



Marketing Information Services: Packaging, Promoting, Persuading

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This white paper provides a summary of the Dialog Quantum² workshop, "Marketing Library Services: Packaging, Promotion Persuading," which was developed for the Quantum² program by Sue Henzcel of Infase Solutions. The paper provides an overview of methods that can be used by information professionals to develop services and products that are organizationally aligned, and to market and deliver them in a client-focused way.

While this paper can only provide an introduction to the key points, the primary objectives are to:

- Define marketing in the context of customer needs
- Understand the specific marketing activities of packaging, promoting and persuading
- Consider how these activities could be practically applied in an information and knowledge environment

Defining Marketing

Marketing means something different to everyone. Some people equate it primarily with communications tools such as brochures, while others think of efforts to bring in new customers or programs to create more demand for existing services. All of these are correct, but the marketing function is broader than any of these activities. Michael Porter, a Harvard professor, offers this simple, but quite comprehensive definition: "Marketing is anything you do to get or keep a customer" NEED REFERENCE

Successful marketing requires seeing the products and services you offer through the eyes of the customers and articulating client's needs in their terms. Focusing attention first and foremost on the customer, rather than on set of products or activities, creates a mindset in which the main objective of marketing is always to understand customer needs. The information services offered can then be defined by those needs and the benefits communicated in terms of the customer's own business objectives. And, staying close to customer needs enables you to respond to change, constantly refining and adapting services over time.

As a starting point for your marketing efforts, ask yourself if you can easily describe your services and products in terminology that makes sense to users. Can you also state the benefits offered in a way that is meaningful to customers and communicate why you provide the best solution compared to other options? You need to start with the business needs and problems that you can solve and work backwards to describe the solutions

Why do Information Resource Center (IRC)'s need to market?

It is all too often the case that potential clients within the organization are unaware of the services of the IRC, are satisfied with doing their own searching on the web, or are unwilling to spend money on information services. Even current users may be aware of only a portion of the services actually available. A successful marketing program can create awareness of and desire for your services, build understanding of the value of the services, increase the level of usage, and expand the client base.

As information professionals, we may make assumptions about what our clients want and need, continuing to deliver products and services that we feel we should deliver, regardless of their

value to our clients. With limited resources to respond to current levels of demand for services, a strategic marketing plan can help you refine the service offering to make sure you are focusing on the most important and highly valued information needs of the organization, rather than just reacting to the flow of information requests.

Through organizational alignment and client focus, the information center becomes an integral part of the organization. Our clients recognise how our products and services add value to their work, and they refer others to us from both outside and within the organization. They have faith in our ability to deliver, and trust us to give them correct, authoritative and context-relevant information

Client-focused marketing will improve the satisfaction of your existing customers and increase the sales of your products and services to current and prospective customers. Greater organizational awareness can also result in higher visibility to senior management and ultimately support higher budgets based on demand.

How to Market: 3 P's

While marketing has many components, it is rooted in an ongoing process of needs assessment and customer feedback. The main components in any strategic marketing plan are:

Market Analysis

- Customer Needs Assessment
- Competitive Assessment

Environmental Analysis

Product Analysis

Marketing Strategies

- Packaging and positioning
- Promotion and persuasion
- Pricing and Budget
- Measurable and Quantifiable Goals
- Monitoring Progress

The Quantum² program covers many aspects of the overall marketing function. Needs assessment is addressed in the Quantum² session entitled Assessing Client Needs: Gather and Analyze Data. Environmental analysis is covered in the Quantum² session "Linking the IRC to Compelling Business Events" at http://quantum.dialog.com/q2_resources/whitepapers/compelling_events.pdf

However, this paper focuses specifically on three specific aspects of marketing. As used here, the 3P's are address how to **Package** your product and **Promote** your services in a way that is attractive to existing and potential clients and **Persuade** clients that your services are better than those offered by competitors. Placement is another P that is often used, but we have chosen "Persuade" as the more relevant concept in the context of the IRC marketing within an organization.

The 4th P of marketing is **Pricing**, which is a key component in establishing the overall value of a product. This topic is not addressed in this paper. For additional information on marketing terminology see: <http://www.wordiq.com/definition/Marketing>

Packaging Information Services

Originally, the word “packaging” referred to the container or wrapping for a product. Now, packaging is much more broadly understood as all the ways to present and convey the value of a product or service. When marketing information services, you should think about the total package represented by the full array of services from the Information Research Center (IRC). Additionally, you can work on developing optimal packaging for specific products or services, or for groups of services.

In the classic book “Marketing High Technology, Bill Davidow refers to this process as developing the “whole product.” For an information center, the whole product would include not only the actual information, but also the service support, customization, and delivery mechanism, as well as intangible factors such as IRC credibility based on past experience

In order to build consistent packaging, you must be clear about who you are and what your services represent. It’s important to always bear in mind that you ARE in competition – with other information services (web, intranets, information brokers, etc.) -- and that your information services are “products” that you sell. A simple way to start clarifying who you are is to ask how you differ from your competition, and to evaluate the way that the competitive services are being packaged and presented to your constituency. Sometimes a competitive service seems more attractive than the IRC’s comparable alternative simply because of more attractive or well focused packaging. Indeed, this is an example of the adage that form is often as important as function.

