

**Delivering Value for Money: why and how institutional
archives should market themselves to their internal publics**

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Abstract

This dissertation puts forward the case for employing internal marketing methodologies within the context of institutional archives. It highlights the paucity of professional literature advocating the use and value of internal marketing, and the widespread existing misconceptions about the subject. The study explores the benefits that implementing internal marketing can deliver to both the archive and its parent body in order to protect the archive's funding and existence. Central to this consideration is the argument that internal marketing does not just constitute promotional activities, but rather involves realigning the focus of institutional archives to identifying the needs of their internal customers, leading to the development of services that will embed the archive in the core work of its parent body. The study additionally argues that a number of the ambitions outlined in current professional policies and strategies, including *Archives for the 21st Century* and the *National Strategy for Business Archives (England and Wales)*, can be successfully achieved through the use of internal marketing. A practical blueprint is also provided in which the process of creating an internal marketing programme is explained, including the use of marketing tools and techniques, and pragmatic suggestions made in relation to the development and promotion of relevant services to internal customers. The research is centred around the views and experiences expressed in interviews with representatives from four institutional archives. These case studies are included as examples of existing good practice in the area of internal marketing, with their efforts forming the backbone of this study. It is demonstrated that the use of internal marketing can ultimately strengthen the position of the archive within its parent organisation.

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1 Introduction

Institutional archives are those that exist as a department or service within a larger organisation, be it a private enterprise or a public sector body. As such, the majority of their funding is provided by their parent, rather than through external sources¹, while their collecting remit is primarily, but not necessarily exclusively, focused on the records of the parent body. These characteristics carry significant implications for the agenda of an institutional archive, as its first priority must be to serve the needs of the organisation of which it is a part. The onus, therefore, is on the archive to identify the requirements of its internal publics, and ensure that the services it provides are adequate to meet those requirements. An institutional archive cannot merely assume that the types of services provided to external users will suffice for their internal counterparts, nor that decision-makers within the parent body will consider the core archival activities of acquisition, preservation and cataloguing alone to be sufficient justification for continued funding. As Victor Gray has argued: ‘...if archives are to be taken seriously in the way that we wish, then we have to demonstrate the relevance of what they are and what we do’².

This study contends that internal marketing methodologies can support institutional archives in becoming relevant and valuable to their internal audiences. Firstly, internal marketing requires that archivists think of their internal publics as ‘customers’ as well as ‘users’. While this may perhaps appear to be a trivial issue of semantics, the use of the term ‘customer’ indicates a more service-oriented approach where the archive’s offerings are developed in response to the needs of the customer. Once ‘users’ are also considered as ‘customers’, there is also an inherent emphasis placed on the provision of customer satisfaction and value, concepts that should be integral to the mindset and function of an institutional archive in relation to their internal publics.

Secondly, this study will demonstrate that internal marketing comprises a holistic approach to the assessment of an archive’s current offerings and the development of more relevant

¹ For example, the Heritage Lottery Fund.

² Victor Gray, ‘Relating into Relevance’, *Journal of the Society of Archivists*, 24:1, (2003), p11.

services. A common misconception of internal marketing is that it is simply a synonym for promotion, and as such is only useful to an archive when developing a new leaflet, poster or advertising campaign. Such a narrow understanding of internal marketing can prevent institutional archives from taking advantage of a methodology that could enable them to strengthen their position within their parent body. This study seeks to demonstrate that internal marketing is in fact a complete 'process responsible for identifying, anticipating and satisfying customer requirements'³. As argued by Kotler and Armstrong, this process, discussed further in Chapter 2, should involve analysing marketing opportunities, selecting target markets, developing a marketing mix, and managing and evaluating the marketing programme⁴. Ultimately, the internal marketing process should produce and promote a range of services that provide benefits for customers and meet their most important needs⁵.

However, the benefits that internal marketing can provide to institutional archives do not appear to have been explicitly recognised or advocated by the archives profession. While the Business Archives Council and Managing Business Archives website do seek to educate on how to exploit the holdings of business archives⁶, little has been written within the theoretical or professional context about why and how institutional archives should undertake internal marketing⁷. There are, however, tentative signs that the profession is recognising the need for the benefits internal marketing can provide, if not identifying it as the means of achieving these benefits.

In 2009, the *National Strategy for Business Archives (England and Wales)* was issued with the aim of raising the profile of business archives, encouraging their use by both business

³ The Chartered Institute of Marketing, *Marketing planning toolkit for small businesses*, (The Chartered Institute of Marketing, 2009), available at <<http://www.cim.co.uk/marketingresources>>.

⁴ Kotler, P and Armstrong, G, *Marketing: An Introduction*, 4th edn, (Prentice Hall, 1997),p49.

⁵ Elliott de Sáez, E, *Marketing Concepts for Libraries and Information Services*, 2nd edn, (Facet Publishing, 2002), p7.

⁶ The Business Archives Council provides guidance to business archives via its website, and highlights issues of professional interest in its annual publication *Business Archives: Principles and Practice*. The Managing Business Archives website is available at <<http://www.managingbusinessarchives.co.uk>>.

⁷ Chris Weir and Elizabeth Hallam Smith have both written in the *Journal of the Society of Archivists* regarding the value of employing internal marketing methodologies to enhance the development and delivery of services to customers. However, in both of these articles, the focus is predominantly on external marketing, with only a brief mention of internal marketing by Hallam Smith.

and researchers, and ensuring the development of representative collections⁸. The Strategy identifies four strategic goals, the first of which seeks to support business archives by: 'raising awareness among businesses of the value of their records and archives...'⁹; it is the responsibility of institutional archives to ensure that they are providing relevant services to their parent body that exploit the value of their records. The process of internal marketing, with its focus on customer needs and the development of services to meet those needs, is a valuable tool in achieving this strategic goal.

The policy *Archives for the 21st Century* sets out the then government's vision of the potential of publicly funded archives and the ways in which they can deliver social benefits. However, as this policy predominantly focuses on the external face of archives, it is easy to overlook the implications it contains for their responsibilities to internal audiences. In particular, the report looks forward to an environment where:

Public sector organisations and businesses make better decisions because they have access to all the relevant evidence and are fully informed about lessons from the past. The economic potential of historic information to the business community is unlocked and fully exploited¹⁰.

The value of archival records in supporting decision-making and efficiency in organisations has long been understood by archivists. However, its inclusion in *Archives for the 21st Century* as a *potential* benefit of archives would suggest that internal audiences as perhaps being neglected in favour of serving external users. If this is indeed the case, archivists should look to employ internal marketing as a means of reassessing the priorities and activities of their archive to ensure that they can contribute to achieving organisational objectives¹¹.

⁸ *National Strategy for Business Archives (England and Wales)*, (The National Archives, July 2009), p4.

⁹ *Ibid*, p6.

¹⁰ HM Government, *Archives for the 21st Century*, (The Stationery Office, 2009), section 2.1.5, p9

¹¹ *Ibid*, section 5.6, p21.

The current economic climate has created a further imperative for institutional archives to provide relevant and valuable services to their parent body. The effects of the global recession have forced many businesses to make efficiency savings, implementing cuts in any areas that are not considered to be crucial to the core functions of the organisation¹². The public sector, too, is not immune, with government departments looking to reduce their expenditure significantly over the course of the current Parliament, with one early casualty being the Museums Libraries and Archives Council, which will be abolished by 2012¹³. Since the commencement of this research, the potential impact on institutional archives has begun to filter into professional debate, with a recent strand on the NRA Listserv assessing how the sector should act in the face of budget cuts¹⁴. Within this debate, attention has been drawn to the need for institutional archives to demonstrate their worth internally:

...I also wonder what thought individual archivists...are giving to this question nearer to home?...I mean the identification of key stakeholders within their organisations (in whatever sector that may be) in whose hands internal budget decisions may be made; the marshalling of statistics and facts to prove the value of the service and, perhaps most crucially of all, evidence of how the archive services is directly aligned with the strategic priorities of the organisation as a whole and is actively and demonstrably helping it to achieve them?¹⁵

It is in this professional debate that this study is rooted, aiming as it does to argue the case for employing internal marketing as the means of making institutional archives relevant to their parent body and demonstrating the value that they provide. It is hoped that this study

¹² Details of the Department of Culture, Media and Sport's proposals can be found at http://www.culture.gov.uk/news/media_releases/7297.aspx.

¹³ HM Treasury, *Budget 2010*, (The Stationery Office, 2010), pp 42-43, available at http://www.direct.gov.uk/prod_consum_dg/groups/dg_digitalassets/@dg/@en/documents/digitalasset/dg_188581.pdf.

¹⁴ The strand was initiated, in anticipation of the emergency budget, on 21st June 2010 by David Mander, who highlighted that archives in the public sector will need to make changes to the way they work if they are to continue to survive, and called for a debate about what stance should be taken by the profession. Available at <https://www.jiscmail.ac.uk/cgi-bin/webadmin?A2=ind1006&L=ARCHIVES-NRA&F=&S=&P=95983>.

¹⁵ Steve Bailey, NRA listserv discussion, 21st June 2010, available at <https://www.jiscmail.ac.uk/cgi-bin/webadmin?A2=ind1006&L=ARCHIVES-NRA&F=&S=&P=10092>.

will go some way to providing a substantive, and practical, contribution to the continuing professional debate.

A literature survey conducted at the outset of this research revealed that little has been written on the subject of marketing within professional archival literature, and even less that deals specifically with internal marketing. Use has therefore also been made of relevant literature within the fields of museums and library and information services, together with marketing literature for the commercial sector. It is argued that, while requiring a measure of adaptation for the archives field, such material is extremely relevant to this study.

In order to build on the small amount of relevant literature on the subject of internal marketing, it was thought essential to obtain the opinions and experiences of professionals who currently employ internal marketing within the institutional context, and face-to-face interviews with five individuals in four case study archives were therefore conducted. Of the archives selected, two were public sector and two private sector (see below for more details); and it was felt that this selection would provide a useful means of assessing the approaches of archives in each sector. In each case a senior archivist was interviewed. These interviews were semi-structured and informal in nature in order to elicit the honest views of the respondents and, while the core areas of enquiry were determined in advance, the line of questioning was largely dictated by the individuals' responses, as advocated by Seidman¹⁶. However, both of the private sector archives requested that the questions be sent to them in advance, and while this enabled them time to give detailed thought to the subject, resulting in more thorough responses, and to prepare supporting documentation, it was necessary to ensure that the respondents did not subsequently control the direction of the interview. It should be noted that the scope of this study does not include the opinions of other employees in the organisations, and so the data only reflects the archivists' opinions as to the role and efficacy of their internal marketing programmes. Each interview, lasting approximately one hour, was conducted in the respondent's place of work, and was

¹⁶ Seidman argues that the interviewer's questions should follow on from what the participant is saying, and that the interview should be moved forward by building on what the participant has begun to share. See Seidman, I, *Interviewing as Qualitative Research*, 2nd edn, (Teachers College Press, 1998), p66.

recorded, then transcribed in order to ensure that their views were accurately represented. For the purposes of publication, a small amount of data has been desensitised at the request of the participants (although every effort has been made to preserve the sense of the comments) and one case study has chosen to remain anonymous.

The case study institutions included in this study are briefly described below.

HSBC Group Archives

HSBC Group Archives¹⁷ holds one of the most important and extensively used bank archives in the UK, comprising historical material, including annual reports and records of local branches and staff, from the Hongkong and Shanghai Banking Corporation Ltd, HSBC Bank Plc, HSBC Bank Middle East Ltd, and Mercantile Bank of India¹⁸. Although open to the general public, the Archives exist principally to support the current work of the HSBC Group, and the majority of its funding is therefore provided by its parent.

Rachael Spree, an Assistant Group Archivist, was interviewed at HSBC Group Headquarters on 1st July 2010.

LSE Archives

The Archives at LSE¹⁹ was established as part of the Library in 1896 with the remit 'to gather primary resources of the history of social sciences'²⁰, and its holdings span the disciplines of economics, politics, sociology and anthropology. These collections are made available both to LSE's external and internal publics, but as 'its main funder is the university'²¹, the Archives have in recent years been working to increase usage by the latter group.

¹⁷ For further information about HSBC Group Archives see <<http://www.hsbc.com/history>>.

¹⁸ *HSBC Group Archives*, leaflet, (HSBC Holdings plc, 2007), pp4-5.

¹⁹ For further information about the LSE Archives see <<http://www.lse.sc.uk/library/archive>>.

