

Digital Strategy for Museums

**A practical guide for museums (and other organisations)
that want to do more with their digital programmes
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UK

Unit 8E North, New England
House, Brighton, BN1 4GH

+44 1273 821600
office@cogapp.com

USA

641 Lexington Avenue
15th Floor
New York, NY 10022

cogapp.com

Author

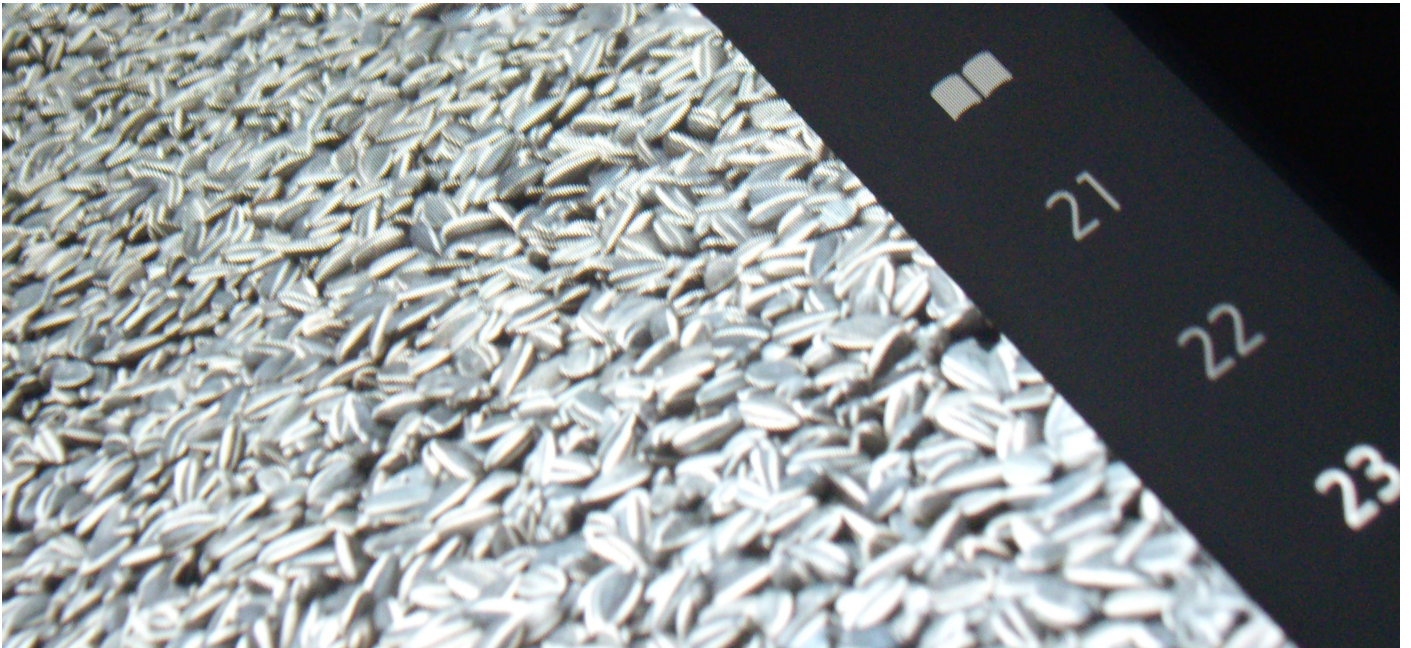
Alex Morrison
alexm@cogapp.com

cogapp

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Introduction



“Museums are being redefined for a digital age. The transformation, museum officials say, promises to touch every aspect of what museums do, from how art and objects are presented and experienced to what is defined as art.”

New York Times article, October 26, 2014

This guide is for museums (and other organisations) that want to do more with their digital programmes.

Over the last three decades we have been lucky enough to work on strategic digital projects for prominent public-facing organisations including some of the world’s great museums.

As digital programmes have become more important during that time, many organisations, including some of our clients, have started to feel the need to develop explicit digital strategies. Working on a series of these projects has taught

us a great deal about what digital strategy can be and how to go about formulating a good one.

This guide is the result of that work, our wider experience consulting on hundreds of digital projects of various sizes and hands-on involvement helping to shape the digital strategy for Art UK and Wired Sussex, two digitally-focussed non-profits.

We are grateful to all our friends, clients and colleagues who have helped us over the years and whose fingerprints, one way or another, are on all the good bits of this guide.

Particular thanks to Neil MacGregor formerly at the National Gallery, Tom Campbell formerly at the Metropolitan Museum of Art, Andy Ellis at Art UK, Roly Keating at the British Library, Aaron Lansky and Susan Bronson at the Yiddish Book Center. Your leadership on the transformational digital programmes we have worked on with you has truly been an inspiration.

Our Digital Strategy Guide was originally published in March 2017. With over 1600 reader downloads it has proved surprisingly popular for such a niche publication. This revised 2019 edition brings it up-to-date.

The revisions in the main text are not particularly extensive but they have important implications. The two principal areas of improvement are advice on explicit identification and management of key risks and an improved account of strategy implementation (using an important technique of modern management, the OODA loop).

A new section ‘What Makes a Good Strategy?’ identifies four themes against which any (digital) strategy can be assessed. You can apply them to your work as a way to identify areas for improvement.

Finally, new pitfalls have been identified in the checklist ‘What Could Possibly Go Wrong?’ and new references added in ‘Further Reading’.

Executive Summary

In case you don't have time to read this whole guide (or if you quickly want to find out if it is relevant for you) here is a quick summary.

