

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

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Compliments of  
Morningstar Library Services

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# The Main Ingredient to Great Database Use

As you'll see in these pages, the main ingredient of increased database use is the same thing that's always helped make libraries great places for thinking, reading, and research: You, the librarian.

In these pages are ideas and programs developed and used successfully by librarians from around the nation to heat up database interest and traffic.

To summarize them:

- Get the word out. These pages offer many different ways to do just that.
- Train your staff. You'll learn how even small libraries conduct effective training programs.
- Bring the databases to patrons. People respond to convenience, and nothing is more convenient than access from home, office, and school.
- Understand your users. And then give them what they want. You'll see how libraries are doing just that.
- Appeal to business professionals. They make up an important constituency, especially for financial databases. You'll see how libraries reach out to businesses and make them feel comfortable in the library.
- Take advantage of free resources. Information providers, including Morningstar, make a variety of promotional and training materials available to you. You'll see how libraries use these.

And 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's very effective at getting and keeping your database use cooking.

## **Bagels & Business at the Orange County Library System in Florida**

The Orange County Library System is a Morningstar.com Library Edition subscriber. We spoke to Marilyn Hoffman, community relations manager, about an exciting and successful program they conduct called Bagels & Business.

Bagels & Business gives local businesses an opportunity to network and to learn effective ways to achieve their business goals with library resources, particularly computer resources.

The Orange County Library System holds Bagels & Business two to four times a year. They schedule the event for weekdays before the library opens, which is a convenient time for business people. They hold Bagels & Business at the Orlando Public Library downtown in the Computer Resource Center.

The Orange County Library System uses evaluation forms to measure the success of each event and to stockpile ideas for future Bagels & Business. Marilyn reports that since starting the program, library use is up, particularly computer resources.

### **The Orange County Library System uses evaluation forms to measure the success of each event and to stockpile ideas for future Bagels & Business.**

How do they get the word out about Bagels & Business? By including it in their patron newsletter and by featuring it on the front page of their Web site and events calendar, on signs and bookmarks in the library, in news releases to print and broadcast media, and at offsite events such as the Hispanic Business Expo and Discover Downtown. They also run an ad in the Chamber of Commerce First Mondays online newsletter.

## Winnetka-Northfield Public Library District's Successful Marketing Techniques

When we heard that Winnetka-Northfield Public Library District here in Illinois increased remote usage of Morningstar.com Library Edition by 38% since April [2003], we had to find out what they are doing right. Juli Janovicz, Head of Adult Services, attributes their success to a combination of superior product and intense marketing on the part of the district. Some of Winnetka-Northfield's activities include:

How do Juli and her staff create excitement? They get mileage from Morningstar.com Library Edition remote access (an add-on service). When the staff sees investment clubs in the library, they ask if the members have tried Morningstar.com Library Edition from home yet. She explains how to connect to the library's Web site and she hands out the library's Web site bookmark and promotional material from Morningstar.

### The human touch goes a long way when promoting new products and getting patrons enthused.

For the most part, these are all simple techniques available to most any library, and we thank Juli for sharing them with us.

- Sponsoring special investing-information events featuring demonstrations of Morningstar.com Library Edition and help on finding and using investing information.
- Featuring Morningstar.com Library Edition on their Web site and in their print newsletter, *The Source*, and their online newsletter, *@Your Library*.

In addition, and certainly as important, is one-on-one marketing. Juli says, "The human touch goes a long way when promoting new products and getting patrons enthused."

## Investing Is a Hot Topic in Anchorage Thanks to the Public Library

Financial and investing reference services often fly under the radar of your tax base. Most aren't aware of a library's resources, and if they are, they don't know how to use them to their best advantage. That's the situation Robert C. Williams, Business, Patents & Trademarks Librarian, faced several years ago, when he and a local stockbroker launched Anchorage Municipal Libraries' first financial-education programs.

Foundation grant, he has launched interactive investing seminars, which patrons can access from their home computers.

From humble beginnings, Robert C. Williams and the Anchorage Municipal Libraries have built a great investing-education program and further increased the value of the library to the community. We're glad Robert shared with us.

### ... when he reoriented the program to focus on investing research, attendance more than doubled ...

His nascent efforts, Robert reports, evolved into a business research education program sponsored by the library. He says this attracted 10 to 20 people at a time. However, when he reoriented the program to focus on investing research, attendance more than doubled to 30 and 50 people at a session. Now topics include Basic Investment Research, Online Investment Research (which features Morningstar.com Library Edition), Basic Charting Techniques, and Basic Investment Information for Librarians (an internal training program).

