

# MARKETING

# Treasures

The newsletter that helps librarians market the services of their libraries and information centers.

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## ***Annual Reports: The Ultimate Visibility & Communications Piece***

You've seen them . . . the big, glossy booklets issued by major corporations projecting the image of success and well-being. These profusely illustrated, handsomely composed, no-expense-spared reports, costing \$2-\$4 or more per copy, are the organizational report cards. Legally, for-profit organizations are required by the Securities and Exchange Commission to report financial statements. But, over time, the annual report has become a central communications showpiece for many organizations.

In the library world, annual reports appear to be published primarily by public libraries. Many corporate, legal, and medical libraries do not issue such reports. Reasons range from "not enough time", "no requirement to do so", "it's too expensive", to "I never thought about it". Some librarians issue a report that compiles yearly statistics, but don't take the opportunity to say more. One librarian said that only her immediate management received the report, so there was no need to make it into an annual report. With librarians looking for opportunities to increase the visibility of their libraries within their organization and to reach upper management, it's time to consider annual reports as the premier communications tool for all libraries.

Of all the communications materials issued by an organization, the annual report may be the single most important publication produced during the course of a year. It reaches the widest audience and serves the most purposes. The annual report is an essential component of an organization's public relations program, for it speaks to all the organization's publics — staff, customers, competitors, suppliers, and financial supporters.

For many organizations the report is used to build a case for past and continued support. It tells the story for an entire year, and allows an organization to look at itself as a whole, see where it is headed, and report

its conclusions to its various publics. It also allows each department, program or section to look carefully at what it has accomplished in the past year and what it still hopes to do.

The annual report is an excellent tool for a library's internal and external communications. Internally, the report can boost staff morale by showing the progress of all the individual efforts. This is particularly important if the library staff is large and multiple projects are conducted without everyone knowing the details. The annual report can pull together the big picture for everyone and point the way toward a common goal. Many external library communications are limited to brochures, open houses, and newsletters. A marketing-oriented librarian will take every opportunity to put the library's information services and products in front of current and potential customers. The annual report is yet another way to get your message to your market, and in a format that is readily recognized in the business world. And since librarians run information businesses, why not produce an annual report to announce the year's triumphs and progress.

Think of your library as a business with stockholders. In your case, the stockholders are the managers who approve your budget and lend support for expansion. What do you want to say to your supporters so that they will give you the money and resources you require to operate a successful information business? What message do you want to send to your target market of customers? How do you want the library staff to see the library? These and other questions will lead you to the very important first step in preparing an annual report — deciding on the message theme. Most annual reports have some sort of theme behind the presentation of data and information. Themes usually reflect the goal or objectives the organization assumed in its annual

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## Pearls of Wisdom

S.D. Warren, the paper company, recently published the informative book entitled *Handbook Of Direct Response Production*. Not only does it give the reader excellent insights into the direct mail process, the book also provides a wide assortment of design and layout ideas. It's a great place to start if you've just begun using the mail for marketing/sales. To obtain a copy of this free publication, and to get your name into S.D. Warren's Idea Exchange information network, write to: S.D. Warren Company, D.A.P. Ctr., 280 Summer Street, Boston, MA 02210-9902.

If you are thinking about creating an interactive library orientation program, and have access to a Macintosh system, then you should read the January 1989 issue of *Online*. Monica Ertel and Jane Oros, librarians at Apple Computer, Inc., have written an informative article about how they used Hypercard to create an interactive tour of the Apple library and its resources. Reprints of "A Tour of the Stack's Hypercard for Libraries" can be obtained from Apple Computer, Inc., Library, Mail Stop 8-C, 10381 Brandley Drive, Cupertino, CA 95014. If your library owns an Apple or Macintosh and you don't receive the *Apple Library's Users Group Newsletter*, do yourself a favor and start subscribing. It's filled with useful information and ideas from Apple/Macintosh-loving librarians across the country.

The newly created Marketing Applications Discussion Group of the Public Relations Section (a

section of the American Library Association's Library And Management Association) will be holding its first meeting at the ALA midwinter conference in Chicago on January 6th. *Marketing Treasures* readers attending the conference may want to stop by and join in discussions. For more information contact Pat Latshaw 216/762-7621.

