

“Marketing and Promoting Records Management”

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The success of a Records Manager will be significantly dependent upon how effectively we are able to market and promote our Records Management Programs within our organisations at a macro level and within our Records Management teams at the micro level. The success of a Records Management Program will also depend on the conviction and commitment of the Records Manager to his or her program.

As a Records Manager you need to:

- Believe in the Value and Worth of Your Program; and
- Believe in the Value and Worth of Your Role

You need to be convinced of your value and of the value of your program to your organisation.

Having established in your own mind the value your program can offer to your organisation, you need to develop an effective Marketing Strategy for your Records Management Program. In order to develop this program, you need to ask yourself some key questions, namely:

- Who are we as a Records Management team?
- Where would we like to go?
- How will we get there?

These questions and your answers to them are the seeds of an effective Marketing Strategy. The answers will obviously be unique to each organisation and depends on your current operation and your future goals and objectives.

Your marketing strategy should take into account your existing program and services and identified future enhancements, which may include your plans for new systems, plans to request additional resources or new policies and procedures you plan to introduce.

Management of your Marketing Strategy will be a key component of your portfolio of responsibilities. By committing yourself to your Marketing Strategy you are essentially putting your philosophy as a Records Manager “out there” to the world - that is, to your organisation, to your team and to the Industry.

When developing your Marketing program it may be wise to evaluate what similar sized organisations (with similar systems) have achieved.

What lessons did they learn? What would they do differently?

Then ask yourself how does their experience apply to our organisation?

Also, keep an open mind. It is very important that you take ideas and initiatives you may learn from seminars, articles etc and incorporate these ideas in to your program and Marketing Strategy.

As Records Manager you are best equipped to determine what ideas and concepts would work effectively within your organisation.

There are three core components of an effective Records Management Marketing Strategy. These are strategies for:

- Marketing Your Records Management Program
- Marketing Yourself as Records Manager
- Marketing Your Records Management Team

Marketing Your Records Management Program

It is important to re-inforce the need to initially convince yourself of the value of your program. In your own mind, you need to clearly articulate your vision for your Records Management program.

Establish a clear picture of what you want to achieve, how you will achieve your goals and when you want to achieve these goals.

Importantly, to gain executive support and acceptance for your plan, you need to design your marketing strategy in alignment with the Mission Statement and Corporate Strategies of your organisation.

Also seek support and assistance from those areas within your organisation that have an interest and share your concerns and objectives. These support areas may include Information Technology (IT), Risk Management, Internal Audit and Quality Management.

It is also important that you acquire a clear understanding of the goals, objectives and values of your organisation. You will need to understand what are the current important issues and how records management can effectively assist the organisation address their current issues.

You will also need to understand the decision making processes – and the key players (sometimes not indicated within the organisation chart). It is also important to understand your organisation's operational deadlines and decision making timeframes.

Be prepared to face objections to your records management strategy.

An increasingly effective strategy of marketing your Records Management Program is to “accentuate the Negative”. Be prepared to not only market the benefits of your program but also to highlight the dangers of the organisation not implementing an effective records management program. Use examples of recent disasters that pertain to your organisations industry. For financial organisations examples such as Enron would be useful, for State Government agencies examples from The Royal Commission in to W.A. Inc, and so on.

It is also vitally important to remind your organisation of their relevant compliance and governance responsibilities (Public Records Act, National Archives Act, Privacy legislation, etc).

In order to effectively market your ideas and promote your Records Management Program you may need to consider the most effective medium or forum to “get your message across”.

Options include publishing material on the Inter and / or Intranet, and circulating newsletters detailing the aims and objectives of your program.

Further strategies include asking to speak at senior management committees and work groups on specific records management issues, and developing internal records management focus groups (for key stakeholders to have a forum to address records management issues). All of these initiatives are aimed at promoting awareness of your program at a senior level within your organisation.

You may also consider inviting records management industry representatives to address your executive group particularly to explain compliance or governance issues and so on.

As Records Manager you must believe that you have a positive contribution to make to your organisation. You have been selected to fulfil a pivotal role of great responsibility within your organisation.

It is not enough to do continual “hands on” work. As a complete “hands on” worker you will not be able to achieve your long term marketing and promotional goals and, importantly, the organisation will not benefit from your experience and knowledge.