²⁰ Sue Donnelly, interview, 5th July 2010.

²¹ *Ibid.*

The Archivist, Sue Donnelly, was interviewed at LSE Library on 5th July 2010.

The Parliamentary Archives

The Parliamentary Archives²², based at the House of Lords in London, comprises the records of the House of Lords and House of Commons, including original Acts of Parliament, records about the Palace of Westminster, and judicial papers. As with the LSE Archives, the Parliamentary Archives receives public money through its parent, the House of Lords and House of Commons, and is therefore open to external and internal customers. As the Archives is funded by both Houses, it is one of the few shared Parliamentary services and launched an internal marketing programme in 2009 to increase its profile amongst its internal publics.

Dr Caroline Shenton, Clerk of the Records, was interviewed at the Parliamentary Archives on 14th June 2010.

The fourth case study archive, that of a financial services company, has chosen to remain anonymous.

*

This study will begin with a discussion of the concept and practicalities of internal marketing, before moving on to outline the case for institutional archives adopting internal marketing methodologies. Subsequent chapters aim to build on this foundation by providing a blueprint for implementing the internal marketing process, initially examining approaches to and examples of planning procedures, then exploring the types of services that could be developed for internal customers, how they should be distributed and priced, and finally, demonstrating the importance of performance measurement and how this can be conducted.

²² For further information about the Parliamentary Archives see <<http://www.parliament.uk/archives>>

2. What is Internal Marketing?

Common Misconceptions of Marketing

At its core, marketing is concerned with determining and meeting the needs, demands, and expectations of the market or, in other words, the customer. However, many misconceptions exist about what marketing is and how it should be conducted, and the archives domain is no exception. It may be tempting for archivists to believe that marketing is purely about selling a tangible commercial product and therefore has no relevance to their work²³. Such an attitude is flawed in two respects; firstly, despite not offering a tangible product to the market, archives do provide services to their users, and these should be viewed as their products²⁴. Although the key tenets of marketing theory were developed with tangible products in mind, they are equally applicable to services²⁵. Secondly, the true emphasis of marketing is not on the mechanics of selling a product or service, but rather focuses on 'establishing what the customer wants, prioritising it, and delivering as much of it as possible'²⁶.

The association of marketing with the commercial sector has further generated the misconception that it is primarily a means of generating profit²⁷. Arguably, archives are held with the altruistic aims of preserving records of evidential and cultural value for future generations, and, therefore, the idea of applying a methodology that would exploit archival material for economic gain is perhaps understandably distasteful to archivists. This view, however, only recognises one potential use and outcome of marketing, and does not accommodate its value as a holistic approach to developing archival services and making them available to users.

²³ Hart, K, *Putting Marketing Ideas into Action*, (Library Association Publishing, 1999), p9.

²⁴ Indeed, throughout this dissertation the term 'service' is considered synonymous with 'product' and will be used in its place.

²⁵ In particular, the four Ps of marketing (product, place, price and promotion) which have subsequently been added to by numerous writers, as outlined in section 2.2. See Hart, K, op.cit., p9.

²⁶ Hallam Smith, E, 'Customer Focus and Marketing in Archive Service Delivery: theory and practice', *Journal of the Society of Archivists*, 24:1, (2003), p36.

²⁷ Hart, K, op. cit., p8.

This view of marketing is additionally manifested when it is 'wrongly defined within the narrow context of advertising'²⁸ or promotion. The majority of archives promote their collections and services internally using tools such as leaflets and websites; however, expenditure on promotional material may be unproductive if the services offered do not fulfil the needs of internal customers. It is in the development of customer-focused services that the entire process of marketing is essential.

2.2 Marketing as a Process

Marketing is a powerful tool to ensure the success and relevance of an archive service, but this can only be exploited if archivists correctly understand what it involves. As previously outlined, 'marketing is the management *process* [emphasis mine] responsible for identifying, anticipating and satisfying customer requirements'²⁹. Kotler and Armstrong argue that this process should begin with market segmentation as a means of identifying groups of customers 'with different needs, characteristics or behaviour who might require separate products or marketing mixes'³⁰. Segmentation is essential as it is impossible to satisfy the needs of all customers in the same way; instead target groups should be selected, and this technique will be discussed in Chapter 4.

Once target customer groups have been identified, the next stage of the marketing process is to conduct a marketing audit of the archive's strengths, weaknesses and environmental challenges, together with the efficacy of current services in meeting the needs of the customers³¹. Marketing literature advocates employing SWOT and PEST analyses to establish the former³², while the latter should be assessed against the six Ps of marketing:

²⁸ The Chartered Institute of Marketing, *Marketing and the 7Ps*, (The Chartered Institute of Marketing, 2009), p2, available at <<http://www.cim.co.uk/resources/home.aspx>>.

²⁹ The Chartered Institute of Marketing, *Marketing Planning Toolkit for Small Businesses*, (The Chartered Institute of Marketing, 2009), p2, available at <<http://www.cim.co.uk/resources/home.aspx>>.

³⁰ Kotler, P and Armstrong, G, *Marketing: An Introduction*, 4th edn, (Prentice Hall, 1997), p50.

³¹ The majority of marketing literature discusses the importance of conducting a marketing audit, and how it should be conducted. Examples include Elliott de Sáez, E, *Marketing Concepts for Libraries and Information Services*, 2nd edn, (Facet Publishing, 2002), p30ff; Fisher, P and Pride, M, *Blueprint for Your Library Marketing Plan: A Guide to Help You Survive and Thrive*, (American Library Association, 2006), p52ff.

³² See for example The Chartered Institute of Marketing, *Marketing Planning Toolkit for Small Businesses*, (The Chartered Institute of Marketing, 2009), pp5-6; Smith, B and Awopetu, B, 'Remote

positioning, people, product, place, price and promotion³³. These tools and techniques, and their application, are explained in detail in Chapter 4.

The six Ps additionally form the framework of the next stage of the marketing process: the development of a marketing mix, defined by Kotler and Armstrong as ‘the set of controllable tactical marketing tools that the firm blends to produce the response that it wants in the target market’³⁴. The internal marketing mix should comprise the development of services that meet customer needs and that are delivered through convenient channels at a price that the customer is prepared to pay. This study addresses this stage of the process in Chapters 5, 6 and 7.

The final stage of the process comprises evaluation of the success of the marketing mix, as advocated by Stern³⁵. Done on a regular basis, this evaluation can enable an archive to learn from its experience, improve its services and provide evidence of its efficacy to senior management. Methods of performance measurement are discussed at greater length in Chapter 8.

Above all, the marketing process is customer-focused, with the aim of understanding customers’ needs and delivering services that provide customer value and satisfaction. The traditional Jenkinsonian approach to archival management focuses on the physical and moral defence of archives³⁶, and although these are crucial elements of the archivist’s role, archives exist to be accessed and used for current work and research, and must therefore be more outward-looking. This is particularly the case for institutional archives, where the parent body requires that the archive serve and support its corporate aims and objectives in

Control: Understanding what drives your market in the long term, available at <http://www.cim.co.uk/resources/plansandstrategy/home.aspx>.

³³ Originally just four Ps – product, place, price and promotion – this tenet of marketing theory has subsequently been developed to encompass a wider range of organisations than just the commercial sector. For example, Stern includes publics (or people) and production in *Marketing Workbook for Nonprofit Organisations*, (Amherst H. Wilder Foundation, 1990), while the Chartered Institute of Marketing increases the number to seven with the introduction of people, process and physical evidence. For the purposes of this study, people and positioning are considered in addition to the original four Ps, as advocated by Stern.

³⁴ Kotler, P and Armstrong, G, op. cit., p51.

³⁵ Stern, G, op.cit., pp87 – 88.

³⁶ For further detail of Hilary Jenkinson’s notion of the physical and moral defence of archives see Jenkinson, H, *A manual of archival description*, 2nd edn (Lund Humphries, 1937; reprinted 1965).

return for their continued funding. The marketing process is a management tool that requires organisations to think more strategically about the services that they offer, rather than just doing something because it has always been done. In this respect, marketing occupies a similar role to strategic business planning in its use of analytical tools to assess the current position of the organisation and determine the activities it should undertake in order to develop and strengthen itself. The marketing process provides a structured framework that archives can adopt or adapt in order to best align themselves with the requirements of their customers.

2.3 Internal vs External Marketing

It is with external marketing that archivists are probably most familiar, which involves developing and promoting services for audiences outside of the archive's parent body. At a broad level, the external audience of an archive is the general public at large, but the specific types of external publics will vary according to the nature of the archive³⁷. An effective external marketing programme will ensure that the archive delivers and promotes services and resources that are tailored to meet the needs of each of these audiences.

Internal marketing is closely related to external marketing, in that it is concerned with developing and promoting services that meet the needs of its users. Within the internal context, however, those users are the archive's parent body and its stakeholders, be they trustees, management, staff, or, where applicable, shareholders. As Hallam Smith argues, institutional archives, 'whose customers are primarily internal, are equally expected to deliver high-quality services, and are likely to be judged by commercial standards'³⁸. Internal marketing, therefore, is a means by which an institutional archive can develop, deliver and promote those services in support of the work of its parent body, thereby demonstrating value for money and justifying the allocation of financial resources.

³⁷ These commonly include family and local historians, school children, university students, academics, adult learners, and the media, to name but a few.

³⁸ Hallam Smith, E, *op. cit.*, p36.

2.4 The Relationship Between Marketing, Advocacy, and Outreach

The dearth of professional literature on the subject would suggest that many archivists do not necessarily consider internal marketing to be a priority activity. However, this attitude belies a lack of understanding of the interconnectedness of internal marketing with outreach and advocacy. The fact that the three are inextricably linked has been hinted at in several publications, but rarely explicitly stated:

Advocacy is a state-of-mind and 'set' of infrastructure tools that support an array of outreach programmes and activities...However, the framework for advocacy work must not be transparent. Too important to be left to chance, it must be articulated into formal, planned components embedded within the managing structure and mission functions of the recordkeeping regime. Advocacy is clearly about relationships with people to change their attitudes and behaviours.³⁹

Advocacy then, is about understanding the value of archives, being able to communicate this value to others and to using it to inform outreach activities. This statement clearly identifies advocacy as a key component and enabler of outreach activity, but the emphasis on the importance of planning and formal structure in order to change attitudes suggests that this work should be framed within the marketing process as previously outlined.

A more explicit connection between marketing and outreach has been drawn by Christopher Weir. Weir identifies archival outreach as being a myriad of activities used to engage with people, and argues that it should be viewed within a marketing context: 'Placing outreach activities in a marketing context ensures a solid management basis for outreach, rather than relying on a one-off "let's have a go" approach'⁴⁰. Again, the marketing process is viewed as enabling a more rigorous, professional approach to planning and executing archival

³⁹Pederson, A, 'Advocacy & Outreach', in Bettington, J, Eberhard, K, Loo, R and Smith, C (eds), *Keeping Archives*, 3rd edn, (Australian Society of Archivists, 2008), p435.

⁴⁰Weir, C, 'The Marketing Context. Outreach: luxury or necessity?', *Journal of the Society of Archivists* 25:1, (2004), p73.

activities. Weir goes on to credit the marketing process with selecting target audiences, identifying outreach activities that are appropriate to the archive's resources and staff skills, and evaluating the success of these activities⁴¹.

From these writings at least, it is evident that outreach and advocacy are interdependent with marketing, both external and internal. While outreach and advocacy are generally considered to be central to the work of an archive, the role of marketing in supporting these activities, particularly those targeted at internal audiences, has not been sufficiently recognised by the profession. The benefits of applying the marketing process are not limited to those outlined by Pederson and Weir and will be considered in the following chapter specifically in relation to the internal context.

⁴¹Ibid, pp74 & 76.

3 Why Undertake Internal Marketing?

It is undoubtedly tempting for archivists to sideline internal marketing, believing that it will divert already stretched financial and staff resources from the archive's other core activities, such as acquisition, cataloguing and preservation. This situation is likely to continue as long as many of the misconceptions regarding marketing prevail within the profession, leaving institutional archive services vulnerable to cuts and down-sizing. However, an effective internal marketing programme can strengthen an archive's position within an organisation and enable it to deliver significant benefits to its parent body, as identified by the archivists at each case study institution.

