

"Marketing the Value of Your Library"

a webinar series organized by
**Wisconsin Valley Library Service,
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webinar #1
**"How (and Why) to Do a
Simple External Communications Audit"**

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What the Heck Is an "External Communications Audit"?

Merriam Webster defines an audit as "a methodical examination and review."

We often think of audits in terms of finances; bank auditors meticulously check to see that everything a bank does is on the up-and-up. We also think of "home energy audits" where people check for drafty areas or old appliances that aren't energy-efficient. Basically, an audit is an organized check-up to see if everything is running as well as it should.

In this sense, I'll explain how to audit various communications that anyone in your library shares with people outside your organization. We'll cover print and electronic media. And we'll look at auditing from two angles: branding and consistency, and effectiveness.

And don't worry—this "methodical examination" will be more enlightening than frightening.

1. Auditing Your Communications' Branding and Consistency

Print Materials

Pick up one of each print item and lay them side-by-side to physically compare them. To help you do a complete check, here's a list of items your library may have. Try to get one of *everything*.

Takeaway Materials

- fliers
- rack cards
- brochures
- bookmarks
- event calendars
- promo giveaways

Business Materials

- letterhead
- business cards
- notices (holds, fines, etc.)
- invitations
- annual reports

Publicity Materials

- press releases
- newsletters
- posters
- advertisements

Signage*

- outdoor
- wayfinding
- shelving / endcaps
- shelf talkers
- signs posted on doors

* Since you won't be able to physically bring all your signs together, either take photos and print them, or find the design templates / mock-ups and print those.

It's important to literally look at printed copies of everything side by side. Scrolling through photos or slides of items will not be as effective. Studying items that are physically sitting next to each other is a better way for our eyes and brains to notice subtle differences.

Checklist for Consistency: Print Items

- ✓ proper, complete library name
- ✓ date style
- ✓ fonts
- ✓ type sizes
- ✓ brand colors
- ✓ grammar / writing style
- ✓ name / logo / wordmark in same place, always
- ✓ URL style (with / without "www" etc.)
- ✓ hashtags
- ✓ tone of message (friendly vs. official, do's vs. don'ts)
- ✓ POV of message ("we invite you to renew" vs. "the library invites you" vs. "the staff invites you" vs. "Smith Library invites you")
- ✓ hierarchy of lists

Electronic Materials

It would be difficult to print copies of all electronic items, but print those you can.

For the rest, here are two tips:

- 1) Line up numerous laptops or tablets, each displaying one item.
- 2) Line up two laptops or tablets, and use the first as the "control" to check against; use the second one to click through web pages and compare each against the control.

This way you can still look at everything side by side.

Checklist for Consistency: Email Items

- ✓ fonts
- ✓ "from" line setup
- ✓ signatures: color or black, name & title, phone & email, branch, full address, logo, URL?
- ✓ signature links live or not?
- ✓ personal additions (pronouns, favorite quotes, taglines, etc.)
- ✓ email blast set-up

Checklist for Consistency: Web Pages

- ✓ brand colors
- ✓ fonts
- ✓ footers
- ✓ tagline
- ✓ grammar
- ✓ images: in boxes or not? resolution?
- ✓ links live?
- ✓ URL style (with/without "www" etc.)

- ✓ hashtags
- ✓ names of services (Ask Here vs. Reference vs. Help desk vs. Help Desk)
- ✓ names of sections / rooms in the building (Smith wing vs. Betty Smith wing)
- ✓ forms (contact us, send questions, etc.)
- ✓ lists (of staff members, locations, etc.)
- ✓ contact info (emails, addresses, phone #s, URLs, etc.)

Additional Web Tests

- Test website for broken links
- Test website for accessibility issues (add or update Alt tags, metadata)
- Test forms from an external ISP. Do they send an auto-reply to assure users that their messages went through? Are the auto-responses clear, friendly? Is the text correct and useful? Is someone monitoring these generic email accounts daily for incoming messages?

