EBSCO Discovery Service (EDS) Best Practices Guide - Promotion & Training

Overview

This guide is designed to assist institution administrators through the EBSCO Discovery Service (EDS) promotion and training process.

In this guide, we also recommend several key tasks that can be completed by you and members of your institution staff, beginning about three weeks prior to your official Discovery Service launch.

With a successful promotional and training campaign, you can get your patrons excited about your new resource, and effectively train them on how to use it.

For related guides visit the EDS Support page.

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Create an EDS Promotion and Training Objective

If the resources are available, it may be helpful to create an informal EBSCO Discovery Service promotion and/or training team at your institution. With a training and promotion team, you can assign specific tasks to individuals in various roles in your institution. These tasks can certainly be assumed by one person if resources are limited.
Suggested Roles:

Marketing: Assist with creating a marketing campaign and develop a logo and name. For more on this, see the EDS Customization Best Practices Guide. Once the name of the resource is created, continue to use it so it becomes a common phrase around the library.

Tasks:
- Develop a theme.
- Develop a promotion campaign and timeline using various media sources (email, posters, school newspaper, or corporate newsletters) to communicate.
- Create a timeline to correspond with implementation schedule.
  - One-week before rollout.
  - One-month before rollout.
- Create a soft launch by adding the search box to the library webpage, promoting only within faculty/managers to receive feedback. A month later, schedule the full launch to include the rest of your users (students, patrons, employees).
- Think about your audience: Employees? Students? Faculty? One academic library recently targeted their incoming freshmen for training. Many times, these students are required to attend library instruction sessions.

Training: Assist with the development of training plans and schedules to educate your users on your Discovery Service features and functionality.

Tasks:
- Create training plans to suit your audience(s).
- Create a training timeline to achieve the following:
  - Train library staff.
  - Train support staff.
  - Train faculty/managers.
  - Incorporate EDS into students'/employees' library instruction.

Promotion: Assist with the creation of promotional materials and promotion methods you will use to alert your users to the availability of your Discovery Service product.

Tasks:
- Develop a schedule for the rollout of your promotional items.
- Develop promotional materials for distribution to your users throughout your institution.
- Utilize available social media methods employed by your institution to broadcast your Discovery Service news to your users.

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Develop training plans for your users

It may be helpful to develop training plans for your institution’s various end users. Each group may have different training needs and therefore may require different materials or presentations.

Ideas for training sessions:

• Develop an informal five-minute training session for users that come to your library’s computer lab.

• Schedule and host a Discovery Service Boot Camp training session for groups of users. For an example Boot Camp session created by Jodi Condit Fagan at James Madison University, see Sample Exercises for EDS Training.

• Ask faculty members at your institution for a few minutes with their classes to make students aware of the availability of your Discovery Service and possibly provide a brief five-minute demonstration.

• Consider adding EDS training to New Employee Orientation sessions, or ask managers if you can spend a few minutes during a team meeting to tell employees about EDS and demonstrate its use.

• You may also register for live WebEx training sessions or view recorded sessions at http://training.ebsco.com/.

Creating your training materials:

The EBSCO Support Site offers a Suggested Training Overview to assist you as you create your training content.

• Suggested Training Overview

Key points to consider when creating your training sessions:

• The Search Box (if implemented on your institution’s website) is an excellent way for users to create a quick and easy search of all of your institution’s library resources.

• EDS offers exposure to additional library resources that users might not have been aware of.

• EDS is an easy way to search library resources and it allows librarians to spend more time on bibliographic instruction as well as the type of information and content available, versus how to search for it.

• Provide instruction to students/patrons on what they are searching and when to use which type of resource.

• Different types of content will provide different types of information.

• EDS helps users find information as quickly and easily as they would find it on Google or other search engines, with much higher quality and more relevant results.

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Create promotional materials

As part of implementing your Discovery Service product, promotional materials are an effective way to alert your users to its availability.

Materials with your Discovery Service name and logo can help promote your new library resource and remind users of its availability.

For more information branding EDS with a unique name and logo, see the EBSCO Discovery Service (EDS) Customization Best Practices Guide.

Suggested Items:

Available from the EBSCO Support Site:

Note: Links to these documents are available in the last section of this page.

- **Customizable flyers** – Customize and print an EDS flyer as a handout to your library patrons.
- **Bookmarks** – Customize and print bookmarks to hand out to your patrons.
- **Email Templates** – Customize pre-written announcement text to share information about your Discovery Service product availability.

Available from EBSCO:

- Posters
- Flyers
- Email Templates

You can request customized promotional materials through your regular EBSCO point of contact (Sales Representative, Discovery Solutions Coordinator, Customer Account Specialist, etc.).

