AUDIENCE:
Reference Librarians
Instructional and Teaching Librarians

OBJECTIVE:
The objective of the Mendeley User Adoption Guide is to provide the best practice and ideas for librarians and information professionals to drive awareness and user adoption of Mendeley as a researcher enabler tool.

HOW TO USE:
This guide is divided into three sections: Pre-Launch, Go-Live, and Post-Launch. The three sections are appropriate for you to prepare for a comprehensive launch of Mendeley (or Mendeley Institutional Edition) availability at your institution.
COMMONLY ASKED QUESTIONS:

Q: Do we still have to do all these activities even if we are already familiar with Mendeley and have a high user base?

- If your Mendeley user adoption is already fairly high, and you simply want to complete some refresher activities for new users, then you should selectively focus on specific refresher activities.

Q: How long will it take to do all these activities?

- The length of time it takes to complete all these activities depends on the size and complexity of your institution as well as your current understanding of Mendeley. If you are new to Mendeley, we always recommend that you focus on a small group of familiar users first and/or identify other librarians to form a project team to work through the activities together.

Q: Do you have some templates we can use to make it easier?

- Yes. If you are interested in sample templates, please check our website first: http://www.elsevier.com/solutions/mendeley/support#chapter1. If you cannot find what you are looking for, please contact your Elsevier sales person for more information.
Mendeley User Adoption Workflow

Pre-Launch
1. Determine your audience
2. Identify and form your project team
3. Consider your message
4. Set a goal
5. Determine a go-live date
6. Identify key promotional activities
7. Set up a Mendeley Group
8. Set up train-the-trainer session
9. Prepare a FAQ
10. Prepare Go-live

Go-Live
11. Broadcast the announcement
12. Customize per stakeholder
13. Make it visible

Post-Launch
14. Monitor User Reception
15. Promote in ‘Standard’ channels
16. Check and benchmark your Mendeley usage
Pre-launch (2 weeks ~ 3 months)

1) Determine your audience
   o Do you want to promote Mendeley to all users, students, researchers, professors?
     Or are you only targeting specific user types?
   o Do you want to target Mendeley for all research disciplines (such as biology, physics, sociology, business), or are you only targeting certain subject areas?

2) Identify and form your Mendeley project team
   o Based on your answers in Question 1, you should consider who else will be involved with you for creating a successful Mendeley project.
     ✓ Other subject librarians responsible for different disciplines/ colleges
     ✓ Other reference librarians (perhaps familiar with other reference tools)
     ✓ Graduate and PhD student advisors/ resources
     ✓ Student associations and representatives
     ✓ Research office and administration
   o Consider what you might need, as well as other functions that need support
     ✓ IT / technology services (who will install Mendeley for the public, shared computers)
     ✓ Marketing (who will announce the news via social media like blogs, facebook)
     ✓ Website/ tech services (who will update website/ library pages to create an information page, as well as update and include new information)
     ✓ University and library administration (who will send a broadcast e-mail to all students and staff)
     ✓ Instructional training (official trainers for the end users)

3) Consider your message about Mendeley
   o Is your institution offering multiple reference management tools now? Do you want to position Mendeley as the preferred tool or is it one of the many options?
   o Are you promoting the Free Mendeley accounts or does your institution have an institution-wide license\(^1\)?
   o How does the library (your team) want to support Mendeley for your users? Some examples of support that we recommend:
     ✓ Include information about Mendeley on your library resources website (LibGuide or others)
     ✓ Set up eye-catching visuals to attract attention. Posters, digital displays,

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\(^1\) Please consult your Elsevier sales person if you need more information.
brochures, etc.
✓ Offer group training sessions, 1-on-1 sessions, or just have a support contact available.