3.1 Benefits to the Archive

3.1.1 Protection of the Archive and its Funding

The fundamental motivation for pursuing a programme of internal marketing is to protect the archive's funding and secure its long-term survival. The economic downturn and impending austerity measures have only served to force the profession to more seriously consider how this can be achieved⁴². More than ever, archives need to be embedded in the work of their parent body and the process of internal marketing can assist in attracting support from senior decision-makers.

In June 2010, the Chancellor of the Exchequer delivered an emergency budget, the contents of which carry a number of implications for institutional archives. Firstly, the economy growth forecast was revised down in 2011⁴³, implying that businesses might struggle to recover from the recent recession for longer than was originally anticipated. Many organisations are likely to seek areas in which they can make savings, potentially by means of cuts to non-essential services. In this situation, the archive cannot afford to be considered a peripheral luxury that

⁴² As already outlined, this debate was initiated on the NRA Listserv in June 2010, and is available at <<https://www.jiscmail.ac.uk/cgi-bin/webadmin?A2=ind1006&L=ARCHIVES-NRA&F=&S=&P=95983>>

⁴³ HM Treasury, *Budget 2010*, (June 2010), p20, available at <http://www.hm-treasury.gov.uk/d/junebudget_complete.pdf>

makes no significant contribution to the core work of the organisation. It is not enough for the staff of an archive to assume that decision-makers understand the value of archival records and share their commitment to preserving this resource.

The 2010 Budget not only affects archives in the private sector, as average real terms budget cuts of 25% to virtually all government departments are proposed over the next four years⁴⁴. Institutional archives within public sector bodies, such as universities and local authorities, will inevitably face cuts to their funding and must act quickly if they are not to be seen as a soft target for the most drastic of these.

It is the argument of this study that the perceived, and actual, value of institutional archives could be greatly enhanced, and their funding more successfully protected, by employing an internal marketing programme. Such a programme would provide a strategic framework in which an archive can assess and understand the corporate objectives of its parent body and the current business needs of staff, continually develop archival services to support these and ensure that staff are kept aware of them, and determine the efficacy of its offerings. If conducted with rigour and commitment, internal marketing can result in the archive being considered integral to the ongoing success of the organisation, as has been the experience of the LSE Archives. Although funded by the School, in 2005-06 'only 12% of...users were from LSE, and...with that level of internal usage it was very hard to lobby for resource...because the argument was always "well, LSE doesn't really use the archive that much therefore everything you do should be funded by external funding"⁴⁵. It was therefore decided to undertake internal marketing as a means of broadening and promoting the services that the Archives offered to LSE's academics, students, and administrative staff:

...I wanted to get the archives much more involved in teaching, and I kind of knew we couldn't do that until there was a generally increased level of

⁴⁴ For further details see <<http://www.telegraph.co.uk/finance/financetopics/budget/7515307/Budget-2010-Whitehall-details-11bn-of-cuts.html>>. The Department of Health and the Department for International Development are the only two departments that have had their budgets ring fenced by the government.

⁴⁵ Sue Donnelly, interview, 5th July 2010

knowledge about the archives because I wanted, and I still want, to really embed the archives in the core work of the institution so that we're not just a little luxury extra added on the side...I think it [the internal marketing programme] does mean we will be viewed on an even playing field with other parts of the library...we are being seen as much more of an equal player in the debate, even if we don't win in the end it won't be because the archives are just a tiny luxury item...⁴⁶

It is arguably impossible to guarantee that the funding of an institutional archive won't be cut in the near future; however, as the experience of the LSE Archives demonstrates, effective internal marketing can alter the perceptions of decision-makers within the parent body about the continuing value of the services the archives provides.

3.1.2 Raising the Archive's Profile

Allied to the protection of the archive and its funding, and as the interview with Sue Donnelly suggests, internal marketing can also serve to raise the profile of the archive. By involving the archive in the bread and butter work of its parent body and promoting its existence to staff, it necessarily becomes more visible within the organisation. Says Caroline Shenton: '...the more people who know about it [the Parliamentary Archives], whether that's Members of Parliament or Members of the House of Lords, or say senior managers within the administration, the more likely we are to get support for our plans'⁴⁷.

Much of the emphasis of the Parliamentary Archives' internal marketing has been on integrating to a greater extent with the overall corporate body, for example by adopting a common logo with the other shared services in Parliament, and marketing itself through existing internal channels. The resulting benefit is that the Archives appears 'to be corporate and... mainstream within Parliament, dealing with things that actually affect the day-to-day

⁴⁶ Sue Donnelly, interview, 5th July 2010.

⁴⁷ Caroline Shenton, interview, 14th June 2010.

running of the various activities'⁴⁸, reminding their customers that the Archives is integral to the functioning of both Houses.

When internal marketing is considered to be a lower priority in relation to the other functions of the archive, the inevitable outcome is that customers are unaware of the material that it contains, are unable to access the resources that they might need, and consequently do not appreciate the value of the archive. As evidenced by the archivist of the financial services company: '...without profile-raising you can undermine the position of the archive, in any organisation'.⁴⁹

3.1.3 Enhancing Collection Development

An unexpected benefit of internal marketing identified during the interview process is the role it can potentially play in developing an archive's holdings. In organisations that do not have a retention schedule that requires staff to transfer material of continuing value to the archives, it can be challenging to identify and acquire the records that are needed for a complete and representative collection. By raising general awareness of the archive and its work, ongoing internal marketing can ensure that the archive becomes part of employees' consciousness to the extent that they think to identify material from amongst their work that should be deposited in the archive.

The HSBC Archives found this to be the case when they decided to market their services to the local high-street branches of the bank, as a means of ensuring that branches knew that the Archives is 'here to help them with their queries, and also to take things off their hands and get them into the collection'⁵⁰. This material has served to broaden the scope of the Archives' holdings, improving the resources available to staff and historians alike, and providing a more complete picture of the bank's heritage.

⁴⁸ Caroline Shenton, interview, 14th June, 2010.

⁴⁹ Archivist, financial services company archive, interview, 30th June 2010.

⁵⁰ Rachael Spree, interview, 1st July, 2010.

3.2 Benefits to the Parent Body

Internal marketing is first and foremost about focusing outwards on the customer, rather than inwards on the archive itself, and, as has already been seen, this process can benefit the archive by increasing its visibility within its parent body and strengthening its position as an integral part of the organisation. At the same time, the parent body derives benefits from an archive service that is more relevant to its current needs

3.2.1 Support for Current Business Activities

One way in which this can be manifested is through the archive's support of the organisation's staff and their day-to-day work.

Institutional archives contain the evidential memory of their parent body, an information resource of infinite value to today's employees. Unfortunately, 'in a business that is very fast-moving, people are not used to using archives'⁵¹; internal users are often unfamiliar with using archival catalogues to identify the records that they require and frequently do not have the time to undertake extensive research. The use of internet search engines as a means of gaining rapid access to information has increasingly usurped the role of archives as a perceived source of reliable data⁵². Archivists, however, know that the records held in their collections, together with their skills in information location and retrieval, can provide staff with all of the information that they need to perform their roles with greater speed, efficiency and to a higher standard. In this way, the support that an archive can offer is likely to be of significant value at a time when organisations are inevitably looking for ways in which to improve staff productivity and efficiency.

Archivists therefore need to ensure that they are familiar with the work of each area of the business and the potential informational needs of staff, so that they can assess the services

⁵¹ Archivist, financial services company archive, interview, 30th June 2010.

⁵² 'I would say that you have to work a lot harder with your internal audience...With an internal market, people have a lot of things on the internet to do with their work.', Sue Donnelly, interview, 5th July 2010.

that they are offering in relation to those needs. For example, archives can be used by company designers to provide inspiration for new or retro designs, thus reducing the costs of product development. Institutional archives can also provide support to legal departments in the event of disputes or litigation⁵³. Internal marketing techniques such as customer segmentation and SWOT analysis, discussed at greater length in Chapter 4, can facilitate the assessment of needs and services, while promotional techniques will ensure that existing and potential customers are aware of how the archive can be used to help them in their work.

3.2.2 Support for Brand Identity

The success of any organisation, be it part of the public or private sector, depends to a large extent on how its brand is perceived, and institutional archives have a crucial role to play in developing awareness of its parent's brand identity. While the necessity of increasing brand knowledge amongst an organisation's external users occupies large sections of almost every book on the subject of marketing⁵⁴, the value of communicating brand heritage and identity to internal employees is given far less attention and is often neglected all together. Although it is impossible to be certain of the cause, it is possible that this value is not sufficiently understood by the archives profession, or that it is simply not considered to be a priority activity for institutional archives.

If employees of an organisation fully understand the nature of its brand, the heritage that supports it, and how this is perceived by external customers they will be in a much better position to promote the organisation and its products/services in a more well-rounded way. In practice, this could ensure that customer service staff respond to enquiries in a manner that is in keeping with the organisation's image, or that sales staff are able to deliver pitches

⁵³ Managing Business Archives, *Exploiting the Archive*, available at <http://www.managingbusinessarchives.co.uk/getting_started/exploiting_the_archive>.

⁵⁴ Of the wide range of marketing literature aimed at commercial organisations, a good starting point on the subject is Kotler, P and Armstrong, G, *Marketing: An Introduction*, 4th edn, (Prentice Hall, 1997). For non-profit organisations, refer to Stern, G, *Marketing Workbook for Nonprofit Organizations*, (Amherst H. Wilder Foundation, 1990). While archives-specific internal marketing literature is virtually nonexistent, useful information and case studies can be found on the Managing Business Archives website, at <<http://www.managingbusinessarchives.co.uk>>.

that clearly differentiate the brand from its competition⁵⁵. This has proven to be the case at the financial services company, whose archive is involved in communicating the organisation's brand identity to its employees around the world:

We don't just have one brand...and each of those brands has its own history which matters in terms of their kinds of particular audiences... the history in the UK is seen as particularly important, that it is a long-established company, it has the expertise and experience in managing people's investments over long periods of time.⁵⁶

The financial services company employs staff around the world, and the archive has produced a pack of postcards of images from the collections and information about the company which is given to delegations of agents when they visit the UK in order to increase their understanding of the identity and heritage of the company's brand.

Through its use of internal marketing processes, the archive of this financial services organisation has identified a service that it can provide to the company and has developed a programme of activities and promotional material that communicate the company's brand identity to a wide range of employees. With this understanding of the company for which they work, employees are better able to sell its products and model the values that it has traditionally upheld. The ability to support an organisation's brand identity is not unique to the this archive; all institutional archives have the potential to enhance employees' understanding in this regard, enabling them to work with greater efficacy and conviction.

3.2.3 Employee Engagement

Internal marketing methodologies can further deliver benefits to the parent body by ensuring that the heritage contained within an institutional archive communicates the organisation's

⁵⁵ Managing Business Archives, *Exploiting the Archive*, available at <http://www.managingbusinessarchives.co.uk/getting_started/exploiting_the_archive>, accessed 22/06/2010.

⁵⁶ Archivist, financial services company archive, interview, 30th June 2010.

culture to its employees in order to increase loyalty and motivation, and ultimately improve levels of staff retention⁵⁷.

Induction, for example, is a particularly effective way of enthusing new employees, and is a service that a couple of the case study archives employ. If new starters feel that they are part of an organisation with long-standing values that they can share and be inspired by, they are more likely to remain for the long term, ensuring the kind of work force stability that underpins an organisation's success. The evidence of these values and heritage is held by institutional archives, and internal marketing should be employed to ensure that this is being used to deliver value to the parent body.

Also important to an archive's role in supporting employee engagement, is the ability to capitalise on people's enjoyment of and interest in heritage, something that has been recognised by HSBC Group Archives:

People – the high-up people if you like – are very keen on making sure that people enjoy coming to work, that there's a good work-life balance, that you get the most out of your job that's when you put the most back into it, and I think that history and heritage is something that a lot of people identify with, find enjoyable and can tie into their work where perhaps they didn't think they could originally.⁵⁸

Organisational heritage has the ability to make employees feel that they are part of something bigger than their individual role and that they work for an organisation that has values and achievements that it can be proud of, consequently increasing their motivation and loyalty. However, this ability can only be successfully exploited by implementing an effective internal marketing programme that supports the identification of market segments and enables the development of activities that will be relevant to the situations of each group.

⁵⁷ Managing Business Archives, *Exploiting the Archive*, available at <http://www.managingbusinessarchives.co.uk/getting_started/exploiting_the_archive>.

⁵⁸ Rachael Spree, interview, 1st July 2010.

