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# LIBRARY ENGAGEMENT PLATFORMS

David Lee King

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# Library Technology

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Expert Guides to Library Systems and Services

## Library Engagement Platforms

*David Lee King*



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American Library Association

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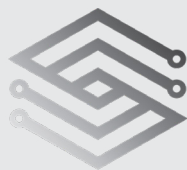
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## Abstract

This issue of *Library Technology Reports* (vol. 58, no. 1), “Library Engagement Platforms,” introduces library engagement platforms, explains what types of interactions take place while using them, and illustrates why libraries need to utilize them to connect with their customers. These interactions take place using a variety of communication channels, including e-mail, text messages, and mobile phone notifications. The end goal of a library engagement platform isn’t the messaging; it’s engaging with that customer and moving them to respond and interact, or engage, with the library.

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# Contents

<b>Chapter 1—What Is a Library Engagement Platform?</b>	<b>5</b>
Library Engagement Platforms	5
Definitions	6
Platform	6
What's Next?	7
Notes	7
<b>Chapter 2—Companies and Products</b>	<b>8</b>
BiblioCommons	8
Communico	9
Counting Opinions	9
Demco Software	10
LibraryAware	10
Gale	11
Innovative	11
Koios	12
Library Market	12
myLIBRO	13
Capira	13
OCLC Wise	13
OrangeBoy	14
Patron Point	14
PolicyMap	14
SirsiDynix	15
Solus	15
Springshare	15
TLC	15
Coming Next	16
Notes	16
<b>Chapter 3—Types of Interactions</b>	<b>17</b>
E-mail Interactions	17
CRM (Customer Relationship Management)	19
Registering and Reserving	19
On Your Phone	20
Gathering Data	21
Ads	22
Notes	22
<b>Chapter 4—Custom Options</b>	<b>23</b>
LibraryAware	23
Koios	23
Library Market	24

## Contents, continued

OrangeBoy	24
Notes	25
<b>Chapter 5—Library Engagement Platforms' End Goal</b>	<b>26</b>
Creating Touchpoints	26
E-mails and Our Library Catalogs	26
E-newsletters	27
Data-Based Collection Shaping	27
Signing Up	27
Pickup and Delivery Services	27
Home Delivery Service	28
Mobile Apps	28
Custom Marketing Help	28
Ad Space	29
One More Thing	29
Notes	29

# What Is a Library Engagement Platform?

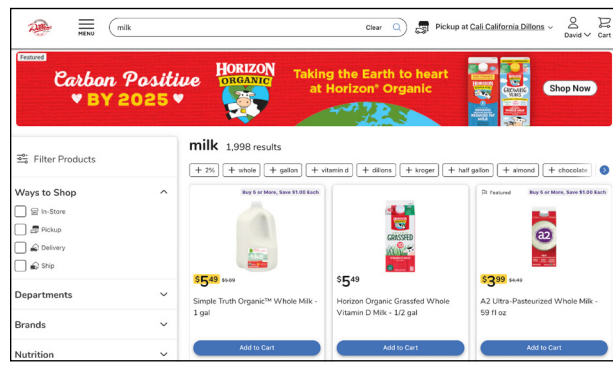
People want connection—to be acknowledged and know you listened. They’re not looking to mimic real-world connections online. A company trying to position itself as a new best friend can come across as fake. But giving people a little nudge shows they are on your radar and is OK—in fact, it’s an important aspect of doing business online.

Here’s an example. Dillons is the local grocery store I usually visit. I have its store card and use it because I get discounts on purchases and on gasoline. The card offers good incentives by itself, but it’s not very personal; however, Dillons has upgraded its online presence to add a more personal connection. Because its online system requires me to set up an account and connect my store card to that account, Dillons keeps track of what I purchase. A few weeks after a purchase, the store often mails coupons to my house. Those coupons are customized: they are for items I have purchased in the past and are also for some products I might be interested in based on my past purchases.

If I order groceries online and use curbside pickup, Dillons also personalizes that experience. When I search the store website for items, Dillons puts the products I frequently purchase at the top of the page. For example, if I type “milk” in the search box, the search results page includes a suggestion for the specific brand and type of milk I usually purchase, with a handy “Add to Cart” button (figure 1.1).

When I check out online, I’m asked if I “Forgot something?” Then the website continues showing me products I frequently buy. I’m sure the goal is to get me to buy more. Dillons is ticking the boxes of being helpful and personal, so I don’t forget something that I want or need.

Adding those types of personal touches—displaying products I’m likely to buy, or providing specific discounts and coupons based on my past purchases—is a type of online engagement. Dillons’ digital engagement platform is a low-hanging-fruit type of



**Figure 1.1**  
Don't forget the milk!

engagement that builds loyalty because Dillons makes it easy for me to shop, both in person and online.

## Library Engagement Platforms

Library software has come a long way from the early days of online union catalogs and databases. Today’s modern library utilizes one or more library engagement platforms with the goal of informing customers about upcoming events, wishing them a happy birthday, or inviting them to use their library card to check something out. These software-based platforms help the library and customer connect, through different types of interactions and prompts, using a variety of communication channels—including e-mail, text messages, and mobile phone notifications.

Today’s library needs a lot of customer-focused software and online services. There are obvious aspects, like an ILS (integrated library system) and a website. You can add products that engage customers, like automated direct e-mails, an events calendar, a way to register for an event or to reserve a meeting room, a mobile app, or a way for staff to view and use library data in a handy dashboard.

These types of offerings are a mishmash of software and services that help engage the library community. These engagement platforms may help nudge customers to action or help keep them informed. These platforms can also help keep the library informed, as well.

The end goal of a library engagement platform isn't the messaging; it's to engage customers and help them respond and interact with the library.

## Definitions

Defining a library engagement platform can be difficult because these platforms are customized and unique (more on that in future chapters). I will share a broad definition so we are all on the same page.

First let's define *online engagement*. Consider this definition of *engagement marketing* from Wikipedia:

**Engagement marketing**, sometimes called “**experiential marketing**”, “**event marketing**”, “**on-ground marketing**”, “**live marketing**”, “**participation marketing**”, “**Loyalty Marketing**”, or “**special events**” is a marketing strategy that directly engages consumers and invites and encourages them to participate in the evolution of a brand or a brand experience. Rather than looking at consumers as passive receivers of messages, engagement marketers believe that consumers should be actively involved in the production and co-creation of marketing programs, developing a relationship with the brand.

Consumer engagement is when a brand and a consumer connect. According to Brad Nierenberg, experiential marketing is the live, one-on-one interactions that allow consumers to create connections with brands. Consumers will continue to seek and demand one-on-one, shareable interaction with a brand.<sup>1</sup>

This definition applies to in-person as well as online engagement. The Duffy Agency has extended the concept of engagement into an Online Engagement Spectrum. It breaks down online engagement into these types of activities:<sup>2</sup>

- **Visit:** Essentially, people using your website, which increases web traffic.
- **Consider:** Visitors who stay and consume content. This increases analytics rankings like time on page, which is good for SEO (search engine optimization).
- **Acknowledge:** These are ways that website visitors can interact by using likes, ratings, favoriting, etc. They're low engagement activities because it

doesn't take much to click a Like button but they do provide an acknowledgement that content was consumed.

- **Contribute:** Taking the time to reply, leave a comment, or chat online.
- **Follow:** Subscribing to your e-mail or RSS feed, which provides a passive channel of contact to these subscribers.
- **Information:** This is when someone submits personal data, like filling out a survey, which provides marketing intel.
- **Permission:** Submitting an email or a phone number, which enables further one-on-one contact.
- **Create:** Adding things that a customer has created or curated, like posts or pictures on their own website or social media channel.
- **Amplify:** When people share content with their proprietary audience and, in the process, promote brand awareness.
- **Advocate:** This means actively endorsing your brand to their proprietary audience, which, in addition to promoting awareness, also fuels understanding, interest, and trust in the brand.
- **Convert:** When the thing you asked your customer to do is actually done. For example, downloading, trying and/or buying something, or linking somewhere.

Examples of these types of interactions in a library setting would include things like leaving a comment on the library's Facebook post or clicking Like on a photo in the library's Instagram account. Another example is a customer visiting the library's website, reading a blog post, and visiting a page about a library service. A customer finding out about a library event and sharing that event on their personal social media account is another example. All are different types of interactions and engagements.

## Platform

We also need to define *platform*. Merriam-Webster's dictionary (the online version) defines *platform* in a couple of ways:

- Computer or software platform: “the computer architecture and equipment using a particular operating system.”
- And the more general definition: “a device or structure incorporating or providing a platform.”<sup>3</sup>

Both definitions help us understand the concept of a platform. The idea is that someone builds a platform where other activities can happen. For example, if you have a deck in your backyard, that deck is a type of platform. Activities, like a party, or gardening, or

reading a good book, can all happen on the platform. The platform (your deck) supports and facilitates the activities and actions.

That platform can also be in the cloud, in which case, it's a platform as a service, or PaaS. That means the software part of the platform is housed on the internet, so the platform is a web-based platform, and people can build other products and services on top of that platform.

There are different types of software-based library platforms. Some are traditional. For example, a library catalog is a type of online platform, with the goal of helping people find items in our collections that they can check out. It's a book- and content-finding platform.

Social media is another type of platform. For example, Facebook is a platform where people interact. You don't think about the underlying platform when you use Facebook. You focus on content, scrolling through Facebook posts and perhaps clicking Like, adding a comment, or choosing to Share.

As you know, Flickr and Instagram are platforms built for sharing photos. When you take a photo and post it to Instagram, you are adding content to the platform. Other people can add other forms of content with Like or Comments.

YouTube, of course, is a video platform. You post a video, and people watch. They might click Like, share the video to a list (or to their network of people), leave a comment, or embed the video on their own platform.

