

# MARKETING YOUR RECORDS MANAGEMENT PROGRAM



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## *Overview*

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- **Marketing is...**
- **Developing Your Marketing Program**
  - **Know and Describe Your Commodity**
  - **Identify Your Customers**
  - **Quantify Costs AND Benefits**
  - **Establish Your Marketing Goals and Objectives**
  - **Create and Execute Your Marketing Plan**
  - **Evaluate Outcomes and Impacts**
  - **Revamp and Revise as Needed**
- **Marketing Resources**
- **How Do YOU Promote Your RM Program?**
- **Summary, Questions, and Discussion**

## *Marketing is...*

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Putting the right product in the right place, at the right price, at the right time, and promoting it.

### *The RM Marketing Mix*

- ❑ **Commodity** – the product(s) or service(s) on offer – think in terms of providing value to the customer, satisfying consumer wants/needs
- ❑ **Customer** – the real and potential “buyers” of your commodity – your target audience(s)
- ❑ **Cost** – the cost to the customer to obtain your commodity – think in terms of costs AND benefits...
- ❑ **Communication** – the tools for conveying commodity and cost/benefit information to your customers

There is NO single “perfect” marketing mix – vary the mix based on YOUR goals and objectives AND the target audience!

## *Developing Your Marketing Program*

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- **Know and Describe Your Commodity**
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## *Know & Describe Your Commodity (Products/Services)*

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- **Develop a Clear, Compelling Message**
  - What Do You Offer?
  - What Are Your Success Stories?
    - Describe in terms of success for the customer!
  - Who Are Your Champions?
    - Don't be afraid to drop names...
- **Keep It Simple!**
  - DON'T use jargon
  - DO use language appropriate for each specific audience
- **Brand Your Identity**
  - If you have (or can create) a tag line or branding statement that really works and has staying power, use it!

# Identify Your Customers

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- **Research Your Market**

- Senior Management
- Department or Unit Managers
- Allied Disciplines (e.g., Legal, IT, IG/Audit, Facilities Management)
- Administrative Staff
- Who else?

*Don't forget about "indirect" and "potential" customers*

- **Match Your Message to Your Audience**

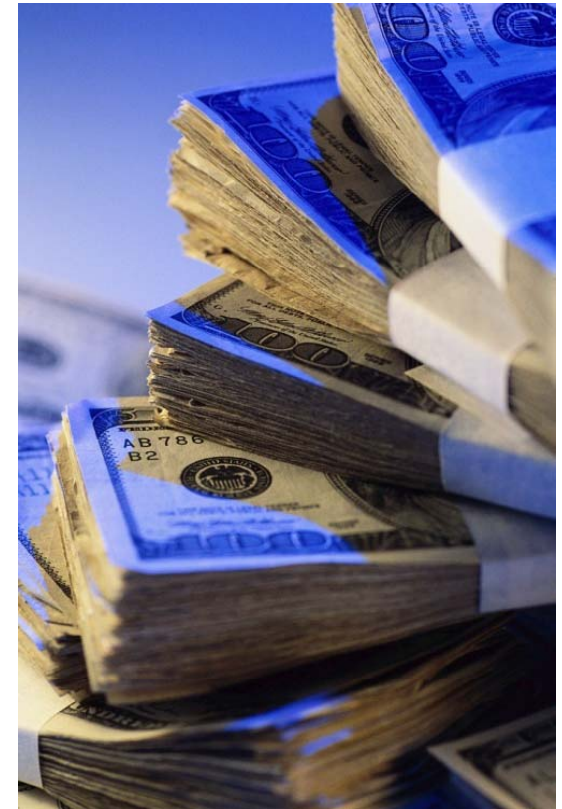
- What's in it for THEM?
- Remember to KISS...
- Target, Target, Target!



## *Quantify Costs AND Benefits*

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- **Use Real Numbers when Possible**
- **Don't Reinvent the Wheel**
  - **Use examples and averages from industry publications**
  - **Ask your finance or accounting departments if they can help**
  - **Ask your Champions if they can provide measurable examples**



## *Establish Your Marketing Goals and Objectives*

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- What do you want customers to **KNOW** about your RM program?
- What do you want them to **DO** with that knowledge?
- What do you want to **REALIZE** for your RM program?
- What resources can you **COMMIT** (short- and long-term)?



