



# Strategic Communication Task force

VIVO

connect  
share  
discover

## Introduction

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The Strategic Communication Task Force came together to create a Strategic Marketing plan to discuss ways to increase the visibility of the VIVO project and improve the VIVO brand.

Task Force members bring marketing and communication expertise, and they represent the VIVO Leadership Group, LYRISIS, industry, and members of the VIVO community with experience in outreach and engagement to the research community.

Strategic Communication Task Force members:

- Ann Beynon, Clarivate
- Anna Guillaumet, SIGMA, and VIVO Leadership Group Vice-Chair
- Bruce Herbert, Texas A&M University Libraries
- Estefania Muñoz, SIGMA
- Meg Blum, Jenn Bielewski, Sam Mitchell, LYRISIS
- Julia Trimmer, VIVO Leadership Group Chair

After discussing the Strategic Communication Plan with the Leadership Group, the Strategic Communication Task Force plans to transition to an ongoing interest group that includes a marketing perspective. The Communication and Marketing Interest Group will convene in July, 2020 and invite new community members to join us.

## Action Plans

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We propose changes to the VIVO communication strategy in three phases. Phase 1 tasks can be accomplished by current members of the Communication and Marketing Interest Group.

### Phase 1: Basic level

- Any member can ask questions or announce news, events, software revisions, webinars, meetings, and other updates on the VIVO-community and VIVO-tech Google Groups.
- Communication team posts the same announcements to Twitter, Facebook, and LinkedIn.
- Communication team schedules social media posts in HootSuite with the goal of four or five posts per week.
- Update vivoweb.org with the following minimal revisions as soon as possible:

- Home: Add an image in the header (instead of the blue area), change the collaborators logos , put a Twitter Plugin and a call to action on the footer to join the community lists.
  - Governance: eliminate steering group and the Project Director
  - Resources: Create a new flyer that reflects the new vision
  - VIVO News: put some information about the continuity of VIVO despite the health alert (COVID-19)
  - VIVO Events: promote the Online VIVO Conference (link to the event web page)
- With LYRASIS, share VIVO communications in LYRASIS publications. The LYRASIS Digest goes out every other month starting the end of June. Whenever there is VIVO news or an announcement to share broadly, it will be posted on the LYRASIS Now blog, sent through LYRASIS social media, and included in the bi-monthly LYRASIS Digest roll-up edition newsletter.

## Phase 2: Growth level

The task force has identified additional communication goals designed to increase community engagement and further VIVO growth. These initiatives would be added if resources exist once the basic level of communication tasks have been addressed for a period of months. These goals are listed in order of priority.

The Communication and Marketing Interest Group is responsible for creating a road map with resources, estimates, and milestones for each of these tasks. The Interest Group will solicit additional resources and help from the community for specific, time-limited tasks that will be coordinated from within the Interest Group.

1. Newsletter
  - a. Send a monthly update/newsletter summarizing all of the lists, blog posts, announcements, plus additional calls for community participation, new sites/members
  - b. Implement a graphical template for this newsletter and send through the Google Groups lists or set up a separate listserv.
  - c. Identify a tool for producing the newsletter.
  - d. Request content for the monthly newsletter from the LG and other guest writers.
2. Annual report
  - a. Working with LYRASIS to use the new Annual Report template, gather information for an annual report similar to the 2018 report.
  - b. Release in August 2020 after the end of the fiscal year.
  - c. Distribute the report to the newsletter lists.
3. Market assessment
  - a. Write an analysis of environment forces, market trends, entry barriers, competition, risks, and opportunities, as well as an evaluation of the

VIVO Project's resources and constraints. LYRASIS has been discussing how to support a marketing assessment for all community-supported open-source programs, which would be a great help.

- b. A SWOT analysis would be a component of this assessment.
  - c. Incorporate a marketing "4P's" analysis (product, place, price, promotion) and the Business Model Canvas to help define and articulate the business model of VIVO. The blocks on the BMC are:
    - **Customer Segments:** Who are VIVO's customers? What do they think? See? Feel? Do?
    - **Value Propositions:** What's compelling about the proposition? Why do customers implement and use VIVO?
    - **Channels:** How are these propositions promoted, sold and delivered? Why? Is it working?
    - **Customer Relationships:** How do you interact with the customer through their 'journey'?
    - **Revenue Streams:** How does the project earn revenue from the value propositions?
    - **Key Activities:** What uniquely strategic things does the project do to deliver its proposition?
    - **Key Resources:** What unique strategic assets must the project have to compete?
    - **Key Partnerships:** What partnerships can the company de-emphasize so it can focus on its Key Activities?
    - **Cost Structure:** What are the project's major cost drivers? How are they linked to revenue?
4. Outreach to all active VIVO sites and implementers in a joint effort with the Membership and Community Engagement Task Force.
- a. Update the VIVO registry:
  - b. Contact all inactive VIVO sites explaining that we'll update the registry on their behalf unless we hear from them by a certain date.
  - c. Contact all active VIVO sites to confirm their continued activity, asking them to update the registry, and inviting them to communicate further via email or a meeting.
  - d. Ask contacts for news about their VIVO, feedback for the project, and volunteers for project tasks.
  - e. Publish VIVO news from the active VIVO sites.
  - f. Provide the newsletter, annual report, and market analysis to the Membership and Community Engagement Task Force as aids to recruit new members and support additional VIVO implementations.