Items that could be created independently:

- T-Shirts
- Mouse pads
- Pens
- Recyclable Canvas shopping bags

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Develop a multi-point announcement strategy

As part of implementing your Discovery Service product, announcements are important for alerting your users to its availability. By using several different methods of promotion, you ensure that users become aware of your Discovery Service product and where they can access it.

Try to keep in mind the marketing adage that it takes 7 “touches” or impressions to ensure that your users remember your message.

Suggested Tasks:

• Circulate advanced word about your EDS product by advertising its release around your institution. For example, create “coming soon” posters with your Discovery Product’s unique name and logo and display them in prominent areas throughout your institution.

• Use social networking resources such as your institution’s Facebook and Twitter accounts to reach your users with announcements regarding your Discovery Service product.

• Reach your users by sending out Discovery Service information/updates via your institution’s listserv. (See the end of this page for a link to sample email announcement text you can use.)

• Utilize your institution’s media resources such as a library blog, internal television station, and newspaper to announce your Discovery Service product availability.

• Distribute Discovery Service branded promotional materials to patrons, such as bookmarks and other materials, as well as library availability information.

• Offer workshops to your end users to introduce them to the interface and demonstrate how to use it effectively for research.

Host a kick-off event/party

A kick-off event or party is an effective way to promote the launch of your Discovery Service product to your users.

Kick-off ideas to consider:

• Prior to your official rollout, host a kickoff party in the library for your institution’s students, faculty, and patrons. During this event, demonstrate your new Discovery Service product and encourage everyone to use it. You might consider offering dinner or snacks to encourage participation.

• Offer a chance to win prizes to patrons who visit the library to take a short five-minute introductory training.
• Set up a promotion table in areas where patrons gather (cafeteria, recreation areas) and give away the promotional items you have had created with your Discovery Service name and logo (pens, mouse pads, canvas bags, etc.).

• Set up a short five-minute introduction/demonstration to Discovery Service in high-traffic areas where your patrons are likely to be.

• Add your customized Discovery Service screensaver to your library’s computer terminals.

Promotion Success Stories

The University of the Pacific

The University of the Pacific, located in Stockton, California, launched EDS in early 2012. The Library Dean’s Think Tank named EDS “Pounce.” To announce the arrival of Pounce, flyers were posted around campus, and librarians handed out bookmarks to their Pacific Seminar students. Upon entering the University Library, patrons were greeted by an electronic sign announcing the new discovery service, and librarians wore badges featuring the tiger logo and the phrase, “Ask me about Pounce.”

In March 2012, the library celebrated the official launch of Pounce with a party that began with a flash mob singing and dancing to “Jump on It” by Sir Mix-a-lot. Nearly 200 students along with the University’s Provost and President attended the launch party. After a brief introduction by the Library Dean, students were invited to experiment with Pounce at library computers. The Think Tank team provided cake, cookies, and punch, as well as free shirts, pens, buttons, and press-on tattoos.

Grant MacEwan University

In the fall of 2012, Grant MacEwan University of Edmonton, Alberta, launched “MacEwan Lib,” a mobile application for iOS devices that combines EDS with MacEwan’s Integrated Library System. Users can search the library collection, place holds and renew items, and download full-text scholarly articles—all within a single mobile interface.

To promote the resource, the library held a couple of launch parties featuring iPhone-shaped cakes with images of the MacEwan Lib app on them. In addition, an article was published in the student newspaper, and announcements were posted on the library web site and displayed on digital marquee boards around campus.

Links to Other Helpful Documents

EBSCO Discovery Service (EDS) Suggested Training Overview

This overview recommends the key steps for training your administrators and end users on EDS.
**EBSCO Discovery Service Promotion Kit**
Find an array of materials for promoting EDS throughout your institution. Included are sample email text, tutorials, training materials, and graphics.

**EBSCO Discovery Service Information Sheet**
This document offers brief introductory information about key features and functionality of EDS.

**Searching the EBSCO Discovery Service – Help Sheet**
This help sheet demonstrates searching the *EBSCO Discovery Service*. You can cut and paste this help sheet to customize it with your own logo and/or screenshots.

**Sample Exercises for EDS Training / “Library Research Boot Camp” Handout**
These sample searches demonstrate how easy it is to search your Discovery Service product, and the attached “Library Research Boot Camp” document is a great activity to use during training sessions.

**EBSCO Discovery Service Tutorials**
This page links to the available EDS tutorials in video and PowerPoint formats.

**EBSCO Discovery Service Training Series Webinar**
This page includes links to sign up for free online webinars about various aspects of *EBSCO Discovery Service*. If the webinars have already taken place, the page includes links to access the previously recorded sessions.

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