Libraries are just starting to use a host of newer online activities. That's where library engagement platforms fit into the mix. With this type of platform, the goal is for the customer to connect to the library, or maybe connect to staff in order to ask a question. Maybe the goal is to help connect on a deeper level. Instead of limiting connection to a traditional library catalog, that connection might be strengthened through personalized e-mail with links to books similar to those a customer has previously checked out.

A personalized e-mail is using a platform as a conduit to send reminders or "nudges" to move the customer to respond in some way. We might want the customer to check out a book or register for an event. Maybe we want them to sign up for our mailing list.

Putting these concepts together, a library engagement platform is an online, software-based solution

that allows library patrons to connect and engage with the library through a series of interactions.

These platforms serve to make connections between the customer and our collections or between the customer and our library services. Library engagement platforms remind customers to use the library. In the process, these tools help keep our customers engaged and coming back for more.

## What's Next?

Here is what I will discuss in the rest of this publication:

- *Chapter 2—Companies and Products:* This chapter provides an overview of library engagement platforms currently available. Each software platform is introduced, target customers are described, and service and tool offerings are shared.
- *Chapter 3—Types of Interactions:* This chapter provides an overview of interactions offered with library engagement platforms. I also discuss why libraries might be interested in different types of software-based customer engagements.
- *Chapter 4—Custom Options:* Some companies offer customized services or offer broader marketing services that can be unique to each library. This chapter dives into those offerings and describes what each service provides.
- *Chapter 5—Library Engagement Platforms' End Goal:* The final chapter focuses on the end results. I describe scenarios where these services and engagement platforms succeed and what that might look like to the customer.

## Notes

1. Wikipedia, s.v. "engagement marketing," last updated July 14, 2021, 5:26, [https://en.wikipedia.org/wiki/Engagement\\_marketing](https://en.wikipedia.org/wiki/Engagement_marketing).
2. "What Is Online Engagement? A Hands-on Guide That Looks beyond Tactical Engagement Tips to Define the Six Core Ways Brands Can Gain More Traction Online," Duffy Agency, accessed July 19, 2021, <https://duffy.agency/insight/what-is-online-engagement/>.
3. *Merriam-Webster*, s.v. "platform," accessed July 19, 2021, <https://www.merriam-webster.com/dictionary/platform>.



# Companies and Products

The world of the library engagement platform is quite diverse, making it difficult to pin down a name for this type of software platform. The term I'm using is *library engagement platform*. You'll also see these platforms called community engagement platforms, marketing platforms, or even patron engagement platforms.

Even though the names and the functionality of these platforms are different, all of them have one thing in common. Each one uses software to help library customers interact and engage with the library.

In this chapter, let's explore some of the software companies and their products. Full disclosure—my library (Topeka and Shawnee County Public Library) currently uses some of these products and has used some of them in the past. Also, this chapter is not a comprehensive list of all library engagement platforms and their product offerings, only the ones I am familiar with.

So, without further introduction, let's explore these companies and their products.

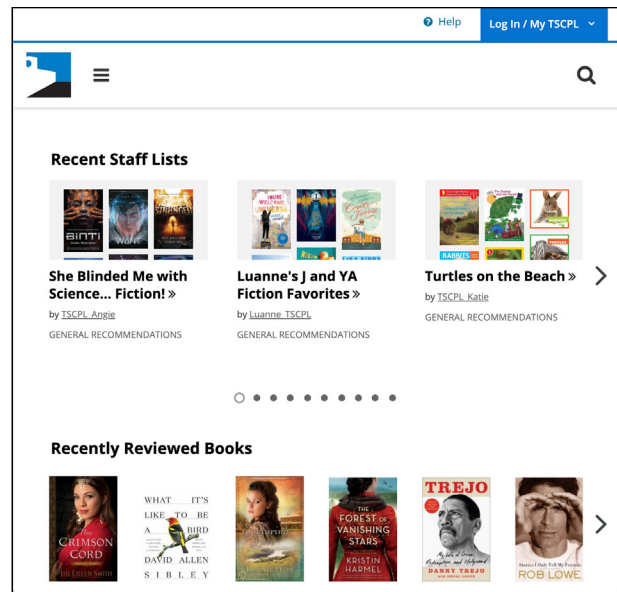
## BiblioCommons

Most librarians are familiar with BiblioCommons because of the BiblioCore discovery layer. BiblioCore is a web-based patron catalog interface (figure 2.1) that functions much better than similar modules from the ILS vendors.<sup>1</sup>

In recent years, BiblioCommons has created some software products that fit the category of library engagement platforms: BiblioEvents, BiblioApps, and BiblioEmail.

## BiblioEvents

Here's what BiblioCommons says about BiblioEvents: BiblioEvents is “an events calendar for public libraries



**Figure 2.1**  
Topeka and Shawnee County Public Library's BiblioCommons catalog

that works like the rest of the web. It's a patron-friendly, fully responsive and visually appealing way to manage and promote your library's programs and events."<sup>2</sup>

BiblioEvents offers a lot of features that draw people to a library's events, including online registration, search facets for narrowing down a list of events, social sharing to your customers' favorite social media platform, and a single sign-on between the catalog (i.e., BiblioCore) and BiblioEvents, which makes it easier to register for classes and events (assuming the patron is already logged in to the catalog). If you use the BiblioWeb product for your website CMS (content management system), BiblioEvents is easy to integrate across your whole website as well.

## BiblioApps

BiblioApps is BiblioCommons' mobile app. The app provides a one-stop shop for quickly finding things at your library. Assuming you have all of BiblioCommons' products, this app will easily find items in your library's catalog, upcoming classes and events, and information about library services from your website.

The app is focused on discovery, that is, on finding items in the library catalog. Discovery is a type of engagement in a library system. Because of that focus, BiblioCommons has built a powerful search feature into the mobile app. Here's what it says about search: "BiblioApps uses sophisticated facets to ensure that the most relevant results are at the top of every query, and follow [sic] FRBR best practices to bring forward every format your patrons might be interested in."<sup>3</sup>

The app also uses a smartphone's native functionality. For example, a user can add their library card barcode number to the app. Then, when users are ready to check something out, they can use their mobile app to scan their library card number instead of digging for their library card. You can also use the app's camera feature to scan barcodes of items.

## BiblioEmail

BiblioEmail is BiblioCommons' newest project, and it uses modern direct e-mail marketing techniques to engage with a library's customers. BiblioEmail allows you to create e-newsletters that can be sent to customers via an e-mail address. It also allows the library to send customers personalized e-mails based on their activity in the library catalog.

## Communico

Communico is similar to BiblioCommons in that it has a large suite of products that are integrated on the back end and serve a wide variety of purposes in a library setting.<sup>4</sup>

The modules that I'll look at for this report allow patrons to interact with the library in some way: Attend, Reserve, and Engage.

## Attend

Attend is Communico's event creation and management tool, built for managing a library's events. It performs all the usual event creation functionality, like setting up classes and events. It also provides customers a way to easily sign up for events using their library cards. Patrons can also share events they find interesting on social media and add a class or event reminder to their favorite online calendars.

## Reserve

Reserve works in conjunction with Attend to manage a library's meeting rooms and equipment. Using Reserve, library customers can make meeting room reservation requests using their library cards. Communico has created several default room layouts to make it easy for staff to manage. This also helps to make room reservation requests simple for the customer.

The Reserve module is fully integrated into Attend (mentioned above) as well as the Broadcast digital signage module. If you have all three modules, a meeting room booking can be approved, the event can show up on the library's meeting room calendar, and the event can appear on digital signage throughout the building, all from a single app.

## Engage

Engage is Communico's version of a mobile app for libraries (figure 2.2). Engage is available from the Google and Apple app stores and has a variety of functionality, including showing information from a library's website, sharing book lists, doing barcode scans, searching the catalog, putting items on hold, accessing upcoming library classes and events, and accessing a customer's account.

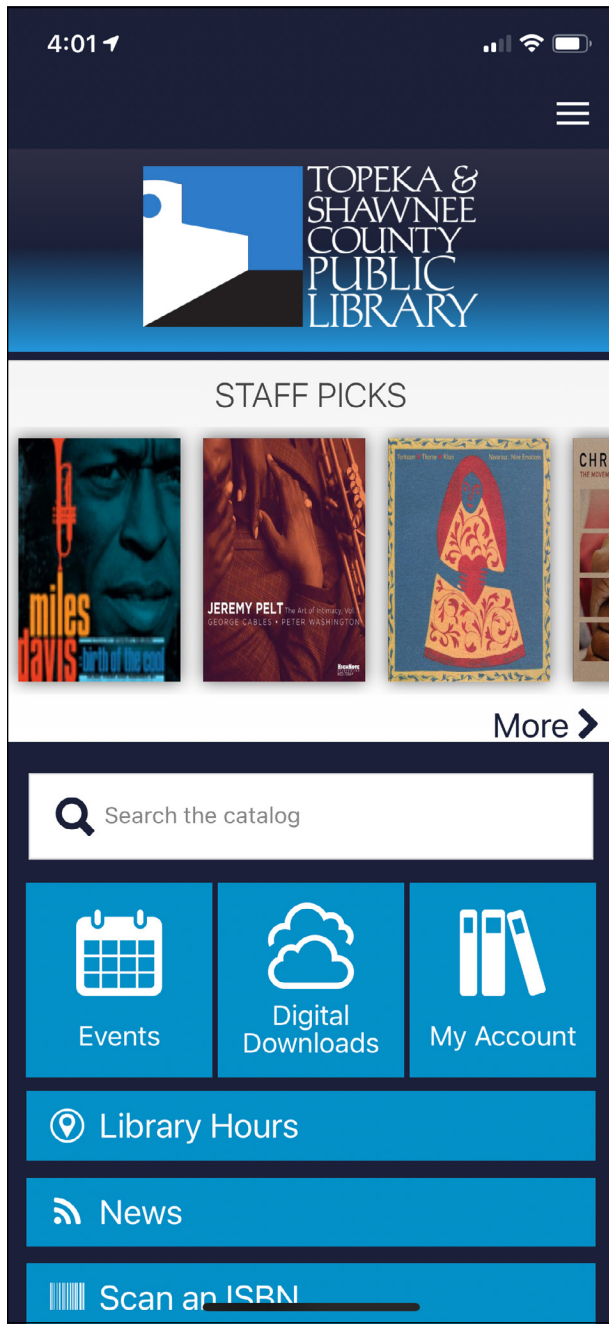
Engage is also where customers can schedule curbside appointments and curbside pickup. This functionality has been especially helpful during the current pandemic.

