

CREATING A DIGITAL STRATEGY

FOR YOUR INSTITUTION





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As museums move further into the age of digital, museum visitors have a stronger expectation to engage with institutions and their collections through digital portals. Museum Professionals are developing and strengthening their outreach through experimentation, and recording their findings in their digital strategies.

Creating a strong digital strategy helps ensure that collection access and visitor experience continue to align with the museum's mission and its technology resources.

This guide provides insight into creating a strategic digital plan, and takes a look at the digital strategies of a few Gallery Systems clients.

WHAT DOES IT ALL MEAN?

In an article on digital strategy for museums at London's Tate museum, Harvard Business School lecturer Jill Avery stated that being digital "means thinking about digital as a strategic priority and thinking about what your objectives are for it, and how you are going to measure success before you jump in." Although institutions may have differing goals, the approach to achieving those goals can be similar. Digital planning allows your institution to make proactive decisions, rather than reactive responses.



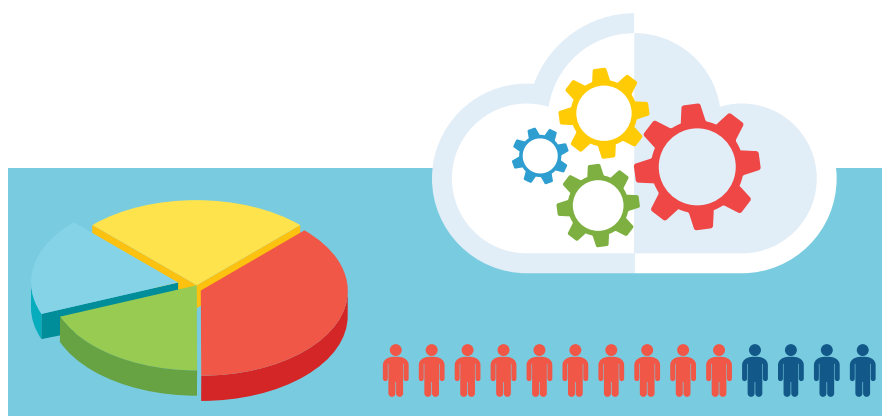
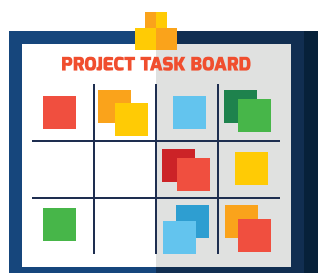
WHO SHOULD BE INVOLVED?

One of the most important things about implementing a strategy is involving the entire institution and their staff. Take it from the Andy Warhol Museum who published their [digital strategy online](#), "If the museum is to thrive in the digital age, it is important that all staff become comfortable and proficient with the new tools and workflows emerging technologies afford." Involving the entire staff underscores the importance of the digital initiative, solidifying institutional commitment to the goal. Simply hiring one staff member to complete these tasks or leaving it to a single department is not enough; there needs to be a broad, institution-wide embrace of the full strategy.



HOW LONG WILL THIS COMMITMENT LAST?

Developing and implementing any new strategy won't happen overnight, and outsourcing strategic tasks or letting the details of digital initiatives slip will result in unfulfilled project goals. A well-executed digital strategy can yield a great deal of informative data that can help the institution grow. Evaluating the resulting data is just as important as the strategy itself. Therefore, keep in mind that the project isn't done after it's been implemented, and will take ongoing commitment. However, that commitment is well worth it and will leave you with a wealth of information to help support your mission.

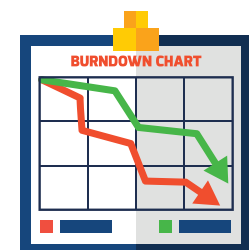
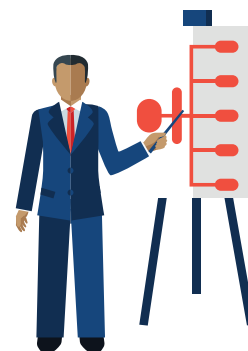
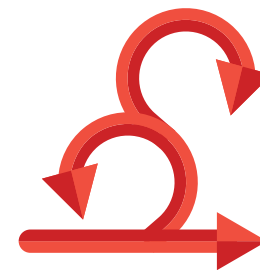
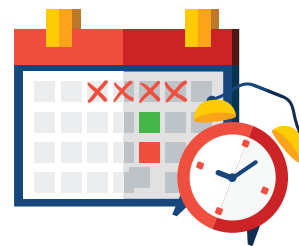


WHERE DO I START? MISSION, THEMES, AND GOALS.

