

VII. EVALUATING YOUR PRODUCTS AND-MARKETING PLAN

The challenge: Get feedback and make changes to ensure success.

- What do you achieve through the evaluation process?
- Do you know and use the various ways to evaluate your products and service?

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Evaluation: An ongoing process

Marketing is not a static effort, something you do once and then leave behind. It is an iterative process by which you change and grow.

1 .0 A validation and a process to spark change.

Evaluation validates what you have accomplished in the development and introduction of your product, and enhances the credibility of the library's activities.

It requires honest, objective analysis of your products and services, the markets you target, and the techniques you use to introduce the one to the other. You don't simply evaluate how well or how poorly you've done.

2.0 The purpose of an evaluation.

The purpose of the evaluation is to identify areas in which a change is warranted, either in the product you offer, the customers you target, or the techniques you use to market your services.

The evaluation is meaningless unless it results in an action on your part—some alteration of the product or marketing effort to make it better, more effective.

3.0 Each evaluation strives to determine how well individual products and services are working.

Identifying why they have succeeded is just as important as determining why they have failed. If you can isolate the reasons for the success of one product, you may be able to duplicate the success in another instance. If a product or marketing plan has failed, you should consider how it might be altered to yield a success.

The key to a successful evaluation lies in how responsive you are to the results of the process: How quickly can you identify that a problem exists and put together a plan to correct it.

1 .0 Evaluations that include quantitative and qualitative data enable you to measure your successes and failures.

1 .1 You must set goals and chart the progress of each product or marketing program, but be realistic when doing so. Don't set your sights so high that your targets are unachievable. Setting milestones and revising schedules for achieving your goals are important parts of the evaluation process.

1.2 Evaluations must be objective and take into account how others in the organization see the library's programs and services.

You are likely to be too close to your own products and services to be objective, but this should not deter you from self-evaluation.

Develop a list of objectives for your department and evaluate how well each product and service you offer contributes toward the fulfillment of those objectives. Make certain that the objectives of your department are compatible with your company's goals.

1.3 The evaluation process should be based on whether or not individual products have met the needs of individual customers, user groups or departments, and the entire organization or community.

In addition, each evaluation must contribute toward a comprehensive analysis of the library's products and its marketing programs. In the aggregate, the evaluations of individual products should yield a clear and accurate picture of the effectiveness of your library as a whole.

2.0 Budget objectives.

It is imperative that you are able to quantify how much of your overall budget is going toward each product offering and each marketing effort,

2.1 When you compare the impact of each product and the financial and personnel resources required to produce it, you'll be able to determine whether it is worth continuing or whether a change is warranted in the chosen marketing techniques.

2.2 You should establish how much of your budget you wish to allot to each product. How much is the product worth to you?

If you find that it is consuming a greater portion of the budget than you wish, you may have to alter the product or the way you market it. A third alternative is to enter into a partnership with a customer or group of customers pleased with the product and willing to share in its financial support.

3.0 Individual user objectives.

Establish goals for yourself as to the number of customers you need to justify beginning a product or service. Then, make certain that you set in place plans for marketing the product or service to others. How many new customers are you expecting to use this product each month? each year?

4.0 User group or departmental objectives.

If you have developed a product or service for one particular user group, what changes will you have to make in the product or service or marketing effort in order to expand the offering to other user groups?

Determine the most likely groups to target and the modifications you are capable of making. Establish a realistic timetable for this process.

Approaches to evaluation

1 .0 There are four distinct ways to evaluate your library's products and services and the effectiveness of its marketing plans.

You need not limit yourself to one particular methodology. Choose the methods with which you are most comfortable but remember that, in any given instance, one may be more appropriate than another. In fact, you may elect to combine several methods in your evaluation of a particular product or service.

Provision must be made to communicate the results of the evaluation process or report and suggest action steps to correct the problems identified during the evaluation process. This process provides tangible evidence that what you do has value to individual customers and user groups as well as the organization as a whole.

Corporate librarians may wish to look at the way their firm evaluates its marketing efforts. What criteria is used and can you borrow or adapt these methods to evaluate your marketing plans? Use the expertise of the marketing staff to help you formulate your evaluation process.

2.0 The top-down approach to product evaluation.

This approach seeks the support and approval of your efforts from above. Your superiors, those to whom you have a direct or indirect reporting relationship, can be called upon to evaluate your library and the products or services it provides.