Creating solutions

Packaging also refers to creative formatting and bundling of product and service components to address particular business needs, thereby provide a compelling solution for the customer. Some examples of packaging components are:

- Reformatting and synthesizing raw information before you deliver it
- Combining personal expertise or consulting in a subject area with access to a set of selected information sources most relevant to the subject area
- Providing training or personal attention to aid a user in accessing a desktop information product

To extend and add value to product packaging, think of the problems that your customers often experience and the potential solutions that you offer. As an organizational insider, you are well positioned to understand the pain points of the customer and the types of information access problems most frequently encountered. Based on this knowledge, you may be able to include in the IRC package services or functionality that add unique value or are not readily available elsewhere. Such tailoring starts to differentiate your services from other alternatives in a meaningful way.

To communicate this value to the customer, products and services should be described in terms of the customer’s needs and the way that the service will solve their problems. Simply describing the capabilities or features does not create the understanding of the solution offered in the mind of the customer. The whole product can address not only an immediate information request but the workflow and business priorities of the client.

Creating a ‘business identity’

Another important aspect of packaging is unifying the package components through consistent use of visual cues such as color, graphics, or formatting. Creating an identity for the IRC and its

products is an exercise in branding. In the context of packaging, let's touch on some of the ways to create a consistent image and brand identity package in order to build awareness and recognition.

Packaging is about not only how you put together and present information products and services, but also about the people who provide the service. First, think about the current business identity that exists for the IRC – for you do have one even if you haven't worked specifically to create it. The current identity is made up of every customer touch as well as the image conveyed by the IRC staff. The way that everyone serves the customer projects an image. For example, when answering the phone, are people formal or folksy? Are they consistent in using the IRC name? Do they recommend additional services or respond just to the immediate request? Of course, different people will behave differently, which means that the customer experience will vary as well. How staff members dress can also send a message – is it casual, corporate, trendy? The important point about dress is to “match” corporate culture, so that your customers will feel comfortable in your presence. The business identity is a composite of all these elements.

Persistent business identity can also be conveyed through IRC communications and by the IRC's products themselves. Some examples of this are:

- Using a consistent typeface, color style format and cover page for all search output or documents delivered to clients
- Including the IRC name and contact email/telephone as a footer on every page of search results, analysis or reports delivered to clients
- Using an IRC logo, graphical treatment of IRC name, or watermark on all work output as well as intranet pages, business cards, brochures, stationery, email signature blocks, etc
- Create a defining message or tag line for the IRC

A few familiar examples of a defining message or tag line are SLA's “Putting Knowledge to Work” and Dialog's “Information to Change the World.” A team exercise to create a defining message can be a great way to get the IRC staff thinking about what is the most important message about the IRC to communicate to the rest of the organization.

.In short, everything that is generated by the information service should have some common identifying features. The immediate goal is to create a recognizable visual image that conveys the message “brought to you by the IRC” with every customer touch. Over time, as your persistent identity becomes identified with the quality and characteristics of your overall package, you will find that it conveys additional messages to the customer such as reliability, accuracy, quality, or trusted source.

Promotion

Promotion starts with understanding and targeting customers. Find out who they are, what their special interests are, what their business backgrounds are, what they require to succeed in the organization, and, most importantly, how you can provide it to them in a way that makes it valuable to them. Information about your products and services (brochures, web site, etc.) can then focus not only on the services you offer, but the solutions you provide to make them successful.

Stimulating customer referrals

The best possible way to generate new and returning business is through customer referrals. You can stimulate referrals by building on the network of those you already know in the organization. Here are some obvious but high impact things to do:

- When satisfied clients say that you have done a great job, accept their thanks and ask them to tell their colleagues (spread the word!)
- Attend all possible organizational functions - be out there and be noticed
- Find out what your clients read - write articles, newsletter snippets, papers and reports (don't forget the intranet!)
- Attend and present at industry conferences on topics of interest to your customers.
- Talk, attend meetings, call people, get involved!
- Revisit past clients - ask what their current problems are

The more visible IRC staff members are in the organization, the more opportunities are created for networking and communicating your value as an information professional. It is, indeed, self-promotion – but of the most practical and useful kind.

Ultimately, the best possible marketing device is a satisfied customer who spreads the word to other potential customers within your organization. Every customer interaction is a marketing activity. Providing great customer service is the *most effective, least expensive* way of marketing.

