

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

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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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