

# FOPL/OpenMediaDesk® project

interim report

Phase2/Phase 3

Monday 17 April 2017

## **the headlines**

The OpenMediaDesk® (OMD) project is moving from Phase2 (almost complete) to the launch of Phase3.

Phase2 [articipant responses continue to be overwhelmingly positive and internal learnings (to be shared below in detail) have proved invaluable in adapting the curriculum 'on-the-fly' for maximum impact.

The curriculum's success has sparked professional connections outside the two-hour Zoom video conference sessions; Phase1 participants continue to participate, months after the conclusion of the pilot. This is heartening, to say the least, and bodes well for the sustainability of the program via a participant 'alumni/ae network.'

Eight different tools and/or methodologies are being shared and used in real-time during the hour-long weekly sessions. Again, the reports back have been overwhelmingly positive, especially with respect to the overall toolkit.

As in our pilot, participants "get it" and are actively applying those aspects of OMD they find immediately most useful. Strategic emphasis has been on using OMD as a collaborative toolkit to break down internal silos and leaven communications strategic thinking across departments.

Our emphasis on agile best practices—treating the creation of targeted library advocacy and library communications media as software to be developed rather than a Facebook post to be 'perfected'—has hit home. Participants are visibly more adventurous, brave and creative in their work and their strategic thinking.

We're now entering the quantitative sequence of the program, wherein OMD's emphasis migrates from brand storytelling best practices (pure strategic creativity against real-world deadlines) to A/B testing and the deployment of social media metrics dashboards (custom-built for each participating library).

We're now meshing the story with data, for maximum relevancy to our target audience/s, maximum intensity of emotion (again, liberating creativity and dissolving silos) and applying the data insights against long-form storytelling in support of campaign-scale storytelling.

The end objectives remain in sight and in focus: strategy first, media design second and the use of time-saving, silo-busting collaborative tools to induce the communities FOPL libraries serve to participate in library-centric, brand advocacy media.

It's working.

## what's working

The 14 libraries participating in Phase2, despite wide differences in staffing (Richmond Hill has a team of 11 media specialists, King but one), have all seen process improvements and visible increases in confidence in their work. In fact, these process improvements are visible to all, as all work takes place collaboratively, in real time, during the Tuesday 10-noon open sessions. The learning experience is as close to a 'brand digital newsroom' as is possible: the response to this collaboration has been intensely positive.

We work against short deadlines, vet one another's work and share out insights and fresh best practices, not least strategic thinking born in real-world programming and communications successes.

We've deployed eight tools either invented specifically for FOPL OMD or customized for the participants' direct, hands-on use.

- 1/ creative brief (presentation shared/customized for collaboration with other library departments)
- 2/ the Five Whys (process shared/customized for collaboration with other departments)
- 3/ brand cornerstones tool (invented as time-saving tool for 'tight deadline' creativity)
- 4/ seven library story archetypes tool (ditto: time-saving tool for 'tight deadline' creativity)
- 5/ the story engine: 'the meat and potatoes 1': strategic toolkit for generating story strategies, high-relevancy storytelling, and creative foundations for 'chaptering out' long-arc campaign storytelling, eg Canada's 150th, municipal strategic plan rollout, citywide surveys (invented as 'strategic canvas' for collaboration with other departments). Invented for Phase 3. No library has ever used this before.
- 6/ A/B testing process tools: 'the meat and potatoes 2': toolkit and testing process for pre-validating Facebook content via controlled testing via private Facebook test group prior to public publication. This well-established media discovery process has been customized for participant FOPL libraries. (See THE RECIPE, attached in PDF.
- 7/ the 'code of context' inferences tool (dashboard data to fresh brand stories, by design) Drawing on audience behaviour data drawn from each library's customized OMD social media dashboard metrics, allied with website Google analytics/library catalogue metrics via Google Analytics. No library has ever used this before.
- 8/ the OMD custom analytics dashboard, which captures social media metrics in a compelling single glance, allied with library website Google Analytics and library catalogue performance metrics via Google Analytics.

This overall process constitutes OMD. See overview OMD process in PDF, 'the full Monty,' attached, for details.