The first thing to consider when starting a digital strategy is the institution's mission and overall goals. Linking digital strategies back to the larger mission assures that the strategy won't stray from the institution's brand, governing requirements, or duty to their public.

Using the mission and institutional goals as a foundation, develop multiple areas that your team is interested in expanding on for your strategy. For example, when the Warhol created their strategy for 2015 – 2017, they focused on 4 themes:

1. Experience and Engagement
2. Narratives and Access
3. Organizational Adaptation
4. Financial Solvency



After selecting your themes, assign each theme to an institutional goal. For example, if an institutional goal is to grow education and research, the theme of Narratives and Access can be aligned under it. A digital strategy or objective to achieve this goal could be creating a curriculum archive on the museum website, creating digital initiatives for academic research, or other projects. The intent is to identify a need and then find the best course of action to fulfill the need in an efficient and purposeful way. Remember to remain flexible, as there may be the need for reevaluation during the process of implementing a digital strategy.

Your team should also consider your ultimate purpose for your digital strategy, which is your audience. Understanding how your audience will consume your content and digital components will drive a major part of what technology your institution should invest in. All of your strategies, across the institution, should serve your user. A good place to start may be with your audience's digital habits, outside of your institution's involvement. For example, if you notice a lot of social media interaction with your works while users are in the gallery, then working

towards a stronger presence on social media may help to support them better. If you find that your audience is using your wifi to look up online articles about the objects in your collection, then creating a digital gallery and informative online space may provide them with content they're already asking for. Ultimately, your digital initiatives should include an interest in creating audience connections.



DEFINING PROJECTS

In creating your digital strategy, each action will need to be justified by the mission. Creating an outline will provide a clear roadmap from mission to action. When planning digital initiatives, consider the following:

- Resources
- Time frame
- Platforms
- Evaluation
- Content

Many digital tools are so ubiquitous in our lives that it may seem excessive to plan the details. It's so easy to create a Facebook page that many institutions forget to ask, "Why?" Everything the museum does should revolve around the institution's mission, so there needs to be clear justification for each activity. Creating a detailed plan while considering these points will provide that justification, and give your team an accurate idea of the amount of work needed to produce high quality digital content. Further, it helps you to know what content will help you to achieve your goals in an organized and efficient way, because you don't have hours to spend doing unnecessary work.



WHAT IF I WANT TO INTEGRATE A DIGITAL STRATEGY INTO A STRATEGY THAT ALREADY EXISTS?

In order to fully meet your institution's goals, it's important to continuously adapt your digital strategy as new circumstances in the planning process arise. The **SWMDP**³ provides some suggestions for alternative strategic plans, "Rather than thinking about digital as a standalone activity, you might want to consider embedding your approaches to digital activity into your current strategies, or reframing objectives within your Forward Planning document with a digital focus." Here, rather than creating a single digital strategy, the digital initiatives are woven into to the overall strategic plan for the institution.

Another option is to consider strategic goals and actions already in place, and develop digital objectives to meet those goals, as shown in this example.

Depending on the institution, integrating digital strategies into broader institutional strategies may be helpful, but it's important to remain committed to the digital processes. If the digital strategy feels like an afterthought to the institutional strategy, it's less likely to be implemented successfully.

FORWARD PLAN GOALS

- To make our permanent collections available to a wide audience through free admission
- To increase retail sales and improve customer service
- To increase use of on site evaluation to better understand our audiences
- To respond to tourism priorities (regional or national)



DIGITAL STRATEGY GOALS

- To offer online access to parts of our permanent collection through Collections Online, social media and other online interpretations such as blogging
- To improve the customer experience of buying tickets and other merchandise online
- To collect customer data online wherever possible and to use online evaluation tools (i.e. Survey Monkey, Audience Finer) to better understand our audiences
- To use third party online tourist platforms to market the museum (i.e. Visit England)

SWMDP Example

MUSEUMS WHO HAVE IMPLEMENTED DIGITAL STRATEGIES

Many museums have explored how digital strategies can grow their institution, and may have even completed multiple iterations of their digital strategies. We've gathered a few examples of digital strategies from Gallery Systems clients to provide a concrete understanding of contrasting digital plans in order to help design your own strategy.