-  Strategy is a cohesive response to an important challenge.
-  Digital regularly presents an important challenge for museums (and other organisations) and when that is true it merits a strategic response.
-  Digital strategy is distinct from other kinds of strategy. The digital environment is frequently disrupted by new developments. So, unlike other departments, the digital operation needs to be regularly and radically overhauled along with the digital programmes that it delivers. Hence the need for a different kind of strategy.
-  The goal of digital strategy is a statement of vision with objectives for the organisation's digital programmes, based on evidence, 'owned' by leadership, backed by adequate resources and used as a guide by management and operations.
-  Engaging and empowering leadership is a key goal of the digital strategy process.
-  The process outlined in this guide, based on systematic research and whole team discussion, will help you formulate an effective digital strategy.
-  Once formulated, a digital strategy needs to be periodically reviewed and refreshed in the light of experience.

The rest of this guide explains all this in more detail.

What is Strategy?

For a comprehensive exploration of the question ‘What is strategy?’ I highly recommend the excellent book ‘Good Strategy/Bad Strategy | The Difference and Why it Matters’ by Richard Rumelt.

In lieu of reading the whole book, the following two short extracts get directly to the heart of the matter.

“The term ‘strategy’ should mean a cohesive response to an important challenge.”

Richard Rumelt

This simple, elegant definition makes a couple of important points.

Strategy is about important challenges. If digital does not present an important challenge for your organisation, more specifically, not important to senior leadership at the present time, then there will be no role for a digital strategy.

The second point is about the cohesive nature of a strategic response. Formulating a good strategy is about making best use of limited resources. It is not about making a list of all the things you would ever like to do. It is about coming up with a set of actions that are efficient, coherent and mutually reinforcing. Good strategy is as much about what you will not do and what you are postponing for later as it is about what you are doing now.

“The kernel of a strategy contains three elements: a diagnosis, a guiding policy and coherent action.”

Richard Rumelt

To see how this might work consider the following thumbnail sketch for a digital strategy.

-  Diagnosis: ‘our digital presence is not properly reflective of our organisation. It is poor compared with our peers and is putting off visitors, members and potential supporters.’
-  Guiding policy: ‘visiting us online should be as good an experience for online visitors as it is for people who visit us on-site.’
-  Coherent action: ‘we will establish a senior task force to lead a 15 month cross-departmental transformation programme to be delivered by the digital department; the initial focus of this programme will be improving the visitor experience of our website.’

Four sentences put the strategy in a nutshell. Everyone involved will know what success looks like. They know who is going to do what and some at least of what they are not doing. Lots of secondary questions open up in a useful way, e.g. ‘Should we re-skin what we’ve got or start again from scratch?’.

Any strategy document, digital strategy or any other kind, can usefully be measured against Rumelt’s definitions.

In case you think all this sounds obvious (and perhaps it should be), you will be surprised to find how many published strategy documents fail to meet these simple tests.

A final word before we move on to our next section.

The root word for our word 'strategy' is 'strategos', the Greek word for 'general'. This points to a critical insight.

Strategy is the responsibility of an organisation's senior leadership, its generals.

Others can help to formulate a strategy and write it up, but only senior leadership can sign it off and give it the authority it needs to be effective. This is particularly true for digital strategy because, as we will see below, digital transformation programmes involve inter-departmental collaboration and only the authority of senior leadership will ensure that such collaboration is forthcoming.

Museums and Digital

The Museum Computer Network was founded over fifty years ago in 1967.

In MCN's fifty year history digital technology has gone from being a back-room preoccupation for registrars and accountants to a critical consideration for the whole organisation.

Recent quotes from leading museum directors show how attitudes have changed:

Statement by

Smithsonian Secretary G. Wayne Clough, January 2009

“For the Smithsonian to remain a vital institution at this important time in our history, we need to fully engage younger generations with our collections and our knowledge.

We need to use new digital technologies to their fullest potential so that we can fulfill the Smithsonian's 19th-century mission— ‘the increase and diffusion of knowledge’ — in a thoroughly 21st-century way for the benefit of all Americans and people around the globe.”

Statement by

Tate director Sir Nicholas Serota, October 2013

“In the coming years we need to devote as much attention to the digital as we have given recently to the physical expansion and improvement of our buildings.”

Statement by

Glenn Lowry, director of MoMA

“We’re at a phenomenally interesting time in terms of how audiences, technology and institutions are recalibrating to each other,”

he said, citing, for example, the way many visitors now take and share photos while in the museum.

WSJ, November 5, 2013

Interview with
Thomas Campbell, Director of the
Metropolitan Museum of Art

Q. What is the biggest issue facing museums today?

A. Impacting all of us is technology. We've made a huge investment in transitioning from being an analog museum to a digital museum and there are great opportunities in that to see the collections on the whole, to deliver the information to our audiences in new ways. Still, at the end of the day, the core values remain the same: It's about bringing people face to face with works of art and stimulating their curiosity.

New York Times article: The Met's Director Looks Ahead, March 2014

Museum directors increasingly (and publicly) acknowledge the importance of digital programmes.

Thomas Campbell's remark is particularly apt: the digital agenda is critical but its theme should be new technology in the service of core values.

What is distinctive about museums and digital?

Museums are not like shops or manufacturers or banks or even libraries. They have their own culture and ways of working. As digital programmes become more important for museums we need to understand what makes their use of digital different.

The following eight factors suggest that museums need distinctive digital strategies:

1. Museums are typically very good at their core business but not so good at innovation

Many museums are more than a hundred years old. They run galleries and produce exhibitions with amazing elegance and finesse. Digital is the first new function they have introduced in many decades. And the digital environment is far more dynamic than anything they are used to. Museum staff structures and governance procedures are naturally geared to change through refinement rather than the kind of disruptive transformation required on a regular basis by digital.