The American Management Association (AMA) has a catalog listing sales and marketing courses being offered throughout the United States. For a free catalog contact: AMA, List Dept, 135 West 50th St., New York, NY 10020 or phone 212/903-8270.

For readers who monitor their organization's coverage in the news media, there is a new software package to help you. *Cliptrak* enables organizations to track coverage by client, product, subject, organization, competition, author, region, type of coverage, and 21 other categories within any timeframe they choose. For more information or a free demo disk (IBM and compatibles) contact Craig Blackman, Cetex Corp., 37 Thunderhead Rd., Medford, NJ 08055 or call 609/953-1406.

The American Library Association (ALA) Video/Library Network has released its *Marketing: A Planned Approach for the Public Library*. The 30 minute tape shows how to apply the principles of marketing to match community needs to library strengths and increase library use. For information contact ALA Video 312/944-6780.

Find out how your customers are treated by your library staff. Make "blind" calls to your own library and evaluate how *your* request was handled.

Your *Marketing Treasures* editor has had a bright idea and needs your help. Inserted into this issue of *Marketing Treasures* is a short survey about your library's newsletter. Please take a minute to complete the questions and drop the survey into the mail (it already has a stamp). If the results from the survey show that the idea is a viable one, you'll receive an invitation to . . . details forthcoming.

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Missing issues: Please report the nonreceipt of an issue within 30 days of normal receiving date. Missing issues requested after this time will be supplied at the regular back-issue price.

The Marketing Treasures office may be reached via FAX. Dial 301/647-0415.

## *Annual Reports Continued from page 1*

strategic plan. Whatever the theme, it permeates the entire report through graphics and text.

If at all possible, the report should be prepared by one person or department, and edited by as few others as possible. However, the information contained in it should be cleared and reviewed by as many as necessary. One way to prevent hurt feelings is to solicit contributions from all appropriate departments and managers. By providing guidelines for what is required in their section of the report, and by establishing a strict schedule, the writing process will be less time consuming and everyone will get a chance to contribute. If you operate a one- or two-person library, preparing the report will require less time and coordination than a report done for a large library.

While annual reports differ in their approaches and contents, there seems to be a standard set of components:

1. First, there's the message from the library's management. This sets the tone for the entire report and is its centerpiece. The message might describe challenges of the past year, and looking toward the future, the preeminent needs of the library and how they were or can be fulfilled. It sums up the entire year, and it looks ahead. The Brooklyn Public Library 1987-88 report theme was "Celebrating 90 Years of Books and Readers", which is introduced on the front cover. The director's message explains further, setting up the positive, upbeat tone for the rest of the report. In many large organizations the president's message is drafted by the person responsible for preparing the annual report. The president then makes additions or corrections as necessary.

2. The report should include a list of the members of the board of trustees, your advisory board, or friends of the library. Be sure that names and titles are correct. Depending on your political situation, these names might appear in the front or back of the report.

3. As so aptly stated by Robert Donahugh, Director of the Public Library of Youngstown & Mahoning

County, in his library's 1988 annual report, "Every annual report has its share of statistics, but figures can never convey the planning, the work and the evaluation that lead to the numbers". The text portion of an annual report is where you can let the library shine. Highlight the past year's efforts and achievements. While this is frequently done on a project-by-project basis, the politics of your organization and the ways that ideas can best be communicated will dictate this portion of your report. Above all, your text must make interesting reading. Put some energy into your writing. Make the library's services and products come alive. If necessary, read some corporate annual reports to get some ideas for dynamic writing styles. This is very important if your report will not be heavily illustrated. And be sure to leave out library jargon!

4. Annual reports sometimes contain a history of the organization. This gives the reader a sense of how the group evolved to where it is today. However, if you have other materials that provide such accounts, you may want to downplay any historical approach to your annual report, unless, of course, your library is celebrating an historical occasion.

5. Many libraries put their mission statement in the annual report. In the Cuyahoga County Public Library Annual Report for 1987, the mission statement appears on the second page, before the message from the president. In other reports it appears on the inside front cover.

