

# **Another Baker's Dozen Ways to Get Your Database Traffic Cooking**

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Compliments of  
Morningstar Library Services



# The Main Ingredient to Great Database Use

We're now into our fifth year publishing our monthly e-newsletter, Morningstar Library Notes, for libraries nationwide. After our first two years, we had gathered from our readers a considerable list of ideas for promoting database use. We published these ideas in our first "Baker's Dozen" booklet.

Two years later, we're back with a fresh batch of traffic-building programs developed and used by libraries like yours.

The big ideas you'll find in Another Baker's Dozen include how to:

- Make the most of the promotional powerhouse called POP (point of purchase)
- Use interesting twists to get more mileage from tried and true promotions
- Deploy e-mail as a database training tool
- Identify key constituencies and market the appropriate databases to them
- Take a page from retailers and put your programs up on the marquee in lights
- Build an alliance with your local newspaper and write a library column
- Post 10-minute tutorials for each of your databases on a Web tutorial page
- Follow the example of national companies and brand your library
- Get more attention for databases with patron testimonials

And, as we've said before, let's not forget the most important and effective ingredient of all: The human touch. It's what makes a library a library. And as you'll see, it still is the main ingredient in keeping your database usage cooking.

## **POP Promotes Databases at the Niles Public Library District**

Point-of-purchase (POP) marketing is one of the most effective ways packaged-goods companies sell their products. What works for some of the top-selling products in the world can work for electronic databases, points out Ken Frank, reference librarian at Niles Public Library District in Niles, IL.

Ken shared with us the many ways Niles has promoted Morningstar Library Edition and other databases. Library staffers in Niles created signage for use throughout the library. They wrote articles for their quarterly newsletter and sent out publicity releases. They posted information on the library's Web site and they conducted in-library tutorials for patrons and librarians.

What does Ken find most effective? The newsletter generated patron calls, and posters (in other words, POP), especially a permanent one next to the print-investment newsletter display, got the attention of the right people.

This all demonstrates that whatever your size and your promotion resources, effective database marketing is within reach.

### **What works for some of the top-selling products in the world can work for electronic databases.**

Other methods of promoting database resources included special programs for the Niles business community. Among their notable efforts was an open house conducted in cooperation with the Niles Chamber of Commerce and Industry.

## Three Big Ideas for Large and Small Libraries from Patchogue-Medford Library

Bruce K. Silverstein, Reference/Adult Librarian at Patchogue-Medford Library, Long Island, NY, has faced—and surmounted—challenges probably very familiar to you. These include: local media that seem indifferent to library news, tight quarters that make it difficult to conduct live staff-training sessions, and a profusion of databases that so confuse patrons that they flee to Google.

### The old standbys work best. Focus on databases with built-in constituencies.

#### Tried and True with Twists

Bruce has found that the old standbys—newsletter mentions and flyers—work best. And he's discovered ways to make them work harder. For instance, he bills a database as "featured" in the library's quarterly newsletter. He follows through with a featured database page on the library's Web site. He sees a definite increase in traffic to the highlighted database whenever he does this.

Nothing could be more basic than the humble flyer. Bruce's twist is to pepper the library with flyers where they have the best chances of attracting the attention of the right audiences. Take what he has done with Morningstar Library Edition for example. He has placed flyers in the print editions of *Morningstar Mutual Funds*, *Value Line*, and other investment newsletters, as well as investment reference books. He lets patrons know they can supplement their stock and fund research with comprehensive, up-to-date Morningstar information.

#### Training Without Space

Yes, it would be wonderful to assemble the entire staff in the computer area and conduct a live, interactive session. But if space is tight, and if closing the computer area might arouse the ire of patrons, try this idea offered by Bruce:

Introduce new databases or new features to your staff in an e-mail. Be sure to thoroughly describe the database or feature. Provide a brief tutorial on key features. And don't limit yourself to just new databases or features. Send similar e-mails to refresh staff on older databases.