2. Museums operate with non-standard business models

This is not necessarily a disadvantage but it may complicate the design of digital programmes. For example, the direct usage of museum digital programmes typically does not pay for their cost of development or operations. Sponsorship, grant funding and other forms of indirect business model are required. Museum digital programmes then need to be arranged to meet the needs of both the public audience and the programme's ultimate funders.

3. Museums are potentially (very) content-rich and substantial amounts of that content that can only be made available digitally

The Museum of Modern Art (MoMA) in New York has possibly the finest collection of modern and contemporary art in the world. Its recently expanded galleries can display (substantially) less than 10% of its holdings (nearly 200,000 objects in total). If MoMA's artworks do not have a public presence through digital programmes like the museum's online collection then 90% or more of their great collection will likely never be seen at all.

Infrastructure for publishing and managing large volumes of high quality content is a key issue for most museum digital programmes.

4. Many museums have large public audiences for their digital programmes

The websites for Tate, the Metropolitan Museum of Art and other major museums regularly receive tens of millions of annual visits. There is an enormous appetite for museum content online.

5. Museums can take advantage of on-site and online possibilities

The first public digital programmes for museum visitors were delivered on-site via interactive kiosks. One piece of kiosk equipment could serve hundreds of thousands of visitors. When done well, on-site programmes can be very popular. Recent success in this area include programmes at the Cleveland Museum of Art, the Cooper Hewitt Smithsonian Design Museum, the Baltimore Museum of Art and the Science Museum in London.

One strategic opportunity for museums is to devise programmes that join up all aspects of the visitor experience: before, during and after a visit.

6. Museum staff typically work under non-commercial pay scales and with limited resources

Many staff work in museums out of sense of vocation and deep love of their subject matter. Pay scales, for the most part, are correspondingly low. From a strategic point-of-view this doesn't matter too much until it affects the resourcing of the organisation's digital programmes. How can the museum compete with well-funded local start-ups for talented digital staff at all levels? A staffing plan has to be worked out that is realistic given the competitive climate and the internal sensitivities.

7. Museums expect to maintain high standards in all areas

Aesthetics, typography, editorial, usability, accessibility, service availability, image reproduction quality, data security: developing and maintaining digital programmes that match the high standards of the museum's on-site programmes can be expensive and time consuming. Digital strategy needs to take account of the corresponding resource requirements.

8. Museum curators are generally trained to write for professional academic audiences

Writing for public consumption via digital media is a new skill. It is very different from the traditional written forms that are familiar in the scholarly world of museum curators.

Given that much of the museum's digital content will be collections-related and that curators are the guardians of truth for their collection objects, the museum needs to find a way to get elegant public-friendly digital content produced

that is also consistent with curatorial standards of accuracy. This is typically a new function and involves establishing new kinds of content work flow.

What is Digital Strategy?

There are really two questions here: ‘what is the scope of digital?’ and then ‘what is digital strategy?’.

What is digital?

The exact scope of ‘digital’ can vary from one organisation to another. Unlike most other industry sectors, museums have ways to reach their audience via digital media on-site during a visit as well as online. And one interesting strategic opportunity may be to offer a unified experience for people before, during and after a museum visit.

So there may be installed kiosks, digital signage, internal digital services, apps and other kinds of digital publication.

For most purposes, and most organisations, a good starting point for a definition of ‘digital’ would be:

-  All public-facing digital services, including onsite kiosks, websites, apps and social media accounts, and all the operations that directly support them.

This may sound obvious but we have seen digital strategy documents from major museums that don’t account for significant aspects of the public’s digital experience.

-  Before you start work on a digital strategy take time to question the boundaries you are setting for ‘digital’ and ensure that any significant omissions have been made consciously and explicitly.

What is digital strategy?

If you have read the Executive Summary above then you will already know our view:

-  The goal of digital strategy is a statement of vision with objectives for the organisation's digital programmes, based on evidence, 'owned' by leadership, backed up by adequate resources and used as a guide by management and operations.

Let's pick this apart so we can see if (and how) it makes sense.

The goal of digital strategy is a statement of vision and objectives for the organisation's digital programmes

This is following on from Rumelt's formulation that 'the kernel of a strategy is a diagnosis, a guiding policy and coherent action'. The vision we refer to here should address diagnosis and guiding policy. The objectives deal with coherent actions.

based on evidence

You could formulate a digital strategy without reviewing the evidence. A general could go to battle without a survey of the terrain and an assessment of the strengths and weaknesses of the opposing forces. Neither of these are good options.

Later on in this guide we will explain how to do a systematic review of the evidence that is needed for digital strategy and then how to put it to good use.

owned by leadership

Looping back to our earlier discussion, strategy is the principal job of leadership. It can not be devolved. If leadership doesn't 'own' your digital strategy then it isn't really a strategy.

One effective way to establish ownership is to get the museum director/chief executive's name (and perhaps their signature) on the final strategy document.

This sends a clear message to colleagues and provides evidence of a proper mandate where necessary changes cut across department boundaries (as they usually do).

Our preferred method is to involve senior leadership as much as possible during strategy formulation and then send them a draft document for their comments and final sign-off.

backed by adequate resources

In the non-profit world of museums and culture, people can be reluctant to talk about money. But at some stage a digital strategy that involves substantial change is going to need resources in the form of money, staff time and the authority necessary to effect change.

If sufficient resources are not allocated by leadership then the strategy cannot be implemented. Best to be upfront about this at the outset and plan accordingly.

and used as a guide by management and operations.

If all our other factors are in place then this will probably follow. But it's still worth saying. A strategy document that lies unread has failed.

The best strategy documents will be dog-eared with use.

If your digital strategy can be summarised on a single sheet and pinned on office walls then so much the better.