4) Set a goal
   o Do you know how many Mendeley users are currently at your institution? If you want to find out the number of registered users with your institutional e-mail address, please contact us.²
   o Mendeley as a reference management tool is a time-saver for researchers wanting to better organize their research and write their papers more efficiently. Mendeley is also great for senior researchers interested in sharing research material and knowledge with their research group. Typical Mendeley users are graduate students and post-docs. Do you know how many total potential users you can have at your institution?
   o Determine what % of the total potential users you can influence to use Mendeley. This will help you plan your Go-Live Day and estimate the volume of questions and support needed.

5) Determine a Go-live Date
Select a date so that the team and activities can be aligned and be in order. You will want to take into consideration institutional activities like holidays, exams, and other key initiatives that may be taking up people’s focus and time.
For organizational purposes, you may want to create a project plan so you can ensure all activities and resources are included. It can be as simple as the example provided here:

6) Identify Key Promotional Activities
   o Investigate and identify institutional activities that already exist and promote tools to researchers. Can you include Mendeley in those activities? (i.e. New Graduate Students Orientation? Annual Research Day?)
   o Can you create new activities more appropriate for Mendeley users?
   o Consider activities that can strengthen and emphasize what’s unique about

² Please contact your Elsevier account representative or send an email to business@mendeley.com
Mendeley? "Drive research efficiency", "Showcase researchers", "Enable researcher’s collaboration", etc. How about adding Mendeley into a "library resources introduction class"?

7) Set up a Mendeley Group
To better communicate with your Mendeley users, you will want to invite them into a group. You can communicate to all of your users if they join the Public Group by having the group communication mechanism activated. Be sure to name your Public Group well, for example include the name of your institution, and give it a good description so new users can also easily search and find it themselves as well.

8) Set up train-the-trainer sessions for the project team
You want to make sure the project team you put together in Question 2 are all aware of Mendeley, its value, and some of the key differentiating features. Once they are knowledgeable on what Mendeley is and how it might be useful for students, researchers, and professors, your project team will be the extended advocates for your initiative (to promote Mendeley for users). You may want to consider two types of train-the-trainer sessions.3

   o Basic session – 20 minutes to 1 hour. Show how Mendeley can be used and how it helps. This is appropriate for non-librarian and non-instructional training staff. You can invite key department heads, unit leaders, and prominent professors and researchers to get them involved in the project. You will want to tailor your demonstration to best fit the needs of the audience. For example, if you only have 15 minutes with faculty you might want to focus on collaboration features or time-saving features such as Watched Folder.
   o Advanced Hands-on session – 2-3 hours. Show and practice using Mendeley so the individuals can be comfortable to provide training and answer questions. Be sure to have all participants join your Public Group (or your MIE Group).

9) Prepare a list of Frequently Asked Questions
Through your various training sessions with your project team and librarian colleagues, you will encounter some commonly asked questions. Start documenting FAQs and official responses, and share it with the rest of the project team. You should also consider creating a list of FAQs that are common amongst users and put them on the library websites as well as refer to them proactively during your normal end user trainings as well as any hand-out material.

10) Prepare for the Go-Live Date

3 Ask your Elsevier + Mendeley team to give you ideas on how to do this and potentially support you in person.
You want to make sure these activities are completed in advance of the Go-Live Date.

- Install Mendeley Desktop on shared computer terminals. Work with your technical department and check that the institutional firewall will not be an issue.
- Prepare an email message to be broadcasted by the administration to all the staff/students.
- Promote the messages on-line and in print. Newsletters, posters, web pages, digital monitors, other social media channels.
- Update the library web pages with new Mendeley information. You can find the latest resources to use on the Elsevier/Mendeley site. You may want to promote a simple demonstration video, Quick Reference Guide, Migration Guide, general training powerpoints, and FAQs and make visible upcoming training classes and how users can get their questions answers. If your institution uses LibGuides you can find a recommended copy here: [http://www.elsevier.com/__data/assets/pdf_file/0008/69677/Mendeley-Libguide.pdf](http://www.elsevier.com/__data/assets/pdf_file/0008/69677/Mendeley-Libguide.pdf)
- Promote the message in person to department heads and other librarians
- Will you hold user training sessions? Have you planned the dates (so they can be included in the email message and on all the promotions)?

