

HOW TO GET THE COLLECTIONS MANAGEMENT SYSTEM YOU NEED

A GUIDE TO MANAGING CHANGE FOR MUSEUMS



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You have many reasons to upgrade your Collections Management System (CMS). You may be struggling with an outdated CMS that lacks satisfactory customer support, or battling an application that wasn't designed to handle your collections data, like Access, FileMaker, or even an Excel spreadsheet. Whatever you may have tried in the past, your system isn't meeting your needs today.

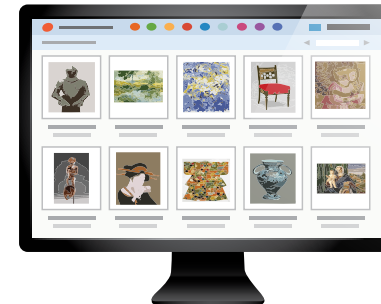
Your outdated CMS is inefficient and burdens you with awkward workarounds. Effective workflows are out of reach,

and creating critical reports are nearly impossible. Important tasks such as getting your collections online or completing a digitization project can seem like a distant dream.

Knowing you need a better CMS is the first step, but procuring one can be a major undertaking. Gallery Systems has coached hundreds of clients through the roadblocks and processes of purchasing and deploying a new CMS. We've gathered our experiences and assembled this guide for achieving buy-in and managing change within your organization.

THE CHALLENGE

Internal stakeholders who resist change can stall or derail your search for a new CMS. It's not uncommon for museums to delay the upgrade or purchase of a CMS due to this challenge, but there are consequences:



1. YOU'RE PILING UP WORK FOR LATER

As you put off upgrading to your new CMS, you're continuing to add data and records to your old system. The more data held in your database, the longer the data conversion will take, adding more expense.

2. IT'S COSTING YOUR INSTITUTION

As your legacy system becomes more outdated, it slows down and is increasingly cumbersome to use. Either it can't handle the amount of data, or it can't keep up with the rest of your digital systems. Chaining your team to a dysfunctional CMS can cost your institution time and money.

3. YOUR ONLINE COLLECTIONS ARE SUBPAR

Using an outdated CMS that doesn't connect with your website can cause your online collections to falter, or prevent you from getting your objects online at all. This creates a roadblock for visitors, students, researchers, and museum staff.

4. AUDITING AND REPORTING IS INADEQUATE

An outdated CMS can make queries, searching, and reporting difficult, if not impossible. The inability to properly report on your collection can result in serious repercussions, including missing object history, incomplete information for insurance documentation, or neglected information for incoming and outgoing loans.

MANAGING CHANGE

Implementing a new CMS can create positive change for your organization by opening up new workflows and processes, and automating tasks that used to be manual. Most of your staff will be affected, so it's critical they understand the reasons for the change, how their jobs will evolve as a result, and the plan for managing the process and leveraging their expertise. Communicating openly about the CMS upgrade will help your coworkers to adjust to the new system, and ease the onboarding and user adoption processes.

Psychologists describe two systems in our brains: the Rational System, and the Emotional System. When we try to drive change within our organizations, we usually focus on our Rational Systems; we talk about the business case and discuss data, show charts and numbers, and develop multi-step plans. However, when we forget to involve the Emotional System we often find our initiatives stalled. This is because our Emotional System provides the willpower to act on the change, and without the Emotional System invested, our Rational System is powerless.



In their book, *Switch: How to Change Things When Change is Hard*, authors Chip and Dan Heath advocate for using a 3-part framework to change behavior, and address the Emotional System:

1. **Clarity: Provide clarity on what to do**
2. **Desire: Provide emotional motivation**
3. **Ease: Modify the environment to make the change easier**

CLARITY

PROVIDE CLARITY ON WHAT TO DO

When relaying information about a change, there is often a disconnect between what leadership thinks they are communicating, and the message the rest of the organization is receiving.

