

# Marketing Records Management



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# Goals for today's workshop

- Give an overview of effective communications techniques
- Provide practical ideas you can use immediately
- Share best practices and successful tactics from other Records Managers
- Starting point for networking

# Challenges and Successes

What are your biggest challenges in the realm of communications?

What successes have you had in this area?

# The Basics of Communications

- Know your audience
- Craft your “key message”
- Deliver it simply and often

# Know your audience

- Communicate from “outside in”—i.e. the audience’s viewpoint
- Begin with the most appealing fact to THEM—not to you
- Strengths (or Features) to Benefits analysis
  - Use formula  
“...which means that you...”

## “Strengths to Benefits” exercise

- Work with colleagues to identify one audience you plan to target (citizens, other staff in your organization, decisionmakers, etc.)
- Make a quick list of the strengths of your RM program that would resonate with this audience
- Convert your strengths to benefits

# Key Message

- The most important thought you want to communicate to your audience.
- May need to be tailored for various audiences
- Provides a compelling reason to think or act in a desired manner
- Use “flags” to call attention to key messages in communications

# Delivering the Message

- Packaging—how will message be delivered?
- Compelling visuals are crucial
- Frequency
- Consistency
- Production and Distribution
- Design considerations

# The Basics of Communications

- Know your audience
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# Best Practices from Records Officers

- Spoke with Federal Records Officers who have successfully raised the profile of RM in their agency
- Most inherited under-funded, low-profile RM programs, all charged with managing previously unmanaged e-records
- Used simple, cost-effective strategies and tactics

# Embrace Technology

- Traditional role of RM has changed
- Consider a title change
- Use technology as a “force multiplier”
- Partner with IT

# **“Scare Tactics” on RM Regs don’t work**

- You cannot “beat them over the head with regulations”
- Educate about laws/regs but don’t rely solely on them to ensure compliance with RM

# How does RM add value in business?

- Communicate how RM...
  - Improves workflow/makes jobs easier
  - Improves quality
  - Saves money
  - Saves time
  - Serves the “ultimate customer”

# How does RM help to mitigate risk?

Identify your audience's "hot issues" in risk management—what will happen if they don't have the info they need when they need it?

- Disaster planning
- Adverse publicity
- Litigation
- Privacy issues/  
identity theft
- Audits

# Forge relationships with “natural allies”

- Legal
- Historians / Librarians / Archivists
- IT
- PR / Public Affairs
- Labor relations
- Engineering / Facilities

# Preserve and share stories and visuals

- Build an archive of your RM “success stories”
- Network with peers (and steal their ideas!)
- Collect “best/worst case scenario” stories and visuals

# Get involved in enterprise architecture

- Lobby for an equal seat at decisionmaking table
- Volunteer time and resources to work on projects—build your rep as an expert
- Be a “player” not an “impediment”
- Become a generalist—learn about the issues affecting other departments

# Questions?



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