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## **Going Green, Green Greener with True Marketing and Strategic Planning: A Practical Approach with Illustrative Examples**

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### **Abstract:**

*Marketing is a process, a tried-and-true systematic approach for matching services and products to customers’ wants, needs, and desires within the resources and mission of the organization. Successful marketing is based upon a well-sculpted mission and organizational goals and objectives, a result of strategic planning. But success can be elusive if either marketing or strategic planning is conceived in isolation. This paper will discuss the necessary partnership and offer two illustrative examples for accomplishing “going green goals and objectives.”*

**Keywords:** Green Universities, Green Libraries, Marketing, Strategic Planning, Sustainability

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### ***“Why Marketing Goals Must be Tethered to Strategic Plan Objectives”<sup>1</sup>***

Knowledge and implementation of marketing principles and practices and strategic planning are 21<sup>st</sup> century management mainstays. Most organizations rely on both for success. But success

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<sup>1</sup> Jason Brewer, [tinyurl.com/376b88j3](http://tinyurl.com/376b88j3).

can be elusive if either is conceived in isolation (Brewer, 2021). This paper will discuss the necessary partnership and offer two illustrative examples.

### **Strategic Planning**

First, strategic planning. It is a blueprint for the entire organization including all activities that lead to a clear mission, organizational goals and objectives, and strategies (Peter & Donnelly, 2019, pp. 6-9). The plan relies on a coordinated effort by all units, usually initiated at the senior level. It must ultimately help the organization to adjust to environmental changes, seize opportunities for new services, and make regular gains in productivity. The successful plan is cost effective, and includes evaluation of results, with feedback leading to improvements. Keep in mind, organizational-level goals and objectives are not the same as *program level* (where marketing activities reside), although they are similar in concept. This distinction is critical as marketing strategies develop.

### **Mission: Compass of the Ship**

The key question in mission development is “What is your organization’s reason for being?” The answer relies on analysis of the characteristics of the actual and potential customers served (who), an analysis of the programs and services offered, (what) and objectives (how) and the desired result. Most organizations function with diverse roles and the mission must embrace and support these. Managers, staff, and stakeholders facilitate mission development through discussion and finally consensus. Mission statements that do not guide or embrace the organization, open the door to missed opportunities and possible failure (Radtke, 2019).

### **Accomplishing the Mission: Organizational Goals and Objectives**

The mission is accomplished over time by multiyear goal setting supported by achievable objectives within a projected time frame. Goals are the results of directed effort or the ends of implemented planning. An organization must have goals that bring focus to the mission. Objectives must carry the goals to completion, characterized by due dates and anticipated quantification of achievements in numbers or percentages. Distinction between goals and objectives is critical. Goals are broad and lofty, while objectives are grounded and measurable. In other words, defining measurable objectives is key to setting achievable goals (Hasa, 2016).

Most managers and staff participate in goal setting. A library might also include the public and other stakeholders. Each unit understands and agrees upon the mission to optimally implement organizational strategies, goals, and objectives. Priorities are determined, and program level goals and objectives are specified for each unit within the organization, spelling out the how the unit will accomplish the mission. Goals and objectives within all units must be consistent, complementary, and integrated to form a successful, unified effort (Mongan, 2022). This is the level at which marketing activities reside. For example, a public library’s mission may be to “provide free and open access to information and services to people of all ages and backgrounds.” A current strategic (goal) is to “enhance library services to the disabled by 2023 (the objective).” At the program level the outreach services unit sets a marketing goal to “provide large print books to 35% of identified visually disabled cardholders in the community served, by August of 2023.”

Professionals are attuned throughout the planning time frame to the organization's mission, and organizational goals and objectives are renewed, reviewed, and achieved within the established intervals. Note strategic planning is most often conducted every three to five years. Further, throughout the organization the changing environment is reflected upon, so processes can be improved to meet expectations (Koontz & Mon, 2014, 13-14).

### **Environmental Scanning**

Change is constant. With mission, goals and objectives refined by the results of previous planning, it is critical to observe, analyze, and forecast fluctuations in the organization's environments. For example, externally, long- and short-term changes in budgets, political offices, public policies, technological innovations, and social or cultural shifts can impact the organization. Internally, vendor prices, staff training needs, and customer market changes also drive changes. Planning with proactive awareness of the external and internal changes is known as *environmental scanning* (Association of College & Research Libraries, 2021).

