pp. 32-35). The research consultation service office is an environment which increases the likelihood of successful interpersonal communication. Studies are also beginning to appear in the literature which point out that accurate answers are not the only factor valued by users who seek information service. Durrance (1989) found that factors such as being made to feel comfortable by the librarian, showing an interest in the question, and being friendly contributed to user satisfaction with the reference transaction. While the reference consultation service office in and of itself will not increase either a particular staff member's interpersonal skills or their "friendliness," it does provide an environment which allows these skills and traits to be used to their fullest.

Like Rankin, Massey-Burzio would probably not view her process as a marketing process. She is more likely to view it as either being a good librarian or being a good manager or both. While it may indeed be these, it is also a marketing process. Some of the marketing elements Massey-Burzio describes in her article are assessing her service's environment, identifying her user community and segmenting that community into unique markets, and evaluating and designing an appropriate delivery system for her service. Her key marketing task, however, was to redefine her product. Rather than defining reference service narrowly in terms of providing the most answers to the most questions, Massey-Burzio and her staff viewed reference service as more than providing answers. By viewing reference service's product as the quality of the reference transaction, the staff at Brandeis was able to make more effective use of their resources and add value to the service received by their users.
CREATING A NEW SERVICE

At the end of 1982, Peggy Hull (personal communication, August 1, 1994) found herself in need of a job. She was just completing the end of a temporary assignment as a cataloger in an exemplary special library. This library served a large pharmaceutical company and was well-known and respected both within the company and within the industry. Her experience in this setting had opened her eyes to the possibilities of providing information services in a corporate environment in the private sector. A remark made by a colleague regarding requests for assistance from another pharmaceutical company in the area provided Hull with an opportunity to attempt to create a position for herself.

Hull made an appointment with a representative of the neighboring company to explore the possibility of being hired as the new company's librarian. This company had recently located to the area and, while it was engaged in pharmaceutical research and marketing, it only had twenty-five professional employees. Hull's contact did not see either the possibility or the need in hiring a librarian at the time of her interview. During the interview, Hull continued to express the specific skills she had that could be of use to the company. These included organizing the company's growing print resources, performing literature searches, and providing a document delivery service for company employees. At the end of the interview, it was agreed that Hull would be given a three-month temporary position to "organize the company's journals." At the end of three months, her position would be evaluated.

With only three months to justify both her existence and the value of her profession, Hull decided to focus on providing those services which would have an immediate and visible benefit for her users. In her new company, Hull quickly learned that time was something that was a highly valued resource. It was also a resource that was in short supply. As a result of reflecting on the needs and values of her users, she decided to focus on performing literature searches and providing a document delivery service. These two services would be tied more directly to the immediate needs of her users and have the added value of saving them time. Shortly after arriving, Hull found herself being kept busy with these two services. She quickly developed forms for requesting literature searches and articles. These forms allowed users to record their requests quickly without having to wait for her if she was working with someone else or was out of the building retrieving documents for other clients.

These forms had another benefit as well. They provided a record of the number of requests received and the number of items obtained. Hull began to gather this information as a way of communicating
the value of her service to the individuals she hoped would become her superiors. The results of her analysis showed a steady increase in growth and demand relating to her service. Hull was not asked to keep this information. She decided that it was important to be able to convince her employers of the value of her services.

Hull spends a great deal of time in her narrative about her experience of the emerging corporate culture in which she found herself. She uses words like confident, enthusiastic, and energetic to describe her users. She goes on to say that these traits were contagious, and she found that her initial feelings of apprehension about her venture were giving way to feelings of enthusiasm and confidence. She found herself buying stock in her company and urging others to buy stock in it. She also found herself turning a potential liability into a major asset. The library was located in the only conference room available to company personnel. Rather than viewing this as an inconvenience, she asked to be allowed to work quietly while meetings were being held in the room. As a result of being allowed to stay in the library while meetings were being conducted, Hull was able to learn more about the company, its language, and its needs. This information was translated into more and better service for her users.

At the end of her three-month appointment, Hull was made a permanent employee of the company. Eleven years later, this library enterprise, which began with one temporary employee, employs a total of fourteen professional librarians. Of the three case studies so far, Hull is most conscious of the marketing aspect of her practice. She entered her company knowing that she had to focus on her users and provide services that added value to them and allowed them to add value to the company. Notice that she does not focus on the activity for which she was originally hired. She identifies and focuses on activities that are based on the needs of her users. Notice also that she quickly begins communicating the value of her service to her consumers. Communicating the value of your product or service is a major component of any marketing program. Notice also that Hull's communication and interaction with her market is not one way. Just as she adds value to her users, they add value to her. They share their enthusiasm, confidence, and energy with Hull. She moves from being someone who wonders whether or not what she is doing is useful to someone who knows that she is making a valued contribution to her company. She also moves from someone who is on the outside looking in to someone who is a full partner in this particular enterprise.

