



Winning the Cobalt Award – How Could YOU Do it?

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The Procter & Gamble logo, consisting of the letters 'P&G' in a blue, italicized serif font, set against a white background within a blue-bordered square.

The Cobalt Award

Your Company Could win in 2012

- 1 What is ARMA?
- 2 What is the Cobalt Award?
- 3 Should YOU think about applying?
- 4 How did P&G prepare and apply for the award?
- 5 What happens when you win?
- Questions & Answers



Who is P&G

www.pg.com



- Four billion times a day, P&G brands touch the lives of people around the world.

Diverse Consumer Products:

- Health: Vicks[®], Prilosec[®], Crest[®], Oral-B[®], Pur[®], Prilosec[®]
- Fabric & Home Care: Tide[®], Bounce[®], Downy[®], Dawn[®], Ivory[®], Cascade[®], Ace[®], Dash[®], Ariel[®], Febreze[®], Swiffer[®], Duracell[®], Fairy[®]
- Baby Care: Pampers[®], Luvs[®], Kandoo[®]
- Beauty/Grooming: Cover Girl[®], Pantene[®], Olay[®], Gillette[®], Wella[®], Venus[®], Braun[®]
- Paper: Bounty[®], Charmin[®], Always[®], Tampax[®]
- Snacks: Pringles[®]
- Pet Care: Eukanuba[®], Iams[®]

- ~ 132,000 employees working in ~ 80 countries
- FY2009-10 Sales: \$78.9 Billion

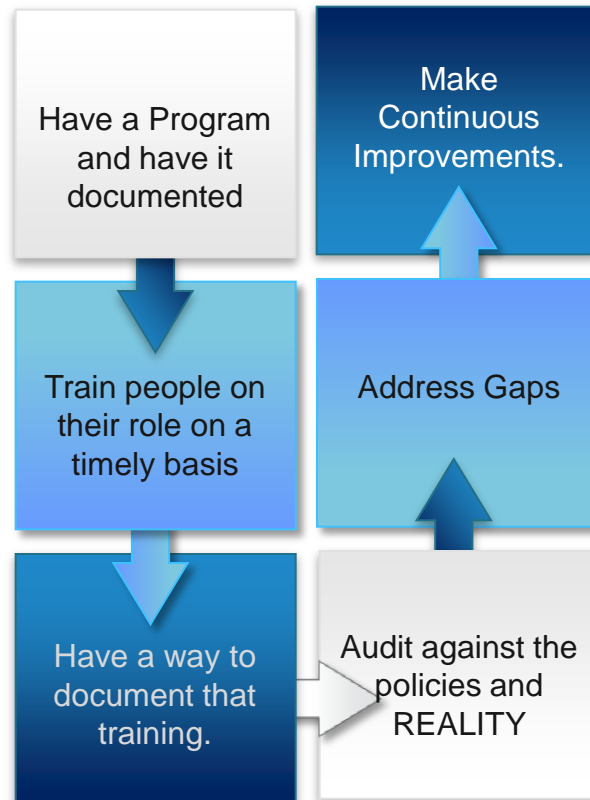
What is ARMA

www.arma.org



- **ARMA International** is a not-for-profit professional association and the authority on managing records and information – paper and electronic. Established in 1955, today approximately 11,000 information management professionals who are members from 30 different countries.
- ARMA offers invaluable resources such as:
 - [Legislative and regulatory updates](#)
 - [Standards and best practices](#)
 - [Technology trends and applications](#)
 - [Live and Web-based education](#)
 - [Marketplace news and analysis](#)
 - [Books & videos on managing records and information](#)
- Membership is by Individual, but if an individual is a member, the Company is a member. (\$175 USD/ yr)

What makes for Good Records Management?



What is The Cobalt Award?
www.arma.org/excellence/index.cfm



Cobalt Award

What they look at, high level

What counts

1

This Excellence in records and information management. It's time we recognized it for what it is...

