

Marketing Records Management to Improve Partnerships between Management, Users, Compliance and Us.

Anne Cornish MRIM
Records Solutions



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Define Marketing?

Marketing

'mɑ:kɪtɪŋ/

noun: marketing



“the action or business of promoting and **selling** products or services, including market research and advertising”.



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What is Selling?

Selling is offering to exchange an item of value for a different item.

The original item of value being offered may be either tangible or intangible.

The second item, usually money, is most often seen by the seller as being of equal or greater value than that being offered for sale.



What is Telling?

Telling is communicating information to someone in spoken or written words.

Which means inform, let know, notify, make aware, mention something to, acquaint with, advise, put in the picture, brief, fill in, speak, utter, state, declare, make known, impart, divulge, announce, broadcast, etc.



What do Records Managers do?

Before we can determine if
we sell or tell...



What are our
services/products?



What do we market and sell?

Services

- Assist with improving your business processes.
- Provide advice – legislation, compliance.
- Storage and destruction services.
- Mail Management.
- File Management.
- Information Management.
- Develop processes.



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What do we market and sell?

Products

- Classification scheme – web content, libraries, intranet, portals, databases, core business systems.
- Retention and Disposal Schedules.
- Security Models.
- Information Asset Register.
- Vital Records Register.



Do we sell or tell?

Selling is a skill which makes products and services appealing to the customer.

Instructing or telling is considered enforcing and/or dictative.

How do we currently market our services and products?



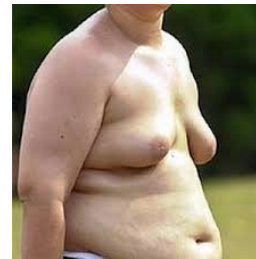
Current Marketing Strategies

- Newsletters.
- Presentations (management, team meetings etc.).
- Gimmicky, feel good gifts.
- Lunch Box sessions.
- Training.
- Intranet.



Why are our customers not buying?

- Records staff who do not know the answers.
- It is too hard to use.
- Don't have time to shop.
- Don't deliver on promises.
- Not sexy...



How can we sell and not tell?

Firstly - What are we trying to achieve with our marketing?

- Increase numbers who use our service.
- Improve the accuracy of usage.
- Inform all customers that the service is there.
- What the actual service is?



What can we do differently?

Remember...

We don't have a shiny Porsche or a new iPhone to sell.



Selling records management can be like selling funeral services or tampons...

They don't really want it but they have to use it eventually.



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What can we do differently?

Explaining the records management concept to people who don't really care or don't want to care is a tough gig.

How can we make it sexy and not have to show body parts.

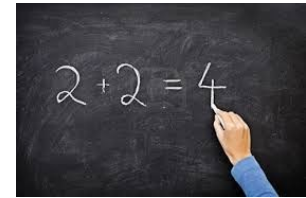


Top 8 Tips



Tip 1 – Keep it simple

Don't use newsletter articles or long winded presentations.
Try straight forward and succinct messages.
Use terminology easy to understand.



Example:

- Message 1: Records Management: Knowing what to throw away
- Message 2: Records Management: Appraising to know what to dispose of.

Consistent messaging. Use the same words in all messages.

Fact: Messages must be heard at least **5 times** before they are retained.

IMR – What can we do for you?



The newly formed Information Management and Records Team (IMR) are working hard to improve our services.

What does IMR do?

- Manage and administer TRIM system
- TRIM Support
- Train and educate in the use of TRIM
- Records Management training
- Mail Management
- Archival Management
- Physical File Management
- Assist with improved business processes
- Vital Records Management
- Business Classification Management
- Records Security

Meet Miss Organised



Tip 2 – Use Analogies

Besides dumbing your messages down you should also use common analogies where relevant.



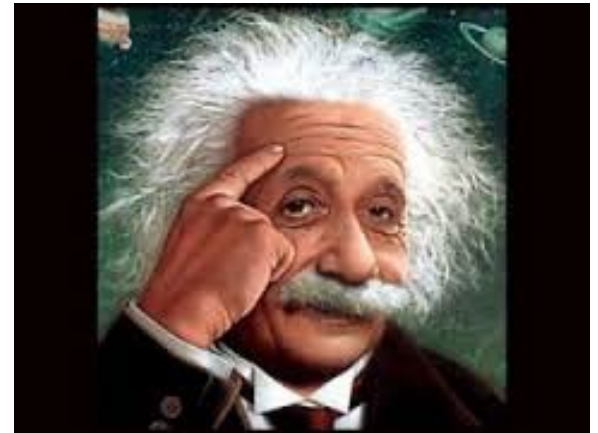
Examples:

- Classification is like the knife and fork drawer and non classification is like that big drawer full of utensils.
- We all keep records, bills, insurance documents etc. and hopefully file them so they can be found later.
- Google like searching on your EDRMS.
- A BCS is like your G Drive.



Tip 3 – Put your global knowledge to good use

- Besides the CEO, you and your team know the most about the business. You know who does what, how and who with.
- Use this knowledge to include yourself in meetings about other projects. Sell the fact you can add value to these meeting.
- Don't sit back and wait for them to ask.



Tip 4 – Find the Influencers

- Form relationships with key persons so you are kept in the loop (ask about the kids, study, holidays etc.)
 - CEO PA.
 - Managers.
 - Risk and audit persons.
- These people will unintentionally market for you
 - Discussions over lunch.
 - Have you seen the meeting agenda in the EDRMS?
- Relationships give you leeway if things go wrong.
- Peer pressure is a gift.



Tip 5 – What value does it give them?

You must sell the value of the service to them as individuals.

The Records Management Care Factor Scale

Organisation Level	Nil to Minimal
Directorate Level	Minimal
Business Unit Level	Somewhat
Individual Level	BINGO

Tip 5 – What value does it give them?

- Not just considered a necessity, get them so they want to use your services.
- Focus on pain points. What really bothers them and how can you fix it.
- To sell your services, you need psychology skills to walk your customer through their emotional issues to overcome their obstacles.
- Show empathy and demonstrate how you can ease their pain...

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Marketing is not about you. It is about your customers. It is not about how great your business is. It is about the needs your customers have.

opshelp.com

Tip 6 – Bring the risks to life?

- Utilise RIMPA resources let your customers know that things can go wrong. Use others misfortunes to sell your value.
- Sometimes, something really bad has to happen before they realise how important your services are.
- Bad news can still be good marketing.



Tip 7 – Sell on a small scale

- Sell components of your services and products to individuals and not the whole suite.
- Customers only care about what they need.
- They will absorb and appreciate smaller components and then buy more if they need it.
- It is like selling a kitchen appliance and then you can buy the attachments.



Tip 8 – Deliver

- You must be accountable for the delivery of what you have sold.
 - If you cant deliver your reputation is shot!
You then need to commence marketing all over again.
- Suggest you under promise and over deliver.