For a simple approach to writing a document that will get read and used see the section below called 'The Digital Strategy Report'.

The Need for Digital Strategy

The implication of this guide is that digital operations in museums (and elsewhere) from time to time require their own strategy.

Why should that be? What are some of the reasons why you might want to spend time and effort developing a strategy specifically for digital?

Every organisation is different and therefore faces different challenges. But there are five generic factors, discussed below, that make the digital operations of a museum a frequent source of important (i.e. strategic) challenges.

Note:

It is not always the case that an organisation needs an explicit digital strategy.

A strategy is a cohesive response to an important challenge.

If the digital operation in your museum does not present an important challenge, relative to other important challenges, and as judged by senior leadership, then there is no role for a digital strategy.

If you think that your organisation needs a digital strategy and that is not currently on senior leadership's agenda then you will need to persuade them to add it.

Changes in digital technology and the media landscape are rapidly transforming public behaviour and attitudes

It is hard to overstate how quickly digital media devices and formats are evolving and being adopted and then how profoundly they are changing people's lives.

Nothing else in the modern world is changing at anything like this rate or having such profound effects in terms of behaviour and attitudes.

Museums typically offer very high quality customer experience on site. If a museum provides poor customer experience online because it has failed to keep pace with technological change then it risks damaging its reputation with important stakeholders and customer groups.

The rapid changes in the media and technology landscape require a particular kind of strategic response: investing in foundations that last (e.g. content infrastructure and capability) while staying agile and responsive in areas that change (e.g. devices and interfaces).

For a useful and authoritative guide to changes in the digital environment see the excellent Internet Trends report produced annually by Mary Meeker at KPCB.

❖ www.kpcb.com/internet-trends

The digital function in the organisation is almost always in a state of flux and frequently needs to be transformed in parallel with the digital programmes that it delivers.

When the leadership of a museum decides on a new exhibition strategy (do a series of blockbusters, do more locally-focussed exhibitions, showcase the permanent collection, or whatever) the exhibitions function in the museum is well developed.

The exhibitions strategy probably doesn't need to explain how the museum will develop an exhibitions function. That function already exists in a well developed form with appropriate infrastructure and capability.

By contrast, the digital operation of the museum is itself a work in progress. It frequently needs new capacity, new infrastructure and new methods of working.

As we will discuss below, the staffing and resource mix for museums' digital operations is itself a critical strategic decision with far-reaching consequences for cost, effectiveness and resilience.

Unlike other operations, the digital department regularly moves (generally upwards) within the overall organisation chart. This movement within the organisation chart reflects not only the changing importance of digital. It also reflects the boundary crossing nature of the beast that in a museum touches IT, marketing and communications, education, curatorial and development.

So your digital strategy needs to address how the digital operation will be developed as well as what it will produce. Inevitably there will be a twin-track parallel process.

Management of digital programs is distinctive

Digital operations produce a huge amount of timely data. This can be an excellent thing for management but it is also a challenge.

Not everything that matters can be measured and many things are measured that don't matter. Google Analytics is a particular minefield in this regard because of the enormous volume of data it throws up.

Part of the art of digital strategy is to provide management with a blueprint that allows them to measure the right things and manage accordingly.

Best practice in digital development is highly dynamic

My company, Cogapp, is a leading developer of digital media software. Nevertheless after 30+ years we are still making frequent and substantial changes to what, in most other fields, would by now be a very established and stable practice.

In 2014 alone we made three major changes. We introduced agile working methods; we introduced a radically improved software development operations system; and we started working with high specification, highly scalable cloud-based servers.

We know that we are at the leading edge of our industry in terms of digital media software development but we also know that best practice is constantly evolving and that we,

and our clients, need to accept this level of change and plan accordingly to stay abreast.

Strategy must be integrated with management and operations

Any well run operation in an organisation can be viewed as a three level structure: strategy; management; and operations.

In the best situations all three are present, well developed and properly connected:

-  Strategy, determined by the organisation's leadership, provides vision and objectives for Management.
-  Management uses Strategy's vision and objectives to manage Operations and decide how they should be developed.
-  Operations, with the guidance of Management, delivers the outputs to meet the objectives of Strategy.

This goes without saying in a mature operation but it is much harder to achieve with something as novel and dynamic as digital.

A further consequence of this insight is that strategy development needs to include a review of the management and operations functions. Our model of the three layers and how they interact is the basis for the approach to Digital Strategy explained in the next section of this document.

A Digital Strategy Canvas

A general planning a military campaign has well established ways of assessing the strategic situation. One of the difficulties in formulating a digital strategy is getting a comprehensive overview of the subject.

The idea behind our Digital Strategy Canvas (shown on the next page) is to give the digital strategy team a standard way to survey all the important factors on a single sheet.

Our diagram borrows its format from the successful (and very useful) Business Model Canvas (see Further Reading section at the end of this guide).

The Digital Strategy Canvas can either be used as a framework for your strategy research programme or as an exhibit for a workshop exercise (possibly a session within the larger two day digital strategy workshop we describe below).

The canvas is divided into four main sections: Our Organisation; Our Digital Programmes; Our Customers; and Our Environment.

Within the four main sections we divide up to focus on the strategically significant elements. A good digital programme will show up well across all these facets.

The current format of the canvas has been widely tested and corresponds with current best practice. For more information visit our website: www.cogapp.com/digital_strategy_canvas.

Note:

Some might prefer 'Our Visitors' or 'Our Audience' in place of 'Our Customers'. We use 'customers' here as a reference to the excellent book 'Who do you want your customers to become?' by Michael Schrage - see Further Reading below.