For ready-made help in this department, be sure to check our Client Site. You'll find tutorials on the Morningstar Library Edition in general, and on specific aspects, such as Stock Analyst Reports and Fund Analyst Reports.

#### Databases with Constituencies

Probably like your library, Patchogue-Medford had been subscribing to databases for years. Given years of experience, Bruce observes there can be too many databases, too many different interfaces, too many glitches, and too much confusion. So lately he has focused on databases with built-in constituencies.

Morningstar Library Edition is an example. It has high visibility because of Morningstar's good reputation. And it has an avid group of users: investors who want and need stock and mutual fund information. Ancestry Plus is a nonfinancial database he cited, for those patrons interested in genealogy.

As Bruce Silverstein and the Patchogue-Medford Library illustrate, you can accomplish a lot with plain, old initiative and ingenuity.

## Why the “Scrappy” Award Goes to an Allegheny County Library Association Member

Morningstar history includes our “Scrappy” Award, given to a member of our product-support team who recognizes and capitalizes on an opportunity—without spending much, or better, any money.

Well, if we could bestow this award on libraries, the Hampton Community Library, member of the Allegheny County Library Association, would receive it this month. Here’s why.

### Stepping out of the comfort zone could produce surprising and rewarding results.

We noticed that the ACLA’s ieNetwork (a collaborative service with Carnegie Library of Pittsburgh) enjoyed high Morningstar Library Edition usage. We called Sharon McRae, our contact at ACLA. Sharon is Chair of the Electronic Resources Evaluation Committee. On our behalf, she asked member libraries to relate what database promotions are working for them.

She inundated us with great ideas. We’ve discussed many of them before, including Web sites, newsletters, special and regular programs targeted at businesses, free publicity, and in-house materials of all sorts.

They are all great efforts—great scrappy efforts for a service and in a profession where money always seems in short supply.

But this really got our attention: advertising on a shopping center marquee!

Hampton Community Library is located in a shopping plaza off a very busy thoroughfare. Workshops are marketing mainstays for them. When they had the opportunity to use the center’s marquee—a towering sign featuring the name of the center, the stores in it, and a place for special messaging—they seized it. Their announcement received lots of attention and extraordinary response. They had to turn away people because they couldn’t handle the volume.

As for what appeared on the marquee, Joyce Anne Von Vreckin, Hampton’s Library Director, told us the messages varied. But they always included the word “free,” the library’s name, and contact information. One in particular she recalled: “Learn to earn \$\$\$ without spending any.”

While you may not have a marquee close at hand, from time to time other opportunities might present themselves. When they do, no matter how out of the ordinary they may seem, why not follow Hampton Community Library’s example? Stepping out of the comfort zone could produce surprising and rewarding results.

## Newspaper Column Pays P.R. Dividends for the Newport Beach Public Library

The Newport Beach Public Library is a relatively new Morningstar Library Edition client. But you don't have to be with us long to get our attention, especially when you have an interesting and out-of-the-ordinary promotional approach.

June Pilsitz, Collection Development Coordinator at Newport Beach, tells us that they have a regular column appearing in each Sunday edition of the Daily Pilot, a local community newspaper. Titled "Check It Out," the library uses the column to highlight different offerings and features of the library. Databases appear frequently. And, of course, they've used the space to introduce and generate traffic for Morningstar Library Edition.

### Consider using training to help staff members take advantage of seasonal opportunities to drive database traffic.

June says that while they can't tie traffic directly to the newspaper column, they prize it for its public relations value.

Is your library located in a smaller community served by a smaller paper that focuses on local news? If you haven't already, why not approach the paper with your own column idea? After all, your local newspaper and your library have similar objectives: serving the information needs of people in your town and district.

Newport Beach Public Library's column is just one in a variety of promotional efforts. These include programs we've discussed often: book-marks and training.