6. The final portion of an annual report is devoted to statistics. In addition to the financial statement, many organizations will illustrate financial support — where the money comes from, and in broad terms, where the money is going. Since libraries are frequently perceived as gobbling up large amounts of money, the section on finances should address this concern squarely. This is the section in which you can emphasize the value of the library's services to the organization. The theme for the Arapahoe Library District 1988 Annual Report is "Measure for

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## *Annual Reports Continued from page 3*

Measure". Throughout the entire report the benefits provided to the community during the previous year are reinforced with statistics, and are presented beside a graphic depiction of a yardstick. The reader gets the message that the library "measures up".

Taken together, these elements provide the who, what, where, when, why, and how — the six basic questions that drive all public relations communications. However, many annual reports go one step further, using graphic devices to generate enthusiasm for the organization, its services, and its products. This gives the annual report its glossy look and creative approach.

Library annual reports range from fancy memos to creative presentations. The Prince Georges County Memorial Library System consistently captures its publics' attention with creative reports. The 1988 report theme was "Information Is Our Bag". Highlights of the report were printed on a large brown paper bag, creating a functional and informative communications tool. The 1989 theme is "Fantastic", and yes, you guessed it, highlights of the annual report are printed on a fan. Another year's annual report highlights were printed on bookmarks.

Note that the entire annual report is not printed for general public distribution, and that what is distributed is actually a low-cost promotion item. This is an alternative way of distributing the complete annual report when money is an issue. You may want to send out a good looking, well-produced annual report to people who need to review library activities and for individuals who are important to your library business' well-being. For the rest of your market, you can send out a short, highlight version of the report, noting that those who wish to see the complete report, can find it in the library. This approach allows you the flexibility to use low-cost promotion items to convey the message. After all, you want people to read your annual report message.

Other annual report presentation ideas that libraries have used include putting the year's highlights on the pages of paper note pads, printing the report on

yellow legal notepaper (this might be appropriate for law libraries), and using the theme of "All In the Day of a Library", in which photos were used to show library activities at different time intervals during the day. Annual report highlights have been presented on posters, computer printouts, calendars . . . you name it . . . well almost, your editor still hasn't seen anyone use a balloon for a year of "expanding services".

If all this sounds too frivolous for your organization, then turn to desktop publishing and some clip art. This month's slogan of "Survival Resource for the Information Age" would make a fine report theme. Or why not produce a nicely typed report, with interesting headlines and clip art. You can use different color paper to cover the report or separate the financial section from the text review section. In the AT&T Library Network 1988 report, a half-page flysheet was used to state the library's mission and introduce the president's message. Reports don't have to be glossy, but they do have to be interesting so people will read them.

So now you're all set to write an annual report for 1989. Let's see what you can do . . . especially the special librarians. Now's the time to take advantage of one of business' most effective visibility tool — the annual report.

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Special thanks to all those readers who sent copies of their library's annual reports and who contributed to this article.

## **Worth Its Weight in Gold**

This issue of *Marketing Treasures* includes your new Cut & Paste clip-art sheet. The sheet includes original artwork in camera-ready form. If you would like previously published clip-art sheets, ask for the Cut & Paste Clip-Art Order Form. The form shows all clip-art sheets that have been published in *Marketing Treasures*.

**Thank You.** Use this design to send out personal thank you notes to special library customers, to individuals who put in extra effort on a project, or to those who take the time to respond to your survey.

**Library/Information Cats.** You can use the initial capital letters with the two whimsical cats as leads into paragraphs or alone as decorative elements for your newsletter. Or use the words to capture the imagination of your readers.

### **Survival Resource For The Information Age.**

Here's a nice slogan for advertising an information service or product being produced by your library. Imagine this emblazoned across your library's front door, or as an introductory slide to your library orientation program . . . and what a great promotion campaign slogan!

**Books.** Here are some small images to break up long passages of text, or use them to accent the margins of new acquisition lists.

**CD-ROM.** Depicting the latest technology is difficult. Here's an image that will look good whether you print it or put it through the photocopier.

**Happy Holidays.** Holiday cards are a great way to reach your library's current and prospective customers. Here's a friendly snowman to grace the corner of your holiday greeting or newsletter.

