



Strategic Marketing Planning

Currently, libraries, archives, museums, and other information organizations face numerous challenges such as globalization, rapid developments of information and communication technologies, changing internal and external environments, increasing expectations of users, budget reductions, and increased competition from alternative information providers. To meet the challenges, it is vital for information organizations that are also user-focused organizations to employ marketing in their strategic management and to provide the relevant and high-quality services and resources to their users so as to remain relevant as well as competitive in an ever-competitive world. Marketing is an important part of an information organization's strategic plan. The success of a marketing strategy in an information organization depends on the success of the management process in marketing as well as the marketing process. The management process in marketing comprises planning, implementation, and evaluation (Etzel, Walker, & Stanton, 2001, p. 578). Planning plays an important role in each part of the strategic marketing processes. This chapter looks at the strategic marketing planning process, the importance of developing a marketing plan, a marketing plan writing, and the elements of a marketing plan.



6.1 THE MARKETING PLANNING PROCESS

An information organization needs “both general and specific plans to be successful,” “management should first decide what it intends to accomplish as a total organization and develop a strategic plan to achieve these results,” and each of its department should develop their own plans on the basis of this overall plan and take into account the role of marketing in these plans (Etzel et al., 2001, pp. 578–579). What is planning? Planning is “deciding what we are going to do later, including how and when we are going to do it,” and planning the marketing strategies in an information organization should be conducted on three various

levels: strategic planning, strategic marketing planning, and annual marketing planning (Etzel et al., 2001, p. 581). The process of strategic marketing planning includes the following five steps (Etzel et al., 2001, p. 583):

1. Conduct a situation analysis.
2. Develop marketing objectives.
3. Determine positioning and differential advantage.
4. Select target markets and measure market demand.
5. Design a strategic marketing mix.

Marketing planning is a circular process of “assessment of marketing opportunities and resources, development or revision of marketing objectives relative to performance, revision or formulation of marketing strategy, development or revision of the plan for implementation and control, and implementation of marketing plan”, which is the marketing planning cycle (Pride & Ferrell, 1995, p. 694). Planning is essential for using time and resources efficiently and productively, for focusing staff’s creativity and efforts, keeping things organized and consistent (Barber & Wallace, 2010, p. 1; Steiner, 2012, pp. 6–7) and for achieving, measuring, and evaluating results. A plan is fundamental for accountability, transparency, and justification of budget and staffing.



6.2 THE IMPORTANCE OF DEVELOPING A MARKETING PLAN

The outcome of the process of strategic market planning is “a marketing strategy that is the framework for a marketing plan,” and a marketing plan is “a formal, written document that outlines and explains all the activities necessary to implement marketing strategies” as “it relates to target markets and the marketing mix” (Pride & Ferrell, 1995, p. 692). Developing a marketing plan is important to the strategic planning of an information organization and its parent organization. A good marketing plan provides direction and focus for an information organization and a guide for an information organization’s fund-raising and outreach efforts (Kotler & Armstrong, 2014, p. 611). The importance of developing a marketing plan lies in its allowing an information organization to ensure that its marketing activities align with the mission statement and the goals and objectives of both the information organization and parent organization, to coordinate the marketing activities to achieve its goals and

objectives, and to help the information organization “get organized, stay focused and be consistent” in the marketing efforts (Barber & Wallace, 2010, p. 1; Welch, 2006, pp. 27–41).

A marketing plan enables an information organization to analyze its internal and external environments, reassess its strengths, weaknesses, opportunities, and threats, and to effectively implement new strategies to market successfully. It also enables an information organization to determine and anticipate what its user needs and wants are, identify what its competitors are doing, and help the information organization to provide unique services and resources to satisfy user needs in a timely, useful, and appropriate way. It can make an information organization’s current and potential users aware of its services and resources (Duke & Tucker, 2007, p. 52).

Developing a marketing plan can help shape the information organization as a service provider, ensure that it understands its community well enough to serve it, and keep good relationships among its stakeholders. It is a guide to successfully promote an information organization’s services and resources. It can provide clarity for staff and give them the direction and tools to implement and evaluate the marketing activities and ensure that the marketing tools are used effectively and marketing activities are directed to the right users in an information organization.



6.3 A MARKETING PLAN WRITING AND THE ELEMENTS OF A MARKETING PLAN

A marketing plan is a written document that guides an information organization’s direction, focus, and marketing efforts and activities. Writing a marketing plan for an information organization is different from that for profit organizations. An information organization is a non-profit and user-oriented organization. There are many approaches to writing a marketing plan, but they have similar elements including situation analysis, goals and objectives, implementation, and evaluation.

According to Potter (2012, p. 14), the marketing cycle includes these cyclical stages: decide on your goals, research your market; segment, set objectives, promotional activities, measurement, evaluation and modification, and a marketing plan shows how these eight stages fit together. The first important stage is that an information organization needs to determine its right direction that aligns with its parent organization’s

strategic planning and goals and objectives. The next stages are to examine the external and internal environments through the PEST (political, economic, social, and technological) analysis and the SWOT (strength, weaknesses, opportunities, and threats) analysis by asking “where are we now?” followed by the question “where do we want to go?”, and to conduct the market research to gather information on and identify the needs and wants of types of user. Conducting the environmental scanning and market research makes it more likely that the marketing plan will result in success (Dempsey, 2009, pp. 165, 169). Market research includes the understanding of the existing and potential users and their needs and wants as well as the specific markets and the offered services and resources by conducting surveys or focus groups, and then identifies the specific market segments (Barber & Wallace, 2010; Kassel, 1999; Potter, 2012).

