



# Leveraging Legacy Historical Records to Create Organizational Value

Many organizations, including Ford and Coca Cola, have employed historians and authors to tell their corporate stories as a way to promote their brands. Information professionals have an opportunity to step into this role, working with other stakeholders to appraise their organizations' historical materials for marketing and other potential uses.

William W. LeFevre, CRM, CA

**W**hile there are many classifications of and terminologies for information professionals – such as archivists, records managers, and information management (IM) or information governance (IG) professionals – the implications of the data explosion are compelling these allied professionals to learn much more about how the others manage and value information.

Archivists, who have traditionally left the shepherding of active records to records managers, now must often deal with recorded information throughout its life cycle – from its creation through its active use and well into the traditional domain after it is considered inactive or “historical.”

Likewise, IM professionals who have traditionally considered their domain to be that of records creation and use, eschewing the inactive phase of records (except to note disposition and disposal), must now accept the need for continuous and differing appraisal of records in their care.

## Leveraging Ford's Historical Assets

IM professionals might look at the recent example of Ford Motor Company to see why collecting and appraising historical records and making them available can be smart business moves.

In May 2018, Ford hired Ted Ryan, a renowned historian and archivist whose previous work at the Coca Cola Company included helping the company license, promote, and market its famous, 100-year-old Coke bottle, to help Ford leverage its historical assets. In hiring Ryan, Ford made a bet that its history will sell and that its historical records will support company brands in myriad ways.

Mark Truby, vice president of communications at Ford, explained in a June 29 article by Phoebe Wall Howard in the *Detroit Free Press*:

**Ensuring we preserve Ford's history and leverage it properly has always been important. Our unique provenance and heritage, 115 years of ideas, innovation and progress — is an advantage for Ford. When brought to life in a modern context, heritage can build reputation and link past innovations to today, building trust in our ability to lead in the future.**

Indeed, this is not Ford's first foray into documenting and promoting its historical significance. Previously, the company employed award-winning author Douglas Brinkley to produce an official corporate history, “Wheels for the World: Henry Ford, His Company and a Century of Progress.”

In the *Detroit Free Press* article, Howard quotes Marcus Collins, a lecturer at the University of Michigan's Ross School of Business, about how this approach will help Ford evolve beyond its traditional car-selling business.

“I imagine the brand will use the legacy approach as a pivot to signal a widening of their business,” Collins said. “That is, they're not in the car business, they're in the mobility business.”

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## Following Ford's Lead

What can IM professionals do to leverage such historical assets? They should begin by understanding the different values that may be assigned to historical records and the ways they may be used. At the same time, these professionals need to provide justification for the collection, storage, and dissemination of historical materials. Ultimately, different partners may need to be found for the use of historical materials, as noted below.

As with all recorded information, records that are deemed to have historical importance have values that may be assigned to them. Historical records may have administrative, legal, economic, and informational value, but each of these values may be weighted differently after the records have been deemed inactive and their disposition is changed to historical. Appraisal of such records should take into account the records' original values and how the records may be used by a disparate audience.

Accounts receivable ledgers are a perfect example. For the records manager, the ledgers may have an administrative and/or legal value that is clearly marked in a records schedule. The ledgers are active for CY+X [current year + a specific number of years] or ACT+X [while active + a specific number of years], or PERM [permanent], or MAX X [a maximum number of years], and the disposition is clear: the records are to be destroyed after the final disposition date is reached. These values are largely a matter of the legal and administrative need to keep them and are driven by a combination of regulatory need, business need, and risk analysis.

For the same records to be deemed historical after this valuation has been exhausted, the IM professional must assess the records' potential to be used for other purposes, such as for marketing and communications, employee training and education, strengthening corporate identity, documenting mission and history, and data mining, to name just a few. Part of this appraisal process involves identifying potential audiences, and it might include reaching out to non-traditional users of the records.

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Returning to the example of accounts receivable records, the material may be used in several ways. They could be mined for information on fluctuations in markets or to reflect changes in economic predictors. The ledgers could be used to flesh out corporate histories or for training purposes. Corporate brochures might be used to bolster corporate brand loyalty or for design review.

In each case, the IM professional must break out of the traditional pigeonhole of existing records schedules and normal retention periods and consider all the potential uses and re-uses of the records at hand.

## Appraising Records for Other Uses

When looking for records that have potential historical value and potential other uses once they are inactive, IM professionals should use a baseline historical appraisal approach; in other words, look to see what records are available to work with. At the same time, they should keep a keen eye toward identifying historical gaps in the records, for they may need to be filled as the historical program is expanded.

Consider these two approaches for appraising the records: internal and external.

*Internal appraisals* draw on the expertise of all potential stakeholders to produce a list of historical records and the ways they might be used. This approach draws on the strength of institutional memory but could lack the formal expertise that identifies common pitfalls in collecting and appraising (for example, collecting records

without a clear collection strategy). Internal appraisals might, however, have the twin benefits of costing less and engaging real and potential stakeholders.

*External appraisals* draw on the expertise of individuals who have conducted historical appraisals before (consult the Society of American Archivists' business archives section for potential expertise) but might lack the institutional memory of an internal appraisal.

## Using Other Sources

Additional sources for identifying records that have potential historical value are written histories and articles in in-house publications and external sources. Industry histories are another great source for identifying potential historical records. Further, IM professionals should not overlook amateur historians and groups; they often provide information that cannot be found anywhere else, and they may possess records that have "wandered" away from their rightful locations over the years.

## Justifying the Investment

The collection and retention of historical materials can be costly, time consuming, and seen as ancillary to the core mission of an IM program. But, in the information age, mining record sets for new ways to use them is the accepted norm, and this should make it easier to pitch the idea of taking a closer look at mining historical records.

There are many justifications for adding historical records to an already successful program. Telling stories through corporate records can enhance efforts to brand or rebrand, advance the organization's mission, boost employee loyalty programs, enhance training efforts, and improve community outreach efforts, all of which will bolster the organization's internal and external brand. **E**



**About the Author:** William LeFevre, CRM, CA, is the corporate records manager for FCA LLC US and was previously senior archivist at Wayne State University. With nearly 30 years of professional experience, he has served in many leadership roles with ARMA International and the Institute of Certified Records Managers and has been a frequent speaker and author on archives, information management, and library science topics. LeFevre earned a bachelor of arts degree from Albion College and a master of science in library science degree from Wayne State University; he is also a Certified Records Manager and a Certified Archivist. LeFevre can be contacted at [William.Lefevre@fcagroup.com](mailto:William.Lefevre@fcagroup.com).