- An acknowledgement of the importance of records and information management to the organization
- The cornerstone to compliance with laws and regulations
- Consistent policies, procedures, and practices that begin at the desktop
- A contributor to organizational success
- One of the most important elements of risk and asset management in any organization

What it recognizes

2

ARMA International's Cobalt Award recognizes the cultural shift an organization makes when it embraces solid records and information management as a foundation for its success

Facts about The Cobalt

www.arma.org/excellence/index.cfm

- How Long: Since 2008
- How much: 120 Questions – Yes/No Short Answer
 - Application fee is \$100
- Where:
 - Award is presented at the ARMA International Conference
 - **Winner flies for free, receives free Conference Registration, and 1 night's hotel stay**
 - 2012 Is Chicago, IL (USA)
 - 2013 Is Orlando, FL (USA)
- When: Apply March 1- April 30
 - If you are a finalist, notified in June
 - Judge visits you in July/August
 - Presented in Sept/October at Conference
- Who: Open to any ARMA member
 - Any industry or government office
 - Panel of RIM professionals judge the applications (Sign a non-disclosure statement)
- HINT: ARMA EAGERLY LOOKING FOR INTERNATIONAL CANDIDATES. WOULD LOVE TO HAVE A NON-U.S. COMPANY WIN !!!!



Is your Organization Ready?

A pre-screener

1

Question 1 : Does your organization have a formal, written records and information management policy statement that requires adherence by all management, staff, and contractors?

2

Question 2 : Does your organization have a formal, written policy regarding information security and controls?

3

Question 3 : Does your organization have a formal, written privacy policy?

4

Question 4 : Does your organization have a formally approved business continuity plan?

5

Question 5 : Does your organization have a formal, written policy for handling litigation holds?

6

Question 6 : Does your employee manual or other policy or procedure include a statement from the organization's top executive about the importance of records and information management?

7

Question 7 : Does your organization manage e-mail based on its content?

Is your Organization Ready?

A pre-screener

8

Question 8 : Does your organization provide ALL employees with formal training on their roles and responsibilities in managing records and information?

9

Question 9 : Are all RIM staff trained on current policies, procedures, practices, and systems?

10

Question 10 : Does your organization regularly backup its systems and data?

11

Question 11 : Has your organization assembled an information management compliance team? *That includes RIM and IT stakeholders?*

12

Question 12 : Does your organization rely on back-up tapes to retain and/or produce data for litigation?

GREAT CHECKLIST FOR DEVELOPING A GOOD
RECORDS MANAGEMENT PROGRAM !!!!

P&G's Journey



- Did not apply for the first 2 years!
 - Used the pre-screener , didn't feel like we qualified
 - Worked hard on the “weak” elements for those 2 years
- Got Senior Management More Involved
 - *“Records management is important at P&G. First and foremost, it's part of P&G's commitment to good governance. Second, it helps ensure we have the right information available at the right time in the right place to make smart business decisions. Third, it makes us more efficient and helps keep costs low – and lower costs ensure P&G brands provide superior consumer value.”*

A.G. Lafley, CEO
- Reached out to other organizations that did “Records Related Work” to complete the Application
 - Privacy, Business Continuity Team, Information Security, Auditing, IT e-mail and back-up teams

P&G's Journey



- We made the finals?!? Now what?
 - Made a list of the key people we'd suggest the judge should meet with: Sponsor, CIO, Tax, Info Security, Key Customers, etc.
 - Judges tell you which people they want to meet with from that list.
 - Briefed each Interviewee to remind them of their work with Records Management and the facts about Records Management.
- We won let's celebrate
 - The winning was posted in the IT Online Newsletter
 - Three people attended ARMA and accepted the award
 - Made plaques with a picture of the award and kinds words for their contributions for all Records Management employee.



Keys To P&G's Winning

Besides patience and luck

Penetrate the Program

1

A program that has penetrated the entire organization and was acknowledged by Sr. Mgmt and all employees

Create Application Team

2

A couple of key people who were passionate about winning and willing to reach out.

Make sure Management Knows

3

If you are a finalist, make sure the management team and key partners/clients know and are ready to meet with the judge.

KEY ELEMENTS OF P&G's RIM Program....

<Dept X> and Records Management over the last 3 years.....



What do you mean we are not done?



- Get interviewed 4 times for Pod Casts
 - Posted on the ARMA website
- Write an Article for our local ARMA chapter
 - (they were so excited, they made us a cake)

Questions?

THANK YOU!