2.1 You may have to request feedback from them and should encourage them to let you know how well or poorly you are doing. In all probability, if they are not satisfied, you will hear from them; praise is not something you are likely to hear on an unsolicited basis.

2.2 It is not advisable to wait for your annual budget or salary review to seek an evaluation of the products and services you have provided throughout the year. By then, it is too late for any correction to have an effect on your department's budget or your raise.

2.3 If you provide services to a large audience, those who are responsible for approving your budget or salary increases may not be aware of all of the services you provide and the extent to which they are used.

Keep them apprised of what you are doing. Send them memoranda, samples of products, copies of letters of commendation you receive from others. Do this on a regular basis.

2.4 Solicit your superiors' suggestions on how the products or services you offer might be improved. This forces them to think about your operation and evaluate it on a product-by-product or service-by-service basis. These evaluations will be crucial when you seek additional staff or funding.

2.5 When soliciting suggestions, make certain that the evaluators understand what you expected to accomplish when you first designed the product. They should be informed as to the original target audience as well as current customers for the product. Only when they are familiar with the service will they be able to evaluate it properly.

3.0 The bottom-up approach.

This approach to evaluation requires feedback from those who have actually used your products and services. The more you know about your customers and how they are using each product, the easier it will be to ascertain how to improve it.

Your objective for the evaluation process is to determine how you might improve your products' or services' marketing programs. Try to elicit constructive criticism from your customers.

Avoid the How *did* you *like* it? question because it elicits the unhelpful response Fine. This tells you nothing about how effective the product was or what you might do to make it better.

Customers are more likely to respond to your requests for evaluation if you explain why the evaluation is so important to your ability to offer better products and services in the future.

4.0 The interactive or negotiated approach.

This approach seeks evaluation from a wider range of people than any of the other approaches. Comments concerning your current product line or products you plan to offer are elicited from current customers, potential customers, superiors, and even outsiders; for example, database vendors, librarians in other companies or communities.

4.1 Sometimes we are too close to the products and services we develop.

We often have a specific, narrow view of how our product will look or the market we serve. The interactive approach will help you avoid placing unnecessary limitations upon yourself. It may uncover information needs not being met or introduce you to a new market for your products and services.

4.2 The usual method for obtaining feedback using this approach is through individual interviews or by conducting focus group sessions.

5.0 The objective approach.

This approach is based on statistical or factual data. It can come from a wide range of sources, including your own records or from third-party sources; for example, surveys.

5.1 The objective approach requires a great deal of effort on the part of the library staff: Keeping the records which will be used to support the case that the products and services you have developed are successful. These statistics, including budget data, usage logs and circulation records should not be compiled retroactively but should be part of the initial product or program implementation. Reconstruction can be a time-consuming and futile effort; setting up the process correctly at the outset will avoid this problem.

5.2 The objective approach is best when it is combined with the more subjective approaches described above.

Characteristics of an effective evaluation

1 .0 A comprehensive, integrated analysis of the library's effectiveness, its impact on your organization and its value demands:

- . Each product must be evaluated on its own merits.
- An assessment of how those individual services contribute to the goals and objectives of the library.

1 .1 Make no trade off between products. Evaluate each product and plan objectively; determine its strengths and weaknesses independently of any other product or plan.

2.0 No matter which approach you take in evaluating your products and services and their associated marketing plans, there are certain elements that characterize every effective evaluation.

2.1 A successful evaluation program has structure.

Evaluation should not be an afterthought but an integral part of the developmental process. A systematic approach for evaluating a product or service will be more objective, less subject to the opinions of one or two individuals, and easier to document.

2.2 It identifies forces affecting the products or services or the marketing program, both those over which you have control (even if it is limited) and external forces (those over which you have no control).

2.3 It determines critical success factors for each service offered and identifies the people who will be responsible for each critical area.

2.4 It selects strategic performance indicators for each product or service, and develops a method for monitoring these over a set period of time.

“The purpose of the monitoring effort is to determine whether specific actions and activities were achieved. A key step in monitoring is to compare the current status of a project with an agreed upon schedule of time, expenditures, and results.” [David R. Kolzow in “Monitoring and Evaluating Performance in the Economic Development Program,” p. 37.]

2.5 It commits adequate resources to the process.

Allot a portion of the budget for the product or plan to the evaluation process.

2.6 It allows enough time to perform a comprehensive evaluation.

2.7 It fosters cooperation between the library’s staff and its customers.

Make certain that the library staff maintains a good relationship with your customers by obtaining feedback from them and by being responsive to changes in their needs.