How does Robert communicate programs to the public? He uses outlets available to most libraries. These include free announcements in the local paper, notices in the library newsletter, and flyers posted prominently in the main and branch libraries.

Robert's programs have been popular as measured by feedback forms and attendance. Now he's taking investing seminars into the homes of patrons. Sharing space with other library activities on a new computer lab established with a Gates

## How Alameda County Library Introduced Print Diehards to Morningstar.com Library Edition

Before subscribing to Morningstar.com Library Edition with remote access, Alameda County Library was a longtime Morningstar Mutual Funds subscriber. When they added our Internet database, the challenge was to get the message out to patrons—and to make the transition easy for the die-hard print users.

Joan Galvez, Reference Services Coordinator, shared how the library staged the introduction and transition for the dedicated paper people. Working simultaneously with Morningstar.com Library Edition going live in May 2003, they:

So, how did they do with those print diehards? Most came around to see the extra value provided by Morningstar.com Library Edition.

On a final note, we'd also like to point out that Alameda County Library's subscription includes our Remote Access option. Remote Access recognizes that many patrons like the convenience of researching from their homes and offices. Making access to library references easy, we think, increases patron usage.

### Remote Access recognizes that many patrons like the convenience of researching from their homes and offices.

- Created handouts. The staff designed this as a simple introduction to Morningstar.com Library Edition. They gave it to Morningstar Mutual Funds devotees and also used it to alert others to the new database.
- Trained the reference staff. Librarians, like everyone else, are most comfortable discussing and recommending things they know. Training focused on the key features of Morningstar.com Library Edition.
- Integrated Morningstar.com Library Edition into their Web site's Business & Investments page. This allowed them to capitalize on a strong base of patrons the library already had for business and investment reference.

## In San Diego, They Cover All the Marketing Bases

When Library Services representative Shannon Dhepyasuwan told us about the terrific traffic that Morningstar.com Library Edition receives at San Diego County Library, we wanted to know more. What we discovered from Betty Waznis, Head of Collection Development/Technical Services, is one very thorough library-marketing program employing tools available to many libraries. Here's a sampling:

- San Diego County Library features all databases on its Web site. It lists Morningstar.com Library Edition twice. The first notes branch access. The second is for home (remote) access.
- The library makes use of free promotional materials supplied by publishers and vendors. Books, brochures, and more are commonly available just for the asking. (Ask your sales representative about Morningstar.com Library Edition's promotional materials.)
- San Diego has also added a catalog reference for each of its databases. When patrons search the catalog for stock or fund information, they'll find Morningstar.com Library Edition in their results list.

### The library makes use of free promotional materials supplied by publishers and vendors.

- The library advertises a new database on its home page. Patrons click through for a description and link to the new database. San Diego got Morningstar.com Library Edition off to a quick start with an icon that remained on the home page for a month.
- When giving class tours, library orientations, talks to community groups, and the like, the staff always features the databases.
- Library staff sends a press release to local papers whenever the library acquires a new, exciting database. (Morningstar Library Services has press releases you can use. Ask your sales representative for copies.)

Above we discussed how the Alameda County Library considered staff education a critical part of its marketing effort. San Diego County Library concurs. It has a full-time trainer on staff. When San Diego first subscribed to Morningstar.com Library Edition, trainer Polly Cipparrone designed a business-resource class featuring it, as well as other databases.

On a final note, those of you who operate multiple branches scattered over a large geographic area will be interested in this comment from Betty: "The single most important aspect of the Morningstar service for us is remote access. We have a big county with a lot of rural areas and long driving distances. Remote delivery is crucial for a lot of our customers."

## Building Database Traffic the Denver Public Library Way

When librarians know a resource well, they're more likely to mention it to patrons. And making patrons aware of a database boosts usage.

Morningstar.com Library Edition includes everything you need to create and run your own training program. This is exactly what Janet Ryan, Web Content Librarian at the Denver Public Library, used when she developed a database-training session for her staff.

While it's tempting to cover several different databases in one session, Janet decided to devote the entire training period to Morningstar.com Library Edition. She believed that her staff would learn more by concentrating on just one topic.

Finally, no training session would be complete without handouts. Participants can use them to follow along, and they can make useful notes for reference later on the job. Janet printed copies of the Patron's Guide for her trainees. These materials are already prepared for your convenience and available in Morningstar.com Library Edition's Help & Education section.