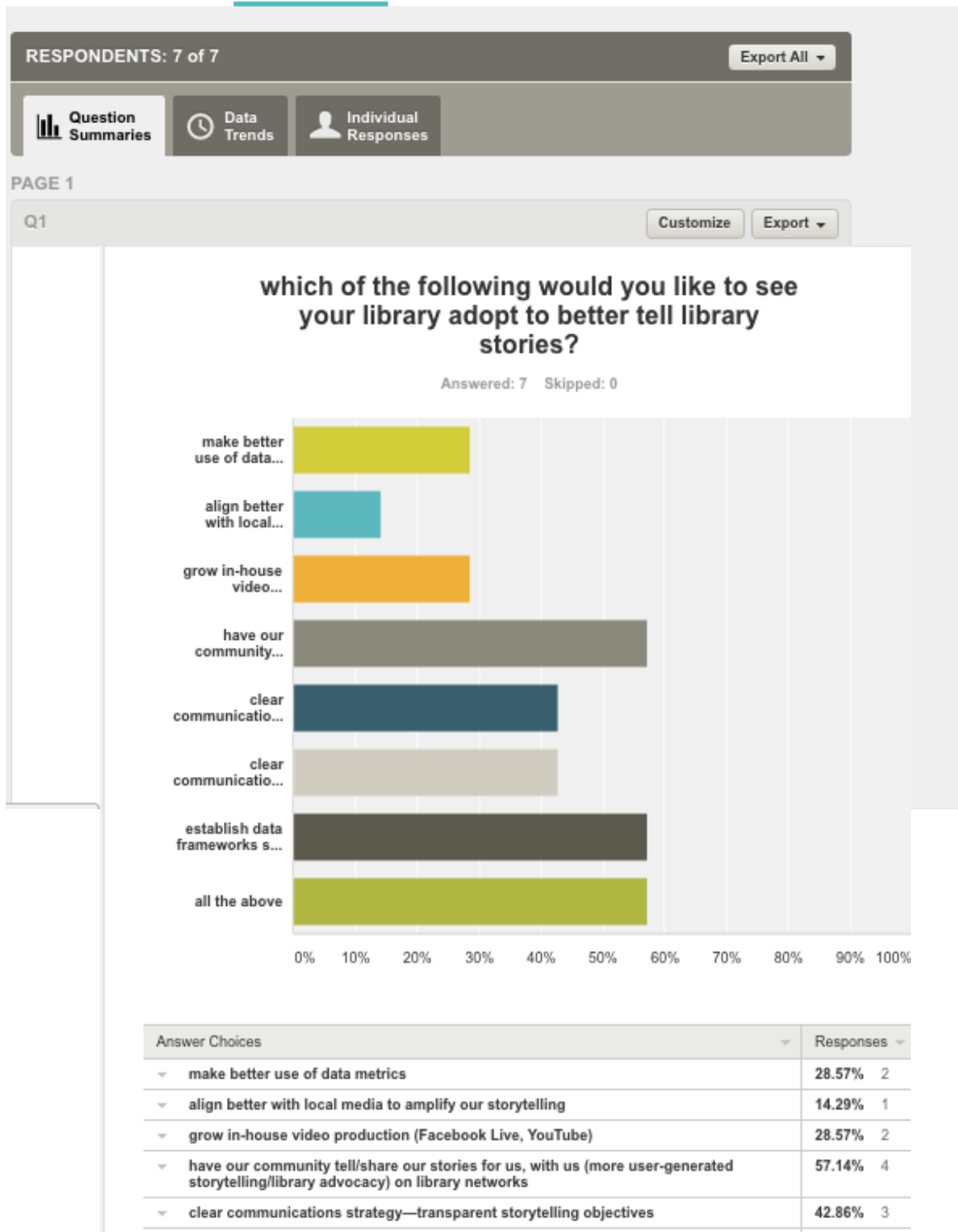
All processes are actively shared and collaborated on in real-time and results vetted out against 'confidence-based learning' threshold: are you confident you could teach a colleague what you've just learned?

The answers, captured at the end of every learning sequence, participant by participant, is yes.

## SITREP: reports from the front lines

The Phase2 group has been notably vocal in their assessments of the working culture of their libraries. That in mind, we asked they complete an anonymized Survey Monkey questionnaire regarding their sense of their progress within OMD and a 'reality check' against an ideal working situation for a library communications/marketing specialist in the spring of 2017.

Here's a set of screen shots of the statistical outcomes.



