



The electronic newsletter
with marketing ideas for
information professionals.

compliments of...
Chris Olson & Associates

A Note From Chris

I was going to write about the brand called "library" but the folks on the PR Talk listserv needed help with what to include in Requests for Proposals seeking logo design services. Because I have years of experience working with designers, and have written requests for services and submitted proposals, I thought that sharing my knowledge in this month's lead article would help everyone looking for design assistance outside their organization. I'll tackle the library brand after I've had a chance to mull over the OCLC Perceptions report. If you haven't seen the OCLC Perceptions report, consider this to be your "heads up." The report holds implications for everyone involved in information services.

Our next issue of Marketing Treasures, to be published January 18th, will feature a discussion and review of library annual reports. If your library produces an annual report and you want to share your experience and pointers, please send them along to MTannual@chrisolson.com.

Best wishes for a healthy and prosperous New Year!

A handwritten signature in black ink that reads 'Chris Olson'.

Chris Olson
Publisher

What To Include In A Logo Design Request For Proposals (RFP)

There will come a day, if it hasn't already arrived, when you or your communications team will seek graphic design services to create a logo or retool an existing one. It could be for your library, a unique product, an event, or special promotion campaign. Regardless of the reason, the decision to have a logo created implies that you are adding a visual element to your brand strategy -- a decision that should not be treated lightly. A logo is going to visually represent the brand name, and enhance its memorability and recognition. You want a design which can stand the test of time and visually convey the essence of the brand.

A successful logo design project begins with homework. Whether you have the design created in-house, by a friend or by an agency, you should acquaint yourself with the components which make up a logo design and the steps that most designers follow when developing a logo graphic. If you are unsure of what to expect, invite 2 or 3 graphic designers to make presentations about their process over lunch that you provide. (Remember, you're asking someone who earns their living by the hour, so the least you can do is buy them lunch in exchange for the education. Be honest with them about your intentions and what you're looking for.)

RFP Components

With your homework done you're now ready to draft a Request for Proposals (RFP). The RFP is a document which outlines a project and seeks written responses which summarize and propose how the project can be accomplished along with a cost estimate. It is imperative that the RFP for a logo design project clearly articulate the parameters, conditions, and expectations of the project in order to receive accurate price estimates.

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Please forward this newsletter to anyone you know who is looking for ideas and resources for marketing their library.

Although more information can be added to the document, the components I have listed here represent a basic outline for an RFP requesting logo design services.

1. Project Background

Provide a brief overview about your library/information service.

2. Project Scope

This section sets up the task to be done by providing a short overview about it, similar to an executive summary of a report. Points which should be addressed include:

- A short overview about the brand to be represented by the logo. This is a brief statement. Save the details for the next section.
- A brief description about the logo design project and how the project will be managed. Again, this is just a short statement of 2 or 3 sentences written to help acquaint readers with the overall project.
- Budget range. Many people don't like to give budget figures in their RFPs because they think it drives the cost estimate. However, not including a budget ceiling can waste everyone's time. You want to receive proposals within your price range and which best match your requirements. Putting a budget ceiling in the RFP will ensure that all the proposals fall within your budget.
- Time frame. When is the final logo design needed? Do you need a logo in 6 weeks? 3 months? 1 year? Is there any flexibility in the schedule? If your schedule is tight, is there a financial incentive for delivering the final logo by a certain date? Depending on the turnaround by the client and the design complexity, I have seen some logos developed within 8 weeks. I've also seen logo designs take 10 months.
- Ownership. Some designers will not turn over the rights to the logo design you select. Copyright law protects creative works, and a logo design falls under that protection unless a provision is made to transfer copyright ownership. If the designer retains the rights to the design you could be responsible for royalty payments each time you use the logo design. Many designers work under "work-for-hire" conditions, meaning that you are buying their creative talent to be put to work for you. However, most designers contracted under these conditions will stipulate that only the final, selected logo design is eligible, and all roughs, preliminary sketches and ideas remain their property. In other words, you can't use designs or the design ideas you didn't select. The issue of ownership can be a negotiating point and is usually spelled out in the final contract terms, but it's important to mention expectations in the RFP.