And how did the training program turn out? "Terrific," says Janet. "I looked like an expert on the database thanks to Morningstar.com Library Edition."

### When librarians know a resource well, they're more likely to mention it to patrons.

Janet conducted her training session in the library's training room, where participants had their own computers. Some libraries might consider this a luxury. However, even in smaller settings, you should be able to find a private area in which to work. Another option is to conduct your training sessions either before or after library hours.

Before training others, Janet made sure to train herself by reading the Training Seminars that appear in Morningstar.com Library Edition's Help & Education section.

Janet culled examples and tips from the seminars to use in her presentation. For instance, for Screeners, she used step-by-step examples found in the Stock and Fund Screener seminars.

## How Greenwich Library Tackled a Business Challenge and Succeeded

Wynne Delmhorst, Business Service Librarian at Greenwich Library in Connecticut, confronted a challenge you may face and overcame it.

Before we explain the challenge that Wynne faced, a little background on Greenwich Library's marketing efforts. When you go to the library's home page ([www.greenwichlibrary.org](http://www.greenwichlibrary.org)), you'll find Morningstar.com in the Business Services section under Financial Information. In addition to displaying Morningstar.com Library Edition at the top with our distinctive logo, Greenwich Library locates us in several sections, including Company Information. This recognizes that given its wealth of information, Morningstar.com Library Edition can serve patrons in a variety of ways in their search for investing and business information.

### ...the staff has dedicated an area of the library to investment resources.

To make research more convenient for busy patrons, Greenwich Library subscribes with the Remote Access feature. As Wynne says, "Users have been quick to take advantage of this service as shown by the steadily increasing user statistics also provided by Morningstar."

Greenwich has many patrons interested in investing information. To familiarize patrons with everything Greenwich Library offers, the staff has dedicated an area of the library to investment resources. They call it the Investor's Corner. Featured are print products, including Morningstar Mutual Funds, and information about what's available on computer.

And now for the challenge Wynne and her colleagues faced: They had to convince patrons that Morningstar.com Library Edition was a more robust, more enhanced database than Morningstar.com, our free sister Web site. They did this by showing patrons all the things they could get on Morningstar.com Library Edition with their library card they could not get on Morningstar.com (at least not without paying an annual fee).

A final note from Wynne about creating awareness of Morningstar.com Library Edition or any of your other databases: "In spite of the high name recognition that Morningstar has, we continue to market our database by providing bookmarks in the library that list our databases, business services in the Investor's Corner, business periodicals, newspapers, and other reference materials." You just can't take promotional success for granted.

## Getting Down to Business in the Palm Beach County Library System

Dani Lichtenberg, Manager of Research and Information Services for the Palm Beach County Library System, takes a proactive approach to marketing subscription databases—including Morningstar.com Library Edition—to patrons.

Palm Beach employs many methods you'd expect: features in their print and electronic newsletters, annotated bibliographies handed to patrons who express interest in databases, etc.

- **Local Business Focus.** Identifying your markets and their needs is a key bit of intelligence you need to increase database usage. And what better target market is there than the businesses in your district—especially small businesses? More than most, they need specialized commercial and financial information, they value the information, and they appreciate acquiring the information easily and at little or no cost.

**The Snapshot page is the landing page for a fund report—use the tabs in the left-hand margin to navigate around a report.**

But Dani also clued us in to a couple of special efforts that deserve a spotlight:

- **Workshops.** Palm Beach offers general workshops covering the library's catalog and various subscription databases. In addition, they offer workshops targeted at specific constituencies. Some topics include: Finding Health Information, Finding Business Information, Finding Genealogy Information, and the like.

If you don't currently offer them, workshops are a great way to familiarize people with your information resources. Workshops also help you spread the word throughout your community via workshop "graduates," who will probably mention their experience and what they learned to family and friends. Nothing beats word-of-mouth advertising.

Dani reports at Palm Beach they mine this market with a business librarian. In addition to helping patrons in the library, the business librarian actively reaches out to the business community in several ways: networking at business association meetings (such as the Rotary Club) to promote library services, holding workshops, giving library tours, and showing how features such as Morningstar.com Library Edition's Remote Access option allow business patrons to access information from their offices.

Even if your library isn't as large as Palm Beach, this doesn't exclude you from the benefits a business librarian can provide. Perhaps a librarian could devote a portion of time to getting to know the needs of the business community and promoting specific services to them. Take a page from entrepreneurial small businesses. In these operations, owners and key employees typically devote 20 percent of their time to finding new business. Why not give it a try?