If you have been involved in a project from the beginning, you have picked up many details and concepts that help to shape your understanding of the project. Therefore, when you communicate the details with a member of your team, you may unknowingly skip over many of the nuances that have helped to inform your own experience. You're speaking as an experienced project member, but your team member is a novice. This means you might be presenting a muddled message when you think you are being clear. The Heaths tackle this issue by pointing out that "what looks like resistance is often a lack of clarity."¹ They explain, "Ambiguity is the enemy. Any successful change requires a translation of ambiguous goals into concrete behaviors. In short, to make a switch, you need to script the critical moves."²

When preparing communications around change, the first and most important step is to articulate what you expect from others. You must clearly show your team where to go, how to act, and what the destination is. Otherwise, it will be impossible to have the organization move together towards one end goal. Use simple language and short bullet points to articulate easy to remember actions.



¹ Heath and Heath, *Switch: How to Change Things When Change Is Hard* (New York: Crown Publishing, 2010), 18. Kobo edition.

² Heath and Heath, *Switch: How to Change Things When Change Is Hard* (New York: Crown Publishing, 2010), 54. Kobo edition.

Dallas Museum of Art

When Brian MacElhose, Collections Database Analyst at the Dallas Museum of Art, was improving the way staff used the collections management system³, he wanted to minimize printed documents in order to decrease paper use, reduce redundancies in procedures, and create more efficient workflows.

Previously, whenever Curators wanted to acquire a new object for the collection, they had to create an acquisition consideration form via Microsoft Word. The form would be typed, formatted, printed, signed by multiple people, and then given to the registrar team to input into the CMS. Additionally, whenever changes needed to be made to existing works in the collection, more paperwork was created, and more information was inefficiently passed between departments. Brian cut out the inefficiencies by enabling curators to input the data themselves. He created a clear protocol and explained the new process to the team. One of the most important steps Brian implemented was a time period for the new changes to go into effect and direction of what to do when the new protocol was broken, "The curators agreed to a six month training-period, after which we would no longer use paper. If they tried to use the old system, their documents would be returned to them, and they would have to start the process over using the new workflow."

By clearly outlining the new protocol, and the response if the new protocol was broken, Brian gave his team a clear understanding of the new actions, and successfully helped them to create efficient and semi-automated workflows throughout the museum.



³ Brian MacElhose, "Funnel to Faucet: Increasing the TMS user base" (presentation, Collective Imagination, New York, NY, April 19, 2016).

DESIRE

PROVIDE EMOTIONAL MOTIVATION

The most overlooked, and perhaps most critical, element to driving change is inspiring emotional motivation in your stakeholders.

Organizational change guru John Kotter explains, “in most change situations, managers initially focus on strategy, structure, culture, or systems, which leads them to miss the most important issue: The core of the matter is always about changing the behavior of people, and behavior

change happens in highly successful situations mostly by speaking to people’s feelings.”⁴

To do this, you must create desire for change by focusing on its exciting aspects, and highlighting specific benefits for each individual. For example, rather than discussing the implementation of improved workflow processes, discuss how much faster it will be for your registrars to manage loans when repetitive data entry is no longer needed.



⁴ From John Kotter, *The Heart of Change*. Quoted in *Switch: How to Change Things When Change Is Hard*, by Heath and Heath (New York: Crown Publishing, 2010), 105. Kobo edition.

It's easy to become overwhelmed when contemplating a change as large as implementing a new CMS. When presenting goals to your team, break steps into small, specific, and reachable milestones. Accomplishing small objectives inspires emotion and pushes the team forward. With each step achieved, your coworkers will be able to easily track progress, inspiring confidence in the change.



For instance, the CMS procurement process can be broken down into these manageable steps:

CMS PROCUREMENT PROCESS

1. Choose the members of your selection team
2. Designate your Project Leader
3. Establish the project plan
4. Assign project plan deadlines
5. Conduct Key Stakeholder interviews
6. Compile and refine your findings and the list of requirements generated from the interviews.
7. Interview vendors and research offerings
8. Explore CMS features: request online and in-depth demonstrations
9. Create a shortlist of potential solutions
10. Compare and analyze costs and benefits for top solutions
11. Evaluate client references from each vendor
12. Finalize vendor selection



Create the expectation that some failures will be encountered on the way towards the end goal. In a project of this type, there will be adjustments to the plan, unexpected challenges, and changes in direction. Preparing your team to anticipate setbacks as a part of growth will ensure your team's emotional resilience. For example, when migrating data into your new CMS, it might become apparent that the data has some inconsistencies and needs to be cleaned up before the transfer. The project timeline will have to be adjusted and extra staff members may need to be enlisted to accomplish the task quickly.