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3. Brand Name And Logo Design

This section provides a basic overview of the logo's branding and design environment, and what influences can impact the design and the process.

- What is the complete brand name to be used for the logo? (You'd be surprised how many people forget this!) Is it imperative that initial caps be used in the brand name? (Remember, you do not have to adhere to grammatical rules in design.) Will the logo need to have different versions for different uses?
- Describe any requirements for acronyms, taglines, co-branding and brand hierarchy relationships. If it's an acronym, does the meaning need to be spelled out? Is the brand name trademarked or undergoing trademark review? This may necessitate a "TM" or "R" to be included in some variations of the logo design.
- Who is the target audience for the brand and its logo design? Is it a local audience? Regional? Global? Are you targeting older adults? Young children? Students? Professors? What about the culture of the intended target market? Is there a bi-lingual spelling requirement?
- What brand perceptions do you want the logo to evoke? What words do you want to come to mind when people see the logo?
- What do you want the logo to achieve? What are the goals for the logo? Do you want the brand to be instantly recognized by a symbol without the words -- like the Nike logo swoop?

-- Will the logo stand alone or will it part of a brand hierarchy? If the brand is part of a hierarchy, where in the lineage does it fall?

-- What is the external environment in which the logo will exist? Are there visual interferences which can detract from your logo? From competitors? From partners? From other organizational units? From vendors? From the visual culture of the target market?

-- If this project is to replace an existing logo, include a copy of the current artwork in the RFP and briefly explain why the design is being replaced or modified.

-- In a sentence or two describe the design style you are seeking. Use adjectives to describe the "look and feel" of the logo design you would like. Indicate that examples of designs that you like and dislike will be reviewed with the designer.

4. Design Requirements

This section gets into the technical aspects of the design work.

-- Are there color palette and font treatment requirements or preferences for the logo design? This is especially critical if your brand is embedded in an established brand hierarchy.

-- Are there corporate identity guidelines from your organization that must be followed?

-- Explain how the logo will be used. In what environments: electronic? physical? On what surfaces will the logo be applied: building signs? bookvans? staff badges? black and white flyers? web sites? silk-screened t-shirts? faxes? e-mail signature blocks? embroidered hats? painted walls? entryway carpets? animated Flash banners? videos and TV ads?

-- If you are design savvy, you can specify the graphic file formats you require, along with the computer platforms and software you will be using. Otherwise, listing how the logo will be used will enable the designer responding to your RFP to propose the file formats you'll need.

-- Briefly describe who will be using the logo and how it will be made available. Are communications materials created by an in-house production team? Will the logo be distributed to staff members to use at their discretion? Will it be posted to a web site for downloading? Sent out on a CD? If you intend to monitor logo usage and standardize the brand visual image, then you should include another task section in your RFP outlining the need for a set of graphic specifications and standards to be developed to accompany the logo design.

-- Specify the minimum requirements for the design process. In other words, you want at least X rough thumbnails showing the logo design concept in black and white. Specify that you want the roughs delivered via an annotated PDF file, one design per page. Or perhaps you want a personal presentation of the logo designs by the graphic artist. Do you require specific design presentations such as showing logo designs mocked up in different layouts? If you are not sure of the design process, include a requirement in your RFP for proposals to include a step-by-step description of their logo development process so you know what to expect.

5. Project Management

This section sets up the project scenario and how you anticipate the project will proceed.

-- Briefly describe the conditions under which the logo will be reviewed and approved. Who will be involved in the preliminary and final selection process? How will the final logo be selected? By a majority vote? By upper management? Will a 25 member committee be involved in the decisions? A 3 person review team?

