

RUBRIC Toolkit: Publicity and Marketing

The desired outcomes of marketing your Institutional Repository (IR) include:

- maximising exposure to the academic community
- maximising acceptance among the academic community
- building an expectation of what the service can provide
- identifying early adopters
- generating interest in submission of documents to populate the IR
- fostering communication with other areas of the university involved in research data management and collection
- adding value to the scholarly communication process in your organisation
- finding other potential applications of the IR (such as web services for Faculties or general promotional activities of the university)
- highlighting ease of use and generating interest in training and individual coaching

It is critical to start planning publicity and marketing early in the implementation phase. Key areas to address include:

- developing a marketing plan
- looking at your objectives
- identifying your intended audience
- considering your key messages
- developing marketing strategies
- developing promotional activities and materials
- considering time lines
- setting a marketing budget

Marketing Plan

It may be useful to develop your marketing plan in conjunction with regular client communication plans or strategies relevant to your organisation.

The Library's Client Communications Strategy at the University of Southern Queensland provided significant input into the marketing strategy adopted at USQ.

This existing document provided good background information for many aspects of the marketing plan, such as communication objectives and sustainable engagement with clients.

A Marketing Plan was developed specifically for ePrints at USQ in 2006.

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Effective Strategies for making your repository popular and well loved is another useful resource developed by Paula Callan from the Queensland University of Technology.

Marketing Objective

A marketing objective:

- is useful for keeping marketing activities on track
- is useful when approaching management for support of activities
- states the expected results from the planned marketing activities
- becomes a useful indicator for measuring the success of your marketing campaign

In the case of an IR, one overall objective is changing a behaviour because academics are being encouraged to change their behaviour by depositing their work into the IR.

A goal associated with the objective might quantify the result to be obtained, such as how many people you want depositing to the repository, the ideal time frame and what benefits they will receive as a result.

Example

The objective is to encourage academics to deposit material into the repository.

Goals:

- 80% of academics self submit their work to the repository
- submission goal is achieved over the next 12 month timeframe
- academics receive (and acknowledge) increased exposure of their work

If such a behaviour change is the desired outcome of your marketing campaign, consider how you can offer the necessary incentives to achieve this. Consider other driving factors, for example, the RQF in Australia is a major driving factor for those organisations launching a repository in time for the 2008 RQF exercise. How might this affect your marketing or the associated services that you offer with the IR (such as training and follow up)?

In '[Considering a Marketing and Communications Approach for an Institutional Repository](#)', Gierveld (2006) states that “voluntary change of behaviour is best achieved by creating an attractive environment (e.g. easy to use, little effort, clear benefits, various incentives) in which the target audience can easily act and receives the benefits it seeks”.

Target Audience

There will be a range of target audiences associated with the launch of an IR and different messages will be required for each of them. You should consider a strategy for the following groups of people:

- academic staff

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- faculty head of departments
- faculty administrative staff
- library staff responsible for selling the repository
- the Vice Chancellor's Committee
- defined groups of students relevant to the Collection Development Policy (at the University of Southern Queensland, 4th year engineering student projects are captured into the IR)

A Communications Plan may be useful to start scheduling your personal contact with various stakeholders identified.

[Introduction to eResearcher²](#) is a presentation used at Massey University to introduce the benefits of the new repository solution.

Key Messages

After defining the range of target audiences, prepare a list of key messages for each of the identified audience groups.

Some examples of key messages include:

Target Audience	Key Message/Benefits
Academics	<p>Increased exposure of research via the internet</p> <p>Potential increase in citation rates</p> <p>Statistics (if available) on the use of their research i.e how many times their work is downloaded, viewed, cited, etc</p> <p>Preservation of their work</p> <p>An easy to use submission process, easily facilitating the above benefits</p> <p>Assistance available</p>
Faculty Heads	<p>Increased exposure to their faculty's research</p> <p>Statistics (if available) on the use of their faculty's research i.e how many times work is downloaded, viewed or cited</p> <p>Tailored services (for example, the University of Southern Queensland developed a web service to automatically generate a list of publications for a department based on publications in the IR – giving them a single point of entry with multiple access points)</p>

Administration staff	<p>An easy to use submission process, easily facilitating the benefits to faculty and the individual academics they support</p> <p>Assistance available, especially details for training and support</p>
Library Staff	<p>Institutional benefits and context</p> <p>Use of the IR for client services</p> <p>Assistance in promoting the IR to their faculties</p>
Vice Chancellor's Committee	<p>Institutional benefits of research exposure</p> <p>Assistance with meeting reporting requirements to funding bodies</p>
Groups of Students	<p>The repository as a resource for research</p> <p>(Target specific groups if relevant. At the University of Southern Queensland, 4th year engineering students' final research reports are deposited. Students benefit from exposure of their work and can use it as part of a portfolio when applying for jobs)</p>

Publicity

Methods to consider for publicity include:

- website advertising
- brochures
- promotional events
- logo
- stationery
- formal and informal networks (such as faculty librarian relationships with academic staff)
- referrals

For further information consider:

- [Ideas for Promoting Open Access³](#) (Suber 2007) and
- [The route of a homeless Digital Object from "Closeland" to "Openland⁴"](#) (Melero and Prats 2007)

Benefits relevant to the audience should be prominent in your message and clearly explained.

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This will encourage the use and promotion of the IR.

Engage the expertise of your Marketing and Public Relations Department to ensure you are getting the maximum exposure through your institution's communications mediums.

A Publicity Plan may be useful to map your purpose, timeframe, audience and medium.

Stakeholder Support

To ensure a successful implementation the support of library staff, library management and university executives is needed. Gain stakeholder support early in the project and keep key stakeholders informed and engaged throughout the project.