Assign responsibilities to staff members for keeping the statistical records necessary for adequate evaluation. Accurate documentation is essential to implementing a successful evaluation process.

2.8 It involves many groups.

Each is likely to evaluate the product differently because each has its own set of criteria against which the service will be rated.

1.0 Develop the criteria to be used in evaluating the product or particular marketing program.

Design the questionnaires and surveys you will use in the evaluation process to help you determine whether you have met these criteria.

2.0 Assemble a list of clients using the product.

Compare this list with those you were targeting by the marketing program in question.

3.0 Check your usage records to identify key customers.

Note the frequency of use for each customer. Do you see any patterns emerging? Are any trends evident?

4.0 Contact key customers and obtain feedback from them using one or more of the methods described above.

5.0 Compile such measurable data as expenses and revenue to help calculate the cost of production per usage.

Do you need to revise your pricing or your marketing in order to bring these costs into line with your budget?

6.0 Ask your staff and your supervisors for feedback on the product or marketing program.

What improvements do they recommend?

7.0 Summarize the evaluation covering the principal accomplishments.

Did your product or marketing program meet its expectations? What are the strengths and weaknesses uncovered as a result of the feedback received during the evaluation process? What steps are you recommending to correct or improve the product or marketing program?

8.0 Estimate the cost and establish a timetable for implementing the necessary changes.

Make certain that all of those involved including your staff, customers, superiors understand what changes are being made, why they are necessary, and the date on which these changes will go into effect.

If the evaluation process determines that a program is not meeting its goals with the present strategies, the program must be revised to improve its effectiveness.

1.0 Reassess the types of customers you serve as opposed to those you were targeting.

Did you get the customers you had hoped? Did you get others which you did not expect? Can you establish the reason for any discrepancy between the two?

2.0 Identify your competitors.

What amount of customer allegiance do you have? Determine if there is anything more you can do to bind your customers more securely to your library's offerings.

3.0 Reevaluate how you and your staff have managed the product or service.

Are any changes indicated?

4.0 Compile a list of alternatives and discuss the possible changes with your staff and key customers.

5.0 Provide structure for the changes indicated as a result of the evaluation process.

6.0 Develop appropriate action steps and integrate the changes into the production cycle.

7.0 Implement those actions deemed most likely to be effective.

8.0 Determine what went wrong the first time and develop a specific evaluation measure to monitor that aspect.

9.0 Set a new schedule for reevaluating the product and its associated marketing plan.

10.0 Develop and integrate appropriate reporting procedures.

Each of the four evaluation approaches described above requires an effort on your part to obtain the evaluations of your products and services from others. The more effort you put into obtaining evaluations, the more useful they will be in improving your products and services.

If you retain control over the structure of the evaluation by providing forms, surveys, and questionnaires, you will obtain better results from them. The more informal the means of obtaining feedback, the less detailed the appraisal is likely to be.

1 .0 The role of feedback in the evaluation process.

Feedback helps to evaluate the effectiveness of a marketing plan by providing a framework for the modification of the library's products and services and the marketing programs associated with them.

1 .1 It is an assessment of your customers' satisfaction with the products and services you provide. In essence, it is a review of all of the products and services you offer measured against the needs of your individual clients.

1.2 It helps to distinguish fact from fiction: What you expected your product to accomplish when you first designed it; what you believed you had accomplished when you first marketed the product; what your client perceives was accomplished by using your product. What is perceived to be the effect is often more important than what has been the actual effect.

1.3 An effort to obtain feedback communicates to management and customers that you are serious about providing quality products and services, and that you are concerned about meeting their information needs.

A successful evaluation is a two-way street: You provide a product or service, your customers and superiors tell you what was good about it and what needs to be improved, and you respond. Your response is a sign that you have listened to their comments, which will foster greater respect for your efforts in the future.

2.0 Ways to obtain feedback.

There are formal and informal means by which you can solicit the evaluation of your products and services. In determining which methods you will employ, take into account the culture of your organization. If your company thrives on memoranda, rely more heavily on formal methods to obtain the feedback you require.

Be sensitive to those individuals who may respond better to informal means; try to choose the best combination of methods for each product and each person providing feedback.

3.0 Formal techniques.

Formal means of evaluation include evaluation forms, questionnaires, and surveys; in-person interviews and focus groups. A sample evaluation form appears in Appendix A to this chapter.