You must strive to improve Records Management within your organisation. To achieve your goals you must be seen “out there” in your organisation.

Consider gaining membership of key committees such as the Information Technology Strategy Committee, the Risk Management Committee, the Privacy Committee, and the Disaster Planning Committee and so on, to promote the value of your program.

Remember you are a professional and an expert in your field!

The organisation can directly benefit from your contribution and the insight you can provide to these important committees and work groups.

Marketing and Promoting Yourself

Be innovative, open and ready to listen and consider new ideas and suggestions for improvement from staff at all levels within your organisation. Always be enthusiastic and ready to promote and market your records management program. Be enthusiastic about records management and encourage staff within your organisation to “learn” and find out more about our profession. This can be achieved by circulating and distributing relevant articles in the press and on the Internet, about records management.

Also “walk the talk” by maintaining an effective and well organised records system within your office.

As we all know Records Management is not always an exact science and we can all benefit from learning about another's experience. It is important therefore that you consider writing articles about what has worked for you and your team. This strategy will not only raise your profile within your organisation but also within our Industry.

It is also important to display your qualifications and awards within your organisation to make the organisation aware of the academic scholarship behind our Industry and to inspire your team who may be considering undertaking similar programs of study.

Marketing and Promoting Your Records Management Staff

The key to promoting and marketing your staff is to encourage and motivate them. You should try to foster an environment of positive achievement and a sense that what we are doing is extremely important to your organisation. This must be genuine and therefore you must be positive and truly believe in what you are doing and what you are trying to achieve.

My suggestions include formulating a Multi-skilling strategy or a staff development plan for your team. You may need to grade the skills and abilities you want your staff to acquire and the time frame you feel is needed for your staff to acquire the skills of each of the records management positions.

Encourage your staff to undertake formal studies and to plan a career in Records Management.

As Records Manager you could solicit Business Unit Managers in your organisation with the objective of having members of your team attend their work areas and observe the work practices within the unit. This step will broaden the outlook of your staff and help them understand when and how the records they manage are generated, and how they are used by Business Units. An additional step is to nominate members of your staff to attend organisational committees such as Occupational Health and Safety and Risk Management work groups.

Also look at nominating mentors for your staff (with their agreement) within the Records Management industry. Help your team members to select mentors who are similar in nature, personality and style to your individual team member.

These steps of promoting and nurturing your team members will have long term benefits in both defining your management style within the organisation and the external Records Management industry; and also have a great positive impact on the careers of your team members.

It is important for the self esteem of each team member that you develop a specific plan and strategy for them as an individual.

The goal of your strategy is to develop their profile within the organisation and this is different from their Performance Plan.

Your promotion strategy may include such initiatives as Attendance on the Occupational Health and Safety committee and / or Communications Committee as the Records

Management representative; Attendance at State Government Records Management forums throughout 2005; Mentoring with Records Manager of a neighbouring organisation and so on.

In summary your Records Management Marketing Strategy should be managed as carefully and professionally as any other important Management Program for which you, as Records Manager, are responsible.

You need to clearly plan and define your Marketing Strategy, including the objectives of your program, your project milestones and timeframes and the outcomes you wish to achieve with your Records Management Marketing Strategy.

The following table is an illustration of a draft Records Management Marketing Strategy.

Records Management Marketing Strategy – Example – 2004/05

Objective	Steps	Timeframe	Outcome(s)
<p><u>Records Management Program - Marketing:</u></p> <p>Proposal For New Records Management Posters</p>	<ol style="list-style-type: none"> 1. Obtain quotes from vendors 2. Meet with CEO – select format 3. Generate Purchase Order 4. Distribute 	July – August 2004	
<p><u>Records Manager – Marketing:</u></p> <p>Submit article on New System for Industry Journal</p>	<ol style="list-style-type: none"> 1. Finalise draft 2. Forward to CEO for approval 3. Submit to Informaa Quarterly 	August – September 2004	
<p><u>Records Management Staff – Marketing:</u></p> <p>Bill Smith – Rep on O H & S Committee</p>	<ol style="list-style-type: none"> 1. Contact O H & S Committee Chair 2. Brief Bill on expectations 3. Forward Previous Minutes to Bill 	October 2004	