

# RIM Marketing Made Simple

Never mind the myths – you, too, can promote a records and information management program within your organization.

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**G**ranted, marketing a records and information management (RIM) program within an organization is not the easiest thing in the world. But it isn't rocket science, either. Still, several silly myths persist and discourage practitioners from making RIM more visible and meaningful to their entire company. (See sidebar: "Major Marketing Myths and How to Dispel Them.")

With a little inspiration and encouragement, however, RIM professionals can dispel the myths and elevate the status of RIM organization-wide in the hearts and minds of their senior executives, managers, and fellow employees.

## Marketing Made Simple

Traditional marketing is not really all that traditional anymore, as people must continually find new and unique ways to get other people's attention. Non-traditional, but effective, marketing ploys include:

- *Developing a great, short answer to "What do records professionals do?"*

A lot of people don't have a clue about the role of records professionals, so each records manager needs to develop his/her own short answer. For example, a response to the question, "So, you like filing?" could be, "What I really like is developing systems and processes to help people better manage their records and information and free up their time to create additional value for their organization." This response would help people

understand that records management is far more than filing. The more people understand about the role of RIM and of RIM professionals, the easier it will be to implement an organization-wide program.

- *Telling people what RIM encompasses.* A lot of people don't understand the broad spectrum of areas that RIM affects or the many aspects of a business with which a records professional must be familiar, including such things as network backup strategy, information technology and software, project management, business analysis, facilities management, and space planning. Sharing this information is particularly important to position the function as more than just "doing the filing."
- *Giving people tips that will help them in their own work.* For example, not everyone realizes that there are

### At the Core

#### This article

- ▶ Dispels common marketing myths
- ▶ Describes strategies for marketing RIM in the organization
- ▶ Provides ideas for marketing on a shoestring budget

ways to organize electronic folders for better productivity. Suggest ways that users suffering from e-mail glut can create inbox sub-folders for their projects. Dragging and dropping messages into project folders eliminates the need to wade through all the messages in the inbox to find what is needed and facilitates the elimination of those e-mails that don't need to be retained once the project is complete.

### Marketing Through Strategic Alliances

A RIM professional can't do it alone. Implementing and maintaining a solid, successful RIM program requires developing key partnerships with stakeholder groups, such as IT, legal, compliance, business development, and auditing. Each group offers its own view of the world, and gaining insight into these views is important to furthering the RIM program. Knowing the key issues that make other groups "tick" allows learning to take place and enables the RIM program to move forward.

Aligning the RIM organization with these groups can provide benefits for all. For example, the RIM group often finds out after the fact that a decision affecting records retention was made without their input. A common scenario is a department purchasing new database software to manage its line of business and putting records into it that have various retention periods. After the fact, the RIM group learns that the software purchased does not have retention capability and discovers, in fact, that no records can ever be deleted from the system.

Partnerships also can help other groups think of RIM implications before their planned initiatives have been finalized. These strategic alliances should be fostered as early on as possible. Don't wait to be invited into cross-functional groups – RIM professionals

## Dispelling the Marketing Myths

### 1. It Takes a Pro

Contrary to popular belief, it doesn't take a marketing or advertising professional to market a program. It doesn't require the person to be a salesperson, and it doesn't take special training or a specific personality type. Everyone can find at least one thing to do to market his/her program. In fact, many of the best marketing ideas do not come from formal training and can be accomplished without the assistance of professionals. Such ideas are typically gathered via networking or listening to another's presentations, and many of these ideas are self-developed and free.

### 2. Marketing Is Scary

The word "marketing" can strike fear into the heart of a records professional. But anyone can do simple things to get people's attention, using non-traditional approaches and strategies. And, what's more, success can be measured by small, seemingly insignificant, steps. For example, if an event teaches just one person something – perhaps to guard more carefully a piece of sensitive or confidential information – the effort may be called a success.

### 3. People Will Think It Is Silly

Sometimes, raising the awareness and interest level within an organization is best done by hosting a "fun" event or developing a theme for the marketing materials. Keeping things light can create additional participation or even raise productivity. Because each organization has a cross-section of personalities among its employees, some may think an event or promotion is silly. If someone complains that a promotion is silly, remember the lesson of myth #2: If someone learned something from the effort, its goal was accomplished and the effort was worthwhile.

### 4. The Program Is Not "Ready"

The program doesn't have to be totally in place before it can be promoted. Promote what is there, and share the vision for where the program can go. This is especially critical when a program is just beginning. Marketing could be in the form of an e-mail from management announcing the program or a series of presentations about RIM at department meetings. People appreciate the opportunity for input, especially if it affects them, so what better place to start than at the beginning? If the program is further along, or even mature, there is still reason to promote it. Things are always changing in the workplace, new technology is released, and records management best practices change. Sometimes, even the corporate climate changes, and that creates an opportunity to accomplish a new objective.

### 5. Marketing Is Expensive

Money doesn't have to be an issue. Tools like word processing and presentation software enable the creation of fun, professional-looking materials that cost only some internal time, paper, and toner. Many good marketing ideas don't have direct monetary costs. Establishing strategic partnerships, alliances, and relationships within the organization to help market the program, in part by raising its visibility, are effective moves.

### 6. Marketing Is Hard

It does not take an intensive, all-out campaign to market a program. Instead, it may make sense to start by doing just one thing, such as publishing a newsletter, creating an intranet page, or engaging a guest speaker. Even if there is only one RIM person in the organization, that person can take many quick, simple, and effective steps to market the program.

may have to invite themselves. If an initiative in which RIM should be involved is discovered, contact the project leader or set up a meeting with key people in the departments to discuss how RIM can help them.

