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Making it Stick: Records Management Training Approaches

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Several weeks ago the University Archivist and I conducted our bi-annual University Archives and Records Management training session, part of our Office of Human Resources Faculty and Staff Development Program. This got me thinking about the various strategies, methods, and approaches records managers employ when conducting training and outreach. I reached out to my peers via SAA's records management and ARMA's EDU listservs to get a sense of just that, and hopefully learn some new tips and tricks!

The following is an overview of responses through which themes of visibility, focus, repetition, and trust were reoccurring. Thanks to Peggy Tran-Le, Cheryl Badel-Stevens, Peg Eusch, Chris Wydman, George Despres, and Hillary Gatlin for sharing their insights.

Visibility is vital. While records professionals may want to nerd out on recordkeeping topics, our users may not be as pro-active. So how to improve participation in records management training (RM)? Make it hard to miss. Incorporate records management training classes with new employee orientations, or pair it with your organization's annually required training on information security or compliance. Reserve a slot in professional development services programs, or space at annual events or expos. In true lifecycle fashion, don't forget to consider departing employee check-ins and exit interviews as points at which to engage users concerning record transitions and purging.

Focus your approach. Once you've captured some attention it's time to drop some knowledge. Develop training consultations around specific recordkeeping topics such as developing effective filing systems, understanding retention schedules, shared drive management, or email retention. Create job aids like RM cheat sheets, quick reference guides, PowerPoint modules, or a Libguide (which tracks usage stats). Focus on particular needs that users can implement directly in their daily work.

Virtual potential. Many records managers may work in decentralized organizations, with distributed offices or campuses. Providing a virtual RM training presence boosts program visibility and increases engagement opportunities. Rather than reinventing the wheel, co-opt the service of an internal learning management system, like Blackboard, or a platform like YouTube to create training videos. These can range from voice-over PowerPoint presentations and subject specific Skype sessions, to casual discussions describing what RM is all about and off-the-cuff Google hangouts.

Repetition rules. Effective and consistent engagement comes from strong relationships, and that starts at the employee level. Target specific user groups like financial or human resource administrators, IT facilitators, or committees such as an Administrative Data Users Committee. Get more granular by conducting one-on-one consults where applicable. Develop repetitive outreach through quarterly newsletters or monthly emails. Consistency in RM training opportunities and resources leads to buy-in, which leads to trust, the keystone of any relationship.

Have fun with it! The following are some fun outreach ideas you can employ in your organization to build visibility and develop relationships:

- Post weekly RM tips on your organization’s media platform of choice.
- Monthly quizzes with prizes. Chocolate is effective!
- “RM Nuggets”, or short pointed articles, in other department’s newsletters.
- RM Literature distributed to departments annually to cover employee turnover, or included in new employee and departing employee packets.
- Web tutorials and quizzes reporting on completion by department to up gamesmanship.
- At trainings, encourage attendees to introduce themselves and what they hope to learn. Attempt to address those concerns directly, or use them to craft a new training!
- Share RM in the news. Make it real and tangible.
- RM on Demand; Quick, topic-specific, ready-to-be shared modules.