## What's the most useful tactic or process you've learned so far in our work together?

Answered: 7 Skipped: 0

**Responses (7)** | Text Analysis | My Categories

Categorize as... | Filter by Category | Search responses

Showing 7 responses

Just a reminder that library staff don't think strategically and have to be reminded that there is more to what they do than just shelf books or deliver programs. All that work goes towards building a brand for the library.  
3/22/2017 9:10 AM [View respondent's answers](#)

To use creative briefs to better communicate with the team about social media posts  
3/21/2017 1:55 PM [View respondent's answers](#)

A tie between the 5 whys and the start of the story engine.  
3/21/2017 12:25 PM [View respondent's answers](#)

Story Engine (by a hair)—the brand story shorthand process (7 archetypes and 28 brand values) really good too  
3/21/2017 12:12 PM [View respondent's answers](#)

How to quick create a story using the library brand cornerstones.  
3/21/2017 9:56 AM [View respondent's answers](#)

Conversational themes and attributes.  
3/21/2017 9:31 AM [View respondent's answers](#)

How to create a compelling story quickly

## Blue sky moment: imagine you could design the perfect data framework to report on your progress in advancing your library's storytelling. What would that look like?

Answered: 6 Skipped: 1

**Responses (6)** | Text Analysis | My Categories

Categorize as... | Filter by Category | Search responses

Showing 6 responses

Framework would track whether there was more engagement on social media (sharing, comments etc), more leads back to website and showing those leads result in action, somehow measure whether there is a greater understanding of what the library offers to the community and how those programs and services fill a need (on an individual level and a community level)  
3/22/2017 9:10 AM [View respondent's answers](#)

Easy to understand and utilize statistics that could be understood by people who don't understand social media (like managers and board members)  
3/21/2017 1:55 PM [View respondent's answers](#)

To measure the impact of storytelling and how it resonates towards the feelings/and perception of the library experience  
3/21/2017 12:25 PM [View respondent's answers](#)

user content doing my job for me so I can create amazing new storytelling for my library!  
3/21/2017 12:12 PM [View respondent's answers](#)

A framework simple enough that everyone could easily understand and use. Perhaps a step-by-step guide to go with it as well.  
3/21/2017 9:56 AM [View respondent's answers](#)

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3/21/2017 9:56 AM [View respondent's answers](#)

It should be a natural, seamless fit to the user experience. The user should not be forced to artificial landing pages for the purposes of gathering statistics. It should be gathered in the background in the natural course of interacting with the library. We need a common, consistent barometer of 'success' with regards to metrics. It should be simple and clearly understood. What is a reasonable engagement level? What does engagement mean to the lay person? What is a reasonable reach level? Et cetera. Are there accepted ratios? Are they documented somewhere? Additionally there should be a qualitative aspect to personalize the metrics.

3/21/2017 9:31 AM [View respondent's answers](#)

## Note direct successes of salient custom tools: creative briefs, 5 Whys, story archetypes and brand architecture tools and the Story Engine.

Here's a selection of quotes from the survey.

- *People in the community coming seeing the library as a place that the community cannot do without. This means they are aware of all of our services and they believe these services fill a need in the community.*
- *more back and forth with library stakeholders. Right now it's more me telling them than them engaging with the material*
- *What's ideally missing is a way to measure the impact and compare it to previous data to benchmark progress / what is/isn't successful*
- *greater efficiency and media efficacy—more media bang for my time...and greater community advocacy stemming from that media*
- *More time to develop stories/videos!*
- *A true virtual library branch with the people supports required to make it successful. (The people make it work, the technology is the support - not the other way around.) "Library as Place" is trending at the management levels in libraries right now. The library's virtual place is just as important. It is often the first window into the physical library. The physical library should also support the virtual for a seamless experience. The virtual library is a core service not an adjunct one. In this day and age, you need both the virtual and physical to be strong, vibrant and connected. The library is a community pillar and valued as such. Similar to firefighters. People don't see them as revenue makers, there isn't a push for them to be revenue makers. They are not fundraising. We have to be a community pillar to break the cycle.*
- *A strong outreach / community development plan*

Here's a selection of notes/quotes from Phase2/Phase 3 participants **before the course began** who chose to respond offline, directly, via email. There is a clear and present need for upgrading strategic thinking and strategic storytelling skills across all libraries, large and small. This deficit

- *I have taken courses on social media before and I feel very confident in my skills, but I am not sure how to engage with patrons and to get them to not only respond to social media but to get them just to read (the*

*media) and come to the events we're advertising and promoting. (from a one-woman marketing department lead, Phase2, January 2017)*

- *Effective social media is time consuming. We often worry we're missing opportunities for engagement... Our library is working on a rebranding project. I'm hopeful this training will help us stitch our library story into everything, from a meaningful logo to service delivery and design (another one-woman marketing department lead, Phase3, April 2017)*
- *I need a clear sense of the effectiveness of social media as opposed to traditional forms of media... sitting in the same room with someone more knowledgeable, so that you can ask questions of every step in the process, so that you know you're doing it right... (social media newbie after some 20 years as print PR staff, Phase2, March 2017)*