## Counting Opinions

Counting Opinions is focused on capturing data and feedback from your library customers.<sup>5</sup> Here's how the company describes itself: "Counting Opinions provides organizations with innovative, comprehensive, cost-effective ways to capture, manage and measure performance data, including open-ended customer feedback, qualitative and quantitative data, trends, benchmarks, outcomes and peer comparisons."<sup>6</sup>

As you can imagine, today's modern library needs to use data and customer feedback to inform the library about trends and to help improve processes, services, and functions. Counting Opinions has built tools to help make that process easy to manage by using data capture tools and services. These include LibPAS, a data management solution for libraries, and LibSat, which is described as a "continuous Customer Satisfaction and Feedback Management Solution."<sup>7</sup> In other words, LibSat captures feedback from customers.

InformsUs is a web-based tool for creating and implementing forms and surveys and is an extension of the LibPAS and LibSat tools. It helps staff easily create drag-and-drop surveys and provides a simple way to collect feedback of many types.



**Figure 2.2**  
Topeka and Shawnee County Public Library’s mobile app using the Engage platform

## Demco Software

Demco, the library furniture company, has gotten into the software business in recent years.<sup>8</sup> I like its focus, which is stated on its website: awareness, engagement, and outcomes.

With the focus on impacts in mind, Demco has a couple of tools that can help with library customer engagement.

## SignUp

SignUp is Demco’s event management solution. It allows a library to promote events and allows patrons to register for events online. SignUp lets customers add library events to their personal calendars, and users can easily share events on their personal social media platforms, which is a great way to get customer-driven help in promoting events to a library’s community.

## Spaces + D!BS

Spaces + D!BS is Demco’s space and meeting room management software. It allows patrons to check the availability of rooms, see the details of the space, and book the room without the help of library staff.

Part of that platform is named D!BS. There’s a reason for that. The software is built to allow customers to “call dibs” on a room in a first-come, first-served manner without any staff mediation, which can save time for both staff and customers.

## LibraryAware

I really like the headline on LibraryAware’s website: “Expand your library’s reach.” LibraryAware’s platform includes newsletters, direct e-mails, and some marketing and promotion services.<sup>9</sup>

## NextReads Newsletters

NextReads e-newsletters are sent directly to a customer’s e-mail address and provide reading suggestions to subscribers. The nicest thing about these e-newsletters is that LibraryAware writes them, so you don’t have to.

Newsletters include annotations to books and links back to your library catalog, which makes it easy for customers to click through and put an item on hold. There are over twenty of these newsletters that are genre- and topic-focused, so it’s easy for customers to find something of interest.

## Targeted E-mails

LibraryAware also sends targeted e-mails that can be personalized to the library patron. For example, if you want to send an automatic welcome message to your new cardholders, LibraryAware can do that. The software also sends a library card renewal reminder before the patron’s library card expires.

Many professionally designed templates are available, so you don’t have to design anything. That’s a nice feature, since many libraries don’t have a full-time graphic designer.

## Marketing and Promotion Services

LibraryAware also offers some marketing- and promotion-focused services. The company has campaign guides and training that will give you a step-by-step guide to follow for a marketing campaign. Resource promotion kits are also available.

## Gale

Gale has two products that fit nicely into the library engagement platform sphere: Gale Engage and Gale Analytics.<sup>10</sup>

### Gale Engage

Gale Engage is described on Gale's website:

*Gale Engage* is a web-based solution designed to enhance your public library system's capabilities by centralizing data analysis and outreach. With the means for faster decision-making and more efficient marketing outreach, your library can increase its meaningful relationships with the community.<sup>11</sup>

Gale Engage allows you to add data from your library into the product. Once it is added, you can use the visual dashboard of your data to find trends and patterns that can help with strategic planning and other decisions and can help bring more data-driven value to your community.

This platform has several useful features, including these:

- *Data synthesis:* You can upload different types of data files from different vendors into one place. Customized scripts help move the raw data from an export file and onto the dashboard.
- *Dashboard:* You can view the data you just loaded using different types of graphs, charts, and other types of visualizations.
- *Patron groups:* You can create groups of patrons based on how they interact with library materials, services, and programs. This can help when you are focusing on smaller groups of your community.
- *E-mail targeting:* You can take those patron groups and export them into your e-mail system (like Mailchimp), so you can easily send targeted e-mail blasts to individual segmented groups of customers.
- *Social media management:* You can post to Facebook, Twitter, and YouTube.

Gale Engage also emphasizes privacy. The company encrypts all patron data going into its system.

## Gale Analytics

Gale Analytics is similar to Gale Engage, in that they both use data and analytics to help analyze what your library's customers are doing. The main difference is that Gale Analytics is using Experian's segmentation system, which places individual households into seventy-one profiles. These profiles help the library get a visual snapshot of its library customers and noncustomers based on demographic and lifestyle characteristics.

A dashboard is included with Gale Analytics as well. Gale is using the free version of Tableau, Tableau Reader, to segment a household's characteristics, including interest, income, technology use, and the presence of children, for example. There are census map overlays that can provide visual depictions of segmentation analytics.

### Tableau Reader

<https://www.tableau.com/products/reader>

## Innovative

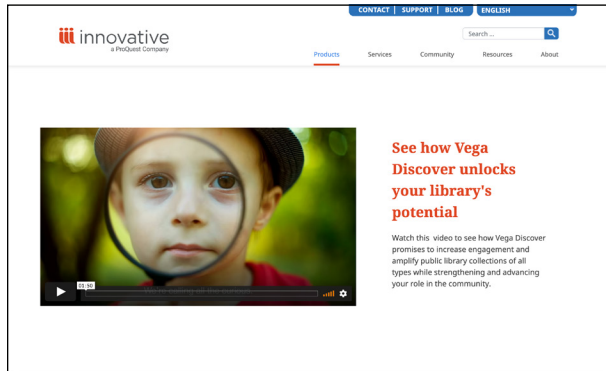
Innovative Interfaces, Inc. (shortened to Innovative) has a new product called Vega (figure 2.3), a platform that “promises to increase engagement and amplify public library collections of all types, helping strengthen a crucial part of communities across the world.”<sup>12</sup> That's a big promise!

Innovative is building products on top of the Vega platform. The first product is Vega Discover, a discovery layer that can be installed over an ILS. Vega Discover is built not only to get people to check out materials; it is built with patron engagement in mind. The product is still in its early stages, but the eventual plan is to include personalized experiences, including creating different types of lists, providing a reading history, and providing reading and viewing recommendations to customers.

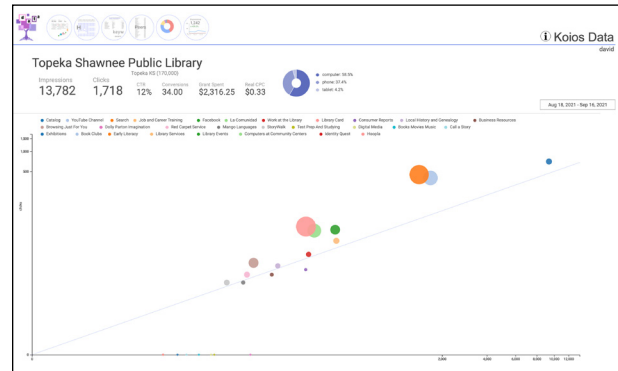
Vega also has a goal of making the process of placing an item on hold easier and making wait times transparent to the end user.

Visually, Vega Discover has a modern design with the goal to move the customer to quickly take action—that is, to check something out. This is the patron-facing goal of any good library catalog. So making the path from search to placing a hold as simple and seamless as possible is very helpful.

Innovative is planning to expand the Vega platform with other product offerings, including “intelligence, analytics, and public library marketing tools, and easily integrat[ing] data and third-party software. Marketing automation, [a] website builder, and event management will be part of Vega to strengthen



**Figure 2.3**  
Screenshot of Vega website



**Figure 2.4**  
Example of Koios reports

libraries' connections to communities.”<sup>13</sup>

I'm looking forward to seeing how the Vega platform expands.

## Koios

One way to engage library customers is to simply make sure you and your offerings can be discovered online. Enter Koios.<sup>14</sup> Specifically, Koios helps make your website and your library catalog discoverable by using Google Ads.

Koios manages Google's Ad Grants program, which provides up to \$10,000 a month in Google Ads for nonprofits (and libraries). Find out more about the Google Ad Grants program online.

### Google Ad Grants

<https://www.google.com/grants/>

Koios helps libraries by applying for the grant and setting it up for the library (figure 2.4). Once it's set up and activated, Koios manages changes to the ad grant program and manages Google Ads for your library.

You may wonder how Google Ads are related to library engagement platforms. It's a different way to think about “platform.” Google is one of the largest platforms in the online world. When your library has a Google Ad, you are placed at the top of the search results page via the ad. Any clicks on that ad move the person from Google to your website. That's called a click-through or a referral. Once they click, that person is now seeing your website and can find out more about the thing they found interesting enough to click. That's definitely an engaged person!

## Library Market

Library Market's mission “is to help libraries connect to their communities by offering superior marketing and technology products.”<sup>15</sup> The company does this by building websites for libraries and through a couple of software-based library engagement platforms and marketing services: LibraryCalendar and LibraryBrand.

### LibraryCalendar

As an aside, I love Library Market's simple and direct naming scheme. When a product is called “LibraryCalendar,” you know exactly what it is and who it's for!