You increase the likelihood of receiving feedback if you offer some incentive, such as a free sample of your product. Try to keep your incentives related to the client's completing the evaluation form.

Remember that evaluation forms distributed along with your information product are more likely to be answered than those sent to your customers at a later time. It is more difficult to say no to a person requesting that you fill out a short form than it is to toss out one you receive through the mail.

3.1 The less complicated the process of evaluation is, the more people will contribute to the effort.

A person is more likely to complete a survey containing specific questions to be answered in a few words than one would be if the survey questions were unstructured and required a paragraph or two evaluating the product in general terms.

3.2 Be as specific as possible when structuring your questionnaires.

Each form is being used to evaluate a particular product or service; be careful that the customer gets the appropriate one. You may wish to include a few questions pertaining to library services in general, but keep these to a minimum.

3.3 Try to separate the various parts of the product, and ascertain how each is useful to the customers by asking them to indicate how often they consult that particular portion; for example, a/ways, sometimes or never.

Make statements referring to specific aspects of the product or service and offer the evaluator a choice, perhaps a five point scale to suggest a range of agreement and disagreement with the statement.

Asking the evaluator to rank the statements in order of importance can also be useful in establishing which areas you will target to correct first. Making specific suggestions to improve the product and asking for their opinion as to whether they would be helpful is preferable to asking for suggestions from the user.

3.4 While evaluation forms are usually distributed to an existing client base, surveys can be conducted in the community at large.

This can be a useful way of introducing new users to existing products. Submit a sample to them and ask for information as to why they have or

have not taken advantage of the service and what you might do to make it more acceptable for their purposes. Perhaps they were not aware that your product or service existed. In that case, try to determine the best avenue to use to market future products to them.

3.5 Interviews with individuals should also be structured.

Most of your customers will not have a great deal of time to devote to helping you do your job. If you are not comfortable using the telephone to conduct an interview, then you must schedule meetings with each evaluator.

Select a few key customers and go to their offices prepared with a list of questions to be answered and let the conversation take its course. Be aware when the interview has gone on too long and bring it to an end.

3.6 Focus groups are highly structured group interviews.

They may include a mix of customers from different user groups as well as non-customers and are comparatively lengthy sessions.

Focus groups can be thought of as fishing expeditions for product development. They are useful meetings to introduce several versions of a product and obtain feedback on each. Often, the resulting product contains one or two suggestions made by the participants of the focus group.

4.0 Informal techniques.

The informal means of collecting feedback include organizing data you have on-hand.

4.1 These include summaries of budget data; notes you and your staff have made from informal conversations with clients; letters of commendation; usage logs; memoranda of praise or complaint.

4.2 As with the formal means of obtaining feedback, the more structured the process for collecting the data, the more useful it will be.

Make certain that those responsible for collecting, organizing and analyzing the data understand their tasks and how important this contribution is to the library.

Some common problems and their solution

1 .0 The evaluation process becomes an end in itself.

The purpose of obtaining feedback is to improve a product or marketing plan. The process must result in an action on the part of the library or it is a waste of time and effort.

2.0 The evaluation process is too complex.

Be sure that each person involved in the evaluation process understands one another's roles in it.

3.0 Surprising your customers with a change in your service.

Inform your clients of the results of the evaluation and how you propose to change the product. Set a timetable for the implementation of those changes and give your clients, as well as your staff, adequate notice.

Do not allow too much time to elapse between the distribution of your survey and the change in your product or service; this is evidence that you have listened to what your customers have said and have been responsive.

Benefits of a comprehensive evaluation

1.0 The evaluation process enables an organization to determine if it is achieving the results it expects and to make any necessary changes.

2.0 Evaluation allows you to revisit the materials you have collected during your original planning process, including the needs assessment, the information audit, and environmental analysis, and compare the level of impact you have achieved with your original target.

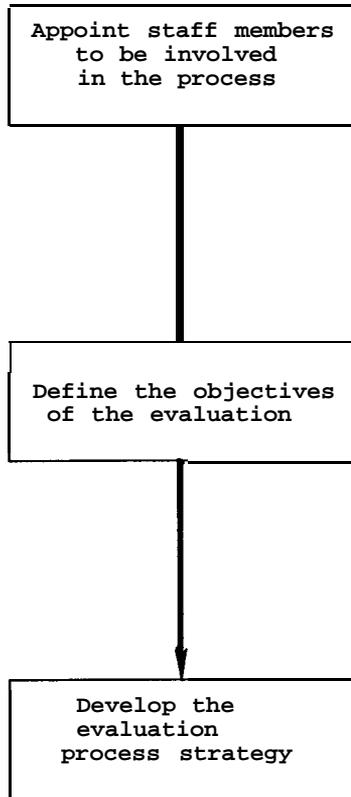
Did you achieve what you intended when you began? How far along have you come and how much further do you have to go?