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4 [http://www.elsevier.com/solutions/mendeley/support#chapter1](http://www.elsevier.com/solutions/mendeley/support#chapter1)
Go-Live (1 day ~ 2 weeks)

11) Broadcast the announcement
Broadcast the news through different forms of social media (email, blog, facebook, twitter, news bulletin, newsletter, library website, poster displays), and also direct e-mails to potential users. Make sure to capture responses along with any feedback!

12) Customize announcement for key stakeholders
If you have determined specific target groups (graduate students, specific disciplines) then it would be best to send them a specific update to make sure they are aware of the opportunity. Sometimes it is very helpful to attract more attention if you could get someone within your target group (department head, senior faculty, student affairs office) to also reinforce the message.

If you have an MIE agreement, then Mendeley/Elsevier will help you send a message to all of your known existing users and encourage them to join the MIE Group. For more information on how and when this service is done please ask your Elsevier account manager.

13) Make it visible!
The key to successful and consistent user growth past the initial promotion date is to make sure it is consistent and visible for all possible users all the time. You also want to embed these activities within the normal institutional activities, so it become part of the research workflow DNA.

- Are there natural gathering spots for your users? Cafes? Common areas? Any of these areas appropriate to post leaflets/flyers about Mendeley and the benefits of using it? Many institutions have put up free standing displays and digital displays to talk “Join Mendeley Now” and the pictures and statements of advocates.
- Include Mendeley in existing programs and activities. Many research groups have frequent poster talks, which can be great opportunities to have the head of the group discuss this topic.
- Don’t forget to promote Mendeley’s Go-live in your social media channels!
Post-Launch (On-Going)

14) Monitor User Reception
   o If you’ve sent out emails – check how many opened the email and read it. Some emailing systems will allow you to send follow-up e-mails to the ones that overlooked your first message.
   o If you have planned training sessions, check to see how many attends and who attends the session. More importantly, did they sign up for Mendeley immediately after the session? (Hint – Create a public group and encourage everyone to join after their training session so you know who is on Mendeley?)
   o Capture all the Frequently Asked Questions and share them with new users. You can add these to the Mendeley Web Page so people can learn answers to what they are likely to ask and be confident this is a good tool for them.
   o Capture happy users! Pictures and quotes are very powerful. Capture positive feedback and share them with others. Mendeley grows because users are sharing and referring it to others so you can help in the process by sharing the compliments.

15) Promote Mendeley in ”Standard“ Channels
   o Most institutions have new orientation material (or orientation sessions) for new staff and students. Consider how to include Mendeley in these material and welcome them with Mendeley in their first day!
   o Work with your IT/ technology team to include Mendeley as part of the standard computer image so that every new computer would also have Mendeley right on the desktop!
   o If you are an academic institution, you can also include Mendeley in standard instructional material such as classroom syllabus. If you are a research institute, you can include Mendeley in your Lab Manual.

16) Check and Benchmark your Mendeley usage
   Once you have enough Mendeley users (at least 8% of your potential user population), you may want to invest some time to do a Usage Analysis Report. A Mendeley Usage Analysis Report allows you to better understand the following:
      o How many Mendeley users do you have?
      o Which of your researchers use Mendeley?
      o How actively do your researchers use Mendeley?
      o How many research documents do they store?
      o How many contacts do they make? And interact with?
   To obtain a Mendeley Usage Analysis Report, please contact your Elsevier account representative.
Concluding Remarks:
This Mendeley User Adoption Guide is a collection of Elsevier and Mendeley team’s collective experience in aiding and partnering with many institutions and librarians to design an optimal user adoption and awareness using the free Mendeley (or Mendeley Institutional Edition) product.

Our goal is to help you bring the best tools to your users and researchers so that their work can impact many others and advance science.

If you have any feedback and great ideas on how you have mobilize users please share them with us at business@mendeley.com.