At Newport Beach, they have a large auditorium holding up to 200 people equipped with a projection system. Here they can train the entire staff, if needed. They also have a smaller training room accommodating six to eight staffers. Soon, June told us, they will equip this room with a smart whiteboard. This technology allows you to project computer images (such as pages from Morningstar Library Edition), interact with them, make notations, and save your notes for distribution later.

Ongoing training is a great asset. But don't limit yourself to just the technical aspects of a resource. Consider using training to help staff members take advantage of seasonal opportunities to drive database traffic. An excellent example of this is training staff to be ready for year-end tax planning and budget rebalancing.

## **A Time- and Money-Saving Training Idea from Richland County Public Library, SC.**

There are many ways to drive traffic to your databases: mentions in your newsletters, P.R. efforts, in-library signs, and more. But when patrons arrive at Morningstar Library Edition, or any of your other valuable databases, are your librarians prepared to answer the questions that will arise?

We all agree training is critical for strong database usage and high patron satisfaction. Now, if there was only a way to train without eating up too much time and too many resources.

Padgett S. Lewis, APR, Public Relations Manager of the Richland County Public Library, told us about her library's wonderful approach: 10-minute tutorials.

In addition to staff training, Richland's 10-minute tutorials are perfect tools for educating patrons on how to use the databases. As a matter of fact, the library has posted a link to their tutorial collection on their database cover page.

If you'd like to take a look, just Google Richland County Public Library, and then click "Research Tools" to get to the database page.

### **Each 10-minute tutorial provides a brief description of the database and explains how to access it.**

These are short PDF files the library's staff has prepared for 30 different databases in their collection. Each 10-minute tutorial provides a brief description of the database and explains how to access it. In the balance of the PDF, the 10-minute tutorial poses typical questions touching on the major features of the data. Succinct bullet-point directions follow.

## Get Research Ready, from the Richland County Public Library

The way some children take to computers and the Internet, you would think they were born with a mouse in their hands and a keyboard on their laps. However, proficiency with searching the Web, downloading music, conversing via instant messaging, and the like doesn't automatically qualify teens as top-flight researchers and library-database mavens.

During the school year, students seem to take up residence in the library. And it's easy to assume they understand computers, databases, and search techniques. They may grasp the basics and grow comfortable with the electronic aspects of research, but only you know the ins and outs of your system and your databases. Richland's "Get Research Ready" is a good example of how to convey that knowledge to your next generation of library users.

### Conduct formal training classes for high school students and teachers.

Richland County Public Library, which we featured last month for its database tutorials, conducts formal training classes for high school students and teachers. A Richland librarian teaches the course titled, "Get Research Ready." It runs one hour and illustrates how to search the library catalog and use print and online resources, and encourages students to do research from home or school using the databases on the RCPL Web site.

## How Fairfax County Public Library Builds Traffic with Morningstar Support

Our conversation with Frances Moffett, Reference Selector at Fairfax County Public Library, proved serendipitous: We had just beefed up Morningstar support material by adding seven new press releases to Morningstar Library Edition's Client Site.

First you should know that Morningstar Library Edition consistently gets stellar page views at Fairfax, which is why we wanted to talk to Frances. We fully expected to hear that Fairfax had implemented some wildly innovative marketing.

So you can imagine our surprise (and delight) when we learned the library's secret. Fairfax's program consists of utilizing Morningstar support materials, many of which are available on the Morningstar Library Edition Client Site.

As we've mentioned before, word of mouth can also be a big traffic driver. Fairfax reference librarians do their part. When a patron asks for *Morningstar Mutual Funds*, the librarians recommend Morningstar Library Edition, explaining to the patron that they can do so much more with the online product.

We thank Frances for sharing her experience with Morningstar Library Edition promotional material. And we encourage you to visit the Morningstar Library Edition Client Site to see what you can use to drive more usage at your library.