-- Who will be the main point of contact for the project? And what is the address of where in-person meetings will be held, if the design work is not to be done electronically.

-- Are there any third parties (subcontractors, etc.) that will also be involved in the project?

-- Identify when you expect the design project to begin. The more specific you get, the better. Do you

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have interim deadlines, such as committee meetings? List the schedule milestones.

6. Proposal Submissions

This section outlines any requirements for formatting and presenting proposals.

-- If you have difficulty reading small print you can specify the proposal be done in a font and size that suits you.

-- For a logo design you will want to see examples of prior work. You should specify the format for the portfolio examples. For instance, do you want a CD? A web page of examples? A personal presentation?

-- What file format will you accept for the proposal? Do you prefer an PDF file? An MS Word document?

-- If you have any other conditions to impose on the proposals, you should state them in this section. Sometimes RFPs require formal proposals, with the cost information presented in a separate document. Other times, a proposal can take the shape of a friendly 2 page letter. If the proposal is to be submitted as a paper document, how many copies do you need?

Comments

-- Don't use an RFP to gather information and not intend to make an award. If you want to gather information and determine what resources are available to accomplish your project, then issue an RFI (Request for Information).

-- Don't consider the RFP process to be adversarial. Whether the successful bidder is an agency or a freelance designer, be considerate and adhere to the scope of work in your RFP or work with them to modify it. Don't try to get something for nothing, because most times you will get what you pay for.

-- Keep the scope of work in the RFP focused. If you want a logo design, then don't mix in the requirements for a brochure and bookmark. If you need a logo, a brochure, and a web site banner, then your RFP should have 3 distinct task descriptions. One for the logo, another for the brochure, and a separate description of what's needed for the web site banner.

-- I recommend that you request people receiving the RFP to notify you of their intentions to submit a proposal. That will give you an idea of how many responses you may get.

-- Don't forget the due date and time for proposals to be received. If you are soliciting proposals over a wide geographic area, it's important to note the time and time zone when proposals are due.

-- Please take the time to acknowledge the receipt of every proposal! Preparing a tailored proposal can take many hours and you want to be sure to thank everyone for their submission and when they can expect to learn if their proposal has been selected.

I hope this overview about preparing RFPs for a logo helps you obtain the design services best suited for your logo development project. While the specifics I have covered here address logo designs, the outline and many of the points can be applied towards other design projects. Good luck with your design endeavors! And for those of you on the PR Talk listserv reading this article, please don't hesitate to share your experience of issuing an RFP.

The PR Talk Listserv is sponsored by the ALA Public Information Office. Its purpose is to provide a forum for news, idea exchange, questions, tips and other information on library public relations and marketing. If you would like to join the listserv, send a message to listproc@ala.org. Include the "subscribe" command in the body of the message as follows: subscribe PRTALK

Treasure Tips

What Is Product Positioning?

Positioning an information product or service means that the marketing plans, and all the promotion and communications activities associated with it, use messages which establish a perception about the product and its relationship with other similar, competing information products. At the same time, the product itself -- its features and attributes -- indicate the product's position in the marketplace.

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For instance, take two book club kit services. One is offered by a bookstore where the kit is packaged in a white box tied with purple ribbon complete with attractive handouts, reader guides, a generous discount on the book price and free in-store coffee vouchers. The other is offered by a library where the kit consists of a nondescript plastic bookbag holding photocopied flyers, paperback books with a 6 week loan period, and a coupon for the in-library coffee bar.

Both products are book club kits, but each kit's features distinguishes it from the other kit, positioning it in the "book club" marketplace so it can target a specific audience -- those that prefer to purchase their book club books or those people who prefer to borrow their book club readings. For a target audience that is price conscious, the kit positioning strategy would need to play on the pricing aspect of the kit. The library, with its "free" positioning strategy, would draw customers. However, there may be another target market who is not sensitive to pricing, but instead is influenced by packaging. To target this audience, communications would stress the packaging features over price, thereby positioning the bookstore product as a "turnkey package" for book club organizers, making it a desirable product over the library's "free" kit.