THE WARHOL

In 2015, The Andy Warhol Museum underwent an institution-wide digital restructuring, which culminated in the document, *More Than a Museum: A Digital Strategy for the Warhol*. In an effort to promote transparency, The Warhol published their strategy online and invited others to repurpose it to fit their own needs. While this example is a few years old, it's still one of the most comprehensive digital strategy documents published by an institution to date.

The Warhol's strategy intertwines through every part of their organization, working to fulfill the mission and serve their audience:

"Each area of focus in the museum's digital strategy is fundamentally tied to the organization's broader institutional goals. Between 2015 and 2017, we will be digitally-focused on strategic thrusts of experiences and engagement, Narratives and Access, Organizational Adaptation, and Financial Solvency."

-JEFFREY INSCHO, MANAGER OF DIGITAL ENGAGEMENT, THE WARHOL

The Warhol Digital Strategy can be viewed and downloaded on their [GitHub](#).



THE NATIONAL ARCHIVES AND RECORDS ADMINISTRATION

Nara's inaugural digital strategy dates back to 2009, when they began their first blog in order to build their community and increase transparency into their objects, records, and actions. Since then, they've continued to grow their digital presence and have remained innovative. But no matter what, they always stick to their mission and goals:

"But whether on paper or a digital platform, the core mission of the National Archives remains unchanged. Social media now gives us more opportunities than ever before to provide access to the records of the Federal government. Through any of our social platforms, we can give people the information they need to learn from the past, to ensure their rights, to hold their government accountable, and to participate in the civic process."

-FROM NARA'S DIGITAL STRATEGY

Nara has opted to post their [social media strategy](#) on GitHub for their audience to view and contribute to. In their introduction, they ask for participation, commentary, and critique from staff, other institutions, and audiences of all kinds.



TATE

London's Tate museum is well known for making digital strides in the art world. From their web presence, to mobile apps and games, to social media, to personally curated digital galleries, Tate consistently produces high quality digital content for a global audience. They've allowed digital to permeate every aspect of their organization, and have used their digital strategy to challenge what it means to be a museum today.

Tate publishes a great deal of online content relating to their digital strategy. In addition to their [2013 – 2015 Digital Strategy](#), they've shared their materials on [digital metrics](#), [collection data](#), and have created a section on their website dedicated to the transparency of their [digital initiatives](#).

The key components of Tate's strategy— training the entire team to create content that's engaging and on brand, saturating institutional policies with new strategies to engage audiences, and being unafraid to challenge traditional museum policies — provides a great case study for institutions looking to explore digital strategies on their own scale.



THE METROPOLITAN MUSEUM OF ART

The Met's digital content includes an online digital gallery, *One Met. Many Worlds* and the *Heilbrunn Timeline of Art History*, which "pairs essays and works of art with chronologies, telling the story of art and global culture through the Museum's collection."⁴

Read more about the Met's digital strategies [here](#), [here](#), and [here](#).



THE MUSEUM OF MODERN ART (MOMA)

MoMA's commitment to modern art required the institution to engage in digital from its early stages. It's only fitting, then, that this museum would support strong digital strategies to engage audiences. Fiona Romeo was appointed in 2014 as the museum's first Director of Digital Content and Strategy in order to connect digital strategies throughout the museum. Since then, the institution has produced a range of digital tools, including many digital interactive platforms that pair with museum exhibitions such as MoMA Learning and Gauguin Metamorphoses. Although they haven't published their digital strategy online, they have provided information on their initiatives, delving deep into the issues of access and engagement through the [MoMA Blog](#). Rather than simply indicating that initiatives are being updated, the digital team at MoMA is showing how and why they're being updated. This kind of information can help your team to make informed decisions about the initiatives you're considering for your digital strategy.



ABOUT GALLERY SYSTEMS

Gallery Systems has developed industry-leading collections management and web publishing solutions for over 30 years. We help your team to streamline the way they manage collections and exhibitions, conservation and media management, reporting and web publishing. We support over 800 clients, from small research institutions and schools to corporate collections and world-class museums.

Gallery Systems stays on the cutting edge of museum technology. Find out how we can help support your digital strategy and collection care objectives.

Visit us today at www.gallerysystems.com.



¹ Michael Blanding *Tate's Digital Makeover Transforms the Traditional Museum*, 25 March 2015

² Warhol digital strategy, *More than a Museum*, *Organizational Adaptation*

³ South West Museum Development Programme, *A Guide to Writing a Digital Strategy*.

⁴ The Met, *Heilbrunn Timeline of Art History*