LibraryCalendar manages events and rooms for libraries, with the goal of engaging your library's community through library programming. The system has a lot of features, including event and class setups, bookable equipment, and ILS registration options, so library patrons can register for events and reserve rooms using their library card. E-commerce solutions are also an option, so patrons can pay for room reservations if that's a requirement. Various reporting tools are available for staff.

### LibraryBrand

LibraryBrand is a unique service in the library world. This product is really a service that helps create a marketing strategy specifically tailored to your library—a valuable service!

As Library Market states,

A library's branding strategy patterns every interaction with patrons—it creates the visual language with which libraries communicate with their communities. Give the vision you have for the library a compelling and consistent design. Show your community that the library is a modern

and relevant institution that can provide value to their lives.<sup>16</sup>

LibraryBrand offers a range of focused marketing and branding services to public libraries, from creating a new library logo to working with a library to create a complete branding package.

Options include a logo package, an editorial style guide, branding guidelines, a marketing plan customized to your library, branding design, collateral inventory (figuring out everything that will need to be rebranded), design consultations, and an on-site evaluation.

## myLIBRO

myLIBRO builds mobile apps for libraries and includes the ability to use voice-activated, natural language searching. One of the company's goals is to provide conversational interaction in its mobile app.<sup>17</sup>

### myLIBRO 3.0

myLIBRO's main product is myLIBRO 3.0, which is a mobile app that connects patrons to a mobile version of your library catalog. The app provides recommendations for checkout, sends push notifications to help customers stay up to date with library events, and has a profile page for the library that includes location and open hours.

Because of COVID, the myLIBRO app has recently included self-checkout. Just scan the barcode, and you're all set. The app also allows scheduling for curbside pickup services.

### myLIBRO Insights

myLIBRO Insights offers a real-time dashboard for examining ILS analytics. These analytics can include information on checkouts, staffing hours, finances, inventory, and patron engagement.

## Capira

Next up we have a couple of products from OCLC. Capira has several mobile apps to help patrons engage with the library and the community.<sup>18</sup>

### CapiraMobile

CapiraMobile's goal is to let customers engage with the library from a mobile device. The app is customizable, so it can be branded with your library's look and feel and can offer specific information and categories that match your library and your community's needs.

This app also offers self-checkout, so customers can avoid library lines and the need to physically touch a library's self-check kiosk machines.

CapiraMobile sends notifications to customers using a smartphone's built-in notification feature. Notifications might come from an event sign-up, for example. The customers will receive a notification about the event so they don't forget to attend. The app is also connected to events and event registration, allowing customers to browse upcoming events and to register for events via the mobile app.

Notifications can also be used in case of an emergency. For example, a library can send a notification that the library is closed because of inclement weather.

### CapiraReady

If you don't want a fully customizable mobile app, choose CapiraReady, a predesigned, off-the-shelf mobile app. It's designed for easy setup and provides functionality like catalog searching, the option to use a digital library card, and a quick way to view an events calendar.

### CapiraCurbside

CapiraCurbside is OCLC's version of a curbside pickup app. It provides a mobile app-based way to pick up library materials without having to enter the library building. The app allows customers to schedule their materials pickup time and will give library staff instructions on where to put the items for the customer (e.g., in the trunk or the back seat of the car). It also sends reminders via notifications when items are ready to be picked up.

### LendingKey and MuseumKey

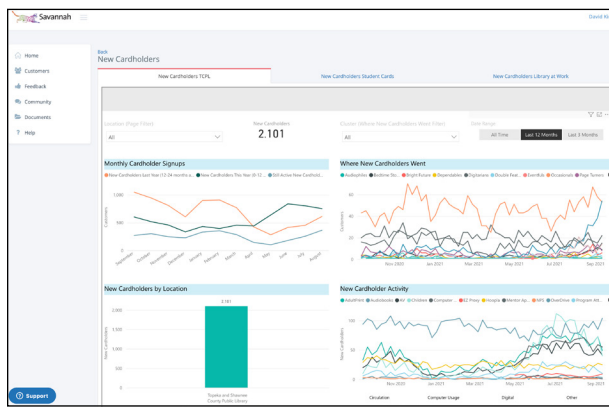
LendingKey and MuseumKey both provide a way for customers to check out nontraditional items. LendingKey focuses on physical items that can be checked out, like video cameras or cameras, sports equipment, or ukuleles.

MuseumKey is designed to provide passes to other community destination sites, like a museum or a children's discovery center. The process of checking out passes can be a bit clunky. MuseumKey can smooth that process for customers and staff.

## OCLC Wise

OCLC calls OCLC Wise a community engagement system. It's a modern library catalog system with customer engagement built into the platform.<sup>19</sup>

Most ILSs capture customer data, but OCLC Wise



**Figure 2.5**  
Example of Savannah dashboard

wants to help libraries use that data to engage with customers in new ways.

For example, OCLC Wise includes a way to build targeted mailing lists from customer information. A library can create an e-mail newsletter and send it to that list. These personalized e-mails can be created on the fly, or they can be scheduled campaigns.

You can also create personalized birthday messages for customers. These personalized messages can also be collection-focused and provide reading suggestions based on past checkout activity.

OCLC Wise also helps a library keep track of the collection by providing analytics on usage data, and scheduled reporting can help libraries evaluate the collection based on what customers check out.

## OrangeBoy

The uniquely named OrangeBoy (inspired by the owner's orange cat) has created a useful product to track community analytics and improve the community.<sup>20</sup>

OrangeBoy's main product is Savannah (figure 2.5), a web-based analytics and trends dashboard. According to OrangeBoy, Savannah is "a cloud-based community engagement platform backed by market leading analytics and a team of dedicated, experienced professionals that is designed exclusively to help you connect with your community in new, meaningful ways."<sup>21</sup>

Using Savannah, you can add library statistics that can be tracked over time. Savannah combines those analytics with "customer segmentation, performance reports, targeted marketing, NPS feedback, incident management, fundraising management, Market Watch, GIS mapping capabilities."<sup>22</sup>

The ability to examine local GIS data and market segmentation data provides your library with the analytics it needs for all types of data-informed planning.

Savannah also has an e-mail component that

allows you to send targeted e-mails to all customers or to a smaller segment of customers.

OrangeBoy also does some consulting work and can help your library with strategic planning, marketing, and branding initiatives.

## Patron Point

Patron Point calls itself

a fully featured marketing automation platform, exclusively for public libraries, that connects with your ILS and other data, allowing you to segment your patrons in any number of ways based on data and harness the power of automation in your day-to-day customer messaging.<sup>23</sup>

Patron Point includes these features:

- *E-mail automation:* You can create regular, automated e-mail messages that can be sent with customized content.
- *Web forms:* Instead of using the form builder that comes with your website's CMS (content management system), you can use Patron Point's web form builder. The benefit to using Patron Point's web forms is that the data collected can be seen on its data dashboard.
- *Landing pages:* You can build landing pages for different services or offerings that need a special web page.
- *Lists:* You can build a variety of distribution lists for your e-mail campaigns.
- *Multichannel communication:* You aren't limited to e-mail. You can also communicate via SMS text message or by the information on web pages.
- *Dashboard:* Patron Point comes with a customizable dashboard that displays a variety of real-time analytics in a graphical format.
- *E-mail insights:* All those e-mails you send out have analytics behind them as well. E-mail tracking, reporting, and analysis are provided.
- *Visitor insights:* These include normal website analytics like page views and traffic sources.
- *Patron Point Verify:* This is a way to verify if the people asking for library cards live in your service area. This verification process can speed up the process of getting library cards to new patrons.

## PolicyMap

PolicyMap provides up-to-date community data, so you can make better strategic decisions. Data includes demographics like race and ethnicity, age and sex, disabilities, foreign-born populations, educational

attainment, family types, sources of income, workforce characteristics, and school performance. The company gets this data from national and regional sources.<sup>24</sup>

You can do quite a lot with this type of data. For example, you can create maps to visualize different aspects of your community; upload your own data, so you can overlay your goals with your community's demographics; and most importantly, use this data to help inform your strategic planning.

## SirsiDynix

SirsiDynix is known for its solid library ILSs. But it has a new product called Community Engagement Platform (or CEP). CEP combines some of the tools we have mentioned previously, like direct e-mail marketing, an events calendar, event registration and ticketing, and lists of customers based on demographics.<sup>25</sup>

I love that a couple of ILS companies (Innovative and SirsiDynix) are included in this list. It's nice to see these more traditional library technology vendors focusing on new ways to use their data and tools to help libraries engage with customers.

## Solus

Solus makes a couple of mobile apps and interactive signage, including The Library App. This mobile app's goal is to help libraries engage with customers by allowing them to browse the catalog and connect to family members within the app. Customers can customize the app to show the content that's most important to them, which is a nice feature. You can find nearby libraries using the app, which is useful in a multibranch library system. You can also download and stream e-content right from the app, instead of having to use a separate e-content mobile app like OverDrive's Libby app.<sup>26</sup>

## Springshare

Springshare has a couple of library engagement-focused apps.<sup>27</sup>

### LibAnswers +Social

LibAnswers +Social is a handy tool for handling the online version of your reference desk or call center. Using this tool, your library can answer questions asked through web-based chat, SMS text messages, e-mail, Twitter, and Facebook.

There is a ticketing system and an FAQ builder for library staff. The ticketing system is a great way to

keep track of questions, answers, and who answered them.

The +Social part of LibAnswers +Social is handy as well. This tool allows you to track activity in Twitter, Facebook, and Pinterest, so you can monitor and engage people with those three social media channels in one place. Responding to questions or even posting is handled the same way as answering a question in LibAnswers, so there is no need to learn multiple ways to answer questions.