**A Special Welcome.** Why not send a note of welcome to new employees joining your organization. You can use the message on the cover note of your orientation package, or to headline a list of new library staff members.

## **Promotion Gems**

Your *Marketing Treasures* editor recently displayed the following definition at a marketing conference for Federal Canadian librarians in Ottawa, which prompted a great demand for copies. The following is adapted from *Marketing News*, Volume 23, No.17, Page 7. You may want to photocopy this definition to pass along to your staff.

### **What is a Customer?**

*A customer* is the most important person ever in this office — in person or by mail.

*A customer* does not depend on us; we depend on him.

*A customer* does not interrupt our work . . . he is the purpose of it. We are not doing him a favor by serving him . . . he is doing us a favor by giving us the opportunity to do so.

*A customer* is not someone to argue or match wits with. Nobody ever won an argument with a customer.

*A customer* is a person who brings us his wants. It is our job to handle them profitably to him and to ourselves.

*Note:* Under each *Marketing Treasures*' clip-art image is the typeface name and point size. This information will help your typesetter produce complementary words that you may want in a compatible typeface and size.

## Sparkling Reviews

*Graphic Design Cookbook*. Leonard Koren & R. Wippo Meckler, Chronicle Books, San Francisco. 1989 \$12.95 ISBN 0-87701-569-4

If you are involved in desktop publishing for your library or use graphic designers for your brochures and handouts, this book is going to make your life easier. One of the most difficult aspects of graphic design is coming up with fresh approaches to design and layout. One way to stimulate the imagination is to pore over examples of printed pieces that you have saved for a rainy day. Another way is to buy this book and review a cadre of ideas in one easy sitting.

The *Graphic Design Cookbook* is organized into five chapters that reflect conceptual approaches toward publication design. The chapters allow the reviewer to examine, compare, relate and deduce visual ideas from the templates. The brief title at the bottom of each page gives suggest and differentiate the various kinds of information graphic designers often consider when solving design problems. For example, 27 different page border devices are provided visual ideas for decorating pages.

The book is exactly what the title advertises — a cookbook of graphic design ideas that can be used to solve design and layout problems. By effectively

mixing and matching the cookbook ideas, *Marketing Treasures* readers should be able to inject new visual energy into their newsletters, handouts, posters, and brochures. If you purchase the book and decide it's not for you, give it to your favorite graphic designer.

Recent eye-tracking studies conducted by Perception Research Services in New Jersey have found a number of reading tendencies that can help make your library's promotion pieces more eye-catching.

❑ Readers often stop reading a page long before they reach the bottom. So get your main message high up on the page. Also, concentrate on headlines; their readership is six to seven times higher than body copy.

❑ Select a bright color in an illustration and duplicate it in a headline. Why? Because the reader's eyes jump back and forth between the two colors, covering the entire page of promotion messages.

❑ Traditionally, people's eyes have been attracted to the right-hand side of magazines and newsletters, hence the preponderance of printed advertising on the right-hand side of the page. Eye-tracking research shows that readers tend to zap past right-hand pages because they "seem always" to be loaded with ads. Instead, readers now look mainly at left-hand pages.

## The Crystal Ball

November 13-16 "Planning & Developing New Products & Markets". Four-day seminar sponsored by American Management Association at the AMA Management Center in Atlanta. Also held December 4-7 in Detroit, Michigan. Contact: Harry Selant 518/891-0065.

November 15 "Personal Image & Self-Projection". Led by Kaycee Hale at the California Media & Library Educators Association Pre-Conference in Los Angeles. Contact: Janet Minami 213/625-6971.

November 28 "Winning Marketing Techniques". Course by Sharon Dean. Sponsored by SLA Central Pennsylvania Chapter in Lancaster. Contact: Elizabeth McLaughlin 717/255-6000.

December 4-6 "Communicating in the Nineties" National Media Conference and Public Relations Forum in New York City. Contact: 212/362-2353.

December 6-8 "Communications Trends for the 90's". Conference of the National Association of Government Communicators in Arlington, Virginia. Contact: 703/823-4821.

