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Defining Your Digital Museum Visitor Experience Strategy: A Case Study of the New Mexico Department of Cultural Affairs

By Sarah Hill

This is a slightly modified version of the similarly-titled presentation originally given in November 2018 at ICOM's International Committee for Exhibition Exchange (ICEE) Annual Conference hosted in partnership with its International Committee for Museums and Collections of Fine Arts (ICFA) in Spain.

INTRODUCTION

Digital is no longer a trend, but a reality. Digital advancement has been a driving force in the 21st century, bringing about unprecedented changes to our everyday lives: the way people search for information, tell stories, interact with each other, consume fact and fiction, purchase goods, experience places, and ultimately the way people understand the world. Digital technologies present an extraordinary opportunity to provide better access to information, connect communities, and meaningfully engage people in new experiences. It also brings with it greater competition for time and attention.

This digital transformation has also had a fundamental, cross-cutting impact on contemporary museum practice from our approaches in collections, operations, and facility management to our need for new skills, audience engagement, income generation, and even how we now measure success. These digital trends also fuel a new set of needs and expectations from our museum-going audiences—particularly millennials and digital natives—with regards to access, understanding, and experiences. With an overwhelming number of potential applications, rapid technological changes, increasing expectations, and wide-ranging operational effects, museums must take a more strategic approach to planning for digital so that the right initiatives are prioritized for maximum return on investment and institutional impact. But where does an institution start?

Using the recent work that Lord Cultural Resources undertook for the New Mexico Department of Cultural Affairs as a case study, this article reviews the key principles and approach that underlie the strategic planning process when thinking about planning for digital and how it is realized as part of the overall visitor experience. It showcases the frameworks, models, and tools used to understand each museums' digital maturity, to map the visitor journey—pre-visit, on-site, and post-visit—and concludes with an overview of the key lessons learned.

Through this case study, readers will also be asked to consider their own institution's visitor experience and level of digital maturity, where digital technology might play a role in improving or elevating this experience, who should be involved in digital development, and how strategic digital initiatives can be implemented to achieve their institution's overall vision.

BACKGROUND

New Mexico's Department of Cultural Affairs (DCA) preserves, fosters and interprets the state's diverse cultural heritage and expression for present and future generations, and manages the largest state-sponsored museum system in the United States. Not only does this network of museums, historic sites and cultural centers play an essential role in safeguarding the cultural heritage of its residents, it also helps to educate and advance its citizens, enhance their quality of life, and ensure the economic wellbeing of the state (New Mexico Department of Cultural Affairs, 2018).

When considering its future direction, the DCA recognized the power that digital has to transform the visitor experience at each of its eight museums. Increased understanding of the future potential of digital technologies and changing audience expectations were considered crucial to the strategic development and success of the DCA. The DCA also recognized that digital improvements might also bring the museums and other divisions closer together, strengthening them organizationally and financially. However, given the limited digital visitor experience within many of its museums, and a number of ever-present challenges regarding reduced staffing and financial resources, a careful strategy would be needed in order to maximize efforts, now and in the future.

THE STUDY PROCESS

Seeking to better understand the ways in which digital technologies could increase relevancy, expand access, and strengthen the quality of the visitor experience, as well as improve digital maturity and operational sustainability, the

DCA hired Lord Cultural Resources to:
(1) Conduct a high-level assessment of the digital visitor experience at its eight state-run museums; and
(2) Develop a department-wide digital visitor experience strategy that will meet the DCA's goals and fulfill its future vision.

To achieve this, the Lord Cultural Resources team of Kathleen Brown, Chief Operating Officer and Senior Practice Leader, Christina Sjoberg, Senior Consultant Exhibitions, and Sarah Hill, Senior Consultant Strategy developed a four-phased study process:

- Phase 1: Define
- Phase 2: Assess
- Phase 3: Imagine
- Phase 4: Strategize

PHASE 1: DEFINE

The Lord team began our study by investigating what was meant by "visitor experience" and outlining key terms like "digital maturity" and "digital visitor experience". This created a common foundation of understanding from which to frame our assessment and established a universal set of criteria for evaluation that could be used at each of the eight museums.
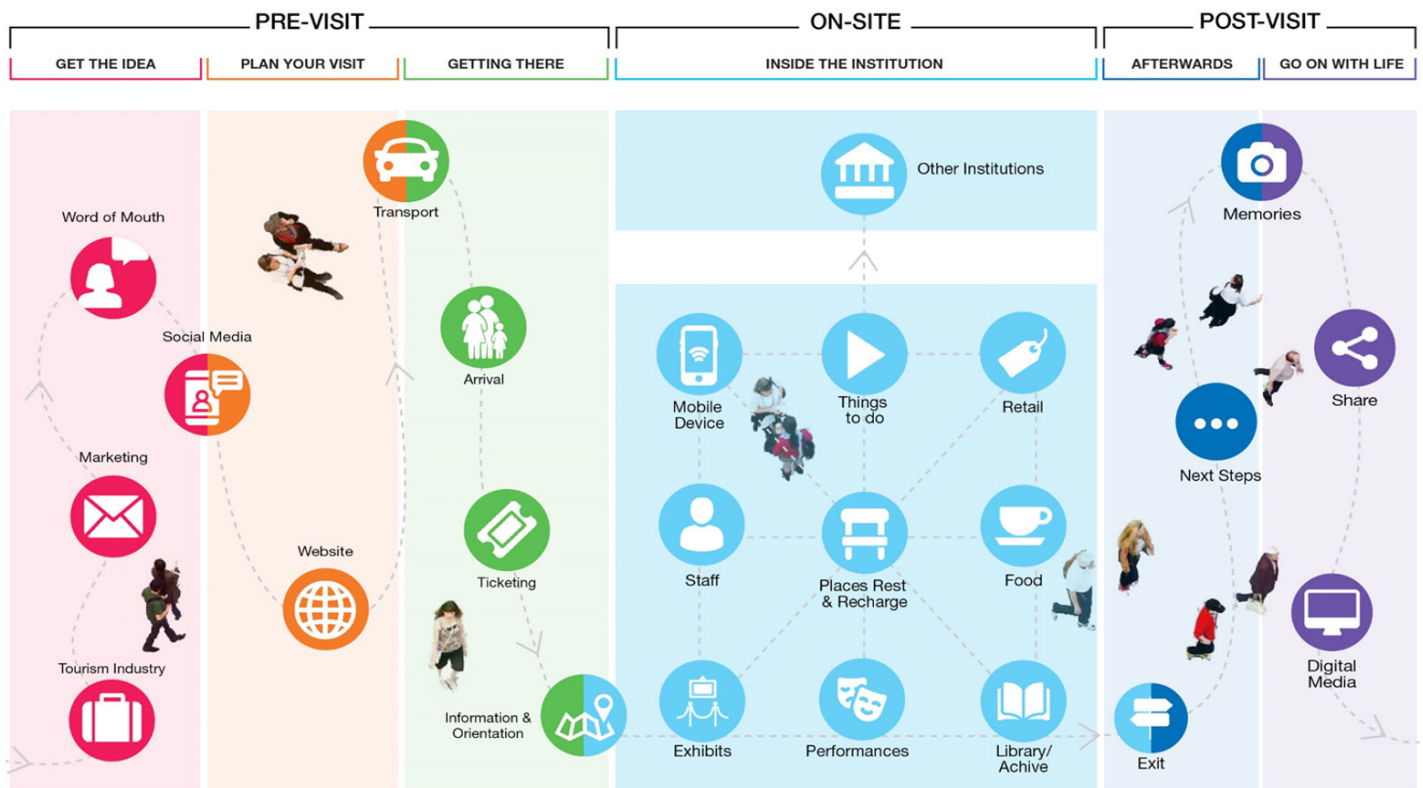

Figure 1: The Visitor Experience Map shows a typical visitor path through a museum experience and all potential touchpoints where a visitor might engage with the collection, content and staff. Adapted from "Exploratorium Visitor Experience Map" by Adaptive Path (Schauer, 2013). Image courtesy of Lord Cultural Resources 2018.

VISITOR EXPERIENCE MAP

The visitor experience or visitor journey starts long before anyone steps inside the institution and continues long after. While the visitor journey is different for each person (based on their motivations, interests, and time), the journey can typically be broken down into three key phases:

• Pre-visit—when a potential visitor is inspired to visit your museum, plans their visit, and then travels to, arrives at, and enters your museum.
• On-Site—when the visitor has entered the museum, is circulating around the building, and is enjoying all that the museum has to offer.
• Post-Visit—when the visitor exits your museum, moves on to another activity or place, and then re-engages with your museum from home or elsewhere.