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The benefits provided to both the archive and its parent body through the use of internal marketing are significant and valuable. Employed effectively, internal marketing methodologies can embed the archive within the core work of the organisation, ensuring that it is an indispensable part of the business. However, in order for this to be achieved, archives must carefully plan and develop their internal marketing programme, as outlined in the following chapters.

4 Planning an Internal Marketing Programme

Benefits of Planning

Internal marketing can be a complex process, incorporating research, analysis, service/product development, design of promotional material, and performance measurement. This requires careful thought in advance if the programme is to be successful, as evidenced by the archivist of the financial services company: 'We are particularly conscious of planning in our department...if you know what you want to achieve...you've got to have a plan to get there. You can't do it without planning'⁵⁹. This section will outline a number of the benefits that can be derived from undertaking rigorous planning.

4.1.1 Understanding Customers' Needs

Archives do not exist in a vacuum, and services cannot therefore be developed and provided without reference to the requirements of the archives' users. This is perhaps especially true for institutional archives, which receive funding from their parent body on the understanding that the archive will support the needs of the organisation's employees, as discussed in the previous chapter.

Internal marketing techniques, such as market segmentation and market research, provide a planning framework in which groups of internal customers can be identified and their specific requirements determined, which in turn will inform the development of relevant services. These planning techniques (discussed in section 4.3.2) can be employed in varying depth identifying key internal markets in order to make the most effective use of resources. Without a sufficient understanding of internal customers' needs, archivists risk wasting money and staff time on services that are not relevant or useful.

⁵⁹ Archivist, financial services company archive, interview, 30th June 2010.

4.1.2 Assessment and Development of Services/Products

In his article, *Relating into Relevance*, Victor Gray exhorted archivists to 'analyse our weak spots and to acknowledge them honestly to ourselves. Equally we need to define our strengths and affirm them'⁶⁰. It can be difficult to accept that what once worked successfully is no longer appropriate or relevant for the current situation, but the services offered to the parent body must be those required by its employees if an archive's funding and existence is to be secured.

The planning process of an internal marketing programme enables archivists to analyse the efficacy of current services, together with the strengths and weakness of the archive and the environmental situation that it is facing. Internal marketing techniques such as SWOT and PEST analyses, outlined in section 4.1.3.2, provide an insight into the archive and its environment, while the information gained through market segmentation can be fed into the development or adaptation of relevant services. Business needs are very specific and often fast-moving, and archives need to ensure that they offer the right services from the outset. Spending time planning an internal marketing programme will ensure that mistakes are minimised as much as possible.

4.1.3 Involvement of Archives Staff

Implementing an internal marketing programme will inevitably bring about changes in the work of an archive, and this can be difficult for staff to accept and adapt to. Changes to services and promotional material that may have been designed by existing members of staff can generate resistance to any new offerings. In order to minimise the risk of staff becoming alienated and resentful, the planning process should involve as many people as possible; at the Parliamentary Archives, 'it was an open invitation to anybody who felt this was an issue that they wanted to get involved in'⁶¹. Allowing staff to participate and contribute ideas creates a sense of ownership of the process, increasing the likelihood that they will support

⁶⁰ Gray, V, 'Relating into Relevance', *Journal of the Society of Archivists*, 24:1, (2003), p7.

⁶¹ Caroline Shenton, interview, 14th June, 2010.

and cooperate with the outcomes of the planning stages. Through giving staff an understanding of the purpose of internal marketing and how it can strengthen the archive's position (and, subsequently, their jobs), the programme is likely to be more successful overall.

4.2 Types of Internal Marketing Plan

Having established the benefits of conducting thorough planning, this study argues that there are two key types of internal marketing plan that could be employed by archivists.

4.2.1 The Full Internal Marketing Plan

Much of the marketing literature for the commercial sector, as well as that written for library and information services, advocates a detailed strategic marketing plan to act as a 'road map' for achieving marketing goals and objectives⁶². This type of plan is similar in format to that generated by many archives as part of their strategic business planning, and includes:

- an executive summary;
- a description of the target market/s and its needs;
- analysis of the current market situation, i.e. the services/products currently offered, how they are made available, information on the macro-and micro-environment etc;
- internal marketing goals and objectives;
- the internal marketing strategies to meet those objectives;
- an action plan detailing what activities are to be done, by whom and when; and
- the controls to be used to monitor progress.⁶³

However, as this list of contents suggests, such a plan is necessarily lengthy and potentially time-consuming to compile, and while it would ensure that the internal marketing programme was carefully thought through, it is unlikely that many archivists would have the time to

⁶² Fisher, P and Pride, M, *Blueprint for Your Library Marketing Plan: A Guide to Help You Survive and Thrive*, (American Library Association, 2006), p27.

⁶³ Ibid, p28.

create this. It may instead be more useful to undertake an analysis of target internal markets and their needs, together with an environmental analysis of the archive, at the beginning of each year in order to keep this information as current as possible. Then, rather than creating a plan that spans a three to five year period⁶⁴, specific services or activities could be planned more along the lines of individual projects, allowing greater flexibility and responsiveness, an approach that has worked at HSBC Group Archives:

We don't have a specific marketing plan. We know our aims...so if we know that projects are going on where we can feed into that to support those ideas, then that's how we approach it. And equally, if we are approached by another party to say can we have your help with a project then we go down that route, but we don't have any strategic planning specific to marketing...it's very project-based.⁶⁵

Interestingly, none of the archives interviewed as part of this research employed a full marketing plan, confirming, perhaps, that many archives simply do not have the available time or resources to do so. A potential alternative, and one employed by a couple of the archives interviewed, is a marketing communications plan.

4.2.2 The Communications Plan

Marketing communications are the means by which promotional messages are delivered to target audiences, and include leaflets, websites, exhibitions and personal selling⁶⁶. A communications plan, therefore, outlines the organisation's promotional messages, to whom they are to be conveyed, how and by when, and is usually allied to a specific project plan.

⁶⁴ As has been suggested in Elliott de Sáez, E, *Marketing Concepts for Libraries & Information Services*, 2nd edn, (Facet Publishing, 2002), p206.

⁶⁵ Rachael Spree, interview, 1st July 2010.

⁶⁶ The Chartered Institute of Marketing, *How to Plan Marketing Communications*, (The Chartered Institute of Marketing, 2009), p2, available at <<http://www.cim.co.uk/marketingresources>>.

This approach, in combination with more detailed project planning as outlined above, may provide a more realistic, less time-consuming option to internal marketing planning than a full marketing plan, and has been successfully employed by LSE Archives for the George Bernard Shaw photographs project:

...we sat down and identified all of the potential stakeholders, the markets both internal and external, all the potential publications we might use, or mailing lists or whatever else it might be, and that's a document that is probably about five or six pages long, and then identified what communication happens when basically.⁶⁷

It is evident from the experiences of the archives interviewed that there is no one-size-fits-all approach to planning internal marketing. Individual institutional archives therefore need to determine what approach, or combination of approaches, best suits their department and its available resources.

4.3 The Internal Marketing Audit

The foundation of a successful internal marketing plan is objective self-assessment on the part of the archive. Archive staff should identify their internal customers, what support they require and what messages they want to hear from the archive. Archivists then need to make an honest assessment of existing services, how these are made available and at what cost to the customer, and as a result will be able to determine what services can be developed or adapted to meet the needs of the internal customer.

Conducting an internal marketing audit can therefore assist archivists to think analytically about their archive, and contribute to the development of a more effective internal marketing programme. The audit should be executed using the framework of the six Ps of marketing: positioning, people, product, place, price and promotion. While there are many tools and

⁶⁷ Sue Donnelly, interview, 5th July 2010.

techniques employed in commercial marketing, this study will focus only on those it considers to be most applicable in the archival context.

4.3.1 Positioning

The concept of positioning relates to the unique role that an archive services wants to play within its parent body, and how it would like to be perceived by its customers⁶⁸. In determining the positioning of an archive, staff should consider who or what is their competition, and the macro- and micro-environments in which the archive operates⁶⁹.

4.3.1.1 Competition

It is perhaps tempting for institutional archives to think that they have no competition within the organisation, that they perform a function that no other department does. However, while the records that they contain may be unique, their role in an organisation often is not. For example, employees may be more familiar with going to an organisation's library service for information and research, not realising that the archive may be better placed to help them with their enquiry. The Parliamentary Archives has found that Members and their staff are 'used to going to the Commons Library as their first port of call for reference information'⁷⁰, and, as a result, historical enquiries are often addressed to the librarians rather than the archivists. Now that Archives staff are aware of this situation, they have been able to target their internal marketing towards increasing awareness of the Archives amongst Members' staff, who can 'refer a member of the public who wants to know about the records of Parliament or the history of Parliament to us if they wish...'⁷¹. In addition, the Archives now participates in joint events with the Libraries of both Houses to provide a single offer to members of both Houses.

⁶⁸ Stern, G, *Marketing Workbook for Nonprofit Organizations*, (Amherst H Wilder Foundation, 1990), p32.

⁶⁹ Parton, E, *Developing a Marketing Programme for Waltham Forest Archives*, (unpublished MA dissertation, 2005), p29.

⁷⁰ Caroline Shenton, interview, 14th June 2010.

⁷¹ Caroline Shenton, interview, 14th June 2010.

Institutional archives may also find that they face competition from information and knowledge management services, who perhaps have different professional attitudes to managing and using information, or marketing departments that are often the first port of call for promotional images and designs and who may not think to involve the archive in this area. Institutional archives need to accept that they do face competition within their organisation, understand where that competition is from, and subsequently determine the point of difference that they can offer to customers.

4.3.1.2 The Environmental Situation

An essential component of the internal marketing audit is an analysis of the environment in which the archive operates, that is, the identification of those factors that affect the archive's ability to meet the needs of its customers⁷².

An archive's macro-environment is comprised of factors that exist in the wider political, environmental, societal and technological (PEST) spheres, the impact of which archives need to be aware and to anticipate when developing their internal marketing programme. In the context of an institutional archive, these could include the impact of the economic downturn on the parent organisation and subsequently the archive's funding, or the trend towards home-working that requires more services to be delivered online. Archives can best assess their macro-environment by undertaking a PEST analysis⁷³.

An archive's micro-environment is comprised of factors internal to the archive and its parent body, and is best assessed by means of a SWOT analysis which helps identify the strengths and weaknesses of the archive, together with the opportunities and threats that it faces⁷⁴.

The results will vary from archive to archive, but are only of value if the process is conducted honestly. A good approach is to gather a representative group of archive staff to brainstorm answers to each of the SWOT categories, which should result in more accurate, complete

⁷² Kotler, P and Armstrong, G, *Marketing: An Introduction*, 4th edn, (Prentice Hall, 1997), p71.

⁷³ A template for undertaking a PEST analysis can be found in Appendix 1.

⁷⁴ A template for undertaking a SWOT analysis can be found in Appendix 1.

data. Once the analysis of internal services has been completed, institutional archives should consider how they can capitalise on their strengths and opportunities, improve on their weaknesses, and combat any threats when developing their internal marketing programme. In particular, the Parliamentary Archives used the results to determine how their strengths and opportunities could be employed to combat any weaknesses and threats, an approach that encourages creative and constructive thinking.

4.3.2 People

In the context of internal marketing, 'people' refers to the archive's customers, or users, from within its parent body. Internal marketing first and foremost seeks to identify and fulfil the needs of customers, both actual and potential, and an archive must therefore understand who its internal customers are.

4.3.2.1 Market Segmentation

Market segmentation is the method most commonly employed commercially to divide the market into groups with shared needs or characteristics at which products and communications can be targeted⁷⁵. However, this technique does not appear to be widely practised within the archive sector, as evidenced by the fact that none of the archives interviewed for this research employed market segmentation in the form advocated by generic marketing literature. This may be attributable to the lack of archives-specific literature on the subject; a literature review for this study identified just three relevant articles, only one of which deals with internal users⁷⁶. The methods of market segmentation advocated by commercial marketing literature, such as geographic, demographic or psychographic⁷⁷, are not generally applicable to institutional archives and, without more

⁷⁵ Ibid, p202.

⁷⁶ Yeo, G, 'Understanding Users and Use: A Market Segmentation Approach', *Journal of the Society of Archivists*, 26:1, (April 2005), pp25-53; Yakel, E and Bost, L, 'Understanding Administrative Use and Users in University Archives', *American Archivist*, 57, (Fall 1994), pp596-615; and Conway, P, 'Facts and Frameworks: An Approach to Studying the Users of Archives', *American Archivist*, 49, (Fall 1986), pp393-407.

