

A guide to writing a digital strategy

What do we mean when we talk about 'digital'?

One of the biggest challenges faced by museums embarking on the creation of a digital strategy, or considering a more digitally focussed approach, is the huge range of activities that are considered 'digital'. Digital can feel like a big word – taking in everything from digitising collections, to using web tools for engaging with audiences, to the use of new technology.

For this reason, creating a digital strategy – or incorporating your organisation's digital approach into existing strategies such as the Forward Plan or Collections Management Framework – can help determine what parts of 'digital' you want to focus on, depending on your museum's objectives.

What is a 'digital strategy'?

When organisations talk about having a digital or a digital engagement strategy they normally mean a shared, agreed direction that they are taking relating to digital products or services. This is normally formalised into a document of some kind – but exactly what shape this document takes will differ, depending on the organisation.

Here are two ways that museums might approach the creation of a digital strategy:

Embedding digital into other strategies or planning documents

Rather than thinking about digital as standalone activity, you might want to consider embedding approaches to digital activity into your current strategies, or reframing objectives within your Forward Planning document with a digital focus. This example shows how you might integrate your approach with Forward Plan goals, and demonstrates how you can make digital part of the work you already do:

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 interpretation 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 Finder) to better understand our audiences
- To use third party online tourist platforms to market the museum (i.e. Visit England)



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Tate set out a similar approach to digital in their 2013-2015 strategy, seeking to integrate it into every aspect of the museum’s structure and output.

"Through the development of a holistic digital proposition there is an opportunity to use the digital to deliver Tate’s mission to promote public understanding and enjoyment of British, modern and contemporary art. To achieve this, digital will need to become a dimension of everything that Tate does... We will achieve this by embracing digital activity and developing digital skills across the organisation."

John Stack, Head of Digital, Tate (2013)

[Read Tate’s strategy 2013-2015: Digital as a dimension of everything](#)

[Find out more about Tate’s ‘Digital transformation’ project](#)

Developing a stand-alone digital strategy

Instead of incorporating your approach to digital into a pre-existing strategy or plan, you might choose to develop a **separate** document. This strategy might focus on a small part of your museum output, or might touch on a broad selection of different departments and objectives.

Standalone digital strategies come in lots of different shapes and sizes and on the whole seek to do one of the following:

- Set out how digital tools will deliver existing objectives for an organisation
- State how a new approach to using digital tools will change an organisation for the better
- Create new objectives and show how digital tools will help an organisation reach them

Using [this template created by Tickbox Marketing](#) for the South West Museum Development Programme (SWMDP), a simple digital strategy for a particular project might look like this:

Objective	Content ideas	Audience	Resource	Time frame	Platform(s)	Measures
Increase number of families accessing collections in the permanent galleries by 15%.	Redraft website, social media and email content to add a focus on family audiences	Carers and their children / families with children aged 5-10	Curator for content creation and IT volunteer for uploading new content	New content added to site by xx/xx/xx	Website, social media channels, email	Qualitative evaluation to assess number of family groups – front of house data collection or surveys

	Create a downloadable family trail with Q+As and fun facts. Digitise small number of gallery objects to achieve this	Carers of children (5-10 yrs), looking for family-friendly holiday activities	Curator for digitisation and content creation, small budget (£150) for external design of PDF, volunteers for delivery within museum, IT volunteer for adding 'event' GA tag to website	New content ready and uploaded by xx/xx/xx	Museum website Third party online platforms for promotion Wifi within museum for download Social media and email for promotion	Qualitative evaluation – front of house data collection or surveys Number of downloads on webpage
	Offer regular live streamed tours of the galleries, aimed at families	Carers and their children / families with children aged 5-10	Curator for creation and delivery of the tour and volunteer support for technical assistance	Monthly	Periscope for live streaming, social media, third party platforms and email for promotion.	Number of Periscope users accessing tour, Google Analytics

Why should my museum develop a digital strategy?

