



**Mid-Hudson Library System**

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# Action Plan Template

**Project Title:** Cardholder Activation & Retention

**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:** I plan to draft the email text in the next week, and pull my first list of new cardholders in the first week of April. I will send out the email immediately following that, and once each month moving forward.

**Support I Need:** None for this task. I will draft the email text and send the emails on a monthly basis.

**Resources I Need:** I will need to make a Create List in Sierra for this purpose, and some time to draft/send the email. I don't anticipate this being an issue at all.

#	Action Item	Owner	Due Date	Status
1	Make monthly reminder to get new card holder addresses	AnnaLee	3/31/18	Done
2	Write text of the welcome email from director	AnnaLee	3/31/18	
3	Send email to new cardholders	AnnaLee	Monthly	



## 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:** I plan to draft the email text in the next week, and pull my first list of expiring cardholders in the first week of April. I will also be drafting the text and design of the postcards at that time. It will take a little time to have the postcards designed and printed. I plan to send out the emails immediately following pulling the list in April, and once each month moving forward. I think the postcard mailings will have to start in May to give time for printing and delivery.

**Support I Need:** I will likely ask one of the librarians to help me monthly with pulling the list and sending the notices. I will take care of the drafting of text and designing of mailers myself.

**Resources I Need:** I will need money for printing post cards and for postage, which I have in my Publicity/Printing budget line. I will also need some time to draft the text, and some time each month to pull the list and send notices. This may take more time the initial time I send it, but I anticipate it being no problem.

#	Action Item	Owner	Due Date	Status
1	Make monthly reminder to get expiring card holder records	AnnaLee	3/31/18	Done
2	Create list for expiring cards	AnnaLee /Matt	Monthly	
3	Draft text for email/print	Annalee	3/31/18	
4	Design postcard/order prints	AnnaLee	3/31/18	
5	Mail postcards/send emails	AnnaLee/Matt	Monthly	



## Essential Factor #3: “The Welcome Experience” New Card Edition (only 5 items)

### Key Steps I Need to Take:

- 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
- Feedback loop with staff to fine tune
- Analyze your current registration process to see if it can be made better (in person and online)
- Allow temporary cards to be issued
- Create postcard that can be mailed to help with “proof of residence” requirement

**Timeline:** The highlighted tasks are those I plan to tackle for the purposes of this project. I plan to create the postcard text and order it in the next week. This is a simple, stand-alone task that can be quickly accomplished. My next task will be the change/ creation of talking points and staff education for the library card sign-up process. Once those tasks are complete, I will work to assess and possibly change the materials that are given to a new cardholder when the register. As this is an ongoing process, I will create a feedback loop with staff during this transition to make sure it is working for both staff and patrons.

**Support I Need:** I will mostly need staff help for this step, as I am not always the person at the front line. I need their buy-in and their feedback to make this a positive change. I want the end result to be both the patrons and staff feeling more positive about card registration.

**Resources I Need:** I will need money for the postcards and mailing, which I have in my Publicity/Printing budget line. I will also need time to review the new patron packets we hand out at sign up. I may need to create a new streamlined piece to replace the current packet, which could mean more funds, but I believe it is possible with our existing budget.

#	Action Item	Owner	Due Date	Status
1	Create postcard for “proof of residence” and get it printed	AnnaLee	4/23/18 (KML Staff Development Day)	
2	Develop talking points for staff to use during registration.	AnnaLee	4/23/18 (KML Staff Development Day)	
3	Discuss upcoming transition and train staff on new method, including instituting feedback loop	AnnaLee	4/23/18 (KML Staff Development Day)	
4	Assess new patron packets, and design new pieces as necessary.	AnnaLee	5/15/18	