Repositioning an Institution

While Hull created an institution, Steve Sumerford and the staff of one of the Greensboro Public Library's branches reinvented an
institution (Pates, 1994, pp. 1-5). Approximately five years ago, Sumerford became director of the Greensboro Public Library’s Southeast Branch. Sumerford was hired, in part, to explore ways of increasing use at the Southeast Branch. Prior to his hiring, the Southeast Branch had been considered for closing because it was not performing as well as other branches in the Greensboro system. Performance at this time was measured mainly by circulation figures. One of the reasons for its low circulation was that the library was located in a low-income neighborhood with high unemployment and a high degree of illiteracy. Sumerford viewed his primary tasks as determining ways to make the branch relevant to its community and determining ways to evaluate the effectiveness of his branch's services.

Sumerford began his first task by establishing relationships with other agencies that were providing services in the southeast Greensboro community. As a result of his discussions with these agencies, he determined that his branch’s market had two primary concerns. The first concern was services for children. A large number of residents of the southeast Greensboro community were children. The parents of these children were very concerned that their children have access to more opportunities than they had themselves. The second area of concern for the Southeast Branch’s market was employment. With these two needs in mind, Sumerford and his staff began to develop programs and services which could contribute to addressing these needs. From the beginning, Sumerford and his staff saw the library and its programs and services as part of a larger program designed to address the needs of the southeast Greensboro community. The library was not an institution operating alone. It was one of many agencies operating to address the southeast Greensboro community’s needs.

Early on in this process, the following motto was developed as a guiding principle for the efforts of the Southeast Branch Library: The library in the community and the community in the library. Some of the services which grew out of this motto were the development of a literacy collection for both students and teachers, a computer laboratory, a job and career counseling service with supporting materials, storytimes for children from local childcare centers, GED classes, an independent learning lab, an after school homework club, and storytimes at the local homeless shelter. As a result of these services, the Southeast Branch Library began to see an increase in both use and the attention it was receiving as part of its efforts. In fact, community groups began to contribute funds to the branch and host fund-raising events to support the branch, its programs, and services. A total of over $210,000 has been raised.
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for the branch and its programs through gifts and grants over the past three years.

Like Hull, Sumerford and his staff were very aware of the challenges they faced in marketing library services. They were faced with the challenge of reinventing their institution. The cornerstone of their marketing strategy was to redefine their institution for their community in terms of their community. This meant, in some cases, delivering library services and creating a library presence outside of the library building itself. This also meant assessing not only their end-users but potential organizational shareholders in the library. By forming a partnership with other community organizations, Sumerford and his staff were able to identify ways to make their library relevant in their community. It was a process which not only positioned the library and its services within the southeast Greensboro community but also made the library a full member of that community. A final aspect of the Southeast Branch's marketing program was to rename itself to reflect more accurately its role in its community and the services it provides to that community. Greensboro Public Library's Southeast Branch is now known as the Vance-Chavis Lifelong Learning Center.

Another reflection of the value placed on the efforts of this branch came from the Z. Smith Reynolds Foundation. Each year the Z. Smith Reynolds Foundation, a private nonprofit foundation, gives the Susan B. Reynolds Awards. The purpose of these awards is to recognize outstanding and courageous leadership at the grassroots level. These awards are frequently referred to as "North Carolina's Nobel Prize." In 1993, Steve Sumerford received the Susan B. Reynolds Award for Community Change. He is the only librarian in the award's eight-year history to be so honored. His quote in the award's ceremony program is an apt summation of the efforts of Sumerford and the staff at the Vance-Chavis Lifelong Learning Center:

There's this image now of reinventing government. I like that image. We need to reinvent some institutions, and there are aspects of the public library that I think need to be reinvented. We've got to listen to what the public needs and then make changes to our institutions to respond to those needs. Otherwise, the institutions will die out of lack of interest and lack of need. (Reynolds, 1994)

CONCLUSION

Each generation of librarians must define for itself and its users what the library is and how it will add value to the information exchanges of its community. Libraries and librarians have traditionally added value to these exchanges in three major ways. They
have provided physical access to information, they have organized this information for use, and they have provided assistance in locating and utilizing this information. Each of the librarians in this article starts with one of these traditional values and makes it relevant to today's users. Virginia Rankin chooses to provide not only physical access to her library's collection but works to assist her students in gaining intellectual access to the information contained in her library. Virginia Massey-Burzio redefines reference service's product and its delivery system. Peggy Hull finds a niche for herself and her profession in a growing and dynamic enterprise in the corporate sector. Steve Sumerford and his staff, by focusing on the needs of his institution's users, moves his library from being irrelevant to being a centerpiece of the community and a vital part of the lives of its citizens.

These librarians have removed barriers between their institutions and the markets their institutions sought to serve. They did so by placing a higher value on the needs of their users than the resources they would use to serve those users. Marketing has frequently been viewed as something that is separate from librarianship and its practice. As these case studies show, there is no need for this barrier to exist. Marketing is not a set of tools and strategies that resides in textbooks and library school lecture halls. Marketing is a stance and an attitude that focuses on meeting the needs of users. Marketing is a means of ensuring that libraries, librarians, and librarianship are integrated into both today's and tomorrow's emerging global culture. Marketing is not separate from good practice. It is good practice.

REFERENCES