### Fairfax's program consists of utilizing Morningstar support materials

Frances says they've gotten lots of mileage from Morningstar bookmarks. And because they have 20 branches, they like the idea that all the branches can print material off the Client Site if they wish.

## Good Usage Starts with Good Staff Training at Hennepin County Library, MN

Morningstar Library Edition got off to a fast start in 2006 at Hennepin County Library in Minnesota. Curious about their secret, we asked Victoria Helgeson, Senior Librarian, Subscription Services. She told us much was due to Morningstar's high recognition. "Old Morningstar hands," she said, figured out the new database quickly.

But the library also put lots of effort into getting the word out, and, most important, training their staff. After all, nothing matches a knowledgeable staff that can refer patrons to databases and to helpful training materials, or can personally show users how to find information.

### **Nothing matches a knowledgeable staff that can refer patrons to databases and to helpful training materials.**

Victoria reports they've have great success with a training program they call ERUG, for Electronic Resources Users Group. The library organizes ERUG sessions by topics, such as Business Resources, Science Resources, and the like. The information services staff, often Victoria herself, conducts most of the training sessions.

Occasionally, the library invites someone from the outside. (As a reminder, we make online, interactive Morningstar Library Edition training sessions available at no charge. Retraining is always a good idea and often yields new insights.)

Additionally, Hennepin provides a wealth of patron training material on their Web site. Examples include help with computer basics, such as using a mouse and e-mail, to guided tours of a variety of databases. They also organize information around key patron groups and locate the group names prominently in their main navigation bar. Tabs include Birth to Six, Kids, Teens, and Seniors. In Internet parlance, they do a good job of surfacing the help they offer.

We've complimented libraries on their Web sites in the past. And we discuss the importance of a well-designed, easy-to-use site in our booklet, "How to Turn Your Print Patrons into Happy Online Users." (Call us at 866-215-2509 if you need a copy.) Hennepin once again proves our point.

## Montgomery County Public Libraries' Branding and Awareness Campaign

Brand-building and awareness campaigns aren't just for giant packaged-goods companies and automakers. You, too, can use Madison Avenue techniques to raise community awareness and patron use of your services—especially your electronic databases like Morningstar Library Edition.

About two years ago, Montgomery County Public Libraries embarked on their own brand-building effort. The theme is that their library is "Where the County Reads" (or "Learns," or "Meets").

### Use Madison Avenue techniques to raise community awareness and patron use of your services.

Applied to the system's extensive electronic database collection, says Mary Ellen Icaza, Electronic Services Librarian, the branding idea is "Where the County Gets MOR." (MOR is the acronym for Montgomery Online Resources.)

To support the campaign, Montgomery County Public Libraries produced a variety of materials.

#### Mouse Pads

Mary Ellen tells us they have placed a mouse pad at every computer in Montgomery's 22 libraries. They also give mouse pads to patrons, so they carry the Montgomery County Public Libraries' message into their homes.

#### Post-It Notepads

These specifically promote the online theme. As with the mouse pads, notepads are next to every computer in the system and used as patron giveaways.

#### Brochures

Montgomery has two designs. One is devoted entirely to online resources, informing patrons of all the databases they can gain access to from their homes and businesses. The second, just coming off the presses, is glossy and promotes the system's many offerings in major categories. In addition, it devotes two full panels to "Where the County Gets MOR."

These two panels are particularly interesting because Montgomery addresses this critical issue: What makes a library's database superior to Google and other online search engines? Key points emphasize that the library databases are authoritative, reliable and accurate, well organized, updated frequently, and user-friendly. Employing the branding theme, the panel succinctly summarizes the benefits of Montgomery's online resources as:

- MOR Information
- MOR Reliable Results
- MOR Access

Over the years, large advertisers have proved that a focused message presented consistently and ubiquitously can produce dramatic results. And Montgomery County Public Libraries' campaign shows you don't have to be a big corporation to take advantage of brand building.