When working to create desire within your team for the new CMS, don't get discouraged when others don't agree immediately. The Heath Brothers tell us, "What looks like laziness is often exhaustion."⁵ Controlling the Emotional System with the rational brain causes mental exhaustion. This is why using logic to convince your team to switch systems is so difficult: our Rational System wants to save time by creating change, but our Emotional System has created habits in the old way of doing things and feels comfortable. As we fight with ourselves, the Rational System usually fails because the Emotional System wears us down. If you are seeing resistance or lack of momentum despite your best efforts, you may need to do more work on engaging your stakeholder's emotions.

⁵ Heath and Heath, *Switch: How to Change Things When Change Is Hard* (New York: Crown Publishing, 2010), 18. Kobo edition.

EASE

MODIFY THE ENVIRONMENT TO MAKE THE CHANGE EASIER

Ease is about removing the obstacles that block the path to change. Often these can be small, overlooked items, such as a workflow with one too many steps, annoying or redundant data entry, or a function that is buried too deeply in a CMS.

Talking to your stakeholders as the project is implemented is the best way to root out small annoyances and hindrances before they derail user adoption. This is the most helpful step for your coworkers, so be merciless in quashing any process or procedures that don't make sense in the context of the new system. Take a hard look at the environments your users are working in and assess if they need to be modified to ease the transition to the better CMS. For instance, if your acquisition consideration process still involves paper approval forms, which create bottlenecks and communication issues between registrars and curators, simply creating the forms in the CMS where each party can input their own data and see changes in real-time, can increase user adoption of the CMS.

Shaping the path to change can often be about changing people's habits, and this can be difficult because our habits are deeply ingrained. For more strategies on managing and changing habits, we recommend *The Power of Habit: Why We Do What We Do in Life and Business* by Charles Duhigg.



COMMUNICATING CHANGE

When working towards buy-in on a complex project such as procuring a new CMS, there is nothing more important than communication. It's better to disclose everything than to have surprised stakeholders throwing a wrench in your plans at the last moment. You should be sharing every step of the purchasing processes and project implementation with your team, reiterating your message on a regular basis.