Then, it is fundamental that the marketing plan includes a mission statement reflecting the priorities of the information organization in terms of its “business, services offered, and markets served” (Kassel, 1999), goals and objectives. A mission statement is an important tool in providing the community with a clear message of “who we are and what we do, and value” (Smith, 2011, p. 339) and a well-defined focus on the vision of the information organization focusing on the future. The development of a mission statement explains how the information organization can meet users’ needs within the community (Koontz & Mon, 2014). A marketing plan addresses the goals and objectives of the information organization but also provides it with the information on how to achieve them, who is responsible, and the timetable required to achieve them (De Saez, 2002).

The next stages are to develop marketing strategies including marketing mix and communication strategies, and to create the implementation strategies including activities, responsibilities, and timetables for a marketing plan. The final stages are evaluation and modification. Evaluation answers questions such as “how are we doing” and “are objectives being met” (Barber & Wallace, 2010, p. 2). Evaluation is an ongoing process. The evaluation of marketing activities on a regular basis offers the information organization the important data and results about its service performance for user satisfaction, and leads to what needs to be adjusted in order to achieve the identified goals and objectives, and maintain a user-oriented information organization.

The elements of a marketing plan may vary in a given situation. Table 6.1 demonstrates the main elements of a marketing plan in a report format.

Table 6.1 The main elements of a marketing plan

1. Executive summary	This is an overview of the marketing plan. The main points raised in each section of the report should be concisely written. According to Etzel et al. (2001, 587) , this section “is intended for executives who desire an overview of the plan but need not be knowledgeable about the details.”
2. Situation analysis	The external and internal environments are examined. “Much of this section might be derived from the results of strategic marketing planning” (Etzel et al., 2001, p. 587).
3. Market research and segmentation	This section includes the understanding of the existing and potential users and their needs and wants as well as the specific markets and the offered services and resources by conducting surveys or focus groups, a breakdown of the community users, and the division of the user groups based on the segmentation criteria (Potter, 2012).
4. Target market(s)	This section includes how to assess the identified segments in an information organization, how to select target segments, and how to make efforts on one or a few significant segments. This section states the identification of what the target segment is.
5. Mission statement	The mission statement aligns the marketing plan with the mission of the information organization and its strategic plan (Barber & Wallace, 2010 ; Kassel, 1999 ; Potter, 2012).
6. Goals and objectives	The goals of what the information organization would like to achieve should be realistic and the objectives to monitor how well the goals are being achieved should be measurable (Kassel, 1999 ; Koontz & Mon, 2014 ; Potter, 2012).
7. Marketing strategies	The strategies need to indicate which target markets are going to be satisfied through the use of the marketing mix and communication strategies.
8. Implementation	The implementation strategies refer to tactics or action plans. This section include activities, responsibilities, and timetables for a plan.
9. Cost analysis	This is the budget for the marketing activities. This section includes two kinds of information: expenses and “the amounts of resources dedicated to different activities in one or more budgets” (Etzel et al., 2001, p. 587). As Potter (2012, p. 35) notes, this section includes the cost of marketing campaign “in terms of both financial outlay and staff time.”

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Table 6.1 (Continued)

10. Evaluation	“This section addresses the questions of what, who, how, and when connected with measuring performance against goals, both during and at the end of year” (Etzel et al., 2001, p. 587).
11. Modification	This section includes how the plan will be modified regularly or annually (Barber & Wallace, 2010; Kassel, 1999; Potter, 2012). “The results of evaluation during the year may lead to adjustments in the plan’s strategies and/or tactics or even the objectives to be achieved” (Etzel et al., 2001, p. 587).



6.4 SUMMARY

In order to succeed in all marketing activities, it is vital for an information organization to focus on strategic market planning which is a circular process of assessment of marketing opportunities and resources, development or revision of marketing objectives relative to performance, revision or formulation of marketing strategy, development or revision of the plan for implementation and control, and implementation of marketing plan, which is the marketing planning cycle (Pride & Ferrell, 1995, p. 694). A marketing plan “serves to document how the organization’s strategic objectives will be achieved through specific marketing strategies and tactics, with the customer as the starting point” (Kotler & Armstrong, 2014, p. 611). It is developed on a situational analysis, internal and external market research, identified mission statement, goals and objectives, creation of different approaches for different target segments, targeted promotional activities, the measurement of marketing campaigns, the measurement of shifts in user behavior, evaluation, and scope for needed modifications to processes (Potter, 2012, p. 16–35).

A marketing plan should be structured and written in a simple and concise way so that it can be easily understood by all the stakeholders of an information organization. As Welch (2006) states, marketing is “everyone’s job.” The main elements of a marketing plan include executive summary, situation analysis, market research and segmentation, target market(s), mission statement, goals and objectives, marketing strategies, implementation, cost analysis, evaluation, and modification.

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