

BACKROOM TO BOARDROOM:



Presented by:
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House Keeping

- Please turn Cell Phones OFF (or at least on vibrate)
- Bathrooms are located....
- In an emergency....
- Don't be afraid to ask questions, it will help us ALL learn.

The long toned legs,
the flowing hair,
the grace and beauty.....



and she'll do 30 miles an
hour on the straight away!

Defining Marketing

Peter Drucker (coined the term 'knowledge worker' in 1959)

He says:

“Business has two basic functions, marketing and innovation.”

But what is marketing?

Oxford Dictionary:

“the action or business of promoting and selling...”

Steve Neilly: (who hasn't coined any particular phrase)

He says:

“Marketing is the art and science behind informing an audience about a product , service or program so that they want to have the product, get the service or take part in the program.”

Defining Marketing (2)

Internal program marketing goals:

Participation

Support

- Gaining *participation* means you must promote the personal reasons for involvement.
- Gaining *support* means selling the corporate benefits.

Defining Marketing (3)

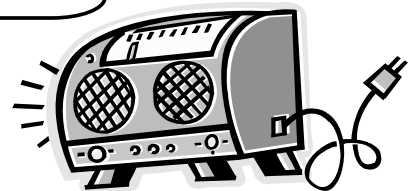
Drivers to participation:

- Solves a problem
- Air of jealousy or envy are created, or desire to be part of a group

Drivers for support:

- Reduces costs
- Reduces time commitment
- Increases safety
- Promotes corporate environmental consciousness
- Provides for enhanced decision making

Thanks for
listening to Wii FM



Defining Marketing ⁽⁴⁾

Look to the retail world for hints on how to approach marketing.

Beer: sold to quench thirst?



Cars: for getting from point A to point B?



Perfume: wear it so you don't stink?

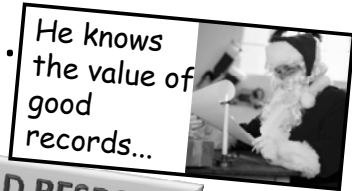
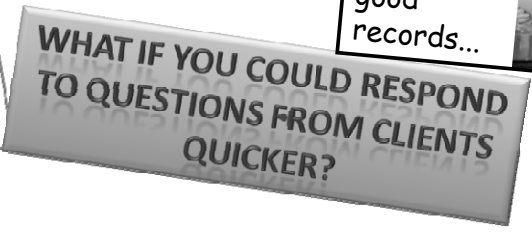
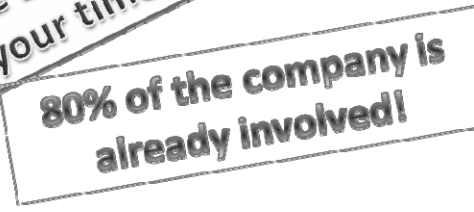


Defining Marketing (5)

The Records and Information Management program has to be sexy.



That is, it has to project an image that's exciting or appealing and makes people want to become involved.



The Foundation

1. Know your goals

Not only do you have to know what *they* want, you have to know what *you* want.

Never ask for more resources! Always ask for:

- specific # of full-time equivalents (FTE's)
- budget \$ for specific equipment
- project budget \$ (for software, consulting, etc)

Always have your requirements list available at a moments notice with documentation to support the requests.

The Foundation (2)

2. Have your 30 second 'sound bite' prepared



VP: "(Jane/Tim), what is your program up to these days?"

RM staff: "We're helping the company staff save time and money by implementing standard systems for filing, storing and disposing of records and ensuring that staff are trained in the systems. Actually, our next class is on Wednesday. I'd be glad to have you attend. It would sure be a great show of support for the program, if you could make the time. It's only 2 hours in the morning.

We're also working to reduce the company's risk exposure by introducing records protection and recovery measures like the contract we just set up with a vendor who will freeze dry our paper records in the event that we have water damage.

