

## *“I Don’t Have Time for That”*

### *An Onerous Responsibility Gets a Creative Makeover*



Records Retention Coordinators reported an increase in records management compliance.

#### **Situation**

Managing business records is a business-critical function. Proper document retention and disposal is especially important in highly regulated industries. While ultimate responsibility for records management usually resides with Legal and Regulatory departments, and mismanagement can affect the most senior leaders, employees at every level of an organization must comply or the system will fail. Records management, however, is one of those activities that falls to the bottom of employees’ priority lists; it’s drudgery, has no immediate benefit and takes time that no one can spare.

#### **Solution**

The Records Management Steering Committee at a global pharmaceutical company engaged VTLO to raise awareness and encourage compliance with its records retention policy in the United States. VTLO brought fun and creativity to the project, developing a communication plan and introducing a lottery-based incentive program called File to Win. Employees who complied with the records retention policy were given a scratch-off lottery ticket with the chance of winning cash prizes.

#### **Objectives**

- Develop and implement a strategic communication plan to support the goals of the Records Management Steering Committee
- Create awareness of the importance of managing records and support records coordinators in bringing this message to employees
- Make a necessary, but onerous, responsibility fun by incorporating a lottery-like incentive, a grand prize, employee recognition and friendly competition to engage employees and encourage participation
- Increase the level of records management compliance

#### **Results**

- All lottery tickets were distributed, indicating that employees were completing records management goals to receive them
- A majority of the twenty records coordinators reported an increase in records management compliance
- The program continued after its initial roll out

#### **How VTLO Helped Our Client Succeed**

- Served as Communications lead on the Records Management Steering Committee
- Conducted focus groups and feedback sessions with records coordinators
- Created and implemented the incentive program, collaborating with support teams in Legal, Human Resources and graphic design
- Wrote material for managers, records coordinators and campus publication
- Provided guidance and materials to sustain the program

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