Patron Point

Overview:

- Marketing software that will allow us to drive patron engagement much more than just sending basic email newsletters to all those signed up.
- It connects to all our other library software systems and allows us to pull data much more effectively from each software in one location, including Sirsi, Signup/Spaces, OverDrive, Hoopla, and ReadSquared. Essentially, we would be able to build marketing segments based on patron behavior, actions, and interests collected from these and the sign on forms and then deliver personalized content and communication to increase awareness about library services and programs. For example, we can market directly to parents with kids all of the children's services.

Specifics:

- Allow us to brand the existing Due Date email and text notifications to patrons and market upcoming events and other services at that point by giving us the capability to do HTML emails and links in SMS messaging for these. Currently, they are just a static text notification and we have limited capabilities on things we can link or add using Sirsi.
- Allow us to automatically add email addresses to our email newsletter when someone signs up for a new library card. We can't do this currently because we can't export the email address with Sirsi. Patron Point would automatically connect to our ILS to get the data on this and other customer attributes.
- We can automate much of our eMarketing activity to maximize staff time, for example:
  - Sending a sequence of welcome emails to new customers joining the library – telling our story, engage each new Patron right at the start of the relationship with bite size chunks of information on what the library offers. We do this currently once they sign up to the eNewsletter, but we can capture this earlier now as soon as they sign up for a library card.
  - Happy anniversary emails after a certain period of library membership
  - Happy Birthday emails
  - A sequence of card renewal reminder emails (and introduce a seamless process to verify each Patron)
  - Re-engagement campaigns to target customers who have stopped using the library
- Improve the retention rate of existing cardholders by driving their engagement with the Library – we want to keep existing patrons as active as possible!
- If we choose the Address Verification option, we would also get: a fully automated solution for new patrons applying to join the library, with **FULL** online identity/address verification. When verified, Patron Point will automatically create the Patron record in our ILS.
- It will also allow us to get rid of Digital Cards and patrons can apply for a full library card from the website and get instant access to everything right away because the system would be checking to verify the address. If it can't be verified for any reason, then they would be prompted to come into the library at that point.
- Allow us to offer personalized eNewsletters to our Patrons where content can be rendered based on data using dynamic content technology (basically people will see different images and content from the same email based on their data).
- Provide us access to powerful reporting tools, which can be scheduled to run automatically and be sent to other Department Heads. The reporting functions in Sirsi in particular are lacking and we'd be able to do a lot more reports and data gathering with this software.
- If we choose this add-on, we can also drive collection use/circulation through Patron Point's 'Recommends' service. It provides automated newsletters containing recommended titles in our

collection to patrons (based on subjects they express an interest in), feed recommendations directly into your marketing communications e.g. notices. While we tried this with LibraryAware previously without success. The fact it can be integrated with notices gives us much more opportunity for success. We can also create widgets for the website, which we used to have, but all the services over the years stopped providing new books automatically for this. Patron Point uses a third-party service to pull ratings on the books as well as the date entered into the system, so we should have success with better recommendations.

- You can distinguish marketing vs. basic notifications in the system. So someone can unsubscribe from monthly newsletters but still receive due date notifications.
- Forms, surveys and other marketing tools on the website can be updated and created using forms from Patron Point so data is gathered from all of those in one place as well. Right now it just sends emails to whomever is in charge of that specific form. It would make it easier to have a centralized place to view and then also gather info from it that can be utilized in marketing.
- Would replace Mailchimp for email, which we would soon need to move to the next tier of subscribers with 2,500+ email addresses at a cost of between $60-$350 per month. If we could utilize the entire 10,000+ emails we have in the system which is the goal of Patron Point and then people would "opt out" of emails then the cost of Mail Chimp would be $220-$465 per month for the same service. It offers basic automation, but doesn't connect to our ILS or offer anything library-related at all with getting data on patrons. All segmentation, Emily creates by hand and also pulls data from SignUp/Spaces and ReadSquared to get new subscribers.
- Comparable software is "Savannah" by Orangeboy (https://www.orangeboyinc.com/) and last time we were quoted based on our library size it was more expensive than Patron Point. SirsiDynix offers something similar at the price of $12,000 a year with a $3,000 set-up fee.

Patron Point cost options:

With current set-up discounts available, which are valid until December 31st 2022.
Annual Sub: $7,000
Set-up: $1,500
Address Verification:$1,500
Set-up: $1,500
Recommendations: $1,050
Set-up: $1,000

First year total: $13,550+.30 per verification

Yearly total after the first year: $9,550+.30 per verification