## How Boulder Public Library Wins Their Binder Brigade over to Morningstar Library Edition

Boulder Public Library got off to a fast start with Morningstar Library Edition by putting on a full-court promotional press. Here are some of the ideas used by Barbara Buchman, business information specialist, and her colleagues.

First on the docket is how Boulder addressed the challenge of ushering devoted Morningstar print product users over to Morningstar Library Edition.

### Think of ways to promote things patrons can do on Morningstar Library Edition that they can't do with print products.

Of course, they did everything you would expect. They placed announcements on the *Morningstar Mutual Funds* binder. They used signage in their business kiosk. They also took a close look at the print product and Morningstar Library Edition. They asked themselves what patrons can do with the database that they can't do with the binder.

They saw immediately that with Morningstar Library Edition users can sort through thousands of combinations of search criteria to develop manageable lists of funds and stocks from the more than 25,000 available. What takes seconds with the database could easily consume days with the print product.

Next, they observed that patrons could do more than simply create tightly focused lists of prospective investments with the database. Patrons could actually aggregate these prospects and see how they work together to accomplish a financial goal using Portfolio X-Ray.

Constructing a portfolio of mutual funds is especially difficult. To truly understand your portfolio from asset allocation, sector, and a variety of other perspectives, you have to analyze down to the stock holdings level. It sounds like a time drain because it is.

Just promoting that what can be accomplished in seconds with Morningstar Library Edition would require hours with the print product is a powerful idea. However, Boulder took it another step.

They understood people don't always put two and two together. Most times, you have to do the math for them. So, as an example, they created a poster featuring the best funds of 2005 and suggested patrons plug them into Portfolio X-Ray to see whether they would make a good portfolio.

Boulder Public Library's high usage numbers show that this, and their many other ideas, worked wonderfully. We'll share more of their strategies down the road. For now, to build your own usage, think of ways to promote things patrons can do on Morningstar Library Edition that they can't do with print products.

## Winnetka-Northfield Makes the Most of the World's Best Advertising

If you've been subscribing to Morningstar Library Edition for a while, you'll probably recognize the name Winnetka-Northfield Public Library. We featured it in Library Notes in November 2003, and again a few issues ago, and in our "Baker's Dozen" booklet. Recently, we contacted Juli Janovicz, head of adult services, in our ongoing effort to uncover new ways to promote Morningstar Library Edition, as well as your other databases.

For example, with the permission of patrons, you could use particularly good comments on a poster and bookmark campaign. You might develop it along the lines of "Recommended by friends: Morningstar Library Edition," followed by a succinct patron quote.

Marketers use testimonials with great success, and they can work just as well for you. Give them a try. Thanks again to Juli and the Winnetka-Northfield team for a wonderful idea.

### You could use particularly good comments on a poster and bookmark campaign.

She and the team at Winnetka are still hard at work executing the basics—including training and in-library promotions—and are being rewarded with great user stats.

Juli reports much success with local investment clubs. She enjoys when these individuals return to the library and tell her they love Morningstar. As she says, "I place a great deal of weight on those opinions. Satisfied patrons will spread the word about a good product. That is exactly what has happened with our Morningstar database."

How about you? Are you holding programs for investment clubs, local businesses, and investors in general and receiving good feedback for your efforts? If so, why not use patron praise to raise the level of awareness of Morningstar Library Edition?

## Boulder Public Library Educates to Drive Database Use

In the June issue of Library Notes, we shared Boulder Public Library's full court press to win users of our print product, *Morningstar Mutual Funds*, over to Morningstar Library Edition.

That isn't their only effort that impresses us. We also like the way Boulder's aggressive education program drives usage. Here are some of their strategies:

**Businesses in your district are potentially active users of your business and finance databases, but you've got to reach out to them.**

### Staff Training

The Boulder staff receives training on databases throughout the year. Some sessions can run up to two hours. Training doesn't stop once members have learned a database. Refresher training takes place throughout the year.