Specific

Worthwhile

Achievable

Measurable

# Create and Execute Your Marketing Plan



- **Select the Right *TOOL* for Each Target, Time, and Place**
  - **Brochures, Flyers, Posters, Marketing Sheets**
    - **Concise – general overview or subject specific**
  - **Presentations, Briefings, “On-the-Fly” Pitches**
  - **New Employee Orientation**
  - **Employee Training Sessions**
  - **Websites**
  - **Newsletters (yours or the organization’s)**
  - **Promotional Items – Branded and/or educational – business cards, magnets, note pads / sticky notes, pens, lanyards...**
  - **Special Events – Open houses, celebrations, guest speaker series, contests, RIM Month...**



## *The Infamous 30-Second Elevator Speech*



An overview of an idea for a product, service, project, or program that can be delivered in the time span of an elevator ride. So... 30-60 seconds = 100-200 words.

Should answer these questions:

- **WHO** are you?
- **WHAT** is your office / program / service / product / project?
- **WHY** should I care / be interested? **(What's In It For Me?)**

When building your pitch, keep in mind your end goal... What do you most want the listener to remember and take away?

Work up variations to use on different “captive” audiences...

**Cool Tool Alert ~ Harvard Business School Elevator Pitch Builder at <http://www.alumni.hbs.edu/careers/pitch/>**

# Logos, Brands and Taglines



*The Written Word Endures*



## *Logos, Brands and Taglines (cont'd)*

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## *Evaluate Outcomes and Impacts*

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Because your marketing goals and objectives are **Specific, Worthwhile, Achievable, and Measurable...** You can quantify some outcomes and impacts:

- Frequency of consultation and technical assistance requests
- Number of attendees at “open” training sessions
- Number of requests for site- or department-specific training
- Volume of records transfers (textual records)
- Volume of records disposition (destruction in most cases)
- Percentage of department with current and active schedules
- *Can you think of others?*

Try to tie these direct metrics to even more meaningful measures like cost savings, employee productivity, better space utilization, etc.

## *Revamp and Revise as Needed*

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**TRACK** what works and what does **NOT**.

- Observe
- Record
- Feedback
- Suggestions



**WORK** the plan.

**TEST** the plan.

**IDENTIFY:**

- Improvement areas.
- Untapped audiences.
- New resources.
- Eager champions.



**NO** resting on your laurels.  
Effective Marketing is **DYNAMIC!**  
Do **NOT** fail to deliver on your marketing message!



## Marketing Resources

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- **ARMA is a Big One!** <http://www.arma.org/rim/promotion/index.cfm>
  - RIM Posters
  - RIM Postcards
  - Campaign in a Box – set of tools that provide information to create and execute an RM marketing program – talking points, posters, RIM FAQ sheet, customizable letters...
  - Records@Work Pamphlets

▪ What is a Record?	▪ What Do I Do with All This Paper?
▪ What Do I Do with All This E-Mail?	▪ What Do I Do with All My Old Records?
▪ What Is a Records Center?	▪ How Should I Pack Records for Storage?
▪ What Are Vital Records?	▪ What Information Do I Need to Keep Secure?

- **RIM Month – ideas, materials, etc. – April each year...**

# ***YOUR TURN:***

## ***How Do YOU Promote Your RM Program?***



**What have you tried?  
What has worked beautifully? What has fallen flat?  
What was / was not worth it? In terms of return on your  
investment (time, effort, resources, etc.).**

## *Summary, Questions and Discussion*

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- **Never stop looking for opportunities to talk about what you do!**
- **Promote your program in more than one way.**
- **Look for logical alliances within your organization.**
- **Cultivate champions.**
- **Be creative, but understand your organization's culture.**
- **Have fun, be enthusiastic, be convincing.**



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Marketing Your RM Program



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# *Thank You*

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