

Upcoming Events

- Thursday, May 19, 2016 – Free Webinar**
Intro to What Makes a Great Library
- Thursday, June 16, 2016 – Free Webinar**
How To Improve Your Workplace When You Are Not The Boss
- Friday, June 24, 2016 – ALA workshop – Orlando, FL**
Freelance Success: Building a Business as A Library Trainer, Educator, Writer, Researcher, or Consultant
- Tuesday, July 12, 2016 – Free Webinar**
Intro to The Iron Triangle: Quality, Resources, and Time Constraints
- Sunday, August 21, 2016 – Free Open House – Denver, CO**
Networking Event - Conversations with interesting people

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We'll start the webinar at the top of the hour.
You are muted. Use the Question Panel, please.
Twitter: **#sieraportfolio**

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The Marketing Portfolio: Balancing the Past, Present, and Future

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Spotlight Series - #sieraportfolio
March 29, 2016 - sieralearn.com
with Pat Wagner

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www.sieralearn.com
#sieraportfolio Spotlight series

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Meet Pat Wagner

Trainer, consultant, educator, facilitator, instructional designer, and producer ...

Oil company map folder, receptionist, graphic designer, college housing director, retail clothing and camera sales clerk, baker, reading tutor, shipping clerk, poet, playwright, printer, dishwasher, publisher, researcher, book reviewer, house sitter, darkroom technician, health equipment sales, feature writer, production manager, community organizer, church youth leader, bookkeeper, mediator, book binder, childcare worker, author, talk show host, book editor, folk singer, college instructor, volunteer, academic library support staff



**Strategic planning, marketing, programming...
collection development, decision-making**

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Key Idea

**Every Enterprise
Has A Ratio.**

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Agenda

- **Traditional View:** What They Love About You
- **Market- Or Customer-Driven View:**
 - What They Are Asking For
- **Visionary View:** What You Think Is Cool.
- **Pros And Cons Of Each View**
- Finding Your Ratio
- Resources

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Outcomes

- **Create visual evaluation tool** with three different points of view.
- **Use the tool** to discuss conflicts among the three views.
- **Establish goals** based on the ratio among the three views.


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Introduction

What is Your Ratio?

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The Symphony



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Traditional

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Market- or Customer-Driven

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Visionary

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Section One

Traditional View:
What They Love About You

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The Past, Up To This Minute

- What customers already love about you
- Custom and culture
- Traditional: has a history and is known
- Might be old to you; new to others
- Your core constituency

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Exercise

What do your customers
love the most about
the services and products
you currently offer?

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Section Two

Market- Or Customer-
Driven View:
What They Are Asking For

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The Present: What They Want

- What they are asking for
- Responding to requests and research
- What other organizations have
- What is considered current and new
- Cutting edge

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Exercise

What are your customers
asking for that
you don't currently offer?

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Section Three

Visionary View:
What You Think Is Cool

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The Future: Creative

- What you want and need
- Bright ideas
- Experimentation
- **Bleeding edge**
- Your customers have not asked for it.

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Exercise

What are the cool new things that you are doing and that your customers did not ask for?

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Section Four

The Pros And Cons Of Each View

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Past: Benefits

- Tested and mastered
- Popular with the core constituency
- What you are known for
- What you are praised for
- Established brand

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Past: Downsides

- Shrinking core constituencies:
 - One to ten percent per year
- Out-of-touch with cultural change
- Ignores new and different customers
- Cripples innovation: Afraid of failure

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Present: Benefits

- Relevance
- Seen as listening and responsive
- New can be a magnet.
- Align with customer wants and needs.
- Attract younger customers

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Present: Downsides

- Driven by fads
 - Not strategic; reactive
- Expensive to say yes
- People "lie" on surveys
- Inconsistent; harder to market

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Future: Benefits

- Anticipate issues, and initiate change
- Attract new customers.
- Potential bigger rewards
- Establish leadership in field and location
- Test ideas: Research and development
- Reputation as innovator

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Future: Downsides

- Lots and lots and lots of mistakes
- Lots and lots and lots of risks
- Can be out-of-step with customers
 - And, tick off customers
- Can ignore the basics

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Exercise

How well does your current strategic plan put aside resources—**people, time, money, tools space**—for traditional, market/customer-driven, and visionary projects and goals?

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Section Five

Finding Your Ratio

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Do You Know Your Ratio?

- Count and measure what you are doing.
 - A mix of models and approaches work best.
- Identify data as:
 - What you have been doing that folks love?
 - What you have been doing recently in response to customer requests?
 - What *way cool* things have you employed?

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Caveats

- Don't rely on anecdotes and intuition.
- Don't just ask your **core constituency**:
 - The results will skew towards tradition.
- Seek out the Invisible Customers:
 - People who've never visited/used you.
 - People who stopped using you

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What About Employees?

- They bond with customers like themselves.
- Can skew traditional.
- Harbor pet projects; protect sacred cows.
- Hard to give up what's tried and true.
- They tend to see their facets of the truth.
- Regardless, take their input seriously.

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You Might Uncover:

- Wrong assumptions
- Pet projects and sacred cows
- Hidden gems
- Projects to end
- Holes in what you offer
- Under-served customers
- Favoritism

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Is There A Right Ratio?

- **Past:** 50-80% Maintaining tradition
Significant nostalgic population
- **Now:** 20-50% Responding to change
Youngish, prosperous, competitive
- **Future:** 5-30% Anticipating change
Ready to risk, clean slate

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Course Correction Challenges?

- Hiding out in the past
Safe, rewarded, popular with the core
- Saying yes to everyone today
Popular, don't have to plan, just respond
- Let's be radical; core changes
Living off the rush of the new

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Applications

- Strategic planning
- Marketing campaigns
- Programming for a conference
- Personal curriculum
- Art/performance/literature/mixed media
- Committee decisions
- Evaluations and change

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Resources

- Victims of Groupthink, Irving Janis
- Democracy in Small Groups, John Gastil
- Breaking Robert's Rules, Lawrence Susskind
- Rational Choices in an Uncertain World, Robyn Dawes
- Philosophy and the Real World, Bryan Magee
- Smart Choices, John S. Hammond
- The Craft of Research, Wayne Booth

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Next

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