And, finally, we're investigating a software package to help everyone in the company find the records they're looking for so they can make better decisions and respond to clients quickly."

The Foundation (3)

3. Build a Plan

Draft a Marketing and Communications plan as a sub plan to the overall Records Strategic/Master plan. This will:

- define the audiences
- provide guidance for consistent messages
- build a road map for when marketing should be done
- set standards for how the marketing will be accomplished

The Foundation ⁽⁴⁾

4. Know your organization

Study:

- Strategic Plans
- Annual Reports
- Business Plans (of each department)
- Budgets (of each department)
- Material related to the vision or mission statement

The Foundation ⁽⁵⁾

4. Know your organization

“Dig” for the information:

- Budget line
- “¾ time FTE – for Administrative Relief and *records* clean up.”

- Survey Servers/Networks
- How much user data was on the servers 12 months ago and how much today? What is the rate of growth and what will the amount of stored data likely be at the end of the next 12 months?

The Foundation ⁽⁶⁾

4. Know your organization

Interact with managers as often as possible,
formally and casually.

What are their philosophies:

“We should be a leading-edge organization.”

or

“We should learn from the mistakes of others.”

The Foundation (7)

5. The Me Factor (selling you as the program)

The Record Manager walk in the meeting room in jeans and a t-shirt, apologizes for his appearance and explains that there is a big records room move happening today and he is pitching in. Seems justified enough, on with the meeting.

Meanwhile, the folks around the table in the suits and dress outfits see the Records Clerk (regardless of actual title) making a pitch for more resources.

Had the same Records Manager arrived in a shirt and tie, the perception may have been one reflective of a *Manager* prepared to support budget submissions.

Perception is everything, whether talking about a product or personal attributes.

The Foundation (8)

5. The Me Factor (selling you as the program)

- Every action ...
- Every conversation ...
- Every piece of good or poorly written documentation ...
- Even the personal attributes (dress, personal appearance, speech, conduct personality and knowledge) ...

... of the Records Manager (and the Records team members)
is a reflection of the RIM program itself.

Build the Approach

1. Who is the target audience?

- Senior management
- Department Managers
- Professional staff
- Administrative staff/Records Clerks
- Project teams

Build the Approach⁽²⁾

2. What is the message for each audience?

Identify the concerns of each audience.

- Senior management: How much will it cost and when will it be completed?
- Department Managers: What impact will this have on the daily operations of my department and will it effect my budget?
- Professional staff: How much time do I have to put into the project and will I be able to find my stuff when it's done?
- Administrative staff/Records Clerks: What is this going to mean to my daily activities once we complete the project and I become responsible for our department's records on an on-going basis?
- Project teams: What work do I have to do and when am I expected to have it done?

Build the Approach⁽³⁾

3. How much detail should be provided?

Each audience will have differing levels of need regarding the amount of detail they require, as well as what the details should cover.

Ex: time lines, resourcing, budget, processes, outcomes, tasks.....

Build the Approach⁽⁴⁾

4. What format will be used?

- Group meetings
- Personal meetings (formal and informal)
- Emails
- Phone calls
- Newsletters
- Posters
- Memorandums
- Intranet posting/collaboration site
- Consider the language used (in all formats above)

Build the Approach⁽⁵⁾

5. Who is the competition and how do you compete?

The competition is other departments or projects seeking budget dollars or resources.

You compete by showing return on investment or cost recovery as well as the benefits to individual and the organization.

Instead of competing head-to-head (when the odds don't look good), consider being complimentary in your budget request.

Build the Approach⁽⁶⁾

6. Going beyond direct communication

- The Me factor
- Follow through and follow up (Service Excellence)
- Walk the talk
- Ask satisfied customers to be your 'salesman'
-

“Since you're satisfied, could you tell a friend?”

Developing Presentations

The sample slides that follow are from the City of Red Deer. It introduces the program to Councillors and requests staffing increase approval.