COMMUNICATIONS PLANNING

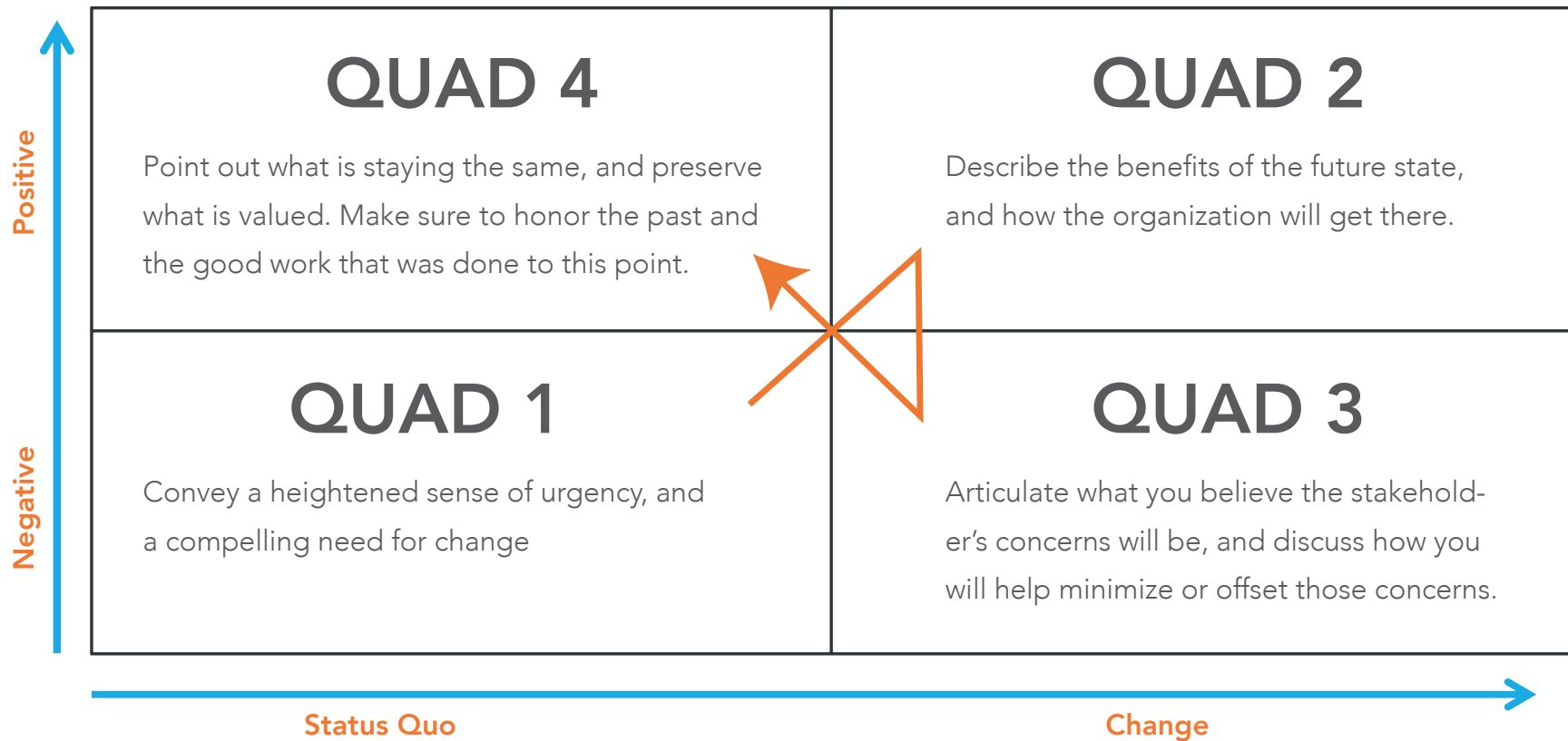
The first step to any communications plan is to identify your stakeholders. These are the people you need involved to ensure signoff on purchasing the new system, and those who will interact with the new system when installed. For a CMS purchase, this will typically include your registrars, curators, collections staff, and a representative from IT.

Once you have identified everyone affected by the change, consider what communication channels would be best for each group of stakeholders. Group presentations, informal chats, email, and personal calls are all channels to consider. If you know who your dissenters are likely to be, it's best to get their advice and feedback one-on-one in advance of any group meetings. This will help them to feel their opinion has been heard, and involve them in the process sooner so you can formulate responses to their concerns. The end goal is to create allies and build support for the project.