⁷⁷ Kotler and Armstrong (op cit, p202) provide a good overview of existing methods of market segmentation. Geographic segmentation involves division by nations, regions, counties etc;

substantial research into its application to internal archive users, archivists are likely to bypass this methodology.

All four of the archives interviewed for this research stated that they segmented their markets informally according to the archive staff's knowledge of the organisation and its employees. However, this study suggests that this approach could be enhanced by employing stakeholder analysis and mapping.

4.3.2.2 Stakeholder Analysis and Mapping

'Stakeholders are those individuals or groups who depend on an organisation to fulfil their own goals and on whom, in turn, the organisation depends'⁷⁸, in other words, they are the customers of an institutional archive. Analysis of internal stakeholders involves identifying all those groups who have, or could potentially have, a vested interest in the work of the archive. In addition to archive staff's knowledge of the parent body, use can be made of organisational charts, annual reports and other internal publications to determine the internal customers of the archive.

This process becomes more powerful when combined with the technique of stakeholder mapping, which identifies how interested each stakeholder is in the work of the archive, and how powerful they are to support or oppose this work⁷⁹. Stakeholders are assigned to one of four sectors, each of which require different actions on the part of the archive:

- lower interest / lower power – the archive adopts a minimum effort strategy for keeping these stakeholders informed about the archive;
- higher interest / higher power – these stakeholders are key players in the success of the archive and so the internal marketing strategy should be to work in partnership with them;

demographic segmentation by age, gender, family size etc; and psychographic segmentation by social class, lifestyle, or personality.

⁷⁸ Johnson, G, Scholes, K, Whittington, R, *Exploring Corporate Strategy: Text and Cases*, 7th edn, (Prentice Hall, 2005), p179.

⁷⁹ Ibid, p181.

- lower interest / higher power – the strategy should be to keep these stakeholders satisfied and to involve them where common ground exists; and
- higher interest / lower power – these stakeholders should be consulted and kept informed on the work of the archive.

When the Parliamentary Archives employed this technique during their planning process, they were able to identify those stakeholders who had significant influence but weren't currently interested in the work of the Archives. Consequently, staff were able to develop internal marketing strategies specifically targeted at these individuals in order to alter their perceptions of the Archives⁸⁰. Stakeholder mapping is a simple, effective way for institutional archives to identify their internal customers, to recognise that each has different needs and expectations, and to assess their services against those needs.

4.3.3 Product, Place and Price

Once the archive's customers and their needs have been identified, the next stage of the marketing audit will use that data to inform the analysis of the services, or products, currently offered by the archive and judge whether they meet those needs. Staff should work systematically through each service and honestly assess its efficacy in relation to the time, effort and resources required to deliver it. This process should also highlight areas where unmet needs exist.

The channels through which services are made available (Place) should be assessed at this stage. The majority of archives will have a physical location where services can be delivered to internal users, but archivists should also consider whether services are made available online, at employees' desks, or elsewhere. The convenience of these channels should be evaluated against the existing knowledge of the archive's internal customers in order to establish whether there are any barriers to access.

⁸⁰ A template for conducting stakeholder analysis and mapping, based on that used by the Parliamentary Archives, can be found in Appendix 2.

Finally, the price of delivering those services should be assessed, and this is perhaps the most difficult aspect of the internal marketing audit for archives. In the archival context, price does not necessarily equate to a monetary charge (although nominal charges may be made to the parent body), but instead can refer to any kind of cost to the customer, for example time, effort or change⁸¹. Archivists should evaluate the actual or perceived price that its customers must pay in order to acquire services in order to determine whether an acceptable balance exists from the viewpoint of the customer.

4.3.4 Promotion

Promotional tools and materials are employed by an organisation 'to communicate effectively the benefits of its products or services to its customers'⁸². The majority of institutional archives will undertake internal promotional activities to some extent, and the marketing audit requires that the efficacy of these be assessed. Quantifying the success of promotional activities and materials can be challenging: while a large number of leaflets may be handed out, or articles written for newsletters, determining the effect of these measures is a complex process, as evidenced by Sue Donnelly: 'what we haven't worked up to is if we give a session to a department, how many people then go on to use the archive...That's harder to quantify really...'⁸³.

However, archivists should make use of any available data, such as literature distribution numbers or enquiry numbers following a promotional campaign, to evaluate the efficacy of their promotion as best they can. This, coupled with an understanding of the needs of the archive's internal customers, should enable a broad-level picture to be established of the success of the archive's current internal promotion and identify areas where it can be improved.

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⁸¹ In the context of internal marketing, if the changes required to internal customers' practices or habits are too great they won't be willing to pay this price for the archive's services.

⁸² The Chartered Institute of Marketing, *How to achieve an effective promotional mix*, (The Chartered Institute of Marketing, 2009), p2.

⁸³ Sue Donnelly, interview, 5th July 2010.

An effective internal marketing programme is likely to be one that has been carefully thought out, and the planning process is central to this. Established marketing methodology provides a number of tools and techniques for identifying internal customers and their needs, and assessing the archive's current product and promotional offerings in relation to these needs. Conducting an internal marketing audit may be a time-consuming undertaking, but it enables archivists to acquire the baseline knowledge about their organisation and its requirements, and provides a framework on which an internal marketing programme can subsequently be developed. Although few of the case study archives conducted such a rigorous planning process, this study contends that it improves the likelihood of creating a successful programme and should be considered a priority.

Once the internal marketing audit has been completed, archivists can use the results to form the basis of the archive's marketing mix, that is, the combination of relevant services, delivery channels, pricing and promotion. The following chapters will examine in greater detail how archivists can develop each of these.

5 The Internal Marketing Mix: Developing the Product

Internal marketing enables institutional archives to expand their focus from traditional core activities, such as cataloguing and preservation, to the delivery of customer-focused relevant services that will ensure they are established as an integral part of the parent body. It is beyond the scope of this study to detail every possible service that an institutional archive could offer to its internal customers. Services should be institution-specific, developed with reference to the information gathered during the internal marketing audit, as what works for one institutional archive will not necessarily work in the organisational culture of another. However, this study does aim to provide some general suggestions for services that could deliver the benefits outlined in section 3.2, together with current examples of good practice from those archives interviewed.

5.1 Support for Current Business Activities

5.1.1 Access to Archival Records

An institutional archive holds the evidential record of the organisation and, as such, its holdings are likely to be required by employees seeking information about decisions made, actions taken or precedents set. The fast pace of today's business activities means that archives need to find ways to provide access to records in a timeframe that suits its internal customers, as demonstrated by the financial service company archive's online archive:

What we've done ... is we've streamlined that process so that, rather than somebody having to ring up the archivist and say "I need a copy of the 1950 annual report" or "I need to access a particular document to do with a product", we've made those documents available online⁸⁴

A series of focus groups conducted with internal customers from the legal, compliance and audit departments, highlighted that the key role of the archive was considered to be its 'legal

⁸⁴ Archivist, financial services company archive, interview, 30th June 2010.

and regulatory function⁸⁵. The online archive was therefore designed to contain digital images of vital records, such as reports, accounts and policy forms, that could be accessed at any time, by multiple users.

Through consultation with the archives' internal customers, a service has been developed that provides essential support to employees, improving the speed and efficiency with which they can work. While a product on this scale may be beyond the means of many institutional archives, it should be possible to adapt the concept according to the available resources; for example, the most regularly consulted material could be digitised and made available via the intranet, thereby going some way towards meeting business need.

5.1.2 Research and Analysis

All institutional archives handle enquiries from internal customers, considering it to be a core service; however, there is scope to expand this function further. The archive of the financial services company has identified an opportunity to embed the archives in the work of the organisation by supporting specific projects, such as legal proceedings. The archivist's expertise is used to conduct extensive research into what information is required for the project, where it can be found in the archive, and to provide analysis associated with that material. As the archivist says:

The people who may need that kind of information, whether its our colleagues in Legal or the senior management, they're certainly not going to have the time or inclination to come and dig out all the records and do that themselves in the archive. So part of the function of the corporate archive is to provide that research and information service and turn things around very quickly...⁸⁶

⁸⁵ Bunkham, C and Carter, D, 'Online Access to Vital Records: Creating a Virtual Archive for Prudential Plc', *Business Archives: Principles and Practice*, 87, (May 2004), p76.

⁸⁶ Archivists, financial services company archive, interview, 30th June 2010.

While this is clearly a labour-intensive service and not necessarily feasible for all institutional archives, it is evident that the archive has managed to make itself indispensable to core internal customers. A similar service could perhaps be offered by other archives, albeit to a smaller target group if necessary.

5.1.3 Training

Training is a high visibility service that is relatively inexpensive to deliver. Archivists should look for areas in which their skills, knowledge and experience could be of value to the wider organisation and develop relevant training resources for employees. The archivists at LSE Archives, for example, regularly contribute to the annual Teaching Day⁸⁷, delivering seminars with the aim of introducing teaching staff to ways of incorporating primary sources into their teaching. In addition to classroom-based training, E-learning is increasingly being used by organisations to deliver training cheaply and conveniently to its busy employees. Institutional archives could look to exploit this by incorporating a module into an existing training programme, thus reducing the cost to the archive⁸⁸. Rather than striking out on its own, it can be more effective for an institutional archive to make use of existing opportunities to deliver training.

5.1.4 Support for Brand Identity

5.1.5 Provision of Archival Material

Most organisations create branded or promotional material that is targeted at its employees, for example newsletters, magazines, mouse mats or posters. The purpose of this type of collateral is to motivate and inspire staff with the values and successes of the organisation. Institutional archives can capitalise on this opportunity by providing press or marketing

⁸⁷ The Teaching Day is an internal conference, aimed at teaching staff and graduate assistants, examining good practice in teaching and how teaching can be developed at LSE. The Archives have participated in two sessions to date.

⁸⁸ This approach has proved successful at HSBC, where the Archives has developed a history module that is now included in the standard global e-learning induction programme.

departments with material from the archive that supports this aim, as LSE Archives demonstrates: ‘...there are some departments, like the Secretariat, the Press Office, the Development Office, that we work with quite closely in terms of providing materials to them for promotion and branding’⁸⁹.

LSE Archives has further expanded this service in response to its understanding of internal customers’ needs. The Archives works closely with the Development Office on the School’s alumni reunions, where they ‘get images out from the right years and help them with some of the branding that they do for reunions’⁹⁰. Developing this type of service as part of an internal marketing programme would be a cost-effective, high impact method of embedding the archive into the day-to-day activities of its parent body.

5.1.6 Tours

Tours of the archive and its holdings can be an effective way of promoting the heritage and brand identity of an organisation to its employees. The Parliamentary Archives, for example, offers tours to Members as a means of introducing them to the history of Parliament, providing them with a better understanding of their role in relation to that history.

A comparable approach is taken at the archive of the financial services company, where ‘an important part of that [the company’s heritage] for ... employees, is our building...and we regularly conduct tours of that building for those people who ... want to learn more about the company and how it’s evolved’⁹¹. In an organisation where its heritage forms an important part of the brand identity, tours such as these are a valuable means of reinforcing an understanding of that brand amongst staff, providing an inexpensive service as part of an internal marketing mix.

5.2 Employee Engagement

⁸⁹ Sue Donnelly, interview, 5th July 2010.

⁹⁰ Sue Donnelly, interview, 5th July 2010.

⁹¹ Archivist, financial services company archive, interview, 30th June 2010.

5.2.1 New Starters

As outlined in section 3.2.3, internal marketing can facilitate the development of services to support an organisation's engagement with its employees. One particularly effective means by which an institutional archive can achieve this is to become involved in the induction of new starters.

Parliamentary Archives staff speak briefly on the regular induction programmes of the House of Commons and House of Lords, introducing staff to the history of the organisation, the holdings of the Archives and the services that they can provide to staff. For employees of the House of Lords, the final afternoon of the induction programme comprises a tour of the Archives, including a visit to the Act Room, one of the most iconic and inspiring images of Parliament's history. Many staff will spend the majority, if not all, of their careers at the Houses of Parliament, and the prestige and heritage of the organisation arguably plays a significant role in this loyalty.

If staff resources are not sufficient to maintain such an oft-occurring service, it could be offered to a more targeted group on a less frequent basis. While the financial services company archive is not involved in the company's main induction programme, they do provide an archive induction once a year to those on the graduate fast track scheme, who will one day be senior managers. Not only does this service connect with new recruits, it improves the chances of senior management supporting the work of the archive in the future.

