

## Thirteen Annual Meeting of the Corporate Archives Forum

June 2010

Host: Procter & Gamble, Cincinnati, Ohio

### Meeting Notes

To protect confidentiality, these meeting notes do not attribute comments to any specific attendee or company. The attendees are sharing these notes with the wider archival community in the hopes of furthering the discussion of issues.

#### Session 1: Alliance Between Marketing and Archives

The attendee began his presentation with an overview of the evolution of the Archives' relationship with the marketing team. The Archives originally began by helping marketing promote its product. Archives did not have detailed inventories or tracking of loaned assets in those early days. The Archives also worked with consumer products groups early on. At that time Archives' assets were exploited by marketing without concern for their long-term viability. After a professional staff of archivists and museum professionals was assembled, Archives began reaching out to other departments. By proving what services Archives could provide, and by increasing visibility through exhibits, Archives assumed a greater role of responsibility. A turning point came in 2005 with the integration with a new parent company. There was a restructuring and several separate historical collections – organized by format – were combined into a single Archives organization, now organized by business function. The Archives relationship with marketing has grown and flourished since then. The Archives holds a much tighter grip on what is coming in and going out and being loaned out. It has positioned them well to work on an upcoming anniversary.

Planning for this upcoming anniversary began in 2009 and the attendee is on the planning committee. He struggles with balancing the historical significance of the anniversary with something that is viable from a media and consumer position. He suggested they celebrate the events that were a spring board for a bigger and better future. And it is challenging to tap into a sense of nostalgia with their key targeted youth demographic.

Discussion followed. For its brand anniversaries, one company uses history not as the message but the "hook." It gets media attention so the marketers can then have the opportunity to get their key messages out and talk about the product today.

Another company has the same approach with an upcoming major corporate anniversary. The anniversary is an excuse for them to talk to their consumer and talk to the media. It gives you leverage, a reason for them to have a conversation with their consumers. It is about longevity, stability, reliability. It gives the opportunity to talk about brand's or the company's "intrinsic."

Another person brought up the challenge of coming up with historical “proof points” for current hot topics such as “sustainability.” Some concepts are universal and we can find episodes in the past that demonstrate sustainability even though that term was not used back in the day.

We survive by not hiding our assets. We are not just custodians, but proactive historians. The historical assets can’t just be put out there, there has to be a gatekeeper who interprets the assets and helps the company leverage those assets.

## **Session 2: Documenting Business from Outside and Inside**

Two countries – England and Wales – published national business archives strategies in 2009. Another strategy for Scotland is in draft form. One attendee gave an overview of the UK strategies from a U.S. perspective...

### England & Wales Strategy

- Raise awareness among businesses of the value of their records and archives, and providing guidance and support from the professional archive community
- Increasing the number of corporate sector business archives and of business collections in public sector repositories
- Raising the profile of business records with the public, and throughout the national archive network, while promoting wider usage and exploitation
- Raising standards in the care of business archives through best practice exemplars, professional training and an improved funding and support infrastructure

### England & Wales Benefits for business (in-house) and for society (collecting repositories)

- Growth - can be used in marketing and customer relations
- Differentiation – each company is unique
- Protection –archives are the memory of the business

### Scottish Strategy

- To raise awareness amongst businesses of the value of archives and provide guidance and support
- To increase the number of collections publically accessible
- To raise the profile of business archives with the public
- To raise standards in their care

## Tactics

- Advisory leaflet on managing business archives
- Best practice website
- On-line registry
- Assessment of suitable facilities and services
- Private public partnerships
- Crisis management
- Dialogue with liquidators and receivers
- Education
- Add archives management to the Corporate Social Responsibility (CSR) index

(From the U.S. corporate perspective, there would be challenges to achieving some of these tactics.)

## Scottish SWOT analysis

### ***Business change and negative economic climates can lead to:***

- Records being lost during acquisitions, mergers and corporate restructuring or when businesses cease to trade and administrators and liquidators take over.
- Rationalisation of global business resulting in headquarters moving out with Scotland and UK jurisdiction, taking part of our heritage with it.
- Missed opportunities to help companies celebrate their pedigrees and longevity to build public and client trust.
- Business archivists and record professionals being made redundant through business rationalisation or posts being frozen by efficiency savings in the public sector and archives therefore becoming inaccessible.
- Funding of cultural and business heritage organisations being put at risk through withdrawal of funds when they are most needed to save and promote archives.