Marketing Communications

Your communications to current and prospective customers have to grab people's **Attention**. If they don't know you exist, they can't do business with you. Then they either need to already have an **Interest** in what you do, or you have to create the interest. Next, you need to stimulate a **Desire** for your services. This means they begin to believe that you can meet their needs and they want to use your services. Finally, they have to take **Action**. If they never take action, you have no business. It is a good test to review every communication to see if it will get Attention, build Interest, generate Desire and result in Action.

The practical marketing communications activities that can help to stimulate awareness of IRC services tend to fall into two main types: written communications and customer events. Some examples of written communications are:

- New product/service announcements
- IRC newsletters
- Brochures, fact sheets or product literature
- IRC Advertisements or articles in internal newsletters

Each communication is an opportunity to create or reinforce an emotional connection or good feelings about the IRC. Through use of pictures or graphics it is possible to create or reinforce positive feelings or an emotional connection. As we all know from our own experience with advertising, this is a subliminal process that becomes more effective with multiple exposures to the same message or graphic, whether presented in a Powerpoint presentation, a handout distributed at a meeting, or on the IRC intranet page.

The main point about marketing communications is that there is no value in doing them without having first worked through a customer needs assessment, determining what's important to customers, and done initial work on packaging. As noted in the discussion about business identity above, all written communications provide an opportunity to reinforce the consistent image and key message of the IRC.

Some examples of customer events are:

- Workshops and training sessions
- Lunch & Learn / Brown Bag sessions
- Open Houses / Vendor fairs

- User Group meeting
- Customer awards or recognition events

Customer events are often tied to written communications because an event can drive the call to action (e.g., an article about an open house in the company newsletter that invites people to attend.) Customer events are valuable in providing an opportunity to reinforce personal contacts, build relationships, reinforce the IRC business identity, and seek customer feedback. However, not only do they require careful planning in order to ensure success, but they have to be targeted to address real needs of customers, who will not otherwise take time to attend. It's probably better to pick one type of program and do it really well (creating a "signature event") than to spread staff time too thinly over multiple efforts.

For a wonderful example of a customer recognition program, see the Quantum² case study about the Air Products "Gold Nugget" award, by Michelle Burylo:

http://quantum.dialog.com/q2_resources/casestudies/goldnugget.shtml.

For a 5 step guideline to creating a communications tool, see

<http://www.enterprisefoundation.org/resources/ERD/resource.asp?id=1305&c=64&a=view&f=browse>.

For additional ideas on marketing the information center, from how to run an open house to tips for promotions see the marketing resources on Quantum2 website at:

http://quantum.dialog.com/q2_resources/marketing/

Persuading

Ultimately, the purpose of printed materials and other communications we've described is to create a readiness in the client or potential customer to hear and be persuaded by your message. Persuasion is the process of helping the client discover whether there is a match between his/her needs and what you have to offer. Persuasion results from focussing on how you can help your clients reach their goals. Successful persuasion is a very fulfilling activity when it results in finding the best solution to meet a customer's needs.

How to Persuade

In any situation, the first goal is to gain the client's trust and confidence. Persuasive messages will motivate customers to take an action by promising a benefit – literally what's in it for them to try your services. One way to communicate benefit is to describe real life examples of how you have made customers successful. Collecting such case studies will provide a tremendous resource for ongoing marketing messages. Your communications, both formal and informal, should include examples of such success stories in order to build awareness of the value you provide. In addition, persuasive messages will convey what action you want customers to take.

The how of persuasion is just as important as the content of the message. Most of us talk too much, particularly when trying to sell something. When it's your turn to talk, be brief and focus on asking questions that draw out the other person. In any meeting with clients or prospective clients, try to spend at least 70% of the time listening and no more than 30% talking. Once you have spent the time listening, you are then in a far better position to target your presentation towards their real needs. In brief:

- Listen rather than talk – focus on what motivates them
- Educate clients as to benefits you can provide
- Use language that is meaningful to customer
- When talking to clients or potential clients be totally focused on what you can do for them.
- Discover their future objectives to understand how to evolve your services

The process of persuasion is an iterative one in which you constantly collect feedback from existing customers. With each customer interaction ask:

- Did we meet your expectations?
- Is there more we can do?
- What could have been improved?

Remember, every interaction is an opportunity to build or develop a customer relationship and create a persuading or “selling” opportunity. To achieve long-term, profitable relationships with your customers, you must make consistent, measurable contributions to their profitability and their customer relationships. You must offer them a value proposition which brings them a service they want and need that they perceive will save them time or money.

Creating a Marketing Plan

Although you may not have the resources to engage in an elaborate marketing program a good starting point for marketing the Information Center is to create a marketing plan. Consolidating your thoughts by creating a plan will help you to clarify your current product positioning and prioritize the resources you do have. For a marketing plan template based on the outline shown at the beginning of this paper and sample marketing plan for an information center, see: <http://quantum.dialog.com/about/framework/workshops/marketing.shtml>

A marketing plan can be a wonderful tool for communicating with management about your vision for enhancing information center products, image and capabilities. It can also be a strong piece of supporting material at budget time.