

ACHIEVING BUY-IN AND ADOPTION FOR YOUR RIM PROGRAM

RIM ADOPTION PLAYBOOK – HOW TO WIN BUY IN AND
DRIVE ADOPTION ACROSS TEAMS



RIM Adoption Playbook

How to Win Buy In and Drive Adoption Across Teams

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A Real Change Story: Shared Drives to SharePoint

- ▶ Migrated from shared drives to automated SharePoint.
- ▶ Automation applied metadata and retention at save.
- ▶ Teams resisted the change at first.
- ▶ The technology was not the problem.
- ▶ Messaging and positioning determined adoption



What changes this week

- ▶ Right rule applies automatically at save
- ▶ Stale content cleans up safely
- ▶ Audit proof available by default
- ▶ Less clutter
- ▶ Less searching
- ▶ Less risk
- ▶ More proof



Why Adoption Fails

- ▶ Too much policy
- ▶ Too big an ask
- ▶ Too abstract
- ▶ Not tailored to the room
- ▶ People support change when they see benefits, not instructions.



The 5 Slide Core Deck

- ▶ Hook - Why this matters
- ▶ What is in it for them - Why you should care
- ▶ Two 60 second demos - Proof
- ▶ Safety rails - controls
- ▶ One next step, one owner, one date – Safe to proceed



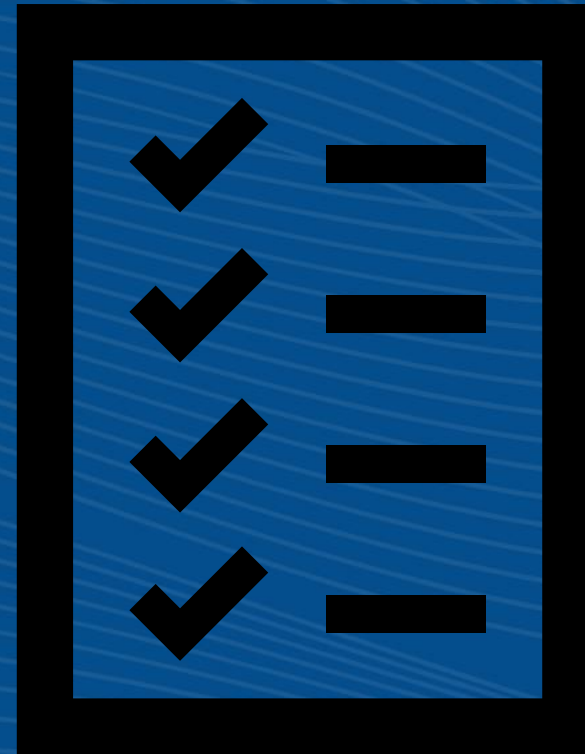
The 2 Minute Discovery

- ▶ Where do you lose time?
- ▶ What risk worries you this quarter?
- ▶ What must be audit ready?
- ▶ What would a win look like in 30 days?



Value Menu

- ▶ Save time
- ▶ Find faster
- ▶ Reduce risk
- ▶ Clean up ROT
- ▶ Audit ready
- ▶ Customer trust



Selling to HR

- ▶ Event driven automation
- ▶ Consistent employee record handling
- ▶ Defensible retention
- ▶ Ask: Map 3 HR events to retention rules
- ▶ 30 minute working session



Selling to Finance

- ▶ Audit readiness
- ▶ Vendor lifecycle clarity
- ▶ Faster retrieval
- ▶ Ask: 30 day AP pilot
- ▶ Measure retrieval time and auto classification



Selling to IT

- ▶ Reduce operational decay and clutter
- ▶ Archive stale channels with preview
- ▶ Label incident documentation at close
- ▶ Ask: Pilot in one squad / Team



Selling to Compliance

- ▶ Evidence by default
- ▶ Hold protection
- ▶ Audit logs and disposition evidence
- ▶ Ask: Confirm thresholds and exception paths



Objection Pivots

- ▶ It will slow us down → Defaults are automatic
- ▶ We need to keep everything → Over retention increases risk
- ▶ Regulators require indefinite retention → Exceptions with proof
- ▶ We already have tags → Use them to align uniformity



Adoption Plays

- ▶ 30 day pilot
- ▶ Champions network
- ▶ Micro nudges at save/share/close
- ▶ Retire 3 confusing folders
- ▶ Recognition and visible wins



Measure to Prove Adoption

- ▶ Percent auto classified
- ▶ Minutes saved per person per week
- ▶ Search success time
- ▶ ROT removed
- ▶ Nudge satisfaction score



Selling to Executives

- ▶ **Interactive Challenge**

- ▶ Break out into groups and produce some ways to sell your program to Executives.



The 15 Minute Meeting Formula

- ▶ 3 min Hook and WIIFM
- ▶ 4 min Two demos
- ▶ 3 min Choose quick win
- ▶ 3 min Objections and pivots
- ▶ 2 min Confirm next step and date



Close

- **Benefits over Instructions**
- **Outcomes over rules**
- **Small asks win**
- **Start small**
- **Prove value in 30 days**
- **Scale what works**



Final Thought

- ▶ Messaging determines Momentum.



THANK YOU!



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