How to Develop a Digital Strategy

How to turn theory into practice? In this section we explain how to create a useful digital strategy in an effective way.

What follows describes the method we use. It is based on the theory set out above and our experience with clients over many years. It can be scaled and adapted to meet the needs of diverse organisations and circumstances. You should feel free to adapt it to meet your own circumstances.

The challenge

Creating a useful digital strategy is hard. To summarise the challenge:

-  Senior leadership need to sign off and own the organisation's digital strategy;
-  But they are likely to lack confidence making decisions about digital;
-  Senior leadership may therefore be reluctant to engage with a digital strategy process;
-  Senior leadership's time is scarce and needs to be used as effectively as possible.
-  A secondary but related issue is the cross-boundary nature of digital programmes; digital strategy needs to be formulated with input from senior staff in adjacent departments; the same considerations about confidence and availability of time apply to them.

Our approach takes account of these factors by giving all stakeholders, including senior leadership, a clearly structured and non-technical framework in which they can review the

evidence and work out a strategy together. Thinking is done together but the leg work of research and write-up is delegated to a digital strategy team. Final sign-off/authorisation remains with senior leadership.

Method

In essence, our approach is very simple:

1. Research: the digital strategy team research your digital programmes and their context using the framework of the Digital Strategy Canvas;
2. Workshop: the digital strategy team organise and facilitate a workshop to review the findings of the research with key stakeholders including senior leadership; this conversation naturally leads to a vision and objectives;
3. Write up and sign off: the digital strategy team write up, review, revise and get sign-off from senior leadership;
4. Implementation: the wider digital team can now proceed with implementation; progress with the strategy is reviewed as necessary.

Research

The research is undertaken by a small team of digital specialists, one or two people, who will also present and facilitate the workshop that follows. It repays a reasonable investment of time. It needs occasional input from colleagues, usually not too onerous, and comprehensive access to data and analytics.

The investigation will require a combination of desk research, questionnaires, stakeholder interviews, online surveys, user testing, hallway testing, expert review of your existing digital

services and analytics reviews. The more time for customer research/user testing the better.

Workshop

The workshop can be run in a variety of ways. We generally do it intensively over two days.

There are usually about a dozen participants including senior leadership, departmental heads from related departments and key members of the digital team.

This approach has two beneficial side-effects:

Senior leadership get a chance to see the digital team in action and gain confidence in their abilities.

The digital team get exposure to senior stakeholders and learn directly what they value and prioritise.

As input to the workshop we turn the findings from the research (including data, graphs, tables, case studies and diagrams) into a giant slide deck.

Participants are provided with post-it notes and pens on which to note down ideas. At the end of the workshop these notes are collated and included in the report.

Rules of engagement for the workshop should be clearly stated. Here is a sample from one we ran recently:

Rules of Engagement

Slides are stimulus material for discussion; interrupt at any time

This is your strategy, not ours; we don't have the answers

Review of the evidence needs to be objective, impartial and open

It is inevitable that some of the findings will be painful

Use Post-Its to record Ideas, Actions, Concerns and Questions

We'll distribute a copy of these slides after the workshop

There will always be uncomfortable moments during the workshop. It is critical that the participant group is able to deal with painful realisations in a grown-up and positive fashion.

The more open and collaborative the organisation and the less there is an institutional culture of blame, the more successful the digital strategy process is likely to be.

The facilitators should also be pro-active and make sure that advance warning is provided to anyone whose work might attract criticism.

Workshop Day One

The first day of the workshop is mostly taken up with a review of the research slides with exercises.

e.g. Who are our target customers? For each customer segment, what is our proposition?

It is helpful to arrange a dinner for the participants so that discussions can continue informally at the end of Day One.

Workshop Day Two

The second day is less highly structured than the first. We usually begin with a recap of day one. What did we learn? There may be more evidence to review.

There will be more group exercises probably including what value we want to capture from digital, how digital relates to our broader organisational agenda, etc.

The statement, in our summary, that ‘this conversation naturally leads to a vision and objectives’ may sound surprising. And it is. But surprising or not, it is our consistent experience that if you get the right people in the room and you give them a well facilitated, well organised and specific review of the evidence then the gist of the digital strategy will emerge quite clearly.

At the end of the second day, participants generally (and rightly) feel a sense of achievement. It is important to set their expectations and make sure they know how the workshop will be followed up.

Write Up and Sign Off

After the workshop we write up the results and fill in any remaining gaps with additional research and analysis.

The draft report goes to senior leadership (and the rest of the workshop participants) for review, amendments and approval.

When a final version has been agreed it is published to all relevant staff with the explicit authority of the senior executive.

Implementation

Implementation will vary depending on the organisation and the strategy.

The first order of business is to make sure that the strategy has been properly communicated to all relevant staff and that management processes are in place to carry it through and monitor its implementation.

Once communicated, a management board should be responsible for strategy implementation. They should meet regularly (at least once a month) and either include the senior executive or report directly to it.

A useful way to think of the management process is in terms of an OODA loop; where OODA stands for Observe, Orient, Decide, Act. You start with observations, you orient yourself by assessing those observations, you decide what to do next, you act and then repeat.

This simple but sophisticated system was originally devised for fighter pilots! Its effectiveness, adapted from its original military context, is at the heart of both major advances in methodology for working in areas of rapidly developing technology and innovation, i.e. the Lean Start-Up Movement and Agile Software Development.

Every meeting of the management board should begin with a review of the strategy's high level objectives and key risks.

Using a dashboard of metrics as part of the observation and orientation system is usually worth consideration, depending on the strategy. The design of dashboards will vary considerably depending on what is going on and is outside the scope of this guide. Suffice to say for now that the Digital Strategy Canvas may provide a useful place to start.