December 11-15 "Strategic Marketing Planning". A five-day seminar sponsored by the Michigan Business School at Ann Arbor. Contact: Jackie Williams 313/763-4395.

January 16 Marketing presentation by Chris Olson at the dinner meeting of the New York Chapter of the American Society for Information Science. Topic and location to be determined. Contact: Carla Pierce 212/854-3353.

January 17 "The User Survey as a Marketing Tool". Seminar led by Chris Olson sponsored by the New York Chapter of SLA. In New York City at the Union League Club. Contact: Jane Reed 212/572-3418.

January 26 "Winning Marketing Techniques". Course by Sharon Dean at the SLA MidWinter Conference in St. Louis. Contact: Joy Learner 202/234-4700.

February 17 "Information Entrepreneurship". One-day workshop led by Alice Warner. Sponsored by the Special Libraries Section in Saskatoon, Saskatchewan. Contact: Florence Dueterback 306/787-2968.

March 8 "De-mystifying Marketing Strategies". Seminar led by Chris Olson. Sponsored by the Philadelphia Chapter of SLA in Philadelphia. Contact: Barbara Chung 215/270-6407.

March 21-23 "Market Position". One of the workshops being offered by the Public Library Association at their Very Best Workshops II in Chicago. Contact: 800/545-2433.

THANK YOU

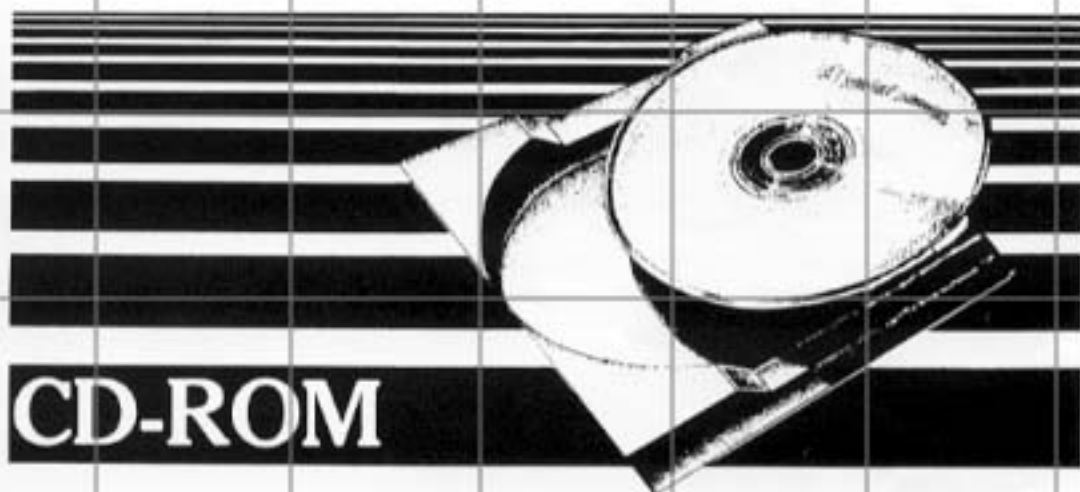
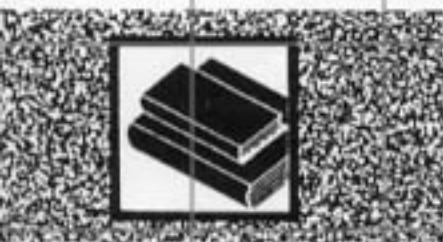
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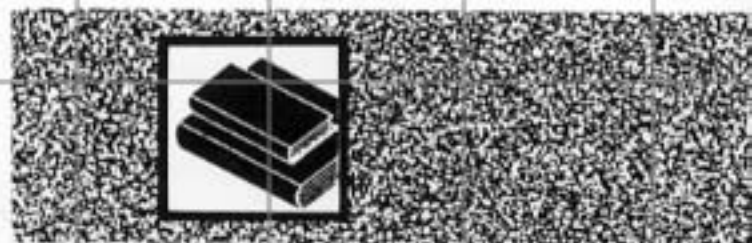
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**SURVIVAL RESOURCE FOR  
THE INFORMATION AGE.**

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*A Special  
Welcome*