MESSAGING

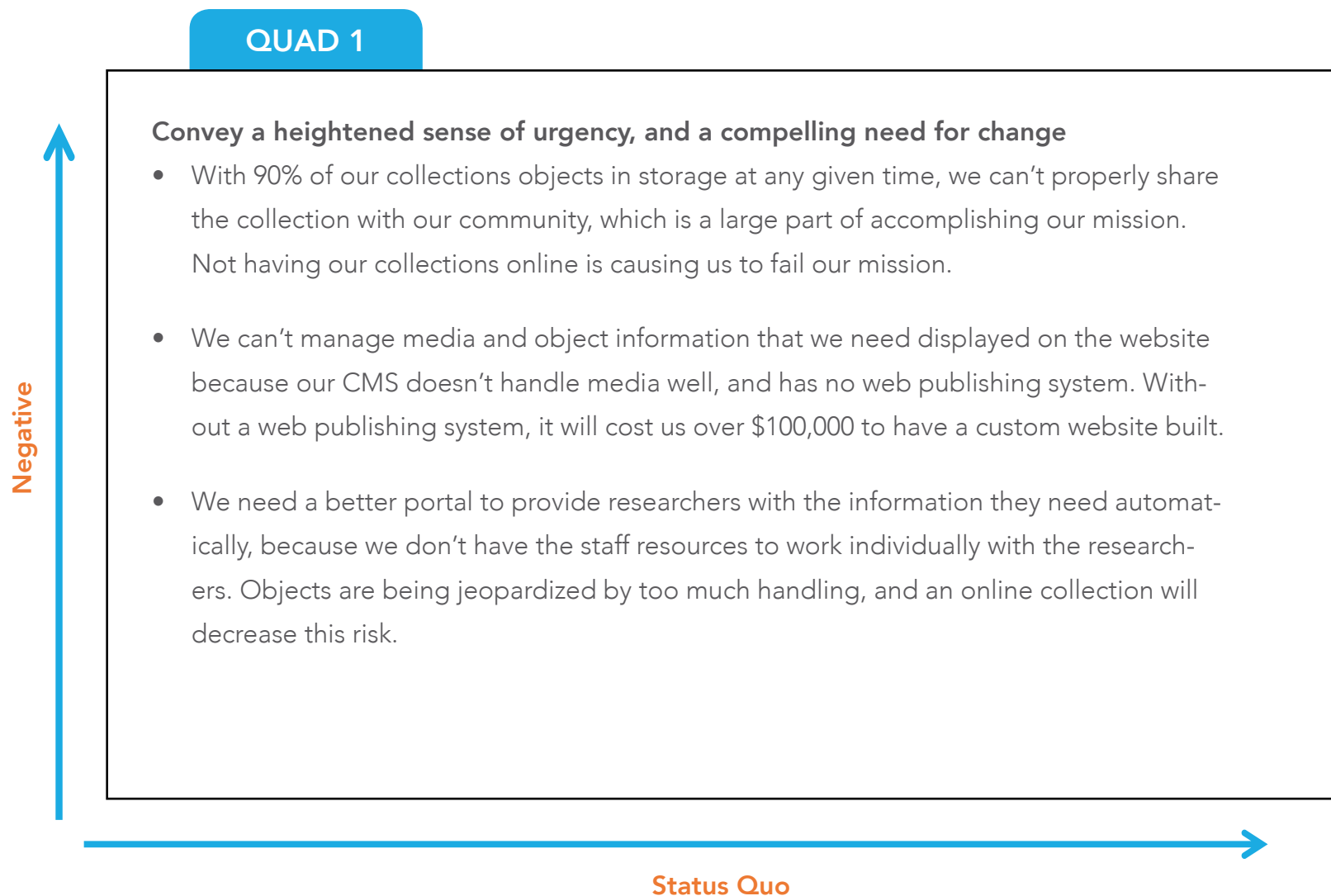
Before meeting with your team to discuss upcoming changes, map out your message in order to communicate as clearly as possible. Below, we've laid out a messaging tool to help you achieve your communications goals.

When preparing your communications, fill in the boxes with your rough points. When you assemble them into a coherent message, be sure to move in order from quadrant 1 to 4.



EXAMPLE

This is a messaging outline sample for a museum replacing an outdated Collection Management System with the end goal of getting their collection online.



QUAD 2

Describe the benefits of the future state, and how the organization will get there.

- We will be able to easily publish the collections online if we purchase a CMS with an integrated web publishing tool, and it will cost much less than building a custom website.
- These are the steps we will take:
 - Research possible solutions
 - Choose a vendor
 - Implement the new CMS
 - Migrate existing data into the new CMS
 - Begin digitizing XX collection first
 - Cleanup existing data to prepare for use online
 - Launch phase 1 of collections website
 - As each collection is digitized, we will add it to the website

Positive

Change

QUAD 3

Articulate what you believe the stakeholder's concerns will be, and discuss how you will help minimize or offset those concerns.