5.2.2 Team Building

Cohesive teams are more likely to work efficiently and with enjoyment, and institutional archives can develop services as part of their internal marketing mix that contribute to this process of team building.

HSBC Group Archives host open days for internal staff, and have found that occasionally whole departments attend 'as a sort of team building exercise'⁹². Increasingly, organisations require that employees participate in departmental 'away days', where teams spend the day out of the office engaged in relationship-building activities. Institutional archives could easily tap into this by offering teams the opportunity to come and view records that relate to their work, perhaps participate in some basic archival tasks, and learn more about the organisation's history. Although this would necessarily be a time-consuming and labour-intensive undertaking, it would raise awareness of the archive and the role it can play in employee engagement. It could additionally perhaps offer a more affordable option for the parent body, as external providers of 'away day' activities are likely to make a higher charge in comparison to offering the service internally.

5.2.3 Exhibitions

Archives are likely to be familiar already with staging exhibitions. However, employing them as part of an internal marketing mix requires that careful consideration be given as to how they can most effectively meet internal customers' expectations and support employee engagement.

As part of their internal marketing efforts to increase employee involvement, HSBC Group Archives mounted an exhibition on the history of sport at HSBC:

We worked with the Sports and Social Club...we had exhibits of archive material, of pieces of sports kit, medals that people had won, so material from the archive but also material from other people in the bank... Not everyone likes history, but if they don't like history, they probably like sport, so we figured that was a brand new market and it went down really well – we had really positive feedback.⁹³

⁹² Rachael Spree, interview, 1st July 2010.

⁹³ Rachael Spree, interview, 1st July 2010.

The exhibition succeeded in reaching employees who might not otherwise have an interest in history per se, communicating an important aspect of HSBC's culture and values, and potentially increasing staff loyalty.

Although regular exhibitions may overstretch the resources of an institutional archive, efforts should be made to ensure that they feature in the internal marketing mix, whether on a smaller scale or more infrequent basis, as they are a particularly potent and visible way of engaging with employees.

5.3 The Role of Partnership Working

When developing the product element of an internal marketing mix, institutional archives are likely to be constrained by the available resources. In order to deliver services relevant to as many internal customer groups as possible, archives could consider establishing partnerships with other departments, as a means of tapping into pre-existing opportunities rather than striking out on their own. Effective partnership working can enable tighter integration of the archive with other programmes and departments, and help to embed it within the core work of the organisation.

5.3.1 Internal Partnerships

An institutional archive should seek to identify those individuals or departments within its parent body whose work it could support, and who could in turn support the internal marketing objectives of the archive.

The LSE Archives have partnered with the School's Liaison Librarians 'to promote particularly the teaching resources we have as well, as they do a lot of information literacy training'⁹⁴ and provide advice to academics and students. The archive staff realised that the most effective way to support these internal customer groups was to become involved with the work already

⁹⁴ Sue Donnelly, interview, 5th July 2010.

being done by the Liaison Librarians, rather than trying to build a reputation and deliver services on their own. Indeed, the Archives has 'been working with the Liaison Librarians for International History, Economic History, Sociology and Philosophy..., to integrate archives into some of the teaching'⁹⁵

Relevant projects that are being delivered by other departments offer institutional archives the chance to tap into the mainstream activities of its parent body. The Parliamentary Archives has found that their involvement in a number of key projects and boards has increased their visibility, to the extent that: 'they think "the Archives ought to be involved in this", so we get invited onto boards or we request that we're on boards'⁹⁶. Institutional archives should aim to make themselves indispensable to their parent body by exploiting opportunities to partner with other groups, delivering services as part of their internal marketing mix that meet their internal customers' needs.

5.3.2 External Partnerships

The impact of an institutional archive's services can be maximised when developed in partnership with external organisations. In 2009, HSBC partnered with the British Museum when the latter held an exhibition of art from India; the Archives produced a brochure about the history of HSBC in India, delivered a lunchtime lecture to employees at the Group Head Office and set up an exhibition of their own, attracting the attention of many senior figures at HSBC. While such high profile partnerships may not be widely available, institutional archives should think creatively about the partnerships that they could form, in order to deliver services of benefit to their internal customers and to the profile of the archive.

Informal partnerships with other business archives are an excellent way of learning from the experiences of others and gathering new ideas for potential services. This is one of the key goals of the *National Strategy for Business Archives (England and Wales)*. Among the actions to be taken as part of the Strategy is the development of 'partnerships between the

⁹⁵ Sue Donnelly, interview, 5th July 2010.

⁹⁶ Caroline Shenton, interview, 14th June 2010.

corporate archives sector and public and university sectors to promote employee secondment, skills exchange, outreach support, information sharing on usage of archives, public relations etc', and the development of 'a stronger network of archivists working with business archives...'⁹⁷. It is hoped that this study goes some way to highlighting the current internal marketing strategies of some institutional archives, but greater transparency and communication between institutions would increase recognition of the benefits that these relationships could bring to the development of services.

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Archives need to be able to demonstrate their relevance to their parent body and create an integral role for themselves in mainstream business activities if they are to be protected from drastic budget cuts. Institutional archives can achieve these aims by developing products, or services, that meet the needs of their internal customers and the parent body as a whole. As the case study institutions have shown, archives have a key role to play in supporting current business activities and brand identity, and helping the organisation engage with its employees. Services that enable the archive to participate in these core organisational goals and objectives will ensure that it is not perceived merely as a luxury, but as an essential contributor to the efficiency and prosperity of the organisation.

Relevant services by themselves, however, are not enough; archivists must give equally careful thought to how these services are made available to their internal customers and at what price. These elements of the internal marketing mix will be examined in the next chapter.

⁹⁷ *National Strategy for Business Archives (England and Wales)*, (The National Archives, 2009), p20.

6 The Internal Marketing Mix: Determining Place and Price

Following the completion of the internal marketing audit, archivists are now apprised of the channels through which products are currently offered and the price that is paid by the internal customer to use them. This information, coupled with the new or improved services to be offered as part of the internal marketing mix, should enable archivists to determine the most effective delivery and price in relation to the internal customers' expectations.

Availability of Services or Products

The primary method of onsite service delivery is through the physical location of the archive itself, i.e. its search room. While the location of the search room is usually outside of the control of archive staff, institutional archives can set their opening hours with their internal customers' needs in mind. LSE Archives, for example, is open until 8pm Monday to Thursday and additionally opens on Saturday, reflecting the non-office hours kept by its internal users, who include students. The Parliamentary Archives, on the other hand, keeps to the standard office hours worked by the majority of employees in both Houses. Archivists should ensure that their opening hours are as convenient as possible for their internal customers.

However, institutional archives should not assume or expect that their internal customers will necessarily be able to visit the search room, and should try to make their services available in other locations. When planning their exhibition on the history of sport at HSBC, the Group Archives decided to stage it on one of the transfer floors at Group Head Office, where 'there's coffee bars, there's meeting rooms where people from every floor kind of meet together, so they are really busy floors with loads of people walking through'⁹⁸ These transfer floors were an ideal location for the exhibition to reach as many employees as possible, and are an excellent example of the considerate placing of services.

⁹⁸ Rachael Spree, interview, 1st July 2010.

Increasingly, however, organisations do not operate from a single location, but may have many offices throughout the UK or, in the case of multinationals, throughout the world. Institutional archives, therefore, have a responsibility to ensure that their holdings are made available to all employees who have need of them, regardless of their physical location, and this is most effectively achieved through the use of company intranets and internet sites. For example, feedback received by HSBC Group Archives highlighted that employees not based at Group Head Office were disappointed to be unable to access previous exhibitions. With this in mind, the physical History of Sport exhibition 'was accompanied by a virtual exhibition which we put onto the Group intranet, which is available worldwide, so everyone in the Group across the world basically could access the virtual exhibition, which had photos and scans of everything we had in the physical exhibition'⁹⁹. Images of the exhibition's contents were also put on Flickr to 'make it available to those who had previously worked that the bank...who had really helped with the exhibition...which went down really well'¹⁰⁰.

The archive of the financial services company has adopted a similar approach, making their online archive available through the intranet so that all employees worldwide can access archival information as and when they need it. The history of the organisation is additionally made available via the corporate website, enabling employees to browse key dates, locate individual business histories or search thematically, without having to contact the archive or read through a lengthy book.

The majority of institutional archives will have access to corporate intranet and internet sites, along with the skills of central IT departments, and should prioritise funding in their budgets for projects that will deliver relevant services online according to demand. However, archivists need to consider carefully what information their internal customers need and what content should be delivered online, rather than including as much information as possible in an attempt to be all things to all people. For example, archivists could easily employ their knowledge of the types of enquiries regularly received, and ensure that this information is made available in the form of an FAQ or digital image. In this way, archivists can make key

⁹⁹ Rachael Spree, interview, 1st July 2010.

¹⁰⁰ Rachael Spree, interview, 1st July 2010.

services accessible through channels that are convenient for as many internal customers as possible.

6.1 Minimising the Cost to the Customer

If careful consideration has been given to ensuring that the services offered by an institutional archive meet the needs of internal customers, and those services are made available through convenient channels, the perceived cost of using the services should in turn be minimised in the mind of the internal customer. Institutional archives can further reinforce this perception by countering some of the key costs to the customer.

Where nominal charges are made to the parent body for services, archives should make certain that they are delivering value for money to the internal customer. This will only be achieved if the services fully meet their needs and expectations, and the actual price charged is proportionate to the value of the product.

Where possible, reductions should be made to the amount of time and effort required to access the archive's services. As has already been seen, the financial services company's online archive enables instant access to key archival documents, reducing the need for internal customers to contact the archivist and wait for material to be retrieved. Digitisation of heavily-used material, and its subsequent production online, is an effective way of speeding up the process; however, this may well not be a financially viable option for some archives. In this situation, institutional archives could look to improve turnaround times on enquiries from internal customers, provide better guidance material on how to locate information in the archive or how to search the catalogue more effectively, or introduce an FAQs section to their intranet pages.

Ultimately, internal customers will be happy to pay for an archive's services if they are convinced that the benefits outweigh the barriers, and archivists should prioritise the communication of these benefits as part of the internal marketing mix.

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The internal marketing concept of 'place' is more than just the physical location where customers can obtain the services offered by an institutional archive; it encompasses any channel through which services can be obtained, such as the company intranet. When developing this aspect of the internal marketing mix, it is essential that archivists determine the channels that will be most convenient to internal customers, rather than relying on the more traditional model of searchroom-based access. Actual and potential barriers to use, such as inconvenient opening hours, should be evaluated and, where possible, removed in order to encourage as many internal customers as possible to make use of the archive's services. However, convenient services will not be attractive to internal customers if the price being asked of them is too great, and in the business context, time and effort are two of the most significant costs to the customer. By making efforts to streamline the process of using an archive's services, customers are more likely to be willing to 'purchase' them.

Once the archive's 'products' have been developed, and their delivery and price determined, the final element of the internal marketing mix – promotion – should be considered, which comprises the focus of the following chapter.

7 The Internal Marketing Mix: Effective Promotion

Promotion is the final element of the internal marketing mix, and should only be implemented once the archive's products have been developed, and the place and price determined.

There is no benefit to be gained from spending time and money on creating internal promotional materials if the services being promoted are not what the internal customer wants. That being said, effective promotion and communication are essential to ensure that internal customers are aware of the archive and the services it offers, and to stimulate them to 'buy' those services¹⁰¹.

At the heart of effective internal promotion, are defined marketing messages which address the concerns of the audience at which they are aimed. These messages should reflect the mission and values of the archive, together with the benefits and services that it can offer to customers. Once these messages have been determined, they should be communicated to internal customers using a variety of media and techniques, some suggestions for which are outlined below. The efficacy of each technique should be judged against the four Cs:

- Cost – how much will it cost and is that cost justified?
- Clout – will the technique reach the required number of people?
- Credibility – will this technique create a positive perception of the archive?
- Control – can the technique be targeted and adjusted to a particular audience?¹⁰²

7.1 Promotional Material

7.1.1 Merchandise

'Freebies', such as pencils or bookmarks, are probably the first thing people think of in relation to promotional material. Many archives already produce this kind of collateral for

¹⁰¹ The Chartered Institute of Marketing, *How to achieve an effective promotional mix*, (The Chartered Institute of Marketing, 2009), p2, available at <<http://www.cim.co.uk/marketingresources>>.