Taking for granted that a large proportion of potential visitors to our museums use digital tools and services regularly (such as computers, iPhones and social media), it makes sense that the sector seeks to engage with its audience in a way that combines the physical and digital.

Apart from this, there are various reasons that you might want to develop a digital strategy for your museum:

- To identify and embed digital skills across the team
- To develop a digital strategy for a specific project (i.e. an exhibition or event, a new collection or creating a new digital service such as a website)
- To help meet accreditation goals (e.g. Section three: Users and their experiences)
- To support your Forward plan, Audience development plan or wider strategic plans
- To be more resilient as a museum workforce

Although there are many potential benefits to developing a strategy for your organisation there are often challenges too. When developing and implementing a strategy, it is worth considering what those challenges might be, and mitigating them where possible.



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Challenges might include the following:

- Digital activity not being seen as an organisational priority
- Lack of in-house resource (people, budget, skills or infrastructure)
- Responsibility for digital activity falling on one person or department
- Need for workforce training or recruitment to ensure strategy is implemented

Tools for developing your own digital strategy

There are lots of helpful resources which already exist, designed to help organisations of all sizes and sectors develop a strategy for digital engagement.

Here's a list of some of our favourites, with an explanation of what each one offers.

Digital Museum Engagement template – Tickbox Marketing

[http://www.swfed.org.uk/wp-content/uploads/2015/05/Digital Museum Engagment Template Tickbox.doc](http://www.swfed.org.uk/wp-content/uploads/2015/05/Digital_Museum_Engagment_Template_Tickbox.doc)

This template was developed for the South West Museum Development Programme's 2012-2015 digital engagement project. It's a solid template for any museum seeking to develop a simple strategy which relates to a specific project or audience. It asks you to define your museum's vision (or 'mission statement'), your goals, audience and offering before thinking about which tactics and platforms (i.e. your museum's website or Facebook page) to use before finally considering organisational capacity and which practical measures you'll put in place to evaluate success. From this you should be able to create a straightforward document or grid from which to practically work from. This template is particularly helpful for smaller projects that you want to formalise and get off the ground quickly.

Digital strategy template – Thirty8 Digital

http://www.swfed.org.uk/wp-content/uploads/2015/05/Ch2-Strategy_Document.rtf

This strategy document isn't specifically designed for digital projects, but is flexible enough to be used for any strategic planning. It offers more of an opportunity to put the strategy into context, including a section on your museum's current operational environment which features both SWOT and PESTLE analyses. There is an assumption that you already know what you intend to do, and how you'd like to do it, so it might make sense to use this for a larger digital strategy or project, once you've already made some decisions on your museum's direction or planning. This template might be best to use if you need to bring senior management on board with your planning, as its approach produces a very structured and thorough document.

Digital engagement framework – Sumo / Inspired by Coffee

http://www.swfed.org.uk/wp-content/uploads/2015/05/Museum_Next_Digital-engagement-booklet.pdf

This PDF was put together by a creative agency who have experience of working with cultural organisations and not-for-profits. It is a very flexible template and although not specifically designed with museums in mind, can be adapted for use in a museum. The framework can be printed off and used as a worksheet for putting together a strategy in team meetings, and encourages the user to



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think about organisational assets, audience, content, activities, goals and values – much like the previous documents. This template would be particularly useful as a tool in a cross-departmental meeting, where a museum is trying to work together to pin down a vision and a strategy. Having completed this work, a museum might then want to repurpose the information into a more traditional template, such as the two previously discussed.

Further reading / useful links

<http://www.southwestmuseums.org.uk/publications-resources/>

<http://www.swfed.org.uk/resource/digital-strategy-activity/>

<http://artsdigitalrnd.org.uk/>

<http://www.collectionstrust.org.uk/digital-strategy>

<http://sharemuseumseast.org.uk/programmes/digital/>

<http://www.vam.ac.uk/blog/section/digital-media>

<http://www.tate.org.uk/about/projects/digital-transformation>

<http://www.collectionstrust.org.uk/digital/digital-benchmarks-for-the-culture-sector>