The Lean Analytics book described in the Further Reading section is also very useful. One key insight from that book is that one should develop a digital service in stages with different priorities and therefore metrics at each stage.

Care and Maintenance

If the process described above has been done well then the workshop participants will be happy to reconvene and review how things are going.

The right time to review your digital strategy will depend on what you are doing. If part of the plan involves a major development or launch then it will be sensible to review after that work has completed and when there is enough evidence from operation to assess how things are going.

The review process itself is simply a repeat (with variations and efficiencies) of the original development. The same pattern applies: research; workshop; report; implementation.

The Digital Strategy Report

How you write up your digital strategy will depend on your own preferences and the house style of your organisation. Our Further Reading section below contains references for a variety of digital strategy documents produced by leading museums.

Important considerations include:

Usability

Brevity is the soul of wit. Ideally you want a summary of the digital strategy on one page that can be pinned to the wall in every office where it matters.

Keeping Score

The document should easily support a future assessment of progress.

Authority

It needs to have the chief executive's name on it.

Bearing these requirements in mind, here is an outline that will work well in most cases:

Cover Page

Title, Date and Document Status

Introduction

Who the document is for; how it was produced; how it should be used.

Executive Summary

Ideally a one page summary that can be printed out and put up on office walls and noticeboards.

Vision

Including:

Diagnosis - why the digital programmes present an important challenge for the organisation at this time;

Guiding Policy - the 'elevator pitch' version of what we're going to do.

Objectives

A cohesive action plan - a summary of the big ticket action items and how they will be tackled and resourced.

Key Risks

The top three to risks that will need to be managed.

Main Body of the Report

More detailed discussion of as many of the Digital Strategy Canvas topics as appropriate.

This section can be usefully organised around the four main sections of the Digital Strategy Canvas: Our Organisation; Our Environment; Our Customers; Our Digital Programmes.

Feedback

An invitation for readers to contribute feedback.

Appendices

The main body of the report should be as short as possible but it is worth making more detail available for people that want it. The easiest way to do this is to provide appendices. Here are some suggestions.

Quick Wins - there is almost always a list of 'quick wins' and 'low-hanging fruit' that comes out of the strategy development. A typical example might be 'Add membership promotion to all pages in section X of the website.'

Research Material e.g. survey results; analytics summaries, etc...

Workshop Slides

Workshop Participants Notes

What Makes a Good Strategy?

Every strategy is different but the best strategies respond to four universal themes. Assessing your strategy in relation to these themes will help you identify areas for improvement.

We explain the four themes of good strategy and then consider how two of them, in particular, have a tendency to interact unhelpfully and what might be done about it.

Focus

Resources are scarce. You need to use them wisely. The best strategies do a few things well in a limited number of areas and develop in stages.

‘What is there that we can stop doing?’ is always a useful question.

Steve Jobs’ key strategic insight, when he returned to Apple and started the process of rebuilding it, was that they were offering far too many products. He cut the product range by 70% to just four models and rebuilt from there.

In relation to strategy in stages, Richard Rumelt makes a strong case for the value of ‘proximate objectives’ i.e. achievable intermediate goals that make a significant step towards the ultimate objective.

For an example of this approach in action see my article on Art UK’s strategy referenced in the Further Reading section below

Competitive Advantage

Do what you do best for the people and the organisation you are trying to serve. Don’t undertake to do things that you are not equipped for or that others can do better. This issue often

arises in digital strategy in relation to content production and technology.

Why write generic content when others can do it better? Why build a digital technology team that you have limited capability to manage and nurture? Why develop custom software when there are numerous highly developed off-the-shelf solutions?

This is a strategic issue even for technology giants. Another of Steve Jobs' brilliant early moves on his return to Apple was to kill the development of its own next generation operating system. A vital success factor in Apple's recovery was his decision to build both Mac OS X and iOS on a leading implementation of UNIX.

Synergy

Synergy is the miracle that occurs when one of your activities systematically adds value to another.

If your strategy relates to digital programmes, you can test every element of it for synergy within your digital programmes and then with other elements of your non-digital programmes.

For example, in the case of a museum and its digital programmes, can your online catalogue entries drive traffic to your exhibition listings and vice versa? Can you use posts from your social media programmes to enliven your website and drive social media subscriptions in the process?

The more your strategy creates synergy between your various activities the more effective it will be.

Risk Management

Any strategic development involves risk. You need to choose your risks wisely and manage them conscientiously.

One good way to compare strategic alternatives and test them against each other is to review the associated risks and see which set is least unattractive!

If any of the risks you have identified are potentially fatal then make sure that your strategy accounts for the need to monitor that risk and explains how you will mitigate it.

We once tried to build a technology business on top of two competing mobile operating systems. We were implicitly relying on them both to maintain a particular facility that made our product possible. When one of them stopped supporting that facility our venture crashed. We hadn't properly identified the risk and when it materialised we couldn't mitigate it. Ouch! Two years work, down the drain.

Bear in mind that risk management can easily get out of hand. A ten page risk register is a useless distraction. The critical thing is to identify and manage only the absolutely critical risks and let everything else come out in the wash of good general management practice.

Of course, if good general management is not something you can rely on then that itself is a key risk.

The Tension between Focus and Risk

If all these criteria were simple to apply and worked independently then strategy would be much easier than it is. But in reality they have a nasty tendency to interact and cancel each other out.

One common (universal?) tension occurs between Focus and Risk.

The more you focus, the more concentrated your resources. Greater concentration increases your relative strength and that increases your chances of success in the areas where you are focussed.

But...

What if your chosen area of focus is not the best? What if it throws up unexpected difficulties? What if unforeseen external factors make your chosen area suddenly unattractive. Should you not spread your bets across a greater number of areas? But that then reduces your relative strength and that reduces your chances of success.