### LibCal

LibCal is a web-based platform made to deal with your library's calendar needs. It has four modules: Rooms & Spaces, which lets users book meeting rooms; Equipment Reservations, which lets a customer check out equipment; Event Management, which addresses all aspects of your library's classes and events; and Appointment Schedulers, which makes it easy for customers to book appointments with staff.

### LibConnect

Springshare's LibCRM was recently reworked and renamed LibConnect. LibConnect is focused on patron engagement and e-mail marketing. Springshare combined its CRM product with an integrated e-mail marketing platform.

You can import user information from your ILS and other sources and then use this data to create profiles in LibConnect. LibConnect offers pre-built e-mail templates, a drag-and-drop editor, a free image library, and multi-device e-mail previewing.

### LibWizard

A more direct form of online interaction comes through surveys, quizzes, and tutorials. LibWizard helps build these feedback tools for your library.

### LibInsight

LibInsight is a one-stop shop for all library statistics and analytics. You can import data sets, including data from e-books, your ILS, other Springshare products, Google Analytics, and interlibrary loan products.

Once this information is imported into LibInsight, you can create reports and datasets, including your library's gate counts, budget analysis, circulation and acquisitions data, and E-content usage analytics.

## TLC

The Library Corporation, or TLC, has an interesting new product focused on social media called



SocialFlow. TLC partnered with SocialFlow to bring this product to the library community.<sup>28</sup>

SocialFlow is a social media management platform, similar to Hootsuite, Sprout Social, or Agorapulse. What's social media management? It's a way to easily keep track of your organization's social media platforms in one place. SocialFlow allows you to post and respond to comments in Facebook, Twitter, LinkedIn, Instagram, and Pinterest.

You can use SocialFlow to monitor the real-time behavior of your followers, so you can know the best time to publish content by finding the most active times on each social media platform. You'll also get some great analytics to measure your effectiveness in social media and with user engagement.

## Coming Next

Next, let's explore the different types of functionalities you can expect from these types of products, and how you can put those functionalities to work to better engage with your library's customers.

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# Types of Interactions

This chapter provides an overview of library engagement platform interactions and why a library might be interested in these types of software-based customer engagements.

Interactions are organized in six groups:

1. E-mail Interactions
2. CRM (Customer Relationship Management)
3. Registering and Reserving
4. On Your Phone
5. Gathering Data
6. Ads

Let's examine each in detail.

## E-mail Interactions

By the time you read this, you will have already dealt with many e-mails today. In fact, you probably have multiple e-mail accounts (I have three) and can probably access your e-mail wherever you are at the moment—by using a phone, a tablet, or a computer.

Most of us use e-mail frequently and for many purposes. Today, for example, I used e-mail to send work e-mails to staff, to set up a calendar appointment for next week, to accomplish some planning via e-mail, and to answer an employee's question.

Other people and organizations used my e-mail inboxes as well. In my work inbox, I received project updates and questions; system updates and notifications from a variety of devices and services, including alerts that a work phone left the library's network; an Office 365 alert; a notification from our finance billing system that there was a requisition to approve; a notification about meeting room setups for tomorrow; and a notification about a short system outage. In my personal e-mail inbox, I received a lot of information on products and services that I use, including

coupons, invites, and reminders about what to watch next on Netflix.

With all that information cluttering up e-mail inboxes, how in the world can e-mail marketing be effective? You'd think everyone would simply hit delete or unsubscribe and be done with it.

That, however, is not the case. According to Campaign Monitor, the average open rate (the percentage of the total number of people who opened an e-mail from an e-mail marketing campaign) for e-mail marketing is 18 percent. That percentage goes up for industries more closely related to libraries. Educational e-mail blasts have an open rate of 24.90 percent. Government and politics open rate is 26.70 percent, and for nonprofits, it's 25.50 percent.<sup>1</sup>

More good news for those of us trying to reach customers with our message is that studies show all ages use e-mail. Here's an age breakdown on e-mail use:

- Ages 15–24: 90 percent use e-mail.
- Ages 25–44: 93.6 percent use e-mail.
- Ages 45–64: 90.1 percent use e-mail.
- Ages 65+: 84.1 percent use e-mail.<sup>2</sup>

In addition, according to 99firms, we check e-mail multiple times a day: “The vast majority of email users log in to check their inboxes at least 3 times a day. 28% of users check their email over 10 times a day, and only 4% have reported doing so less than daily.”<sup>3</sup>

Our messaging not only tends to be seen, but it is often seen early in the day. Fifty-eight percent of e-mail users check e-mail the first thing in the morning, even before checking social media.<sup>4</sup> Furthermore, “60% of consumers state that they have made a purchase as the result of a marketing message they received by email.”<sup>5</sup>

E-mail marketing works for the retail and business world, but what about libraries? Although libraries

don't typically sell a traditional product, we certainly want our customers to participate in the library by checking things out, by registering for events, or by signing up for activities. You can think of activities as a type of transaction with customers, and libraries have a lot of activities (transactions) that we can promote in e-mails to our customers, including the following:

- *Welcome to the library:* Once someone signs up for a library card, we can send a welcome e-mail and provide some “next steps”—suggestions on how to use a new library card.
- *Card renewal time:* If your library cards expire, send out renewal reminders.
- *Renewal notices:* These are reminders to re-check something out or to take it back so it's not overdue.
- *New book notifications:* These notifications can be generalized lists of new books the library added to the collection or curated lists of staff picks. They can also be genre-, subject-, or author-specific, based on what a customer has checked out in the past.
- *Promotional e-mails:* Is a popular author coming to your library? You can send out reminders to sign up for the event.
- *Reminders to use a library card:* If customers haven't used their library card in six months or a year, you can send out targeted e-mails to encourage those people to check something out.
- *Birthdays:* Say happy birthday to your customers using e-mail! Some of the library engagement platforms can be set up to trigger an e-mail when it's the customer's birthday.

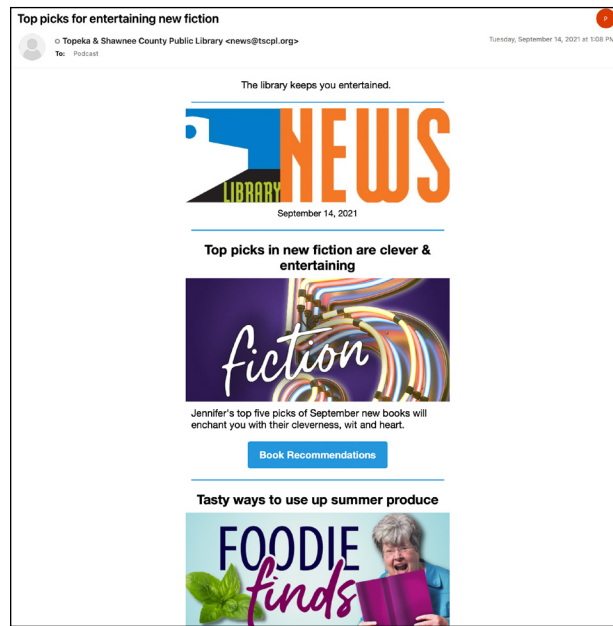
Use these ideas as a springboard for your own creativity with e-mail messaging. There are many other ways to use this type of targeted e-mail.

## E-newsletters

Another type of e-mail that can be sent is an e-mail newsletter, or e-newsletter. You've probably seen e-newsletters that replace a print newsletter that you may have received in the past.

What can you include in a library e-newsletter? Figure 3.1 is an example from my library. A recent e-newsletter of ours included this content:

- a link to our summer reading website
- a link to one of our blog posts from a staff member recommending music to check out
- another linked blog post focused on fantasy novels
- a reminder about our summer reading challenge (read twelve or more hours to win a prize)



**Figure 3.1**  
Example of a library e-newsletter from Topeka

- a friendly reminder to wear a mask
- an invite to a jazz concert at the library
- a blog post about fun mysteries to read
- links to three of our virtual and in-person events, with a link to see all our library's events
- and a fun trivia question!

That may seem like a lot of information to pack into one e-mail! But those links get clicked, and our articles are read. People do sign up for our events through links in those e-mails. So we find them both useful and effective.

And of course, you probably should include a way for customers to opt out of marketing e-mails. While many of your customers will be interested in library news, not every customer will be.

## E-newsletters You Don't Have to Write!

In the example above, Topeka and Shawnee County Public Library's marketing department created the e-newsletter. Multiple staff members wrote the articles, created the trivia questions, and wrote and posted the event listings on our website.

If you don't have the staff or the inclination to write your own content, LibraryAware's NextReads newsletters does the work for you. The company writes the articles and links to items in your catalog, so your customers get the same helpful information, but you don't have to do the work.

## CRM (Customer Relationship Management)

A customer relationship management (CRM) platform has many uses, dependent on your industry. Here's a good, simple definition of CRM from Salesforce.com:

Customer relationship management (CRM) is a technology for managing all your company's relationships and interactions with customers and potential customers. The goal is simple: Improve business relationships to grow your business. A CRM system helps companies stay connected to customers, streamline processes, and improve profitability.<sup>6</sup>

In other words, a CRM is a database about your customers and how they interact with your company and products. It keeps track of contact information and what people have purchased and shows potential leads. This is a handy tool for anyone who has customers and needs a better way to manage customer relationships.

The examples of library-focused CRMs loop into whatever other products the company offers. For example, Springshare's LibConnect works in conjunction with Springshare's other products, like LibGuides and LibAnswers. It can be a powerful platform to help a library manage and gather customer data by managing individual customers.

Vega (from Innovative) and OCLC Wise are adding CRM functionality into the ILS. This makes a lot of sense, since these systems already keep track of patron data and patron contact information. These CRM systems are adding personalized e-mail marketing to the patron database, and the plan is that the patron information will eventually be able to be used to send automated communications out to customers.

## Registering and Reserving

We are all familiar with the ability to register for and make reservations online: you reserve an Uber or a table at a restaurant. As I'm writing this, I'm sitting in a hotel, and I reserved a room online. You can register for an event online. We're still in a pandemic, so you might reserve your parking space at the grocery store for curbside pickup. I'm being reminded right now to "reserve" an appointment with my eye doctor.