### ***Digital records require careful management and a proactive approach or else:***

- They become inaccessible due to digital obsolescence and technological advances.
- They will be lost and a black hole will appear in the historical record.
- They will continue to be seen by business as historically unimportant.

- Record offices will be unable to accession and manage deposits of digital records due to a lack of technical resources and knowledge.

#### “Soft Spots” from a U.S. perspective

- Primacy of in-house corporate archives for an active corporation – something important is lost once they are moved outside
- Emphasis on public access to records
- Funding - the US national archives is not taking a leadership position in preserving business records
- Attitudes towards business, particularly in academic sector – an anti-business bias in academia
- Leadership
- Drive to outsource
- Compliance – a double edged sword

#### An American strategy? – some thoughts/questions

- Would we have the same 4 elements as the UK strategies?
- Can we hope to overcome the soft spots in the U.S., particularly leadership? There is no one to take the leadership in developing a US strategy. It is not in anyone’s job description. The SAA Business Archives Section (BAS)? Everyone has a full-time job already.
- What areas would you prioritize?

Discussion followed the presentation. The consensus was that there needs to be a focused approach. Corporations take pride in what they do. So if there are groups or stakeholders outside the company (i.e. organizations, government, consumers) who feel a company is doing something well, executives will listen. But there still typically is no culture or practice within companies to save records just for the sake of possible future historical research. In developing a strategy for business records you need to “think like a business” otherwise the tactics are not going to fly. Benefits to the company have to be either financial or reputational. Companies like to see themselves on “top 10” lists. Public opinion is one index that will matter to companies. The most transparent companies seem to be ones that have established corporate archives programs.

Who are users of the corporate records that are retained? If the users are internal, then there is a separate set of guidelines for collecting scope. If you are collecting records for external researchers, that changes the parameters of what is retained. Even internally, we target some users over others.

At one company external researchers have been able to give validity to some aspect of the company's history (such as its record on employee profit sharing) because they were allowed in to use the company's historical records. Users should drive what you collect.

How would the UK strategies differ if they just focused on in-house archives and not collecting repositories? Should business archivists collaborate more with SAA's BAS? Should BAS be more of an advocacy group than it is? BAS has been about just internal discussions with each other. Who has time to do more?

The UK National Archives has a full-time funded position to consult with companies about how to deal with records. There was discussion about the need for the US to have someone like that. It needs to be someone at the governmental level or an NGO; a not-for-profit organization/trade association interest group, not a private consultant. The Canadian archivists do have a group which advocates for the preservation of business archives. With some countries on the verge of an economic collapse, how high on the priority list for most countries is this strategy of preserving business records?

### **Session 3: Integrating Interfaces Across Repositories**

This company archives has developed an overall content management strategy that involves 3 repositories: one database for image files (DAM), one SQL database for metadata about physical records, and one SharePoint digital repository for fully electronic records. Currently the Archives staff uses the native search functionality of each tool to conduct searches. Each repository was developed incrementally. The last step is to attempt to design an integrated search interface to allow both the Archives staff and employee end-users to perform an integrated search access across all the three repositories via the Archives intranet site.

The discussion moved to the marketing of "icon" brands and how, if it is even possible, can archives document that iconic status and how a brand becomes an icon? What makes a brand "iconic?" It is very subjective. Marketers may WANT their brand to be an icon, but does that really make it an icon? Discussion of managing long-term brands with the emphasis by marketers always want to on always "update" older brands. They want to take the brand in new directions and sometimes that may not be consistent with the equity and heritage of the brand.