Provide Background

Records & Information Management The Past To The Present

- Several reviews – failing grades
- FOIP brings The City into action
- Records & Information Coordinator position established
- Electronic records management piloted

Note Successes

Successes Over The Past 3 Years

- Records driven basement renovation
- Safe, secure and properly organized record storage
- Inventories of inactive records created
- Greater compliance with corporate Retention, Disposition and File Classification Manual
- Significant increase in Archival holdings
- Records & Information Coordinator invited, not avoided
- Processes have been implemented that have resulted in better work practices

Successes (continued)

- Several tons of paper have been kept from the Landfill
- Departments wanting electronic records management
- Records Clerks in each department are enthusiastic
- Identified and corrected health and safety issues (mold, retrieval equipment)
- Identified space saving opportunities and assisted departments with implementation
- Created cost savings through purchases of standardized equipment and supplies

Demonstrate Successes

Before & After



Before & After



Convey the Driving Forces

Records Management Is A Necessary Component Of All Business Activities

- Governance
- Financial Management
- Administration
- Taxation
- Infrastructure
- Community Programming
- Historical Preservation

The Driving Forces Of A Records And Information Management Program

- We are in the early years of the Information Age
- 54% of Canadian households have computers and want to interact with government and business by electronic means
- Record holdings are increasing at staggering rates. Corporations that consciously control their records and stay near the leading edge of information management trends are going to be successful

Convey the Driving Forces⁽²⁾

Drivers Of Records And Information Management In The City

- Section 3 of the Strategic Plan:
“We must work ... to be ... accountable to the community.”
- Freedom of Information and Protection of Privacy Act
- Numerous business activity related Acts and regulations

Current Records Practices In The City Are Reactive Instead Of Proactive

- Being reactive is more expensive than having a plan -
“an ounce of prevention . . .”
- “We’re out of records storage space, what can we do?”
vs.
“We’re about to renovate, what should we consider for our record storage now and in the future.”
- “We need another filing cabinet.”
vs.
“What equipment would best suit our needs?”

Convey the Driving Forces⁽³⁾

Current Records Practices (continued)

- Casual staff are currently being used to meet critical needs
- Coordination is done on an ad hoc basis
- We are storing versus managing electronic records
- We're trying to catch up on our backlog while managing current information and addressing the need for implementing electronic records management

Most Business Units Are Not In Compliance With The Records Policy

- Compliance is sporadic
- Departments are at greater risk of contravening statutory requirements
- The completeness of FOIP responses and responses to discovery proceedings are questionable

Make it 'real' for them

**Electronic Record Storage Increased
By Over 400% In The Past 2 Years.**



2001	2003	2005
1,660 Cabinets	7,714 Cabinets	37,027 Cabinets

Show What's Next

Where To From Here

- Here are just a few sample tasks that will need to be tackled:
 - Continue electronic records management software (PC DOCS) rollout
 - Migrate existing network files into PC DOCS
 - Ensure all department's current and inactive files are organized according to the corporate classification scheme
 - Initiate annual file disposition in all departments
 - Create and maintain vital records protection and recovery plan

Records Management In 2004

- Build a corporate records program framework and action plan to address:
 - Accessibility
 - Usability
 - Accountability
 - Integrated Approach (lifecycle management)
 - Planned & Coordinated Approach (corporate vs departmental)
 - Identify Future Planning to Protect Information Assets (intellectual property, business continuity, historical preservation)
 - Identify Resourcing Requirements (2005 and beyond)

Be Clear About the Request

Records Management In 2004

- Recruit a Records Analyst and a Records Technician to continue to make progress while developing the corporate plan, including:
 - Rollout Electronic Records Management
 - Assist departments with back-file cleanup
 - Address corporate and departmental emerging issues

Records Management In 2004

- Recruit 2 Records Technicians to address critical needs within the Engineering and I & L departments

Thank You for Attending

Additional questions? Contact:

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Information

Innovation