Checklist for Consistency, Social Media Accounts

- ✓ proper, complete library name
- ✓ date style
- ✓ fonts
- ✓ type sizes
- ✓ brand colors
- ✓ grammar / writing style
- ✓ URL style (with / without "www" etc.)
- ✓ hashtags
- ✓ tone of message (friendly vs. official, do's vs. don'ts)
- ✓ POV of message ("we invite you to renew" vs. "the library invites you" vs. "the staff invites you" vs. "Smith Library invites you")
- ✓ contact info (emails, addresses, phone #s, URLs, etc.)

Checklist for Consistency Across All Electronic Materials

- ✓ About Us section / organizational descriptions
- ✓ POV of message ("we invite you to renew" vs. "the library invites you" vs. "the staff invites you" vs. "Smith Library invites you")

Tips for Staying Consistent

- Create a Writing Style Guide that includes your preferred style (AP, Chicago), chosen dictionary, writing point of view, whether or not you use the Oxford comma, etc.
- Create a Brand Guide that lists your approved fonts and colors, and includes a folder of logos, taglines, etc.
- Create a folder of templates for everyone to use (for various sizes of posters, for press releases, blog posts, etc.).
- Create a folder of sanctioned local photographs, links to stock photo collections, icons, etc.
- Assign one or two people to be the official editors / proofreaders, and set up a process by which all external communications must go through them to get final approval. These people should be the final word on writing style, brand compliance, design approval, etc.
- Work with managers and administrators to have all these resources officially sanctioned. Have them announced and recommended from the Director level. Standards only help if they are created thoughtfully, launched officially, and enforced in a friendly but firm manner. Staffers may struggle with changes, but eventually nearly everyone will get on board.
- Ideally, you'll hold a few brief training sessions that include everyone who may be writing press releases, blog posts, social posts, etc. so you can explain the importance of consistency and the reasoning behind your decisions. The training should include how to access the folders of resources and guides you've created.

General Tips for Success

- Have an external proofreader or auditor who's not used to seeing the items.
- Keep your info up-to-date everywhere. (Having a responsive website helps.)
- Lingo must go!
- Make sure printouts look fresh, not dated.
- Everything should reflect your Mission, Vision, Values, and Goals.

2. Auditing Your Communications' Effectiveness

Is it findable?

Is it picked up / clicked on?

Is it clear and easy to understand?

Do people remember / discuss / repeat it?

It's savvy and professional to ensure that all your communications vehicles look consistent. But there are more-advanced properties and features you can check if you're able to do a deeper audit.

To find answers to questions like the ones above, try the following audits as appropriate:

+ Talk with the people who give out the materials and who work in proximity to them. Ask about what they see and hear when people scan your racks of brochures or when the staffer hands someone an informational flier or bookmark. Are patrons glancing for a few seconds and saying, "Wow, good to know, thanks!" or are they saying "Wait, what's this? When is this event?" (The latter might indicate that the design isn't helping make the info clear. In great promo materials, the eyes should be drawn to the most critical info right away.) Do this via formal or informal one-on-one discussions, surveys, or observation. Compare this anecdotal data to quantitative data on usage or attendance.

+ Look at how print materials are displayed. For rack cards, is the most vital info visible on top? For posters, are they displayed in spaces where people are standing or waiting, instead of places where people are walking by? Note that doorways are *not* great places for signs because people are on the move; they're unlikely to stop and read.

+ Ask a few people from your target audience to test major materials before you release them. Board members, student workers, teen advisory board members, and frequent users can be good helpers. Try some A/B testing: Show two different versions of an item to your volunteer auditors and ask them to talk through what they see first, what it makes them think/feel, what info they take away. Do the testing in the setting where the info will live, when possible. For instance, have people walk by a poster at their normal pace and ask if it was eye-catching; ask what they gleaned from it. For testing online communications, show a web page for a few seconds, or scroll down a social media page and see if your info stands out.

The most important thing you can do to improve your communication materials right now is to take a fresh look at them as a whole.

Going forward, be more aware of consistency. Create templates and style guides. Remember that others don't see and understand things the way you do. Always gear everything toward your target audience. And bit by bit, you can improve.