Unsolicited Phase2 interim responses include these two comments from the week of March 28, both from mid-size libraries with one- or two-person communications/marketing/social media staff:

*Hi Brendan,*

*I wanted to share a story about the immediate impact of the Story Engine that we have been discussing in the Open Media Desk project.*

*After being introduced to the Story Engine, I was able to meet with our new programming manager and discuss how to incorporate the design elements of the Story Engine into our program planning process.*

*By implementing the Story Engine at the program planning stage, our library will be able to create programs that are tied directly to goals and more tailored to our customers/potential customers and other stakeholders.*

*Of course, the better conceived a program or service is, the easier it is to generate marketing messages and campaigns that resonate with our audience.*

*By laying a solid foundation on the planning side, the process of marketing the programs and services at the library will be much more focused and efficient.*

*Overall, the Story Engine is an amazing asset that will have a positive impact across our entire organization.*

*\**

*Hi Brendan*

*Thx so much for organizing this OMD group ;) ... It's such a pleasure to be part of this group and the learning process. I don't want it to end... here's what I'm finding most effective*

- *The seven conversational themes (archetypes), the library brand cornerstones, creative brief and story engine, all are fantastic tools. Most people, if they have the time, can write a proper post. The tools are extremely helpful for a person who has only 15 minutes to quickly post, with 20 other items waiting for the attention (great time management tools).*
- *Thanks for the reminder that stories are effective on social media! Sometimes libraries become so wrapped up in promoting the next program, date/time, the importance of stories is lost.*

- *Connections/networking/Facebook group page: OMD is such a great way to connect with others that are working through the same learning/challenges. This group has initiated meetings between myself and various libraries that would not have happened without this group. Also the Facebook page is a great way to stay in touch with others—people have posted questions to the group, we have shared information, etc. It's definitely a resource that I will continue to use moving forward.*

### phase 3: what's next

Phase3 recruitment emails issued Friday 07 April. Invitations were sent to 42 libraries: all major metropolitan member libraries and all Northern membership libraries with catchment populations over 5,000 cardholders.

The response during the short pre-Easter workweek was immediate from London (team of three), Oshawa (team of three), and Kingston Frontenac (team of three) and some 10 Northern libraries.

Follow-up calls to ensure harried CEOs had shared the invitation email produced nine (9) follow up calls for Tuesday 18 April. Mississauga PL committed last fall to Q2 2017 participation; conversations are ongoing with their team.

Three additional Northern libraries participated in a Zoom Q&A Thursday 13 April and will participate but have not yet formally signed on.

Further, internal member advocacy—not from OMD but from participating library CEOs and marketing folks—generated asks for more information from seven (7) additional Northern and National Capital Region libraries.

Lastly, six present Phase2 participants and two Phase1 past participants volunteered as third-party OMD advocates to move fence-sitters into the participant category the week of April 18th via conference calls with the undecided.

There are 26 responses outstanding yet. 'Nudge calls' went out Easter Sunday evening to all non-responding CEOs, a second ask.

Most positively, London Public Library has volunteered to open its entire email marketing program, at present pre-launch, to FOPL OMD participants as a usecase-in-action. This means libraries with no access to email marketing curriculum otherwise will be participating, hands-on and in real-time with a best practices-caliber program by a crack social media marketing team. Damned exciting.



## next steps

### Phase 2: Library Digital Relevancy Index

The customized dashboard feeds for social media, website and library catalogue data outputs are harmonized, weighted and hand-computed for push email reports capturing the 'state of play' of a library's digital offerings. The LDRI reports mean participating FOPL/OMD staff have monthly reports to present demonstrating their internal gains/learnings and their libraries standing with respect to all other FOPL/OMD libraries. LDRI is pilot-only in Phase2 because of the scale of hand-computation required.

The objective in deploying LDRI is to create a province-wide purview into social media and website data, storytelling efficacy and the 'state of play' of growth of social media networks, library advocacy and the connection with difficult-to-reach populations (eg: adolescent males and isolated seniors.

Phase 3: launches Thursday 27 April @10am. Be there or be square ;)

Board meeting April 28 2017: Brendan Howley will present an OMD updater detailing the program. (Hint: there will be at least two surprises in store. Stay tuned!)

## addenda

See companion PDFs

1. 'The Full Monty' > *an overview of the entire OMD process; legacy workflow tool for OMD participants to use*
2. 'The Recipe' > *teaching tool and reference work for A/B testing; also legacy tool for A/B testing*
3. The Story Engine > *teaching tool and story generation tool; also legacy tool for generating on-target, high-relevancy media*