¹⁰² Adapted from The Chartered Institute of Marketing, *How to plan marketing communications*, (The Chartered Institute of Marketing, 2009), p2, available at <<http://www.cim.co.uk/marketingresources>>.

external customers, but it can be just as effective for internal marketing. In order to achieve maximum results from these items, archivists must carefully consider which ones are likely to be best received (and retained) by customers and what message they should convey.

The Parliamentary Archives' Records Management team commissioned mugs bearing their 'Control Your Records Before They Control You' slogan, together with the contact details of the team. Their purpose was to be something that employees were likely to keep and use, continually reinforcing the importance of managing records and the availability of advice. Rather than distributing these mugs randomly, the team took a more strategic approach, giving them away at training sessions, as well as at meetings with senior staff. In this way they were able to maximise the effectiveness of a limited resource by targeting it at key decision-makers and staff.

A similar targeted approach was taken by the LSE Archives to promote a project on the history of LSE in photos, where postcards of some of the images were sent 'to all heads of departments, anybody that we thought might be interested...with a sticker on the back explaining about the project'¹⁰³. The aim was to provide material that could be put up on notice boards, and such was the success of this idea that many are still currently displayed in offices, maintaining awareness of the Archives.

While postcards are a common form of promotional material in archives, it can be advantageous to design a more unusual item that will capture the attention of internal customers and stick in their minds. To promote the launch of the online archive, a promotional item was developed by the archive of the financial services company based on material that they held in the collection:

It was used as a desk-drop in...key offices, and was a little fold-out leaflet saying "What's this?", so that people were encouraged to open it up and find out what it is, and so you can see it's a bit of a teaser, and

¹⁰³ Sue Donnelly, interview, 5th July 2010.

it...referred people to the website address where they went straight to the online archive...we found initially that we had a huge number of hits as you would expect...¹⁰⁴

The interest in the online archive generated by this promotional item demonstrates the efficacy of the novelty factor; promotion is arguably most effective when it takes the customer by surprise and captures their interest, encouraging them to find out more.

However, archivists should be cautious about relying too heavily on this type of material alone, as it can be expensive to produce and may not be the most effective approach for internal customers, Caroline Shenton points out:

... in terms of...enabling us to do what we want, it is actually about having an effective staff who can communicate what they want very clearly...¹⁰⁵

Budgets for internal marketing are likely to become increasingly constricted and so archivists should consider whether freebies are the most appropriate media through which to communicate their internal marketing messages before investing resources.

7.1.2 Stationery

A more subtle method of promoting the archive internally is the branding of departmental stationery, such as letter paper and compliment slips, with the archive's logo, contact details and, perhaps, mission statement. Internal promotion needs to be done on a regular and consistent basis, rather than being a one-off occurrence, in order to ensure that the archive remains on the radar of internal customers. In view of this, every time the archive communicates with an internal customer, branded stationery should be used, just as it would be for external users. In this way, a clear link can be established in the mind of the internal customer between the archive logo and the service that it provides.

¹⁰⁴ Archivist, financial services company archive, interview, 30th June, 2010.

¹⁰⁵ Caroline Shenton, interview, 14th June 2010.

The Parliamentary Archives have developed this principle further by applying it to all emails sent from the Archives. Staff have a generic email signature comprising their name, contact details and one of the internal marketing messages devised as part of their internal marketing programme. During the periods when the Archives is hosting an exhibition, this message is changed to include a link to information on their intranet pages about the exhibition. This is an effective means of reinforcing the mission of the archive each time the Archives communicates with its internal customers, and requires no financial outlay.

7.1.3 Advertising

The use of advertising is not confined to external marketing campaigns and comprises more than television or newspaper adverts. This form of promotion can be effectively used by institutional archives as part of their internal marketing mix to communicate with internal customers, through media that are relatively inexpensive to produce.

The visibility of advertising is key to its success, and an institutional archive should capitalise on opportunities to make itself known. Pop-up banners bearing the archive's name and logo, along with information about the services it offers to internal customers, can be employed to advertise the archive outside of the search room, for example when it is hosting an exhibition or a talk. In a similar vein, posters can be an effective method of advertising, but should contain the minimum amount of text needed to convey the information, as employees will not normally spend a long time reading them. Office and staff room notice boards can be focal points for the dissemination of information to internal customers; where physical notice boards have been superseded by the corporate intranet, a digital version could be posted on the news page.

The location of advertising is just as important as its content and style, and consideration should be given to this aspect. Tent cards - table top stand-up cards that contain information about the archive, the services it offers and how it can be contacted – have the ability to

reach potential as well as actual customers, through their placement in communal areas, such as staff restaurants.

Whatever form of promotional material is employed for internal marketing, efforts should be made to ensure that its design is as professional as possible, as this will serve to enhance the impression of the archive as corporate, mainstream and efficient. Many organisations now have internal departments that manage communications, media and publications, and archives could certainly benefit from utilising their design knowledge and skills.

7.2 Public Relations Tools

Public relations (PR) has been defined as ‘the planned and sustained communication of your messages to your target markets using the public media of print, broadcast and electronic press’,¹⁰⁶ and should form an integral part of the internal marketing mix. PR tools are considered to provide more credibility to those employing them than advertising or freebies, and can target a variety of internal audiences via the medium most suited to each group¹⁰⁷.

7.2.1 Publications

7.2.1.1 Leaflets

The majority of institutional archives produce literature outlining their holdings, services and contact details, which is usually aimed at the widest audience possible. This study, however, argues for the development of leaflets targeted at more specific internal audiences and tailored to their particular needs. For example, the Parliamentary Archives produce a leaflet aimed at Members of both Houses, containing information about the services the Archives can offer to them, such as research, enquiries and advice on preserving their own records. Careful consideration has been given to its contents, with only information relevant to this particular market included, couched in clear language that is free from jargon. While it may

¹⁰⁶ Hart, K, *Putting Marketing Ideas into Action*, (Library Association Publishing, 1999), p47.

¹⁰⁷ *Ibid*, p48.

be tempting to try to include as much information as possible, internal users are unlikely to have the time or inclination to read through reams of text, and instead value distilled, relevant guidance.

The efficacy of a well-designed leaflet, however, can be limited if thought is not given to the most appropriate means of distribution. The Parliamentary Archives' initially planned for a leaflet aimed at Members to be distributed to their inboxes at the start of the new Parliament. However, the Internal Communications team:

said it's best to have leaflets available in key places, rather than mailing individual Members...so we've arranged with their internal communications people to...get them distributed to places like the Libraries, the Members' Centre in the Commons, some other key hotspots where literature for Members in both Houses is available.¹⁰⁸

As this example demonstrates, leaflets should be made available in locations that are used by, and convenient for, the target market if they are to catch people's attention.

7.2.1.2 Newsletters

Making use of existing organisation-wide or departmental publications, such as newsletters, can be an effective way of promoting the services and successes of the archive to internal customers. By using well-established channels of communication, rather than attempting to forge a path on its own, an institutional archive is more likely to have its message read by a wide internal audience and be considered part of the corporate mainstream.

Archivists at LSE use all of the School's publications to promote their holdings and services, including staff bulletins and LSE Connect, a magazine for alumni. The staff bulletin is considered to be particularly important, as it is sent out across the organisation, and the

¹⁰⁸ Caroline Shenton, interview, 14th June 2010.

Archives tries to contribute every month. It is this consistency that Sue Donnelly considers to be the key to their success: 'Some of it is really basic stuff, but I think the key thing's stamina; you've got to keep going with it over the years and be very, very regular about it because [otherwise] you will just drop out'¹⁰⁹.

As well as information about collections and services, case studies could be included of how the archive has supported internal colleagues in their day-to-day business activities, perhaps including quotations from satisfied customers¹¹⁰. In this way, potential internal customers will be made aware of the benefits that the archive could provide, increasing the likelihood that they will 'buy' its services.

7.2.1.3 Annual Reports

Often overlooked, annual reports, of the archive or the parent body, are a useful channel of communication for institutional archives, which should form a key element of the promotional mix.

An approach successfully employed by the LSE Archives is to be 'sure that the annual report has got loads of archives material in it', such as an update of the Archives' activities or images of items from their collections,¹¹¹ The archive's own annual report is an additional opportunity to highlight all of its successes and contributions to the organisation over the preceding year, and a copy should be sent to all senior staff, together with a covering note drawing their attention to key areas. In this way, key internal decision-makers can be reminded of the value provided to the organisation by the archive.

7.2.2 Multimedia

¹⁰⁹ Sue Donnelly, interview, 5th July 2010.

¹¹⁰ This technique proved to be effective for the Information Services team at Pfizer Ltd, who have taken a more proactive and aggressive approach to their internal marketing. For further details see Graham, S, 'Shout Louder: thoughts on internal marketing', *Library and Information Update*, 2:5, (May 2003), pp52-53.

¹¹¹ Sue Donnelly, interview, 5th July 2010.

The use of multimedia, such as video, is a more unusual promotional tool that could be employed. HSBC, for example, has 'an internal company TV channel that people in the branches have to watch... on a weekly basis...and it is accessible to everyone else via the intranet as well. So doing things like that really promotes why we do things and what we do'¹¹². Staff at the Archives tend to approach the TV department with an idea for a feature which will then be filmed, and this kind of proactive approach is key for successful internal promotion.

Institutional archives who do not have such a facility available to them could perhaps consider hiring equipment to produce a short film about an aspect of the work of the archive, making it available on the intranet. In this way, internal customers could be made aware of the archive and its activities, potentially resulting in increased usage of the archive's services.

7.2.3 Events

Internal events can be a valuable way of engaging with internal customers and promoting the holdings and services of the archive, and institutional archives should look to capitalise on existing opportunities.

7.2.3.1 Anniversaries

If they are part of a long-standing organisation, archives should proactively involve themselves in the celebration of significant anniversaries. This year, the Parliamentary Archives has been marking the 150th anniversary of the Victoria Tower with: 'a series of talks to which people can come along...to do with the Victoria Tower repository', which have been an opportunity for the Archives to get their 'identity and existence known more widely'.¹¹³ Allied with a leaflet on the Victoria Tower and a range of merchandise, these talks have been very well attended so far...probably because they are around the heritage of the building,

¹¹² Rachael Spree, interview, 1st July 2010.

¹¹³ Caroline Shenton, interview, 14th June 2010.

people are always very interested in that'¹¹⁴. Institutional archives can capitalise on employees' interest in the heritage of the organisation for which they work to promote their services more widely, raising the profile of the archive in the process.

7.2.3.2 Awareness Week / Month

A concept from the museums domain that could easily be adapted for use by institutional archives is that of Museums Week, initiated in 1974 as a week of events to promote museums across the UK. The week is promoted through adverts, leaflets and websites, and begins with a launch and VIP reception¹¹⁵. Institutional archives could implement an awareness week along these lines, with senior staff invited to the launch, and events aimed at target groups from across the parent body. While such an event would require an investment of time and financial resources, the benefits it could deliver in terms of profile-raising amongst decision-makers and staff make it an effective internal public relations tool.

7.3 Personal Selling

While the concept of personal selling may evoke images of door-to-door salesmen, it is nonetheless perhaps the most effective of the promotional tools. Within the context of internal marketing, personal selling involves the staff of the archive communicating its value to employees face-to-face. Archives staff should seek to participate in the team meetings of other departments when they have a particular event or service to promote that would meet the needs of that team. Archivists should make it a priority to attend senior management meetings when the opportunity arises, in order to communicate the activities and successes of the archive to those who hold the purse strings.

The Parliamentary Archives has put personal selling at the core of their strategy, with staff encouraged to build relationships with decision-makers and senior management, in order to

¹¹⁴ Caroline Shenton, interview, 14th June 2010.

¹¹⁵ For further information, see Runyard, S and French, Y, *Marketing and Public Relations Handbook for Museums, Galleries and Heritage Attractions*, (The Stationery Office, 1999), pp165-167.

influence people personally. While they do not actively seek out senior staff, they take any opportunity to involve themselves in high-profile projects as a means of promoting the role of the archive internally¹¹⁶. The Parliamentary Archives has chosen to invest in 'some training [for senior staff]...about how to influence and collaborate with people, how to get decision-makers to make the right decisions in relation to us, and I think in the public sector that sort of thing is much more important internally than anything else'¹¹⁷. Institutional archives should consider providing this kind of training to its staff in recognition of the fact that they are the face of the archive and its most powerful tool for promoting it internally.