We use online tools to register and reserve a lot of spaces, places, things, and time. Our customers are used to that, and they expect an online option from their library as well. Thankfully, with library engagement platforms, there are many ways to provide

online registration and reservation in our libraries. Let's explore some of the options.

## Events Calendar

Most libraries have a calendar of events. Modern library calendar systems allow customers to register or reserve their space at events, like classes, story-times, author talks, and book clubs. Some calendar systems also let people sign up even if the meeting is over capacity and will place those people on a waiting list.

Many calendars also offer reminders, like the ability to add the library's event to the person's personal calendar on their smartphone or to send an automated e-mail or text reminder.

## Meeting Room Reservations

Calendars are a good solution for library-led events, but what if your customer wants to reserve meeting room space at the library? In today's library, these spaces can be reserved online, using room reservation software. This software is often built into event calendar systems. For example, Communico offers modules for attending or reserving. Library Market's Library-Calendar product combines event and room management into one system.

There are many products that will help you better manage your meeting room and study room reservations. Paper sign-up forms are no longer needed.

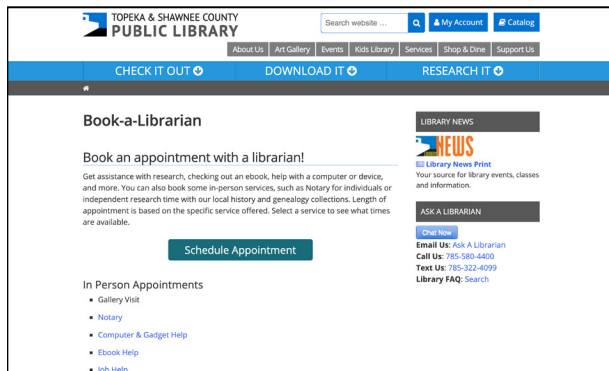
## Miscellaneous Reservations

Some library engagement platforms include a way to reserve nontraditional items like tools, musical instruments, technology products, or Wi-Fi hotspots. These are items you don't necessarily want to put in your ILS (though some libraries do). For example, during the pandemic, Topeka and Shawnee County Public Library repurposed twenty customer training laptops for staff. We used Springshare's LibCal product to allow staff members to check out a laptop, which was convenient and helped us keep track of who had the laptops.

Does your library let customers check out zoo or museum passes, or similar passes with area cultural institutions? If so, some library engagement platforms have a way to keep track of these types of passes.

## Appointments with People

There are many reasons someone might need to set up an appointment with a librarian or staff member. Thankfully, library engagement platforms are here to help (figure 3.2)!



**Figure 3.2**  
Making appointments at the Topeka and Shawnee County Public Library website

What types of appointments can you set up? Here are some examples:

- You can book time with a specialist—like a reference librarian or a genealogy or local history specialist.
- You can reserve time with a tech-focused librarian for a one-on-one gadget help session.
- Some libraries have social workers on staff and have a way for customers to set up appointments with them.
- Topeka and Shawnee County Public Library offers a notary service. We let customers set up an appointment for that service.
- Topeka also has an online reservation tool where area organizations can book staff to give talks about the library.

### Curbside Pickup

Because of the pandemic, many libraries have started offering some type of curbside pickup service. Thankfully, many library engagement platforms quickly built this new service into their products, which has been a lifesaver for many libraries and for our communities.

### Asking Questions

Although asking a question online may not seem like reserving anything, it is a type of “borrowing time.” There are many ways to ask questions, including a web-based chat service, e-mail, or an after-hours voice-mail. Customers also ask questions using their favorite social media platforms. Topeka frequently gets Facebook, Twitter, and Instagram questions, for example.

Wouldn't it be nice to have a way to combine all these questions? Thankfully, there is one! Some library engagement platforms funnel questions from different platforms into one handy web-based bucket, so all questions can be easily answered and tracked.

## On Your Phone

We use our phones to read, make calls, answer e-mails, check calendars, play games, and listen to music. Today's modern library can also be on our phones. Let's explore mobile apps, social media management, and voice-activated services.

### Mobile Apps

Mobile apps aren't usually folded into a larger library engagement platform. Instead, they're often sold as separate products. That said, mobile apps really *are* a type of library engagement platform that keeps customers interacting with and focused on their library. That sounds like library engagement to me.

There are various mobile apps for libraries, including the mobile app version of your library website. A good website app should make it easy for customers to find information on your website, search the catalog, find an event, pull up information on services, and read blog posts.

Customers like to access the website from their phones. Topeka and Shawnee County Public Library currently has the mobile app product from Communico, and we have approximately 5,000 downloads of the app from the Apple and Google app stores. So our website app is on 5,000 customer phones. Do these customers regularly use the app? We can't actually tell.

But here's what we do know, from BuildFire:

The average person uses 9 mobile apps per day and 30 apps per month. If the average smartphone user has 80 apps on their phone, this means that more than 62% of those apps don't get used every month. What does this mean? It's simple. People are downloading apps and not using them. In fact, 25% of apps are used only once after being downloaded, and then never used again.<sup>7</sup>

So your most engaged customers who also enjoy using smartphones to interact with the world will probably use your mobile app. Everyone else? Possibly not. A lot of people who downloaded the app are nominal users or wanted to try it out but quickly forgot about it. Instead, they're using all the most popular apps, like TikTok, YouTube, Instagram, Facebook, Facebook Messenger, Gmail, Google Maps, Amazon Shopping, or Zoom Cloud Meetings.

If you want customers to use your library app, you need to promote it often. You'll also need to make sure it is easy to use and meets your customers' needs.

Your customers will also enjoy many other library-related apps that, like OverDrive's Libby, Hoopla, Flipster, or Mango Languages. These apps are all popular because they offer content your customers want. Plus, apps are the only way to access certain content. For

example, if you want to read an e-book, you need the e-book mobile app.

## Social Media Management

Another type of library engagement platform is social media. Social media offers direct, two-way customer engagement. It's a good idea to use social media to reach library customers because they are probably already using these platforms.

Your library should probably be on Facebook and YouTube. Anything beyond that really depends on the needs and habits of your customers and your community.

For example, if you want to connect with area professionals and c-suite workers, you should be on LinkedIn. If you want to connect with techie types, local journalists, and PR and marketing professionals, you should think about using Twitter. If you want to connect with a more visual crowd, you can do that on Instagram. Want to connect with teens and twenty-somethings? You need to be on TikTok.

Whatever you choose, social media platforms all work the same way for a library. For each platform, simply share what you do! Share your content, ask and answer questions, be helpful, be a bit goofy or playful at times, and you will gain local followers and start making connections in those digital spaces.

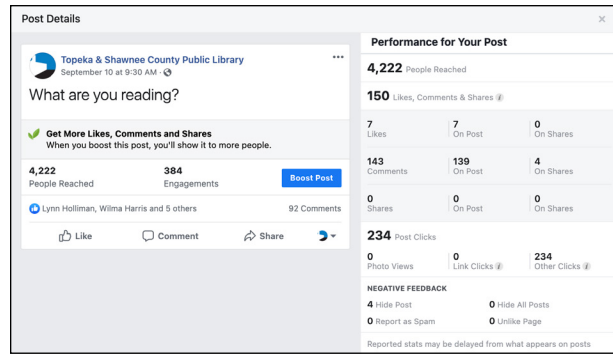
Here's a simple-to-create example from Topeka's Facebook page. We often post a simple question: "What are you reading?" (figure 3.3). Those posts are generally very successful for us! People reading those posts often comment by adding the books they are currently reading.

*Topeka and Shawnee County Public Library  
Facebook page*  
<https://www.facebook.com/TopekaLibrary>

This post, to date, has received 143 comments, mostly people answering the question and sharing what they are currently reading. The post has also reached 422 people. Reach in Facebook means that over 4,000 people had the opportunity to see that post. The results of this simple question, posted to a social media account, is a large list of reading suggestions based on what people in the library's service area are reading.

## Voice-Activated Services

myLIBRO is building voice-activated systems, which is a great idea. Your phone has a microphone and probably includes a personal assistant (Apple's Siri or Google Assistant, for example).



**Figure 3.3**  
Post details from a "What Are You Reading?" Facebook post

Other apps on your phone and devices around your house also interact with voice commands. For example, you may talk to Amazon's Echo Dot or Google's Nest Mini. My Bank of America mobile app has Erica, a voice-activated assistant.

I think we will see more library apps that incorporate voice recognition into their products.

## Gathering Data

Now let's shift our focus and discuss analytics and data. All these products and services I've been talking about say they engage your community. We can measure their success by using data from analytics that we collect from library engagement platforms. Here are some examples.

## Community Surveys

Some library engagement platforms create and run community surveys. This is an easy way to find out what your community wants without waiting until they come to the library to ask them about it. Surveys can be done online, via e-mail, or they can be mailed.

## Website Surveys

You can also create website surveys, which are similar to community surveys but are housed on your website. You can quickly gather and analyze information from website surveys, since responses can be directed to either an e-mail address or a back-end database.

## Dashboards

You'll need to analyze the data you collect from your surveys, and some of the companies we looked at in chapter 2 offer a visual dashboard. The dashboard is an easy way to view analytics to quickly see trends or problem areas.

## Community Analytics

Some of these tools offer GIS and market segmentation data from your community. This is very helpful when you want to map your community in different ways—like seeing where your customers live in your community. If you want to compare library use from different zip codes, this type of community analytics package could help you quickly find that information.

## Ads

Koios will help you set up a nonprofit Google Ads account and can help you create Google Ads that will show up in people's search results if they live in your area.

You can also create ads on a variety of social media platforms. For example, you can create ads in Facebook, Twitter, and LinkedIn. You can make Instagram ads. You can even create video ads that play on YouTube.

Why make ads? Because people click on ads.