- Our registrar will want to change our exhibition processes as soon as possible. We will support him by endorsing this as our first workflow pilot.
- Our curators find our existing system to be too complicated and don't use it properly. We will schedule curator-focused presentations to demonstrate the functionalities they will use most often, including the privacy settings so their work is secure, exhibition checklist functionality, and how they can export their notes and images to Powerpoint.
- Our database administrator implemented the last system and loves it, and may not want to switch systems. We need to confirm that her responsibilities will stay the same, and provide her with administrative training for the new system as soon as possible, allowing her to train other users and maintain her expertise.
- Our Web Manager will be concerned with how a web publishing system will affect search results and Search Engine Optimization. Let's do our research in advance on this subject so we can answer those questions immediately.

Negative

Change

QUAD 4

Point out what is staying the same, and preserve the things that are valued. Make sure to honor the past and the good work that was done up to this point.

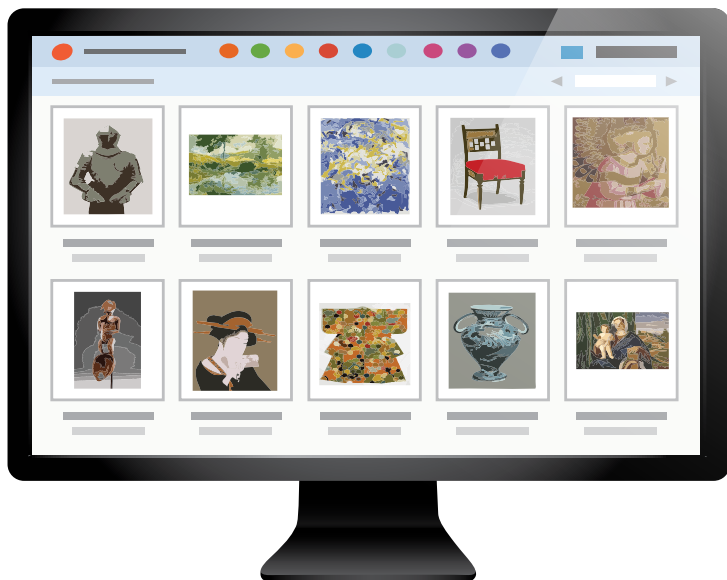
- We have kept good records, and switching to a new system will allow us to preserve our work and our research
- Our existing data will be migrated into the new system, and we will keep our field names the same
- Our critical reports will be migrated
- Only processes which can be improved will be changed. All changes will happen over time, giving everyone the space they need to adjust to the new CMS.

Positive

Status Quo

CONCLUSION

The challenge of changing your CMS doesn't need to be as daunting as you might imagine. Procuring a new system is hard work, but it can be managed. Gallery Systems works with you to provide a seamless migration path. We have taken hundreds of clients through the process of improving their CMS, and can guide you through all the issues and questions that arise, providing advice and help every step of the way.



WORKS CITED

Heath, Heath. *Switch: How to Change Things When Change Is Hard*. New York: Crown Publishing, 2010. Kobo edition.

MacElhose, Brian. "Funnel to Faucet: Increasing the TMS user base." Presentation, Collective Imagination, New York, NY, April 19, 2016.

Kotter, John. *The Heart of Change*. Quoted in *Switch: How to Change Things When Change Is Hard*, by Heath and Heath. New York: Crown Publishing, 2010. 105. Kobo edition.

ADDITIONAL READING

Switch: How to Change Things When Change is Hard

Chip Heath and Dan Heath

Leading Change

John P. Kotter

The Heart of Change: Real-Life Stories of How People Change Their Organizations

John P. Kotter and Dan S. Cohen

The Power of Habit: Why We Do What We Do in Life and Business

Charles Duhigg

Thinking, Fast and Slow

Daniel Kahneman



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, media, reporting and web publishing. We support over 800 clients, from small research institutions and schools to corporate collections and world-class museums. Our museum ecosystem lets you get the collections management system you need now, but is integrated with web publishing, digital asset management, and conservation documentation systems, to ensure you have what you need in the future.

Contact us today at www.gallerysystems.com