This cyclical scanning is essential, as successful managers of libraries, and other organizations must anticipate and rapidly adapt to changing environments. Lead time for decision making and responding to change is diminishing. A SWOT analysis emerges from the scan, identifying internal *strengths* and *weaknesses*, and external *opportunities* and *threats*. (Visual Paradigm, 2021). The SWOT results are often called the "quick and dirty" analysis, which facilitate rapid self-assessment.

The scan traditionally reviews five major external forces at local, regional, national, or international levels including: state of the economy; legal/regulatory/political; competition; technological developments; and ever-changing social/cultural conditions. Sometimes the media and physical environments are included. The key rule of thumb is that categories chosen for scanning must be relevant to the organization. This proactive knowledge of change is critical to success as all organizations serve markets that are in a constant state of evolution and change (Association of College & Research Libraries, 2021).

### **Marketing**

Second, consider marketing. True marketing requires organizations focus on and question what they do, why they do it, who they do it for, and how. If any organization wants to be ultimately successful, they must know these answers to move forward, build on strengths, and improve weaknesses. True marketing derives answers and information from the strategic plan.

This information is a must as the ever-changing and wide-ranging needs of heterogeneous customer groups impact services, products, and programs in critical ways. For example, the expansion and diversity of knowledge available within multiple media types and formats is especially pertinent to the organization's collective customer offers. And who else is supplying it, and are they "better"? Offerings must be based upon thoughtful understanding of unique and distinctive needs of specific groups or segments of customers (Koontz & Rockwood, 2001). The strategic-planning process identifies and prioritizes target customer markets and facilitates the marketing mix, which delivers and communicates satisfying programs and services (within

measurable objectives). One such program might be *going green* supported by sustainability measures (Association of College and Research Libraries, 2022).

The organization's services, products, and all offers, are then developed based on the philosophy, mission, and set goals and objectives (at the organizational and program level). The organization cannot operate or market successfully without this framework in place. In the past, some organizations were lucky to be able to offer the right product at the right price to a rapidly growing market. However, the world has grown too competitive and complex to rely on luck. (Peter & Donnelly, 2019, p. 6).

Now we can consider the steps and tools which develop the marketing strategies.

### **Marketing: A Four Step Model**

The marketing model illuminates important components imperative for building success. The four include: 1) *marketing research*; 2) *marketing segmentation*; 3) the *marketing mix* (the 4 Ps—*product, price, place, and promotion*); and 4) *marketing evaluation and productivity*.<sup>2</sup>

*Marketing research* is conducted, which solves problems; identifies actual and potential customers and changing customer needs. *Market segmentation* occurs, coalescing customer markets around shared wants and desires, allowing targeting or prioritizing markets to meet goals. Next the *marketing mix* optimizes offers by setting acceptable customer prices, delivering goods through appropriate channels, and forming promotional messages which targeted customers can hear. These successful offers are developed and only developed after marketing research and market segmentation. (A strategy that is the boss' favorite idea but not based on customer research is doomed for failure). *Marketing evaluation* identifies success or failure. Additionally, if management exhibits interest in productivity, the staff is likely to approach operations with an eye to greater efficiency (Mon & Koontz, 2021, pp.76–77).

The interesting thing about marketing is that all organizations do it whether they know it or not—though with varying degrees of success. Like businesses seek prospects, or in the library's case, customers, they develop offers; set prices (in terms of fees, as well as cost of customers' time); distribute (through the main facility, branch facilities, bookmobiles, traveling exhibits, kiosks, websites, and other online venues); and promote (via publicity, public service announcements, posters, brochures, and possibly advertising Koontz & Mon, 2014, p. 70). It is important to note here that promotion is not marketing.

### **Promotion is a Tool of Marketing**

Aggressive promotion is often confused with marketing (Difference Between, 2012). Yet true marketing is not just selling what you have in a publicity blitz. It is the strategic use of a wide range of promotional tools and media including social networks, print or online advertisements or publicity articles, television and radio announcements, seminars, websites, or personal pitches (White, 2020). The tools, often mixed up as representing the totality of marketing, do not emerge until the third step (the marketing mix). The techniques, tools and media are applied to benefit and improve the entire organization (Mon & Koontz, 2021, Chapter 15).

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<sup>2</sup> Refined and developed initially for public libraries based upon discussion and insight from marketing professor emeritus, College of Business, Florida State University, Persis E. Rockwood, and Christie Koontz.