Clicks on paid search listings beat out organic clicks by nearly a 2:1 margin for keywords with high commercial intent in the US. In other words, 64.6% of people click on Google Ads when they are looking to buy an item online!<sup>8</sup>

If your library creates an ad to share a service or resource with your community, it will probably get clicked, which is another way to move people from

Google to your library's website for a small amount of money.

There are many ways that library engagement platforms help a library engage with its community. In the next chapter, let's look at some of the custom marketing and promotion services offered by a few of these companies.

## Notes

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# Custom Options

So far in this issue of *Library Technology Reports*, we have looked at a range of different library engagement platforms. Some of the companies that build library engagement platforms also offer customized marketing services or some strategic planning services that can be tailored to each library. This chapter dives into some of those offerings and describes what each service provides.

Why include marketing services in a report about library engagement platforms? Your marketing plan, your branding guidelines, and other strategic planning can be a type of platform you use to engage with your community. In addition, some companies offer marketing services in their products.

So, let's take a closer look at four companies that offer some type of marketing or promotion service.

## LibraryAware

LibraryAware offers customized marketing services that include promotion campaign guides. These guides provide a step-by-step path to follow when implementing a promotional campaign. LibraryAware also offers professionally designed templates for collateral.

Here's what LibraryAware says about its templates: "Library-focused templates: Whether you're promoting a STEM story time or a Library of Things, our templates have you covered."<sup>1</sup> These templates offer a way for a library to have nice-looking promotional material like bibliographies, posters, reading maps, signs, and bookmarks without having a graphic designer on staff.

Resource promotion kits go a step further, creating a promotional campaign for library resources. The kits include e-mails, bookmarks, and flyers to use when promoting a library resource.

For example, if your library is participating in a 1000 Books before Kindergarten program, "LibraryAware customers can find an entire 1000 Books Before Kindergarten program kit with customizable reading

log templates, signs, social media graphics, a certificate of completion, bookmarks and more. To see the full kit, search 1000 books in LibraryAware."<sup>2</sup>

This type of product is great for libraries that have a small marketing department or no marketing department. Many libraries share some marketing and promotion duties among staff members. Instead of spending valuable time making flyers, posters, bookmarks, and so on for a program or resource, with LibraryAware, you can use a predesigned promotion kit, and you are well on your way to having a promotion campaign for your resource, service, or event. You'll learn more about developing future successful marketing and promotion campaigns as you follow LibraryAware's preformatted campaign guides.

## Koios

Koios applies for and manages the Google Ad Grants program for nonprofits (more info online) that is available to libraries. Topeka and Shawnee County Public Library is a Koios customer.

*Google Ad Grants*  
<https://www.google.com/grants/>

Besides setting up the grant program, Koios has helped my library figure out what web pages could benefit from Google Ads. We also have a regular meeting with Koios to discuss ad performance and what we might want to do next with ads. These meetings help my library stay on top of our ads and they help keep the Koios team in our planning loop.

Topeka has a variety of Google Ads for services and library catalog records (figure 4.1), and those ads are being clicked. Here's what Mike Lannen from Eternity (a marketing agency in Vermont) says:



People really do click on Google ads.

...

According to a survey by Clutch, 75% of those surveyed [sic] claimed they had clicked on a paid ad in the past month and said that it helped them find the information they were looking for.<sup>3</sup>

This trend makes sense. Google has created algorithms that find what you are looking for when you use its search engine. When people decide to click the Google Ad, it's because that ad leads to the answer they were seeking. In addition, the ad is usually at the top of the page, so people see it first.

Koios says its click-through rate (CTR) average is 12.8 percent, which Koios says is well above the industry average of 3 percent.<sup>4</sup>

To illustrate this point, here are some monthly stats from my library for the month of April 2021:

- 31,630 impressions (people who saw the ad)
- 3,686 clicks
- 12 percent click-through rate (CTR)
- 2,007 conversions
- \$5,132.22 of the allotted \$10,000 per month used
- \$0.16 cost per click (CPC)

A lot of the impressions and clicks came through ads on the library's catalog and our YouTube channel. Some clicks came from ads pointing to our web pages, as well. Our jobs and careers, local history and genealogy, and business resources pages all received multiple impressions and clicks via a Google Ad.

By paying a small amount of money for the Koios service, Topeka is getting a good return. We are benefiting our customers—and seeing thousands of web impressions, clicks, and conversions—as customers discover our services and resources and engage with us—all because of Google Ads.

## Library Market

Library Market has a few library engagement platform offerings that we have already examined. Its Library-Brand service offers professional branding and marketing services tailored specifically to public libraries.

Branding is your organization's visual look and feel, defined by Investopedia as follows:

The term brand refers to a business and marketing concept that helps people identify a particular company, product, or individual. Brands are intangible, which means you can't actually touch or see them. As such, they help shape people's perceptions of companies, their products, or individuals.

Ad · <https://www.tscpl.org/> · (785) 580-4400

**Dolly Parton Imagination - Topeka Shawnee Public Library**

Every Child Should Have Books in Their Home. Topeka & Shawnee County Public Library. Free books by mail for children ages birth up to 5. Make An Appointment. Get A Library Card.

[Job & Career Center](#) · [Browse Events](#) · [Services Offered](#) · [Get a Free Library Card](#)

**Figure 4.1**  
One of our Google Ads created by Koios

Brands often use identifying markers to help create brand identities within the marketplace.<sup>5</sup>

Library Market tackles this visual aspect of branding by providing a logo package with logos designed in a variety of formats, including different size logos for websites or for social media platforms. Sizing options prepare you for all your website, social media, and third-party vendor logo needs.

Library Market can also create an editorial style guide for your library: “We provide a thorough style guide based on your preferences that outlines rules for library communications with an emphasis on consistency, clarity, and correctness.”<sup>6</sup> If you use a style guide, all communications will have a consistent look, which is important when branding your library. Using consistent branding rules helps your communications be recognizable and professional. Library Market can also create a branding guidelines book to help you maintain consistency online and in print with branding.

For marketing planning, Library Market will assess your current marketing efforts and will then use that assessment as a stepping-stone to create a thorough marketing strategy for your library.

This can be a very customized service depending on your library's needs. Library Market can even set up a visit to your library to meet your staff and customers in order to create a comprehensive plan for marketing and branding.

## OrangeBoy

OrangeBoy also does some custom marketing and promotion consulting work and will help you with strategic planning, marketing, and branding initiatives. Topeka and Shawnee County Public Library has used this service from OrangeBoy.

We wanted to do a series of short-term marketing and promotion efforts to see if we could impact specific groups of people in our community. So we formed small teams, each focused on a demographic section of the community. I was on our Modern Family team.

OrangeBoy led the project by holding focused discussions with each team so we could figure out what we wanted to do for the project and what our deliverables should be. My team focused on young, busy families in a specific zip code in Topeka. That focus

provided a small, yet measurable, target group for our project.

Our goal was to encourage this demographic to take advantage of the TSCPL@Home home delivery service. You can find out more about the library's TSCPL@Home service online. We shared information about the home delivery service by using postcards that were mailed to households in the targeted zip code area and by sending multiple e-mails to customers when we had e-mail information.

*TSCPL@Home*  
<https://tscpl.org/tscplathome/>

Next, OrangeBoy measured activity via its Savannah product. By mid-July our statistics showed success: we had 461 signups for the service! OrangeBoy also kept track of e-mail open rates (about 17 percent), clicks on links in the e-mails, and activity after opening the e-mail. OrangeBoy also tracked the number of lapsed library card holders who reengaged with the library. Statistics also showed that out of 1,396 households, 1,225 used their library card after getting our messaging.

OrangeBoy was able to look at our data and develop a plan to help the library plan a promotion effort from start to finish. Through this and similar projects (we had five teams focused on different

demographics), we were able to reengage our customers and introduce them to new library services. We were also able to measure our effectiveness by using OrangeBoy's Savannah platform and our own analytics. This experience has increased our marketing and promotional savvy by teaching us what works and what doesn't.

## Notes

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# Library Engagement Platforms' End Goal

We have examined a range of library engagement platforms and have discussed functionality and marketing aspects. In this final chapter, let's focus on the end results: when these services and engagement platforms make sense to reach library goals, what that interaction might look like to the customer, and why the customer might be interested in these types of connections to the local library.

## Creating Touchpoints

Let's begin by taking a look at touchpoints: a marketing and customer experience term. SurveyMonkey explains what touchpoints are:

Customer touchpoints are your brand's points of customer contact, from start to finish. For example, customers may find your business online or in an ad, see ratings and reviews, visit your website, shop at your retail store, or contact your customer service. Seems like a long list, but these are just a few of your touchpoints!<sup>1</sup>

Libraries have a lot of touchpoints—many of them built-in and traditional. For example, when a customer visits a reference desk with a question, that's a touchpoint. When a customer checks out a book at the circulation desk, that interaction and experience is a touchpoint. When a customer enters your building? Another touchpoint. When that customer finds an article on your website or scrolls to your most recent Facebook post? These are also touchpoints.

All the library engagement platforms we have been discussing—newsletters, e-mail marketing, reservation and sign-up software, delivery services, and mobile apps also have many built-in touchpoints.

## E-mails and Our Library Catalogs

First, let's talk about touchpoints in regard to library catalogs. We learned about two ILSs that have some customer relationship management (CRM) features built in, or at least have some direct e-mail marketing components built into the system.

The catalog experience is filled with touchpoints. For example, when you search the library catalog for something to read, watch, or listen to and put that selection on hold, you are engaging with touchpoints. These touchpoints include finding the website, finding the link to the library catalog, logging into the catalog with your library account, searching the catalog, and putting an item on hold. These touchpoints don't provide much customer engagement with the library.