Support is necessary from all levels of library staff but particularly any staff that have regular contact with academics and researchers. Faculty or liaison librarians are often a direct link to the academics and researchers and can assist with promotion.

Keep library management in the loop with the project as their staff will be involved in the workflows arising from the repository implementation. Address any concerns quickly.

Resources to help you find information to deal with their concerns and questions include:

- ['Fifteen Common Concerns – and Clarifications'⁵](#) (SHERPA)
- [InstitutionalRepositoriesCommunity-ANZ⁶](#) (Google group - subscription required)
- [AuseAccess⁷](#) (Wiki)

Other library department managers may also be able to assist in developing policies, service level agreements and operation level agreements. Aim to get their support, as this will ensure workflow procedures can be developed effectively.

The University of Southern Queensland found that the most successful approach initially was to take the information to the faculties via faculty meetings, department meetings and departmental support staff (if appropriate), rather than holding centralised talks expecting faculty to come.

Publicity Timeline

Publicity should be started as soon as a pilot instance of the repository is ready to receive papers. In the early stages publicity will be fairly low key and will usually involve recruiting academics individually to deposit their work as “early adopters”.

Once your IR is in production, increase publicity to ensure you are getting the message to academics that the resource is available. An IR is a change process that is rarely instigated or driven by academics, but will require their involvement. It will be necessary to spend time promoting the benefits to ensure their engagement.

In 2007/2008, a lot of publicity will revolve around meeting RQF requirements but it is

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important not to lose sight of the equally beneficial aspects of Open Access and the exposure of their work.

Selecting Champions

Consider enlisting a champion from each target audience that could be used to help market the repository to this particular audience. For example, an early adopter academic would probably be keen to promote the product among their peers. Build the relationship with the selected champion and seek their feedback..

Deal with both negative and positive feedback. Negative feedback can usually be addressed with a possible solution. Highlight the positive areas where the champion feels there are particular benefits to them and ensure they know how to promote these to their peer groups.

Once you have their support, suggest other ways that the champion can be involved in presentations to key audience groups. For example, the induction presentation to new academics may be an opportunity for the champion to discuss their experiences using the repository.

Callan (2006) suggests the following points for sourcing academics to champion the repository:

- identify and groom some early adopters that are technologically savvy, and come from disciplines that are likely to appreciate the value of Open Access
- target some late-career academics
- target some high-status researchers
- publicise the involvement of the academics
- ask them to tell their colleagues about it

Think about what you can offer your champions to assist in building a positive relationship. Is it possible to provide them regular updates regarding their own citations on their papers? You could do this by email notification or meetings with your champions once a month to display the citation rates and discuss any other issues they may have with the IR.

As a show of appreciation for your champions, you could host a small morning or afternoon tea where, in a social setting, you acknowledge their contribution to the success of the IR. Feature their work at the launch or other promotional events.

Terminology

Keep key terminology consistent and easy to understand. For example, from the beginning, clearly define a “repository” so that everyone has the same understanding of the term..

Naming your repository and creating publicity around the name could prove more successful than trying to market it purely as an “Institutional Repository” and its associated terminologies. Hokkaido University found that “many researchers were not familiar with the

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term “repository” and what the library understood by the word”. [Suzuki and Sugita](#)⁸ (2006).

Some researchers in their study also admitted that the amount of leaflets they received in relation to the IR were dismissed as junk mail. To turn this situation around, Hokkaido University:

- named their repository
- used simple publicity surrounding the name and the logo
- placed posters around campus
- prepared a guidebook for researchers who had expressed an interest after seeing the posters
- held presentation sessions limited to 15 minutes
- held lively discussions around copyright issues and journal submission processes from the presentations.

Launch

Use an official launch to create a sense of excitement about the Institutional Repository:

- increase attendance by providing food and drinks
- consider the time of day suitable for most people
- use your institution's common hour to ensure maximum attendance by your academics

Use a planning spreadsheet to ensure you cover all the details. Set up a running sheet for the day of the event. The spreadsheet can include:

- who is responsible for organising the event
- a plan from commencement to the launch date
- a plan for timing the event around your key target audience's known commitments
- a plan to ensure availability of academics (avoiding the beginning of a semester and exam blocks etc to maximise attendance and attention)
- a budget for your launch and plan accordingly
- a suitable venue (on campus will be more suitable but ensure the venue meets technical and catering needs)
- a plan to enlist the help of your institution's event staff
- a checklist to ensure appropriate people are invited
- a reminder to send invitations at least two weeks before the event (include an RSVP for catering purposes)

Resources for Follow Up Activities

Your launch event is likely to cause an increase in interest in the repository. It would be advisable to:

- prepare your staff for an influx of academic inquiries in the weeks after the launch
- ensure resources are in place to offer training to academics
- ensure library staff are available to provide the training as quickly as possible to promote adequate take up

References and Further Reading

Refer to the Further Reading section at the end of the Toolkit for bibliographic details of works referenced in this section.

“RUBRIC Toolkit: Publicity and Marketing” produced July 2007



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- 1 <http://www.ariadne.ac.uk/issue49/gierveld/>
- 2 <http://www.ira.auckland.ac.nz/docs/fox.pdf>
- 3 <http://www.earlham.edu/~peters/fos/do.htm>
- 4 <http://eprints.rclis.org/archive/00009339/>
- 5 <http://www.sherpa.ac.uk/documents/15concerns.html>
- 6 <http://groups.google.com.au/group/institutionalrepositoriescommunity-anz>
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- 12 <http://www.rubric.edu.au/>