And so on...

Planning the spread of your activities in order to balance focus and risk, is a critical issue in formulating any strategy.

On this subject, it is worth noting that (inevitably) strategies are assessed in hindsight and more attention is paid to winners than losers. Those who focussed very single-mindedly and succeeded may look, in retrospect, like strategic geniuses when, in truth, they were just gamblers who got lucky.

One way to reduce the tension between Focus and Risk is to exploit a third theme, synergy, as a way to reduce the cost of spreading your bets.

For example, can you find a way to use one technology platform to deliver products for two different specialist markets? If you can, then every hour spent developing that platform will be doing double duty. That kind of result is what strategy is all about and why good strategy is so valuable.

What Could Possibly Go Wrong?

“Try again. Fail again. Fail better.”

Worstward Ho by Samuel Beckett (1983)

There are failures of strategy, failures of management and failures of implementation. In this section we look at some of the common ways in which strategies are flawed, irrespective of how they are managed or implemented.

The following are all weaknesses we have seen more than once. Together they provide a fairly comprehensive checklist. You need to be able to defend your strategy against these accusations.

-  Not enough (any) research
-  Not enough focus on customers and their needs; too much focus on internal issues
-  Insufficient buy-in from senior leadership
-  Not enough input from senior colleagues in adjacent departments
-  No clear formulation of ‘the significant challenge’
-  Misguided formulation of ‘the significant challenge’ - fighting the wrong war, often the last war; pursuing objectives that don’t really matter to the organisation and its key stakeholders
-  No ‘guiding policy’
-  All ‘what’ and no ‘how’ - anyone can say what they want. A good strategy needs to explain, at least in

principle, how its objectives will be achieved with the resources available.

-  Too many disjoint objectives - an extended wish list is not a (good) strategy
-  Poor analysis of key risks - see the discussion of risk in 'What Makes a Good Strategy?' above.
-  Failure to consider the competition or identify our competitive advantage(s)
-  Failure to consider value for money i.e. resource costs in relation to outcomes and their value
-  Barking up the wrong tree - guiding policy does not correspond with the significant challenge
-  Not enough resources for implementation
-  Weak links - weaknesses in key areas block successful implementation (e.g. strategy predicated on unrealistic staffing and resource plan)

Suggested Exercise: apply this checklist to some of the example strategy documents listed in the 'Further Reading' section below.

Next Steps

Thank you for reading this guide. We hope you find it useful.

If you would like to follow up or provide feedback please contact:

Alex Morrison

Managing Director/Founder at Cogapp

+44 1273 821 600

alexm@cogapp.com

www.cogapp.com

APPENDICES

Further Reading

About Cogapp

About the Author

Further Reading

A reading list for museums (and other organisations) that aspire to do more with digital media

Contains:

-  references for strategy, digital strategy and lean start-up;
-  example digital strategy documents from leading museums;
-  a handful of museum-specific resources.

An updated version this reading list is maintained on our website here.

www.cogapp.com/digital-strategy-museums-reading-list

Strategy, Digital Strategy and Lean Start-Up

Developing any substantial digital programme will involve elements of strategy and innovation. They are both worth studying. Particularly innovation because so much has been learned over the last two decades and the new approaches are radically different from traditional methods.

Lean Start-Up is the generic name for the leading modern approach to innovation, particularly innovation related to developing digital products and services.

Here is our list of essential resources:

[Good Strategy/Bad Strategy | The Difference and Why it Matters](#) by Richard Rumelt (on Amazon.com)

The best general book on strategy. Full of trenchant observations and useful insights. Any work on digital strategy could do worse than begin with Rumelt's definition of strategy as 'a cohesive response to an important challenge'.

[Digital Strategy](#) (wikipedia article)

An article with multiple issues, but thought-provoking nevertheless.

[The OODA Loop](#) (wikipedia article)

Observe-Orient-Decide-Act: the key idea behind our approach to strategy implementation also at the heart of Agile Programming and Lean Start-Up.

[The Four Steps to the Epiphany](#) by Steve Blank (on Amazon.com)

The original lean start-up guide.

Blank's key recommendation is to start any innovation programme with a systematic exploration of customer needs and behaviour (customer development) undertaken in parallel with early lightweight product development.

For this initial 'start-up' stage, traditional siloed work assignments are unhelpful and should be abandoned in favour of a dedicated cross-disciplinary team working together across the whole programme. Elaborate business plans and formal job titles should also be avoided until the new operation has been thoroughly tested in the field.

I read this book after a brutal experience developing an unsuccessful online start-up. Reading it showed me how far

we had gone wrong despite a huge amount of effort and expense. It felt like a kick in the guts.

Best to read it before embarking on any substantial digital initiative and before you have a chance to repeat my mistakes. It may save you a great deal of pain.

The author, successful entrepreneur Steve Blank, is an inspirational writer and teacher. He maintains an active web presence at www.steveblank.com.

[Lean Analytics](#) by Alistair Croll and Benjamin Yoskovitz (on Amazon.com)

If the lean start-up mantra is 'build-measure-learn-repeat' then a guide that helps you work out how and what to measure must be a key text. This book is the bomb. Every page is useful.

[Who Do You Want Your Customers to Become?](#) by Michael Schrage (HBR ebook)

A new way of thinking about innovation based on the idea that great new ventures change the people who become their customers. Particularly relevant for organisations like museums that have the potential to open people's hearts and minds to new possibilities. I recommended this paper to more people in 2016 than any other.