Other touchpoints can be created with our library engagement platforms by using the direct e-mail functionality built into some of these newer systems. Here are some examples of automated e-mails you can send using these systems:

- *Getting a library card:* Once customers have signed up for a library card, you can send them a Welcome to the Library e-mail. This e-mail can share ideas about card usage. Customers probably know they can check out books using their new library card, but you can share other capabilities, like downloading e-books or digital audiobooks, using a library database, or reserving a computer. If you have a zoo passport program at your library, you can explain how to use a library card to access passes, or if you have events that require a reservation using a library card, you can share how that process works.
- *Reminder to use the card:* Some customers get a library card for a specific reason, and they don't

use their card again. Take the opportunity to e-mail and remind customers that they have a library card and that they can use it for books, movies, music, and so on. Sending a reminder to use the card might pique interest enough to visit the library again and check something out.

- *Renewal reminder:* If your system's library cards expire after a set amount of time or after a set amount of time with no use, send out a renewal reminder to customers' e-mail addresses. And, of course, take that opportunity to remind those customers of ways to use their library card.
- *What to read next:* You probably have plenty of customers who use their library card regularly. Consider sending recommendations to those customers. Some of these CRM-based systems can look at what the customer generally checks out and can e-mail them a list of reading recommendations. Or you can send an e-mail to notify the people who have checked out an author's books when there's a newly published one to read. You can even send a general e-mail that has a list of the newest books the library has purchased.
- *Fun things:* You can also send some fun e-mails, like a happy birthday e-mail or a library card anniversary e-mail.

## E-newsletters

While we're talking about e-mail, let's think about e-newsletters. Instead of an e-mail targeted to an individual, these are e-mails targeting a wider range of customers.

E-newsletters are a good way to use your e-mail lists to get library information into the hands (and e-mail inboxes) of your customers. If you gather e-mails in your ILS, you have those e-mails available to use in other products (like your library engagement platforms).

Many of these systems also have a way to track interactions. For example, you can tell when a customer clicks a link to an article that was in the e-newsletter. This type of data about your e-newsletters can be something you share in a board report or at an internal library meeting. Similarly, you can measure the click-through rate (CTR) of people clicking from the e-newsletter to your library's website.

Most of these products require that you create the content. This can be fairly easy to do if you pull content from your library's news or blog posts and create a list of books to go along with it.

But if you want to simplify the process further, LibraryAware can write the e-newsletters for you. It provides stories and links to material in your library catalog. So, if you work at a small library with no staff or time to create an e-newsletter, or you are too busy

to devote time to writing articles, you can pay someone else to do it for you.

## Data-Based Collection Shaping

Another thing ILSs connected to patron data can do is to help shape your collection. For example, some systems will make purchase and discard recommendations based on previous checkouts. Using library data in this way can help shape a collection (even at the local branch level) so you have materials of interest to customers.

## Signing Up

Many libraries have events and classes happening either at the library or in the community that people must reserve a space to attend. This process is like getting a ticket for the concert—seating is limited!

Your customers can sign up for and reserve any number of things by using library engagement platforms. This is an active type of touchpoint. Your customers want to sign up for or reserve something, and through the platform software, they're able to accomplish their goal (i.e., signing up or reserving an item).

This functionality empowers the customer and shows you what types of programs your customers like. With this information, you can tailor your events to your customer needs.

Meeting room reservations are similar. Streamlining the process improves your customer touchpoints. When people sign up and use your meeting spaces, this also creates customer data and is a good way to show library use over time.

## Pickup and Delivery Services

During the pandemic, many libraries have created new contactless services: curbside pickup and other delivery methods. Curbside pickup services have been around for a long time. For example, restaurants often provide curbside pickup services for carryouts. Grocery stores, restaurants, and even music stores have adapted and have developed curbside pickup services to operate during the current pandemic.

Some libraries have drive-through-window-styled pickup services, which is handy for customers on the go. At those libraries, customers simply put something on hold and designate drive-through. Once customers get a notification that the item is ready, they drive to the library's pickup window to check out the item.

While most libraries don't have a drive-through service, many have recently created a hastily built

curbside pickup service. For example, at Topeka we marked some parking spaces in our parking lot with flags. Then we placed holds in an outdoor sunroom building that is adjacent to those parking spaces. We added a few staff circulation computers in the room, installed phones—and voilà! We had curbside pickup.

Now, we are reclaiming that sunroom for its intended use (meeting and eating space). We moved the staff part of curbside pickup to another area of the building. It's still the same process for a customer, but we needed to adapt the service as we have continued to slowly open our buildings back up.

As we adapted, we also started using Springshare's Pickup Manager to manage our curbside pickup service. Here's what Springshare says about Pickup Manager:

Pickup Manager helps you streamline the holds pickup process while adhering to your COVID-19 safety guidelines. Patrons can easily request their holds via their ILS, schedule a pickup, and enjoy 2-way SMS/text and chat communication when they've arrived. Pickup Manager has so many features to not only make your current day-to-day easier but when COVID-19 is a thing of the past, you'll wonder how you ever did holds pickup "the old way."<sup>2</sup>

## Home Delivery Service

Home delivery services are yet another option. Topeka and Shawnee County Public Library has had home delivery services for a long time for our older customers. We have regular routes and take books to those customers who normally can't get to the library.

Our TSCPL@Home service has expanded that concept to include everyone in our community. Customers simply designate TSCPL@Home when they place a book on hold in our ILS. Then we'll deliver books to the customer every two weeks (assuming the customer has items checked out). This is a growing service in my community.

Curbside pickup and home delivery have become popular services. My guess is these types of services will continue to be offered because they are a convenience many industries are now offering. There's a whole service industry devoted to third-party deliveries, with familiar names like DoorDash, Instacart, or Grubhub. Uber is even getting into the delivery game with its Uber Eats service. Curbside pickup and home delivery services are probably here to stay, presenting an exciting growth area for libraries and library engagement platforms.

## Mobile Apps

Library-focused mobile apps are handy tools to have in your pocket and on your smartphones. When your customers have added your library's mobile apps to their smartphones, they have an enhanced opportunity to connect with the library.

To maintain customer interest, make sure your library app is useful. If you are building a mobile app from scratch, find out what your customers really want. For example, they might want to use the app to access the library catalog and put things on hold or to sign up for classes and events. They might also want to check their accounts to see what they have checked out. Customers probably also expect to get reminders in the form of notifications.

Your library probably also has a bunch of other mobile apps. For example, you might have OverDrive's Libby app for e-books. You might also have Hoopla, Flipster, or LinkedIn Learning apps as well. You might have a summer reading app like Beanstack or a language learning app like Mango Languages.

A good question to ask is this—does your customer know about your mobile apps? You will need to continually promote your mobile apps to customers. Create a mobile apps page on your library's website as well. This page should list the library's mobile apps and should include links to the Google and Apple app stores.

## Custom Marketing Help

Do you have a large marketing department? No? Thought not. My library has a four-person marketing department . . . and enough work for at least twice that many people at any given time. There's always a ton of programs, events, services, and other awareness opportunities that a library wants to promote. Add to that workload all the other everyday things, like "bathroom out of order" signs that staff need to quickly create.

Yet despite personnel issues, marketing and promoting in libraries is crucial to today's modern library. That's why we need solid marketing and promotion strategies. The good news is that even if you have a small marketing department or if you just really need help developing marketing and promotion plans, you can use one of the companies that help with developing marketing, promotion, and branding strategies that were discussed earlier.

A great thing about the library engagement platform companies that offer marketing services is that they are all library-focused organizations. They are already familiar with libraries. That is so important! If

you have worked with an outside company that didn't know what libraries really do, you'll understand what I mean. You can waste valuable time explaining the width and breadth of a modern library to a company that is new to the library industry. Why spend time on education when you can use a company or product that already understands libraries?

## Ad Space

Ads are a handy way to engage people with a click and, as I shared earlier in this publication, people do click on online ads.

Google Ads help place library services at the top of a Google Search. That function alone is probably worth your time and money. Don't think of your ad as spam that unsuspecting people might click. Instead, think of it as a way to put the thing that person was searching for at the top spot on their search results page. By doing that, you just saved that customer time by offering the information they wanted in a Google Ad—and for just a little money.

The same principle applies to other types of ads. Topeka has used Facebook Ads, Google Ads, and YouTube video ads, all with good levels of success. These types of ads are an easy way to provide the information people want, and at the top of their searches.

## One More Thing

We have been focused on library engagement via software. In some ways, it can feel a bit like we are using software to invade our customers' space. Doing this might seem intrusive, especially when we are talking about ads, notifications on a smartphone, or direct marketing via e-mail and e-newsletters.

Here's the thing—our customers are used to this kind of engagement, and actually expect it. Every other company they interact with uses these forms of

engagement. For example, when you buy something online, you have also probably provided your e-mail address and are signed up for marketing e-mails.

Sometimes that's a bit irritating. But often, we're OK with it because we like the company and the product we bought, and we might find the e-mails interesting. It's possible it will even prompt us to make future purchases.

Remember, our library customers like the library. They signed up for a library card and want to interact with the library. They provided their e-mail address willingly, downloaded the mobile app, and maybe reserved a meeting room space. So our customers expect us to interact along those touchpoints. This type of interaction is a normal, expected, everyday activity for a modern business or organization.

Not only is it expected, but our customers also want these interactions. Unlike a traditional product that involves a purchase, an upgrade, or an extended warranty reminder, the library provides many free services. We are a valued community resource that many customers hold near and dear to their hearts.

Libraries provide books, information, and answers. We help people change their lives—through a new job, or a new skill, or knowledge, or even through a few moments of escape with a fun story.

What are you doing to meet your customers' need for connections? Library engagement platforms can engage customers in ways beyond the circulation desk. So start exploring these emerging opportunities packed into a software platform, and connect with your community in new and meaningful ways.

## Notes

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2. Talia, "Pickup Manager Is Here!" *Springshare Blog*, October 14, 2020, <https://blog.springshare.com/2020/10/14/pickup-manager-is-here/>.

## Notes

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## Notes

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