### **Session 4: Corporate Etymology**

This topic is based on a recent New York Times article by Ben Zimmer (published April 26, 2010) about corporate "etymology." The discussion focused on how as archivists we can help keep marketers honest when it comes to telling the story of a brand's history or company origins. We can use Legal as a partner. Inaccurate Wikipedia content and other miss-information on the web is a serious problem. It isn't possible to correct all the bad history on the web. One company had a brand that wanted to pick an anniversary year that looked aesthetically pleasing even though it wasn't historically accurate. And marketers often want to know what the origin is of their brand name. But it is not always possible to document the story of how a brand got its name. We must make sure that if marketers rely on "urban legend," that they indicate it is so, and not position legend as fact.

How have archives been able to kill urban legends within their companies which are not true but have become part of the corporate lore published in older sources? It is very difficult, especially when you are asked to verify the lore or provide documentation. It is difficult to correct miss-information once it is out there. There were several examples from the group about how they dealt with corporate myths. It does not always make the archivist popular, but it is necessary. Make sure that key communicators (speechwriters, PR folks, internal communications) know they need to loop the Archives in as fact checkers. The Archives is not just the “history police” but a source of true & accurate stories. We have their back. The etymology article is an example of the reputational risk if a brand story - positioned as fact - is revealed as a myth/untrue.

One archivist found “expanded annual reports” to be very helpful. They are binders of source documentation to support all the statements in their annual reports. Do other companies have something similar?

#### **Session 5: Finding Solutions to the Gobs of Video in the Archives**

This archivist finds it a challenge to provide appropriate source video for the creation of b-roll clips. He has to manage voluminous numbers of video footage since the year 2000 when the company’s video production unit closed and the Archives took custody of the video assets. There was minimal metadata and about 6000 reels, all analog video. Some were raw unedited footage, some edited B-roll. His goal was to “repurpose” the footage.

But in 2001 the company’s logo changed. So existing b-roll all became outdated and is virtually useless now for repurposing. Marketers don’t want to see the old logo in video. But they still need footage and do not want to re-shoot what has already been produced. Subject experts can discern the age of the subject matter, so footage that didn’t seem outdated to the archivist, is considered outdated by the subject experts. So he has developed guidelines for archival footage used in creating new b-roll. He was confronted with a paradox. He could dispose of some of the unusable footage and not invest time and effort of viewing and tagging it. But he couldn’t determine what footage was unusable without spending time viewing and tagging the footage. But he pared down the collection down to 3000+ tapes. And now the collection is primarily historical.

Lessons learned:

- Not enough time in the world to do all the work
- Quality – lose the non-broadcast footage unless it is unique
- Forget the b-roll – that means don’t try to repurpose historical footage for current b-roll
- No metadata, no clue, no save
- Don’t outsource format migration until you sure you want to keep it
- Formats galore

- March of technology – there is always something new - wide angle digital, high def
- Digital migration is forever
- The need for bits of video (raw video are like raw records) – research takes time and work
- There is Use problems (‘etards’) even with the best technology – end users are not always familiar with the technology or don’t have compatible software.
- Talking heads and meetings – boring. These tapes have some archival value/content but low possibility of re-purposing except for a retirement tribute

Solutions:

- Serve it on a platter – give clients footage in usable form
- Advanced work with production
- “20-years ago” snippets like on Twitter or wiki page (content not meaning - you are creating content for an insatiable “monster” )

Discussion followed about corporate video collections and content that has re-purpose value as opposed to what is just “documentary” evidence. Do we need to do a better job of informing our clients about the availability of the documentary footage? Attendees shared examples of external (media ) requests for moving image footage and some of the issues and challenges, including rights. What happens to the raw footage which does not end up in the final edit of a video project or b-roll? A couple companies have had experience with CNBC producing a feature about their company. They were positive experiences. But there are risks to participating in projects like this.

<p><b>Session 6: Corporate Acquisitions and Archival Integration</b></p>
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Several attendees have recently dealt with major mergers or acquisitions and they provided an overview of their experience and some learnings. Each situation is unique but there are lessons with each experience. Another company has a pending acquisition which could change how they do business. How does the archives document and deal with a shift of that magnitude? Discussion centered around the impact of integration, reorganization, employee turnover, new employee education, added roles and responsibility without additional resources, and other consequences of corporate acquisitions. For one company the acquisition of a business resulted in the addition of two headcount. It is always a positive occurrence when an acquisition includes additional resources for the archives function. Another company is changing its growth model from growing the business “organically” to growing through acquisitions.