## Phase 3: Optimal level

Once the basic and growth tasks are implemented and maintained for a period of months, the VIVO Communications team can turn their attention to larger goals. Implementing these initiatives will support a VIVO Project that is growing and expanding. The following section provides details for these goals.

- Implement benchmarking to measure the effects of the communication plan.
- Build a communications team to define and implement a business strategy.
- Improve and update VIVO branding.
- Define strategies for offline (printed) and online marketing initiatives.
- Incorporate social responsibility goals into VIVO communications.
- Update the current VIVO website with a new modern design and more attractive content.

## Phase 3 Goals and Strategy

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To guide this Strategic Communication Plan, the Task Force asked Estefania Muñoz, Head of Marketing at SIGMA, to help us identify best practices for determining VIVO's communication goals and how we might attain them.

These recommendations are offered to help focus the communication strategy and suggest new approaches to setting goals.

### Use benchmarking as a measure of competitiveness

- Identify online competitors or comparable programs and determine which businesses have a big presence offline and online.
- Compare with the competitors our strategy to identify improvements.
- Every year, hold a benchmarking session to update the research and create new goals.

### Business environment

- Create a well-defined marketing team and partners to achieve the marketing plan.
- Define the “4Ps” marketing strategy, considering:
  - Product -- marketing should have presence in the roadmap.
  - Place -- where should marketing focus on new opportunities, for example, the European market
  - Price-- evaluate membership pricing, that could open the market, such as a personal membership option

- Promotion -- how to create more content for the community like webinars, workshops, awards to attract members and increase the member's loyalty.

## **Branding**

- Create new identity brand (logotype, branding style, brand colors, typographies, documentation templates, etc) and new online branding (corporate web restyling, social media restyling, videos, etc).
- Do a Brand workshop to understand key values and main references for your brand. These kinds of workshops are perfect to contrast what you want to communicate with your brand vs. what you are actually achieving.
- Create a design work schedule to point out priorities in the process such as new logo; new corporate colors, online and offline touch points. In that way you can identify which should be done first or faster.

## **Offline Marketing Strategy**

- Define and redesign the offline material: roll ups, leaflets, merchandising, etc.
  - Make a list of the current offline material and redefine the necessary material according to the budget.
  - Design and produce the new offline material taking care of the brand essence.
- Improve the current event strategy
  - Analyze the results of the past VIVO's Conference and make a plan with improvements and new proposals.
  - Think more micro events that we can do during the year

## **Online Marketing Strategy**

### **Social Media**

- Create a social media marketing strategy with a summary of everything we plan to do and hope to achieve on social media.
- Consider carefully which social media sites your business should be on, and do a deep analysis of the profiles you already have.
- Define the different objectives for each social media platform according to the main uses of each one of them.
- Create a contingency plan to deal with bad reviews and comments to keep the community engaged and active.
- Make sure social media buttons are visible on the website, emails and other marketing collateral.

### **SEO & SEM**

Develop SEO and SEM strategies for website and social media.

- Ensure Google Analytics (or another analytics package) is installed on the site for tracking the visitors behavior and the effect of the online marketing
- If we have an existing keyword list—Make sure all the keywords are still relevant and up to date. If we don't have an existing keyword list, create one.
- Generate a SEO structure that includes a schedule of how often you are going to post, a distribution of your keywords, fresh content that brings out relevant topics to keep your page updated and relevant.
- Use paid tactics as SEM to gain faster visibility (for example, if we want to promote an event).

### **Email marketing**

- Improve the utilization of the database of contacts for email marketing, consider whether you want to do it to build relationships with your contacts and/or keep them in the loop.
- Create regular campaigns, review its performance and rethink the strategy to adjust it to current needs and objectives. For example a bimensal email reporting recent updates (segmented by the different groups of customers), institutional communications, and punctual communications (for example Christmas).
- Grow the email marketing list through inbound marketing strategy; requirement of email address to attend webinars; downloadable content; entering a competition; qualifying for a discount or even just use a big, visible form on the website asking people if they want to be kept up to date.

### **Corporate Social Responsibility**

Implement policies and procedures that integrate social, environmental, ethical, human rights or consumer concerns into business operations and core strategy – all in close collaboration with stakeholders.

### **Resources**

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The task force: Julia Trimmer, Anna Guillaumet, Ann Beynon, Bruce Herbert, Estefania Muñoz and Carol Minton Morris.

### **Targets**

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**At institutional level:**

- Universities
- Centers

- Research Institutions

**At geographical level:**

- Worldwide

**At membership level:**

- Platinum Member – \$20,000 and up
- Gold Member – \$10,000
- Silver Member – \$5,000
- Bronze Member – \$2,500
- Copper Member – \$1,000
- Supporter – \$500\* (no project governance benefits for this level)

**At profile level:**

- Researchers
- Librarians
- Technicians (IT)
- Research Managers/Directors

## Metrics

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How will we analyse and identify the strategies that we are working on? Consider which metrics will enable us to measure the success of our communications, such as:

- Number of Twitter, Facebook and LinkedIn followers
- Google Group subscribers
- Newsletter readers (click-throughs)