In this example, both kits have staked out their positions in the marketplace by defining the features of their core product -- the book club kit -- differently. By understanding the book club kit target market and the preferred features, each kit product positioned itself in the marketplace so that they were unique, and satisfied the preferences of a target market.

Product positioning goes hand-in-hand with target marketing. When assembling your library's marketing plans and in evaluating your products and services, it's important that you know how the product is positioned -- how it stacks up against the competition and what specific audiences it is targeting along with their preferences. Products can be changed and their marketplace positions modified to target new audiences. That's part of marketing management -- crafting strategies to maximize revenues/usage. Understanding the marketplace positions of your library's products and services, and the positions of your competitor's products, is the first step towards leveraging positioning strategies to your advantage. Think about it the next time you hear a colleague fuss over the Internet being a competitor.

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Promotion Gems

Check Out Umbrellas

This caught our eye as we were putting this issue of *Marketing Treasures* to bed. We decided to jettison our original article in favor of the following promotion idea. This is reprinted from the Tampa Bay Library Consortium electronic newsletter, *WaveLinks*, Winter 2005 issue

<http://www.tbtc.org/about/newsletter.htm>.

No More Rainy Days at Palm Harbor Library

What started out as a brainstorming challenge for staff members last December turned out to be a "novel" idea for the Palm Harbor Library this Fall. In preparation for the library's annual Staff Development Day, Director Gene Coppola asked employees to suggest new ideas for innovative services that could be offered to patrons.

Library Assistant Susan Plas took his request to heart, and came up with a clever idea. Why not offer umbrellas to patrons so they could check them out on rainy days? The library was already providing plastic bags to keep library items (books, videos, CD's, etc.) dry, but had nothing to keep patrons dry.

Funding was provided by the Friends of the Library and 36 umbrellas arrived in September - what turned out to be one of the driest months on record. Within 24 hours, however, the torrential summer rains returned, and the library's Technical Services Department worked furiously to catalog and bar code the umbrellas. Department Head Nancy Sheffield-Warman was up to the challenge, as she had previously catalogued everything from the adaptive toys collection for special needs patrons, to in-house computers, to the library's newest offering, CD/MP3 players that can be checked out.

The burgundy-and-white folding umbrellas, imprinted with the library's logo, circulate for 28 days and renew for an additional 14 days. Overdue fines are a modest 10 cents per day.

A **Note from Chris**. It would be easy to take this idea a step further and offer library customers the option of purchasing uncataloged umbrellas. You could actually make this into an annual promotion event -- when it rains the library has you covered. Or this idea could be worked into a fundraiser by creating a limited edition version of the umbrella with special artwork, numbering the umbrella "editions," and selling them at the library and through local retail shops. You could have the original artwork for the umbrella signed by the artist and framed, and then raffled off. If this idea tickles your imagination, look at the umbrellas sold at art museum shops and how they spin the artwork into ancillary products with messages. Thanks to Susan Plas and the Tampa Bay Library Consortium for a gem of a promotion idea!

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Pearls of Wisdom

BookLetters

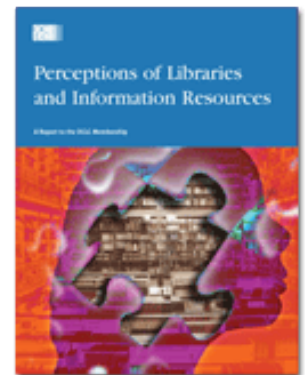
Have you ever wondered if there was a way to seamlessly create a dynamic electronic library newsletter -- a web-based service that alerts library customers to the latest book and library news-- that connects to your library's web site, e-resources and catalog? BookLetters may be the service you're looking for. Libraries use the BookLetters Tool Kit to access rich content for creating professional quality communications when reaching out to their customers. And they don't lose their brand identity either. All BookLetter e-newsletters and web pages are branded with the library's identity and automatically link back to the library's web site and online catalog to increase usage of library resources. Web page creation and e-mailing is controlled by the Library, but automatically performed by BookLetters computers. Take a look at BookLetters at <<http://www.bookletters.com>> The site does an excellent job of explaining its services and includes examples of working library web sites where BookLetter products are operating.