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Effective internal promotion relies on a thorough understanding of the target market, from the services that will be of interest and the messages they want to hear, to the most effective channels through which to communicate those messages to each internal market.

Institutional archives need not simply stick to the promotional techniques they always employed, if these are not as effective as they could be. Instead they should seek creative approaches to promoting their services, that will attract the attention of their internal customers and stimulate them to 'buy' those services. Ultimately, promotion needs to be a regular process rather than a one-off exercise in order to keep the archive in the forefront of employees' minds.

Once all four element of the marketing mix have been developed and implemented, institutional archives should ensure that they measure the performance of the programme in order to evaluate its efficacy. Potential approaches to performance measurement, and the challenges it presents, are discussed in the following chapter.

¹¹⁶ Caroline Shenton, interview, 14th June 2010.

¹¹⁷ This type of corporate training is widely available, with the Chartered Institute of Professional Development, for example, offering courses such as Effective Negotiation Skills and Positive Influencing Skills. For further details see <<http://www.cipd.co.uk/training/MANNS/about.htm>>.

8 Performance Measurement

8.1 What is Performance Measurement and Why is it Important?

Performance can be defined as ‘the relationship between the resources that go into an archive service (inputs) and what the service achieves using those resources (outputs)’¹¹⁸. Performance measurement is therefore a method of evaluating the work of an archive, the information it generates assisting the planning of services and the monitoring of their progress and success. In this respect, it can be a valuable management tool, informing the allocation of resources and maintaining levels of quality.

Within the internal marketing context, performance measurement enables an archive to determine whether or not it has achieved the marketing goals that were set during the planning stages of the programme. It is possible to evaluate each service and activity on an individual basis to determine efficacy in relation to the amount of time and money invested. As a result, archivists can adapt or enhance the services that they offer, or the promotion of those services, in order to meet the needs of the internal customer, and thereby completing the internal marketing cycle.

The collection of usage statistics can additionally help establish demand for a service or product, as in the case of the financial services company archive:

We collate the measurements that we have and we look at the trends associated with them – we would look not just at the number of enquiries, but the number of enquiries that were straightforward requests...the number of people who were coming on tours...when we send out something like this [postcards and brochure] we want to know how many

¹¹⁸ Methven, P, Foster, J, MacKenzie, G and Rogers, R, *Best Practice Guideline 1: Measuring Performance*, (Society of Archivists, 1993), p6.

copies are needed for our ... business and in which particular markets, and so we will get a sense of the type of demand for that kind of material.¹¹⁹

This knowledge is extremely valuable to an archive, enabling it to prioritise the allocation of resources. Statistics such as these can further be used to justify the funding of the archive to senior managers within its parent body. An archive is far more likely to retain, and potentially increase, its level of funding if it can be demonstrated that its services are being widely used and are having a positive impact on the organisation as a whole. One of the principle reasons that the LSE Archives chose to undertake internal marketing was to increase the number of internal users from 12% in 2005-06 in order to retain its funding from the School¹²⁰. Performance measurement statistics have enabled them to demonstrate to the School's senior management that internal customers now account for a third of users, which 'is a figure that LSE feels much more comfortable with'¹²¹.

Without performance measurement, institutional archives have very little way of establishing for certain the efficacy of their internal marketing programme, and would not have the kind of evidence respected by senior managers if ever required to justify their existence. Effective performance measurement should form the back bone of an internal marketing programme, enabling the ongoing evaluation and evolution of services.

8.2 How Should Performance Be Measured?

8.2.1 Statistics

This type of performance measurement is one with which most archives should already be familiar in relation to the collection of statistics on enquiries, such as how many are received, from whom they originate, and what is the subject. However, institutional archives should additionally seek to collect statistics relating to other services developed as part of the internal marketing programme. For example, a knowledge of the number of customers

¹¹⁹ Archivist, financial services company archive, interview, 30th June 2010.

¹²⁰ 'So about...around about 2005-06 we were looking at this, and probably only 12% of our users were from LSE, and of course with that level of internal usage it was very hard to lobby for resource.', Sue Donnelly, interview, 5th July, 2010.

¹²¹ Sue Donnelly, interview, 5th July 2010.

attending talks, training sessions or open days, together with details of departments and level of seniority, can help archivists determine which of their services are best used and whether they are reaching the target audiences. Statistics on the number and identity of visitors to an exhibition could reveal whether it warranted the expenditure of staff time and money, while the number of leaflets taken can inform how many are ordered in future, resulting in more efficient use of time and financial resources.

8.2.2 Feedback Questionnaires

While statistics are useful for quantitative research, they only capture one side of the picture. Qualitative data, people's thoughts, opinions and experiences, provides a more thorough understanding of customers' reactions to an archive's services, and can be captured through the use of feedback questionnaires. These questionnaires should be given to internal customers after every training session, talk or exhibition, and should determine the identity of the customer, their level of satisfaction, where applicable, with the content of the session, the speaker and the venue. They should also allow space for customers to write any suggestions they might have for the improvement of the service, related services that they might value, and general comments.

8.2.3 Anecdotal Feedback

Although almost impossible to quantify or analyse, anecdotal feedback can be a revealing form of performance measurement. The informal comments of stakeholders and customers about the archive and its services may well be more frank than those in a formal questionnaire. However, efforts should be made to record these comments in some form if they are to be effectively analysed and used to evaluate performance.

Despite the importance and value of performance measurement, few of the archives interviewed collected data relating specifically to their internal marketing. One archivist interviewed made the intriguing point that 'performance indicators are notoriously difficult for

archives, in terms of activities such as cataloguing, because you can say “I’ve catalogued 100 items”, but what does that mean? And so I’d always be a bit wary of saying we’ve done this, that and the other’¹²². When setting performance indicators, archivists should therefore ensure that the resulting data will give meaningful information about the efficacy of services and products. Performance measurement provides the basis by which archives can evaluate and redevelop their internal marketing products, ensuring that internal marketing is an ongoing cycle rather than a one-off activity. However, further research is required to identify the most effective methods for capturing performance-related data.

¹²² Anonymous contribution.

9 Conclusion

In response to increasing threats to the funding and security of institutional archives, this study has sought to demonstrate that internal marketing can be a highly effective strategy for establishing and demonstrating the relevance of an archive to its parent body. With much of the existing professional literature principally concerned with the archive's role in relation to its external publics, the necessity of providing equally appropriate services to its internal publics has been largely undocumented. It is hoped that this study goes some way towards redressing the balance and challenging the notion that internal marketing equates only with the limited sphere of promotion.

Internal marketing is a holistic process that begins by enabling an archive to identify its internal customers, together with their needs and expectations, before evaluating the efficacy of existing services in meeting those needs, developing services and products that better suit each internal customer group, and finally measuring the success of these services. If internal marketing is to be an effective tool for increasing the relevance of an archive, it must be employed in its entirety and recognised as a cycle that repeats on a regular basis, rather than being treated as a one-off activity. The relevance that internal marketing can enable an archive to develop is not static, as argued by Victor Gray: '...the nature of that relevance changes across time, and we need to be sure that the kind of relevance we are proving is a relevance of today, not yesterday'¹²³. The cyclical internal marketing process of review and development allows archives to evaluate and evolve their services in step with their rapidly changing environment.

This study has further argued that internal marketing enables archives to offer valuable benefits to its parent, be it support for current business activities, engaging employees with the organisation for which they work, or reinforcing the organisation's brand identity in the mind of its employees. In this way, it can be seen that internal marketing can provide the

¹²³ Victor Gray, 'Relating into Relevance', in the *Journal of the Society of Archivists*, 24:1, (2003), p11.

tools and infrastructure to support effective outreach and advocacy to the parent body, as Elizabeth Hallam Smith has highlighted:

We need therefore to accept that while we may well have much to be proud about in our services, there will always be scope to develop them in order to help us win the support and respect both of our funders and our users. Customer service and marketing methodologies are invaluable tools for doing this, for setting up systems for improving services to customers both internal and external, and for reaching out to new audiences.¹²⁴

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A potential reason for the low profile of internal marketing in professional literature and practice may well be that many archivists are not routinely trained in marketing techniques and might subsequently consider this to be beyond the bounds of their expertise. This study has therefore additionally sought to provide a practical guide to implementing an internal marketing programme within an institutional archive. At the heart of this blueprint is an emphasis on the importance of planning for the success of an internal marketing programme, as acknowledged by every archive interviewed in the course of this research. It is the contention of this study, however, that the planning process does not have to follow the rigid and detailed format advocated by commercial marketing literature¹²⁵, but rather could take the more convenient form of a project or communications plan for each service or product offered. Whatever approach is adopted, archives must prioritise the regular identification of their customers' needs and expectations, and the self-assessment element of the planning process, taking time to examine its existing strengths and weaknesses

¹²⁴ Hallam Smith, E, 'Customer Focus and Marketing in Archive Service Delivery: theory and practice', in the *Journal of the Society of Archivists*, 24:1, (2003), p37.

¹²⁵ Indeed, none of the archives interviewed produced a detailed internal marketing plan. Instead, the approach taken was more ad hoc, with projects developed and planned as required on the basis of the archives' understanding of their customers' needs.

together with the potential impact of its environment. Without this central knowledge in place, institutional archives are likely to struggle to develop services that are of continuing relevance to their customers and feasible to deliver.

Of equal importance, once services have been developed and promoted, is the capture of performance data that can subsequently be used to enhance customer services. Although all of the archives interviewed collected enquiries statistics and feedback from sessions such as training or seminars, none have approached this in a particularly systematic way and few have gone on to use that data to evolve their services. This study has argued for a more rigorous approach to performance measurement, through the use of more detailed user statistics, questionnaires, focus groups and anecdotal feedback. The results obtained by these methods will not only enable archives to evaluate and improve their work, but can also provide examples of best practice to other institutional archives.

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These issues of effective performance measurement and the sharing of experience and best practice, have revealed the limitations of this study and suggest further areas of research required to create a more detailed understanding of current practice and potential areas of development.

Firstly, this study has been restricted by the number and type of institutional archives that it has been able to include. While the four archives interviewed represent a balance between the private and public sectors, institutional archives exist in a wide variety of organisations, from county councils to the retail sector, museums and galleries to telecommunications. By its very nature, internal marketing is not visible to the outside observer and so an investigation of the attitudes, experiences and current practices of a greater range of archives in relation to internal marketing would help to increase understanding of the existing situation nationally, and provide examples of what approaches have worked and could be more widely adopted by the profession.

Secondly, as has already been mentioned above, the application of performance measurement techniques to internal marketing strategies has been little discussed in professional literature thus far. As a result, there is arguably uncertainty amongst the profession as to the value of this kind of data, the most effective means of gathering it, and how it can best be used to enhance archival services. Further research into this area is therefore warranted in order to determine the most meaningful and feasible methods of quantifying the performance of internal marketing strategies.

It is hoped, however, that this study has provided an introduction to the methodology of internal marketing, and how archivists can employ related tools and techniques to assess their current situation and go on to develop relevant services for their internal customers. It is further hoped that the examples of current practice provided by the case study institutions have demonstrated the variety and efficacy of internal marketing strategies. Above all, this study has aimed to dispel existing misconceptions about the process of internal marketing and demonstrate 'that customer focus, and marketing methodologies and skills, are of the highest value in supporting and enhancing service development in archives...in order to assure the future standing, reputation and viability of the archives profession, and the long-term survival of archives in our care'¹²⁶.

¹²⁶ Hallam Smith, E, op cit, p35.

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Appendix 1: PEST and SWOT Analysis Templates

POLITICAL	ECONOMIC
SOCIAL	TECHNOLOGICAL

STRENGTHS	WEAKNESSES
OPPORTUNITIES	THREATS

TO COMBAT THIS WEAKNESS OR THREAT...	WE WILL USE THIS STRENGTH OR OPPORTUNITY...	IN THIS WAY...

Appendix 2: Stakeholder Mapping Template¹²⁷

	LOWER INTEREST	HIGHER INTEREST	
HIGHER POWER	<p>Involve / Keep Satisfied</p> <p>‘We can work together where common ground exists’</p>	<p>Partner / Key Player</p> <p>‘We need to work together on...’</p>	HIGHER POWER
LOWER POWER	<p>Inform / Minimum Effort</p> <p>‘We will tell you...’</p>	<p>Consult / Keep Informed</p> <p>‘We will listen to you and respond’</p>	LOWER POWER
	LOWER INTEREST	HIGHER INTEREST	

¹²⁷ Based on material used by the Parliamentary Archives.