[Business Model Generation](#) by Alexander Osterwalder and Yves Pigneur (on Amazon.com)

[Business Model Canvas](#) by Alexander Osterwalder and Yves Pigneur (online resource)

Map your digital operation on a systematic canvas diagram. Look for opportunities and explore its strengths and weaknesses. The Business Model Canvas is simple to use in workshops with teams of people including non-specialists. Highly effective. The Business Model Generation book explains and presents the canvas.

[Internet Trends 2018](#) by Mary Meeker (online resource)

Our 'go to' resource for a general survey of developments in the global world of digital. Authoritative and insightful. Produced annually as an extended slide deck. Always a useful for a strategic review of the digital landscape.

Digital Strategy Examples

A showcase of digital strategy documents from leading museums, cultural organisations, etc:

[Tate Digital Strategy 2013-15](#)

[Tate Digital Strategy Update 2016](#)

[Science Museum Group Digital Strategy 2015-17](#)

[Science Museum Group Digital Strategy 2018-21](#)

[Arts Council \(England\) Digital Policy Plan Guidelines 2016 \(pdf\)](#)[livepage.apple.com](#)

[Smithsonian Web and New Media Strategy 2009 \(pdf\)](#)

[Smithsonian Digitization Strategic Plan 2010 \(pdf\)](#)

[National Portrait Gallery Digital Strategy 2016 \(pdf\)](#)

[Next Steps in the Met's Digital Evolution 2015](#)

[National Archives \(US\) Social Media Strategy 2017-20 \(on Github\)](#)

[UK Government's Transformation Strategy 2017](#) (weblink; a digital strategy for UK Government public services)

Museum-Related Resources

[How to Uncross a Director's Arms](#) by Maxwell L. Anderson (online video)

What do museum directors want? And how can the people running their digital programmes help them get it? A concise, funny, if somewhat politically incorrect, and insightful guide by one of the most digitally engaged of the current generation of museum directors.

[Understanding Museum Visitors' Motivations and Learning](#) by John Falk (pdf article)

Who visits museums and what do they want to get out of the experience? John Falk offers an explanation (and an approach) that cuts through the marketing speak and points us in genuinely useful directions.

[Art UK: An unexpected case study in innovation strategy](#) by Alex Morrison (on Medium.com)

How Art UK, an independent British charity, has leveraged its way to international prominence by pursuing a systematic step-by-step digital strategy. Possible inspiration for similar programmes elsewhere. Written by the author of this guide who is also a trustee of Art UK.

[Leading Digital Transformation: Recommendations for Charity Chief Executives](#) by Katie Smith, Alex Morrison and Fay MacDonald (pdf article)

What can charity and non-profit chief executives do to help their organisations prosper in an age of digital transformation?

We asked people running digital programmes in major UK charities for their perceptions of how digital was being handled and then we turned the questions round and did the same with chief executives.

What we found was general agreement about the critical importance of addressing the digital agenda properly. But this agreement was undermined by mutual frustration. Too many demands on the one hand and not enough evidence for decision-making on the other.

Our report reviews the evidence and, based on its findings, makes six recommendations that will help charity and non-profit chief executives lead digital transformation.

About Cogapp

Cogapp is a community of specialists working together as a combined digital agency and innovation studio.

We operate nationally and internationally from a headquarters in Brighton and an office in New York.

As a digital agency we serve leading clients in the museums, culture, media, sports, non-profit and commercial sectors.

As an innovation studio we turn useful ideas into successful digital products and services.

Our work includes:

-  The National Gallery's Micro Gallery, the first large-scale application of digital media in a museum;
-  Microsoft Art Gallery, the first CD-ROM reviewed by the New York Times;
-  Numerous digital products for Microsoft Home;
-  ICONS, a national online campaign to identify icons for England in the 21st century;
-  A series of iPad travel apps for Dorling Kindersley;
-  Design of the London 2012 Olympics website;
-  Interactive installations for Ai Weiwei's Sunflower Seeds exhibition at Tate Modern;
-  The Qatar Digital Library online archive;
-  Neoscope, an app-based system for enhancing live events;

-  Large-scale strategic digital projects for MoMA, the Metropolitan Museum of Art, Manchester United, the British Museum, the Barnes Foundation, the National Portrait Gallery, Qatar Museums and many others.

Here is a snapshot of some of our clients, past and present:



About the Author



Alex Morrison

Founder and Managing Director at Cogapp

Alex regularly consults, advises, writes and speaks on digital strategy. His approach, as set out in this guide, comes from three decades leading strategic digital projects for prominent clients including the National Gallery, the Metropolitan Museum of Art, the Science Museum, Manchester United and MoMA. He also has extensive experience working on the board of two thriving non-profits and involvement with a variety of (more or less successful) online start-ups.

Alex wrote his first computer program, an online game for an IBM mainframe system, on a deck of punched cards. After a spell as a management consultant with Arthur Andersen, he became involved in artificial intelligence. In 1985 this led to a move to Brighton to found a company associated with the University of Sussex's Cognitive Studies programme, Cognitive Applications; now Cogapp.

Alex and his colleagues at the new company started developing projects using hypertext and multimedia. Projects in the cultural sector followed including the development of the 'Computer Information Room' for the National Gallery's Sainsbury Wing. An intense and formative three-year project, which often resembled an extended seminar on museums, new media and art history, this gave birth to the Micro Gallery. Opened in 1991, the Micro Gallery was the first large-scale application of digital media in a museum.

Since 1991, Alex and his colleagues have been applying digital technologies for clients from Seattle to Tokyo via London, Athens and Doha.

Alex is Chair of Wired Sussex and an advisor to Our Future City. He served for nearly eight years as a trustee at the leading digital charity, Art UK (www.artuk.org). He has a degree in Mathematics and Philosophy from Oxford University and is a Fellow of the British-American Project.