OCLC Perceptions Report

"Books" is the library brand.

Information consumers like to self-serve.

These and other findings are presented in "**Perceptions of Libraries and Information Resources**," a report issued December 6, 2005, by OCLC. The report, based on surveys of information users across six countries administered by Harris Interactive on behalf of OCLC, is a follow-up to the 2003 OCLC Environmental Scan: Pattern Recognition, a report that describes issues and trends that are impacting or will impact OCLC and libraries.



The findings cast a spotlight onto the handwriting on the wall. This is not just one library's challenge. This is the challenge to our profession. This is where the knowledge and practice of marketing management and communications will prove their worth. If you haven't read the report, take a minute to either download the report (free) or purchase a copy, and peruse it with a highlighter. Ponder its implications and think outside the box for ideas. The perceptions found in this study will not be fixed with a promotion campaign. The ALA @Your Library campaign drives people to your library. It's what you and your library does after that which will determine how the Library Brand will evolve. Copies of the report are available at <<http://www.oclc.org/reports/2005perceptions.htm>>.

IFLA Marketing Papers

The Management and Marketing Section (M&M) of IFLA is planning a pre-conference at the World Library and Information Congress, August 16-17, 2006 in Shanghai. "Library Management and Marketing in a Multicultural World" is the theme. Proposals for papers must be submitted by 15 January 2006. Information can be found at <http://www.ifla.org/VII/s34/index.htm#Conferences>.

Help This Marketeer

Need some help with a promotion program? Looking for advice? Want to know what others have done? Send your marketing challenge to "Help this Marketeer" at MarketeerSOS@chrisolson.com. We'll invite other readers of Marketing Treasures to share their experience and advice to help you.

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Golden Opportunities

January 4 Writing E-Newsletters that Work. A full day workshop about writing newsletter content presented by Leslie O'Flahavan. Sponsored by OCLC CAPCON in Washington, DC. <http://www.oclc.org/capcon/training/courses/descriptions/1174.htm>

January 10 Brand Names & Touchpoints. The first workshop in a 3 part series called Strategic Library Branding. Presented by Chris Olson in Washington, DC. Sponsored by OCLC CAPCON.

<http://www.oclc.org/capcon/training/courses/descriptions/M213.htm>

January 20 Creating a Marketing Plan for your Academic and Research Library. ACRL Midwinter Workshop in San Antonio, Texas. A full day session with numerous presenters. <http://digbig.com/4fshr>

January 31 Visual Branding and Design. The second workshop in a 3 part series called Strategic Library Branding. Presented by Chris Olson in Washington, DC. Sponsored by OCLC CAPCON. <http://www.oclc.org/capcon/training/courses/descriptions/M214.htm>

February 7 Planning Those #?!&*~@! Special Events. A morning workshop presented by Jill Stewart and Michelle Weber. Sponsored by North Suburban Library System. <http://www.nsls.info/ce/ClassDetail.asp?course=1198>

February 7 Marketing your Virtual Library. A full day workshop by Laura Crook sponsored by the Tampa Bay Library Consortium and SOLINET. In Tampa, Florida. <http://digbig.com/4denr>

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Are your marketing efforts stuck on the back burner? Time to call Chris Olson!

Whether you need help on a product make-over, logo design, brainstorming sessions, promotion campaign, web site design, communications plans or branding strategies, Chris and her associates are available to lend a helping hand. Call 410-647-6708 or send a note to Chris@chrisolson.com. All inquiries and projects are held in complete confidence.

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