## Up Close and Personal Wins Results at the Topeka & Shawnee County Public Library

Do you political science buffs remember the 1948 presidential election? It was Harry Truman vs. Thomas E. Dewey, and Truman appeared to be a goner. So what did Truman do? He boarded a train and pressed the flesh nationwide. And it worked. We saw a bit of the same strategy in the [2004] election when the candidates swooped down on key states for a little “mano a mano” campaigning.

### There’s nothing like the “wow” factor for creating database traffic.

This up-close-and-personal marketing technique is just what Terry Miller, Adult Services Business Librarian at Topeka & Shawnee County Public Library, uses to build database usage.

She impressed us with the variety of ways she not only reaches out to patrons, but also uses those opportunities to walk patrons through the features of Morningstar.com Library Edition. Here are some of the tips she passed on to us:

#### 1. Teach Investment Groups

Do you have small groups of people investing together in your area? They do in Topeka and Shawnee, and Terry reaches out to them.

She speaks at their meetings at the library. When she does, she pulls up Morningstar.com Library Edition and walks them through our information and features. To make the database more relevant to her audiences, she illustrates with stocks they are researching.

She reports, “People cannot get over the quality of information they can get at Morningstar.” There’s nothing like the “wow” factor for creating database traffic.

#### 2. Help Individuals

Most people love personal attention, and there just isn’t enough of it in our commercial world. Hopefully, you see very positive reactions when helping patrons find the information they seek.

Terry applies this basic principle when showing people how to use Morningstar.com Library Edition. Working one-on-one with patrons can pay large dividends because it can fuel the best advertising there is: enthusiastic word-of-mouth.

#### 3. Build Business Interest

This is a recurring theme in library promotions of financial databases. Terry and the Topeka & Shawnee County Public Library work closely with the local Small Business Development Center and Washburn University Business School, gaining visibility for the library and its business resources.

She participates in the school’s four-part entrepreneurship series, covering business ownership, writing business plans, keeping financial books and tax records, and marketing. She shows participants how various library resources can help them in their business ventures.

Terry also sponsors investment seminars at the library featuring local investment professionals. Seminars not only attract people to the library, they also help patrons regard the library as a center for business and financial information.

Does it pay to get up close and personal with your patrons? It sure does at the Topeka & Shawnee County Public Library, and will at yours, too.

## Shoe-Leather Marketing and Other Techniques from the Pawtucket Public Library

Most of us have heard of it, but fewer and fewer of us experience it. In our electronic age it may strike us as anachronistic. But for these reasons and for the personal contact it involves, it can be a powerful attention-getter. "It" is door-to-door sales.

The staff of Pawtucket Public Library in Rhode Island used door-to-door salesmanship to promote a series titled Lunch Hour Workshops. Library

### ...few things beat face-to-face contact.

workers used the workshops to familiarize businesspeople with the library's electronic databases—including Morningstar.com Library Edition, which was the subject of a workshop.

The Pawtucket staff prepared flyers explaining and advertising the workshops and personally delivered them to businesses surrounding the library's downtown location.

Additionally, said reference librarian Julie McBride, Pawtucket Public Library showcases online reference databases on its Web site. Staff members often write press releases to promote new databases.

But as we've heard from other libraries, few things beat face-to-face contact. There's a lot to be said for the shoe-leather marketing practiced by Pawtucket Public Library. If you're in a commercial location, it's something to consider for promoting the use of Morningstar.com Library Edition and other databases.

## East Brunswick Public Library's Innovative Strategies Boost Morningstar.com Library Edition Use by 96%

How can you double member use of Morningstar.com Library Edition in just a few months, as did New Jersey's East Brunswick Public Library? Manager of information services Karen Parry, who played a key role in the project, said that such an accomplishment begins by observing the most basic marketing precept: Understand what your customers want and then give it to them.

### Understand what your customers want and then give it to them.

After working with focus groups, East Brunswick Public Library concluded that customers (a term library officials use to reflect their strong marketing orientation) want a financial Web site accessible around the clock and available remotely, from their homes and offices. The staff also learned from customers that Morningstar is the respected and preferred source of stock, mutual fund, and market information.

East Brunswick Public Library follows another tenet espoused by top marketers: Provide the highest level of customer service.

Instead of simply directing customers to a computer, librarians offer content guidance and navigation tips. To ensure that each librarian is well versed in the library's many databases, East Brunswick uses a peer-mentoring approach. In groups of four supervised by a team leader, librarians master databases like Morningstar.com Library Edition and then train other librarians at their desks in one-on-one sessions.