3.0 Getting feedback from appropriate sources forces your group to be responsive to the most current needs of the client community.

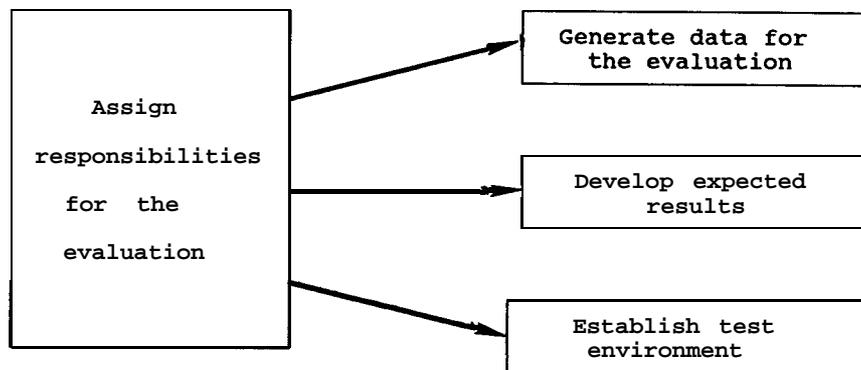
It is a way of maintaining the dialogue you established when you conducted your information needs assessment.

- Have you met your goals?
- Have you determined which marketing tactics worked for you as well as which did not?
- . What was your return on investment? How much profit was earned on each product or service offered by the library?
- Have you initiated steps to improve the return on your organization's investment?
- . Have you identified the areas that need improvement, and initiated the steps necessary to correct the problems?