## **Session 7: Corporate Anniversaries: The Gifts That Keep On Giving**

At one company with a major anniversary coming up, 50% of employees have been with the company for 5 years or less. The Archives staff developed a Heritage series of hour-long lunch presentations and brought in different speakers: an author who wrote a book about the company, a guy whose family was on the board for the company for several generations, a former advertising agency partner, and the archivist who talked about the founders. They also showed a movie with a company connection for another session. The series was very popular, attendance was higher than expected, and they received great comments from the employees. That was last year, so they will do the series again this year as a lead-in to the company anniversary.

One attendee reviewed her not-so-positive experience with a recent anniversary.. She wanted to do more for this major anniversary since the founder was still alive. The Corporate Communications VP who controls all the messages was lukewarm to the idea of celebrating a company anniversary. She got some budget and put together a plan. She and the Archives staff did a lot of work, but much of it was not implemented by the VP. He dragged his feet. She talked with him and was able to get more of his support, but he still controlled the implementation of some of the plans. There were some PR events that were tied to the anniversary, but they were not actually heritage events. The archives did not get any recognition for the anniversary program, only the VP did. The founder died the month after a large fancy party for executives, where the VP was recognized for the anniversary celebration but he did not give credit to the Archives. It was a difficult and disappointing year. She did everything right in terms of planning and strategies. But at the end of the day, if the “gatekeeper” isn’t valuing the message, it isn’t going to have the impact it could have. Most employees didn’t go to the fancy party so they only saw some posters and a booklet. The political reality with the Communications group is that the Archives supplies the raw materials and Corporate Communication takes the credit. But the story is very different with the brand teams.

Others gave input about the challenges of getting senior leaders to be pro-active in planning and implementing anniversary celebrations. Executives are not always responsive to these types of activities they see as “soft” events without “hard” results. A take-away is that we need to start planting seeds for an upcoming anniversary early on. Build a base of support. Get people engaged. Do pro-active processing to ensure appropriate visual and text materials and video footage that will support the anniversary efforts are ready to go and easily accessible. Try to get processing support and other archives support using the anniversary budget. Be careful to make sure you maintain tight control over any original materials or artifacts you may loan out, to ensure they aren’t damaged.

## **Session 8: Working with Exhibit Designers**

Every 2 years there is a worldwide convention at one company. The archivist was asked to work with a design firm on a corporate exhibit booth for the meeting. This was in addition to his work on designing



and building the Archives exhibit. The corporate exhibit needed to be innovative, inspiring and imaginative – a tall order. He was given the following guidelines...

- Leverage past successes
- Highlight milestones
- Minimal text maximum figures (statistics)
- Bold & breathtaking

It was a challenge to provide the details and figures the designers asked for. And some of the statistical figures did not exist or were not in the Archives. There were too many “cooks” and it resulted in lots of changes. The exhibit started out with pictures and inspirational text from the founders. There were panels with milestones and facts & figures. “The numbers tell the story.” There was a wall where all the visitors signed their names. It was a huge time investment, lots of work. And he still had to keep up with his regular work. Plus he had to compile all the proof points to back up the exhibit content. In terms of outcomes, it did make a great impression on attendees, and they got the key messages. The Archives was viewed as a trusted partner. But he questions whether the exhibit really delivered on its goals for that short 4-day event.

This is an example of one of our key challenges. Senior leaders come to us for help as historians as well as archivists. We have to wear both hats.

Another attendee showed pictures of a heritage wall they produced for one of their business headquarters. Now other businesses want to do the same thing. But other businesses don’t have the space or a separate HQ space to do this. He also showed a presentation on Brand Heritage produced by a senior executive, where he tells brands that “the Archives can provide you your brand history for video and exhibit projects.” But the Archives doesn’t always have the documentation or staffing resources to support something on that scale. He will let the executive know that this is going to be a challenge for them. Discussion followed about how organizational structure and onerous processes for getting projects funded are often roadblocks. The benefit of our relationship-building skills (which helps us get things done) is mitigated by the lengthy and challenging process requirements that are sometimes in place.

Meeting adjourned.