The final—and most important—component of East Brunswick's nearly doubled use of Morningstar.com Library Edition was something we all aim for: Getting the word out.

To get the word out on all its latest developments, East Brunswick Public Library applies the same strategies and techniques as most libraries: newsletters, press releases, etc. However, to add emphasis, encourage use, and convince customers that databases like Morningstar.com Library Edition are easy to use, the library developed one-page tip sheets titled Shortcuts from the Librarians. These Shortcuts highlight a database's best features and explain how to find them quickly. Library staffers also designed a unique logo for Shortcuts documentation, giving it an eye-catching visual cue for customers seeking quick answers.

The library uses "Shortcuts" in its mailings and in the library. For example, when a customer requests a print-stock reference, librarians turn them on to the Morningstar.com Library Edition database, providing a one-on-one demonstration as well as the relevant Shortcut literature.

How do the library's customers react to this unique range of services? "They love it," Parry said. The numbers support Parry's view: A 96% usage increase in three short months testifies to the power of focusing on your customer.

## Eight Marketing “Refreshers” from Timberland Regional Library

In the hurly-burly of the workweek, it’s easy to overlook opportunities to promote your databases such as Morningstar.com Library Edition. Every so often then, a checklist of things to do comes in handy.

This month, Donna Schumann, computer application specialist at Timberland Regional Library in Olympia, Washington, shared with us the various programs the library uses to reach out to patrons in 27 locations. It makes a great checklist.

### ... patrons who use one database are probably interested in other databases.

- Train your staff to use your databases. Timberland has taken advantage of Morningstar’s free Web-based training programs. Plus, the library includes training sessions on Morningstar.com Library Edition as part of new-employee orientation.
- Train your patrons to use your databases. When a patron has questions a Timberland librarian knows can be answered by a database, staffers introduce the patron to the database and show him or her how to use it. This technique has the added benefit of getting more people using your databases.
- Provide patrons with database options. Timberland knows patrons who use one database are probably interested in other databases. So when patrons ask about one financial database, librarians will also mention Morningstar.com Library Edition.
- Reach out to your best customers. Timberland librarians do presentations and conduct demonstrations of databases such as Morningstar.com Library Edition at Chamber of Commerce and other business organization meetings.
- Conduct classes and programs at your library. People have an avid interest in things financial these days. Timberland appeals to them and gets the word out about its databases and programs.
- Keep a list of your reference databases in front of online patrons. At Timberland, librarians put a link to each one on every page of their Web site.
- Reach potential online patrons with a printed brochure. Timberland knows that even the electronic set likes printed reference materials. The library staff details Morningstar.com Library Edition and dozens of other databases in a brochure titled “Information at the Speed of Light.”
- Promote your databases in your newsletters. Timberland always includes a list of databases on the back cover of its quarterly newsletter, “Today’s TRL Library.”

Doing everything on the checklist regularly? Great. And if you aren’t, give some of them a try. Your patrons will benefit.

## Schaumburg Goes the Extra Mile for Business

When you think about it, the business community in your district is a large and powerful constituency for your library. Business leaders should be great supporters and users of your finance databases.

But to take advantage of your resources, business people have to know what's available. Also, they need to be regularly reminded. What's more, access has to be easy and, preferably, available from home or the office.

### **Business leaders should be great supporters and users of your finance databases.**

Just as important is the fact that the library has used remote access availability to make accessing Morningstar.com Library Edition (and other business and financial databases) simple and easy.

Of course, not all libraries are as large as a Schaumburg Township District Library. But there's always something you can do. Perhaps it is setting up a business corner. Maybe it is hosting a monthly business breakfast meeting. Or it could be as simple as dropping in on businesses from time to time to see what they do and inform them of reference help available at your library.

Schaumburg Township District Library, in Schaumburg, IL, takes business users seriously, according to Training and Instruction Librarian Kristine Kenney. The library has given this group the attention it needs by designating a devoted Business Outreach Librarian, who promotes the library's services to businesses.

Additionally, Kristine tells us, the library brings in guest speakers to address business topics, and distributes a newsletter featuring the library's business resources. Additionally, the library is a member of the local chamber of commerce and other business groups, and attends business expos, breakfasts, and after-hours functions.

If that isn't enough concentration on business people, librarians speak at the local Rotary Club and other not-for-profit organization meetings.

## What librarians like about Morningstar.com 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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