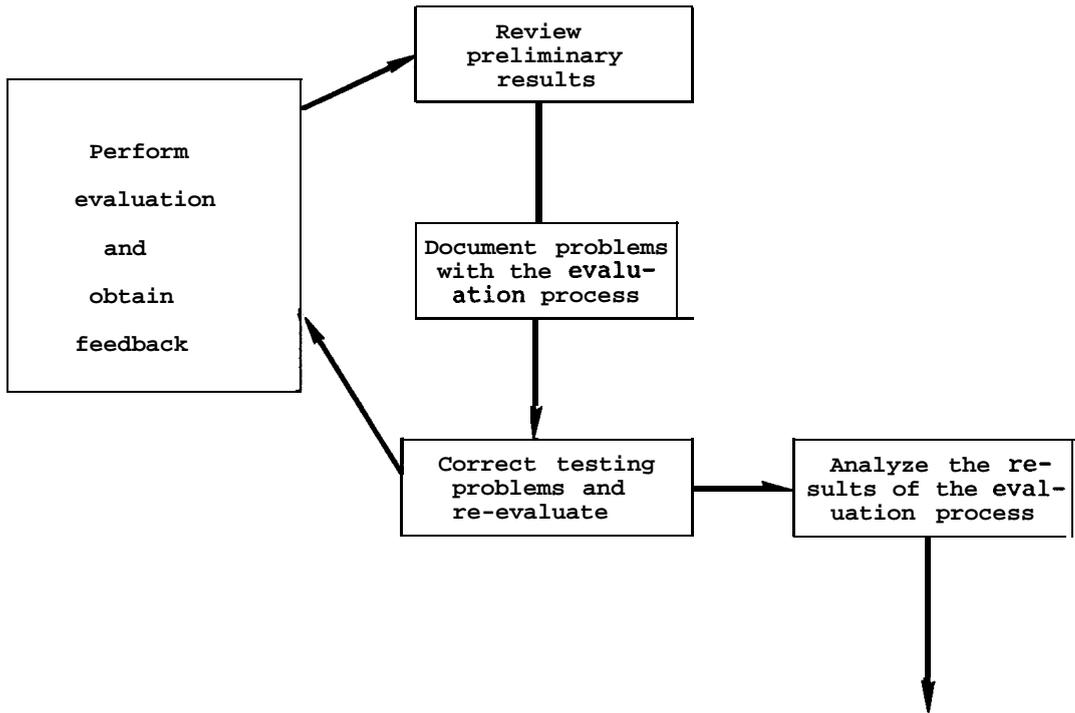
STAGE ONE: PLANNING



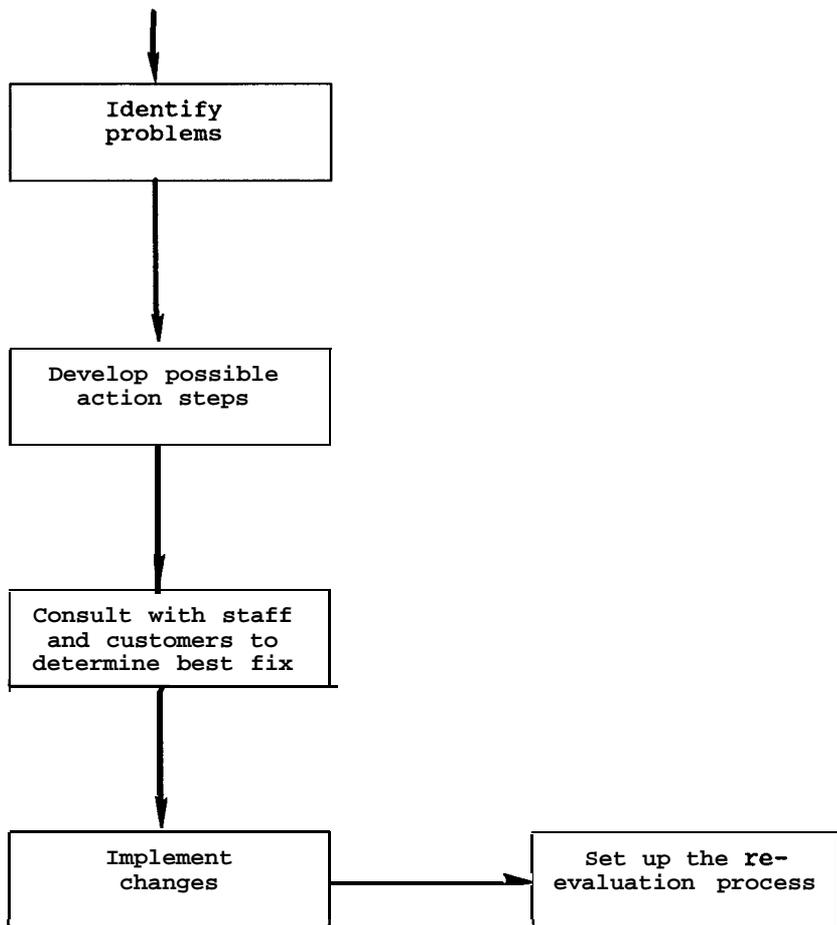
STAGE TWO: PREPARATION



STAGE THREE: EXECUTION



STAGE FOUR: POST EVALUATION



PART I

Please indicate your assessment of the value of [the service's] features by circling the appropriate number on the scale, where 1 is very valuable and 5 is not valuable at all.

- | | | | | | |
|---|---|---|---|---|---|
| 1. The library's market intelligence service provides timely information on the firm's competition. | 5 | 4 | 3 | 2 | 1 |
| 2. The staff is competent and helpful. | 5 | 4 | 3 | 2 | 1 |
| 3. The financial information contained in the competitor profile is appropriate and accurate. | 5 | 4 | 3 | 2 | 1 |

PART II

How often do you consult this portion of the competitor analysis:

- | | Never | Sometimes | Always |
|---------------------------------|-------|-----------|--------|
| 1. Executive summary | — | — | — |
| 2. Financial data | — | — | — |
| 3. Product information | — | — | — |
| 4. Customer analysis | — | — | — |
| 5. Ownership summary | — | — | — |
| 6. Subsidiary company valuation | — | — | — |
| 7. Market performance | — | — | — |

PART III.

This is a list of suggestions we are considering to improve our competitor analyses. Please rank them in order of importance to you. Include any additional ideas you might have.

Rank

___ Additional information concerning subsidiary companies.

___ Product evaluations.

___ Comparison of company with industry averages and ratios.

___ Comparison of competitor financials vs. our firm's data.

___ Investment recommendations by Wall Street analysts.

___ Scheduled meetings with industry consultants.

PART IV

Expansion of source material. Please list additional publications that you would like to have scanned or outside agencies that should be contacted for our competitor analysis.

Magazines and Journals (titles)

Local area newspapers

Trade associations

Consultants