When introducing marketing to staff or even management, it is important to remember marketing language can be unfamiliar, and perhaps at times may even rankle from the viewpoint of nonprofits. A glossary of marketing definitions was sponsored by the International Federation of Library Associations and Institutions (IFLA) and developed to enhance understanding of marketing (Koontz, 1998).<sup>3</sup> This was created for language barriers to be overcome within the IFLA International Marketing award application<sup>4</sup>, as marketing tools are created largely from the business world. Many professions must bridge to the marketing literature as it grows and develops, so as not to be left behind.

In summary, true marketing represents a continual systematic assessment of actual and potential customer interests combined with effective communication methods targeted to market segments, resulting in imaginatively designed services and products using feedback for improvement. A final note? Successful managers know that marketing is not a panacea for underfunding, understaffing, or under competence by staff or lack of substance within the offers, nor a substitute for knowing the interests and concerns of potential as well as actual customers.

### **Illustrative Examples**

The following two illustrative examples communicate the necessity of the strategic planning components including mission, and organizational goals, and objectives, for implementation of marketing programs. These examples reveal why and how successful marketing programs must be “tethered” to the strategic planning process.

#### **Example one: A University goes Green**

As discussed earlier, senior management often gather at intervals every three to five years to develop new strategic plans. This is the case at Florida State University, FSU, (and most others). The recent 2017-2023 FSU strategic plan has six goals. In concurrence with the times statewide, nationally, and globally the university is focused on energy conservation and sustainability. The sixth goal represents this:

#### **Florida State University (FSU) Strategic Goal VI:**

Aims to invest strategically in our institution and reputation. We hope to be known as a university that makes a difference in the lives of our students and in the quality of life of our society . To do this, FSU will incorporate sustainable living practices in all FSU activities:

To further Goal VI, FSU formed a unit (Florida State University Sustainable Campus, 2017) with its own mission and vision statement, and a commitment to align the unit’s goals and projects with the FSU Strategic Plan (Florida State University Strategic Plan, 2017):

**Climate Action** (increased conservation and efficiency efforts);

**Waste Minimization** (reduce, reuse, recycle);

**Resource Stewardship** (environmentally friendly land, habit, watershed management);

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<sup>3</sup> Developed by agreement (with author Koontz) from the American Association of Marketing dictionary)

<sup>4</sup> The IFLA PressReader International Marketing Award awards organizations which implement creative, results-oriented marketing projects or campaigns. Three finalists are selected based on innovative contributions to marketing in the library field from <https://iflapressreader2022.org/>

**Education for sustainability** (communication through related curricular, service, research initiatives).

Each of these project areas are furthered by a myriad of program level marketing activities carried out across the university landscape. The Sustainable Campus is “tethered” to Goal VI of the FSU Strategic Plan. Without this tethering, or if created in isolation, the Sustainable Campus would have little hope of long-term university funding or support.

### **Example two: A University *Library* goes Green**

University libraries set organizational goals and objectives based upon the parent (college) organization’s strategic plan. Marketing programs can then be aligned with and facilitate the organizational goals and objectives. In this case a college’s environmental scan identified a national effort to improve energy efficiency across the country by 2020, with a public sector goal of 33%, leading the college (University of Cork College) to conduct an extensive review of energy usage across its campus. The review led to a marketing level program by the library, “Love our Library” campaign by staff (Valkama, 2021).

The campaign goals included:

Reduce energy consumption; increase recycling rates, reduce waste generation, increase the use of water fountains, improve staff and student behavior, and increase both staff and student engagement with these projects. Specific objectives were created to meet goals e.g., tackling waste generation and increasing recycling rates, creating binless offices and installing compost bins with centralized waste collection points. And the list goes on. Please see the full report “Green libraries tackling environmental challenges: University College Cork (Valkama, 2021).” Measures of impact and success (fourth step of the marketing model) earned the library the IFLA Green Library Award (Hauke, 2019).

### **Summary**

Marketers require current, reliable, useful information to make effective decisions, exploit opportunities, and avoid mistakes, if they are to survive and satisfy customers, and gain new customers (Peter & Donnelly, 2019, p. 30). To achieve this, marketing goals and strategic planning objectives must be tethered. Just do it<sup>5</sup> (JDI) and go green, greener, greener.

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<sup>5</sup> [https://en.wikipedia.org/wiki/Just\\_Do\\_It](https://en.wikipedia.org/wiki/Just_Do_It)

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