



Mid-Hudson Library System

103 Market Street, Poughkeepsie, New York 12601 | tel 845.471.6060 | fax 845.454.5940 | <http://midhudson.org>

Action Plan Template

Project Title: Cardholder Activation & Retention **[HUDSON]**

Project Description: To engage community members in a way that inspires them to interact with library services and programs so that more community members are aware of, use, and find value in their local public library.

Project Goal: Active Cardholder Retention Rate – Increase of 5%

Timeline: March – November 2018



Essential Factor #1: Welcoming Email

Key Steps I Need to Take:

- Get email at time of registration
- Pull a create list monthly
- Text of the email (from the lib director)?
- Method of delivery (Constant Contact or general email)
- Any response will be acknowledged within 48 hours

Timeline:

April 1 - April 16 (initial email); send mid-month moving forward

Support I Need:

Erica

Resources I Need:

Sierra, Mailchimp

#	Action Item	Owner	Due Date	Status
	Create list of new cardholders	Erica	First of month	
	Write draft of email text	Emily	4/9/18	
	Edit draft of email text	Erica	4/12/18	
	Create Mailchimp template	Erica	4/16/18	
	Add emails and send	Erica	4/16/18	
	Acknowledge responses	Emily	Within 48 hrs	



Essential Factor #2: Notify patrons when cards are about to expire (print & email)

Key Steps I Need to Take:

- Pull monthly create lists to identify patrons whose cards are about to expire
- Drafting text for the message
- Design the print version
- Design the email version
- Create process to manage the responses

Timeline:

April 1 - May 1 (initial mailings); send at start of month moving forward

Support I Need:

Paul and Erica.

Resources I Need:

Sierra, Mailchimp, Vistaprint, USPS

#	Action Item	Owner	Due Date	Status
	Create list about to expire *	Paul	4/2	
	Draft text of message	Emily	4/1	
	Edit text of message	Paul	4/2	
	Design print version	Emily	4/5	
	Design email version	Erica	4/5	
	Edit print/email version	Emily/Erica	4/12	
	Purchase postcards/postage	Emily	4/12 & 4/19	
	Send	Erica	5/1	
	Acknowledge responses	Paul	Within 48 hrs	

* for first email blast we will also send to those whose cards have expired since the start of the new year (separate email with same design and similar text).



Essential Factor #3: “The Welcome Experience” New Card Edition

Key Steps I Need to Take (only need five):

- Script/talking points for frontline staff
- Staff education to carry out exchange
- Outline the tour – start with, “What brought you in to the library today?”
- Assess what you physically hand a new cardholder
- Analyze your current registration process to see if it can be made better (in person and online)

Timeline:

By June staff meeting.

Support I Need:

Staff and volunteers

Resources I Need:

Resource sharing standards, handouts, Canva, Wordpress

#	Action Item	Owner	Due Date	Status
	Talking points for frontline staff (plan)	Paul/Emily/Shanekia	4/19	
	Analyze current reg. process (plan)	Paul/Emily/Shanekia	4/19	
	Assess handouts + web (plan)	Paul/Emily/Shanekia	4/19	
	Update reg. process (Board approval if necessary)	Emily	5/18	
	Talking points handout (prep/edit)	Emily/Paul	5/18	
	Handouts/packet (prep/edit)	Shanekia/Paul	5/18	
	Web update (prep/edit)	Emily/Paul	5/18	
	Review handouts and website	Emily/Paul/Shanekia	5/25	
	Finalize handouts and website	Emily/Paul/Shanekia	6/1	
	Frontline staff education	Emily/Paul/Shanekia	6/7	