This subtle way of marketing the RIM program produces a circular effect. The better the RIM program is known, the higher its chance of success and the easier it will be to approach departments with RIM initiatives. Soon, including RIM in initiatives will become second nature to other groups in the organization. Each initiative will help raise the RIM program's visibility, and each project can help broaden the RIM professional's skill set.

#### **Co-Promotion**

Another way to develop partnerships and alliances with internal groups is to co-promote initiatives. As groups work together and develop synergy, each group realizes benefits. For example, partnering with IT on how to clean out recycle bins or Internet caches helps IT with storage space, RIM with general de-cluttering, and legal with litigation concerns and compliance efforts.

Other examples of co-promotion include:

- Working with legal to train users on careful communication or e-discovery
- Coordinating with compliance on training about general compliance issues

Stepping outside the RIM box enables a tighter integration between programs and departments and better support. The more people know and hear about RIM, the better the chance of successful implementations.

#### **Partnering with Management**

Management support is essential to the success of a RIM program. Partnering with key management can instantly raise the RIM program's visibility, so seek management support

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despite how "scary" that may seem. If a manager declines to provide support, it will likely be more a reflection of poor timing or the manager's unavailability rather than disregard for the program. Ideas for gaining management support include:

- *Invite executive management to RIM events.* In one real-world example, records coordinators (who were primarily administrative assistants with responsibility for RIM within their departments) hosted a "thank-you" luncheon and invited executives. Several members, including the company president, stopped by. That the senior management of the company cared enough to come to the event instantly raised the coordinators' view of RIM as well as their morale. A tradition of management attending the event continued for years.
- *Get RIM mentioned in a company meeting.* Company skeptics may ask, "If RIM is so important, why does upper management never talk about it?" If RIM is able to get 30 seconds at a company meeting, a brief spot in the company newsletter, or an e-mail from upper management that mentions its importance, the program's credibility will be instantly raised.

#### **Partnering with Vendors and Outside Agencies**

Vendors can make great partners and assist internal marketing efforts. Vendors can be a source of educational opportunities for the company, serving as seminar presenters on such topics as compliance, Sarbanes-Oxley, HIPAA, electronic content management, mobile computing, or new technologies. Vendors also may be willing to help sponsor RIM events within the organization. In addition, outside agencies like the local police or fire department may be willing to help provide education on identity theft protection or emergency preparedness.

#### **Marketing Opportunities**

There are three things that need to be marketed: 1) the RIM professional; 2) the team; and 3) the program. RIM professionals can market themselves simply by explaining why they are records managers. Marketing the team can include sending feedback to members' supervisors and promoting their successes to other departments. Marketing the program can be done by simple, yet effective, one-on-one efforts such as preparing a one- to two-minute speech about the program's successes and taking advantage of elevator rides with management to promote those successes.

Recognize that effective marketing includes taking advantage of built-in opportunities as well as creating new opportunities. Some possibilities:

- *Prepare an article for the company newsletter.* Even just a short “spot” can help raise awareness about the program and RIM initiatives.
- *Develop a RIM intranet web page.* Today, website creation doesn’t require a lot of money or special training. The site pages should be tailored to fit the culture of the company and could include program vision and mission statements, RIM contacts, the retention schedule, and links to RIM-related training and references.
- *Talk about RIM at department meetings.* Have a presentation that tells what the RIM program is about and where it is going.
- *Participate in cross-functional teams.* Even if the initiative isn’t strictly RIM-related, it could help develop strategic partnerships and alliances and indirectly market the program.
- *Celebrate RIM Month.* Celebrations can start small and build up. ARMA has a RIM promotional page at [www.arma.org/rim/promotion](http://www.arma.org/rim/promotion) with ideas to promote RIM in April – and throughout the year.
- *Send out e-mail links to news articles that discuss RIM.* This is a way to share RIM knowledge, indirectly remind people about the importance of RIM, and get people to think about how RIM applies to them.
- *Host brown bag lunch RIM seminars regularly to keep people thinking about records issues throughout the year.* Help develop a culture that RIM is more than an annual cleanup day. This helps drive home to employees that managing records is a part of their everyday jobs.

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- *Develop RIM training sessions or online RIM training to help people become aware of company expectations.*
- *Strategically place RIM posters in the building to get people to think about RIM.* Place posters in areas where people have to stand and wait for things like food in the microwave or copies at the photocopier. Ideas for the poster content could include tips for protecting information security, managing e-mail, or shredding documents.
- *Promote professional RIM associations and vendor-sponsored web seminars to more than just the records staff or coordinators.* Often allies come from people who have suddenly become aware of a hot RIM topic.

#### Event Ideas and Tools

Events can help publicize RIM throughout an organization. Themes can add to the excitement of the event and increase participation and productivity.

If people are having a good time, the perception is that RIM is not “painful.” Themes can be either business-related – such as clean-up days, open houses, or “housewarmings” when records collections move – or non-business-related, such as a treasure hunts.

Food, prizes, and permission to wear casual clothing can increase participation and the event’s success. Having management promote and participate in the events also greatly increases their success.

RIM-related contests can raise awareness of RIM throughout the year. These might include trivia contests, crossword puzzles, word games, or contests to see who can most quickly assemble a records storage box, put files in order, or find files or RIM supplies in a scavenger hunt.

No matter the means, the end goal is to make RIM more visible and important within the organization. Whatever marketing method a RIM professional uses to achieve that can be considered a big success. ■

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