### Patron Training

Boulder offers free classes to patrons but always limits the size to ensure an available computer and, thus, hands-on experience for each participant. When they conducted their first Morningstar Library Edition session, they had to schedule a second class because of demand. How'd they get so many attendees? They encouraged participants to bring their own stock, fund, and portfolio information. The lesson: Always personalize training to drive home the usefulness of a database like Morningstar Library Edition.

### Business Outreach

Businesses in your district are potentially active users of your business and finance databases, but you've got to reach out to them. Boulder does this by exhibiting at local business shows, such as the Boulder County Business Expo. In addition, business information specialist Barbara Buchman joins with other business experts in teaching classes offered through the Boulder Chamber of Commerce. And if this isn't enough, how about running programs exclusively for organizations, as Boulder has done for the local Rotary Club?

Building and maintaining great database usage, whether for Morningstar Library Edition or any other database, requires a significant marketing effort. Boulder Public Library provides an instructive example of how to go the extra marketing mile.

## Getting Personal About Driving Traffic at St. Charles Public Library

At St. Charles Public Library, IL, they call the bookmark the “old warhorse” of library marketing, and they strive to take marketing to a higher level—the level of personal contact.

Their experience is that the most effective way to get the word out about the library’s databases is to talk to individuals and groups. This means presenting at organizations that profile well against your databases. They told us, “The Kiwanis demographic is mainly focused on those in their 50s, 60s, and 70s, so it is the perfect group to talk about how Morningstar, Value Line, and Standard & Poor’s can assist them with their financial questions concerning retirement.”

St. Charles also told us about their in-library promotions used to get the attention of patrons. For example, to familiarize patrons with Web Feet, the staff gave out business cards and rubber duckies. For marketing Morningstar Library Edition, they are planning gold-foil wrapped chocolates. And why not, when, as they point out, Morningstar Library Edition is one of St. Charles’ most popular databases? The gold standard of databases, if you’ll permit us.

### **The most effective way to get the word out about the library’s databases is to talk to individuals and groups.**

Whatever the size of your community, you’re sure to have a few organizations that profile well against your financial databases. Some ideas for you include:

- Investment Clubs
- Chamber of Commerce
- Rotary Club
- Kiwanis
- Men’s Clubs in Churches
- Women’s Circles in Churches
- Fraternal (Elks, Moose, etc.)
- Country Clubs
- American Legion
- VFW

## What librarians like about Morningstar Library Edition

“...The attractive, easy-to-use interface and the additional features and expanded content have made Morningstar Library Edition popular with our users. They especially like the advice in the analyst reports and the one-page snapshots formatted for printing.”

Joan Galvez, Reference Services Coordinator,  
Alameda County Library, California

“Morningstar.com provides convenient online access, in the library or from home, to a product that our patrons have come to depend on for their investment needs.”

Dani Lichtenberg, Manager of Research and Information Services,  
Palm Beach County Library System, Florida

“Our collection would not be complete without Morningstar Library Edition. The concise snapshot with data interpreter, the company profile, plus the key ratios, make Morningstar an all-in-one research tool. The database keeps getting better with its simple format, detailed content, and remote access.”

Kristine Kenny, Training & Instruction Librarian,  
Schaumburg Public Library

“One of the things I love about Morningstar.com Library Edition is how it is specifically designed for the library user. In addition to the clear and colorful interface, the interactive help screens and data definitions mean that answers are never more than a click away.”

Julie McBride,  
Pawtucket Public Library, Rhode Island

“What attracted us to Morningstar was its simple and intuitive interface that delivers complex, high-level business information such as analyst reports and portfolio analysis in a clear and understandable format. Morningstar’s remote access has been an asset in forging partnerships with the business community and personal investors by delivering strategic information at their convenience, whenever they need it.”

Karen Parry, Manager of Information Services,  
East Brunswick Public Library, New Jersey



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