Within each phase there are a wide range of potential touchpoints where visitors will engage with the collection, content, and staff. The phases of the visitor journey and these potential touchpoints are illustrated in Figure 1. The "digital visitor experience", therefore, reflects all those touchpoints within the visitor journey where the visitor might use digital platforms, interfaces, or technologies to engage.

The Lord team used this concept to put ourselves in the visitors' shoes in order to map out the sequence of their visits to New Mexico's state museums, highlighting when, where, and how visitors were likely interacting and engaging with each institution. It also allowed us to understand which interactions were currently digitally-driven and identify which potential aspects of the visitor experience could be improved by introducing new or enhancing existing digital technologies.

DIGITAL MATURITY

The Lord team also examined what it meant to be a "digitally mature" cultural organization, in an effort to be able to evaluate where on the continuum of digital maturity each of the New Mexico museums was relative to other museums and each other. Thinking from Forrester Research Inc. (Reid, 2014) suggest that there are two domains that should be evaluated to understand an organization's level of digital maturity—its customer experience (or visitor experience in the context of a museum) and its operations. A museum with a highly optimized digital visitor experience and that had also achieved digital operations excellence would be considered a "digital master". An organization without an optimized digital visitor experience, nor an optimized digital operation, would be considered a "digital dinosaur". Figure 2 illustrates the five categories that an institution could potentially fall into.

Adding an extra layer of depth to this was the digital benchmarking toolkit developed by the Collections Trust (2017). This evaluation tool also provided us with a structure for our investigation and evaluation, ensuring a holistic approach that encapsulates the eight core areas that the Collections Trust believes contribute to digital maturity:
•   Strategy
•   People
•   Systems
•   Digitization
•   Content Delivery
•   Analytics
•   Engagement
•   Revenue

THE DIGITAL VISITOR EXPERIENCE ICEBERG

Layering our understanding of the visitor experience with that of digital maturity, the Lord team came to realize that the "digital visitor experience" represents more than what is merely visible to the museum-going public in those front of house areas such as the lobby and the galleries. It also represents many important behind-the-scenes activities and infrastructure that are essential for making the visitor experience happen. Without them, it would be impossible to achieve a high-quality digital visitor experience; so, to ignore them would be perilous. Thinking about it like an iceberg (see Figure 3), any potential strategy to improve or develop the digital visitor experience for New Mexico's eight state museums must take into consideration all those things that are above the surface or waterline, as well as all the work going on below the waterline in order to reach success.
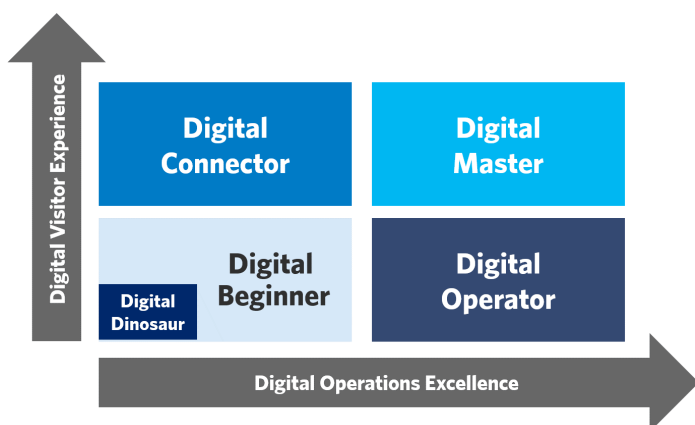

Figure 2: The quadrant diagram helps museums understand where they are in terms of digital maturity based on how "digitally optimized" their visitor experience and operations are. Adapted from the "Digital Dinosaur Trap" by Forrester Research Inc. (Reid, 2014). Image courtesy of Lord Cultural Resources 2018.

Above the waterline – VISIBLE

- Content
- Website & Social Media
- Interactives & Touchscreens
- Screens & Projections
- Mobile Technology
- Kiosks
- Interfaces

Below the waterline – ENABLE

- Digital Strategy
- Staff Skills & Knowledge, and Organizational Structure
- Connectivity
- Hardware & Infrastructure
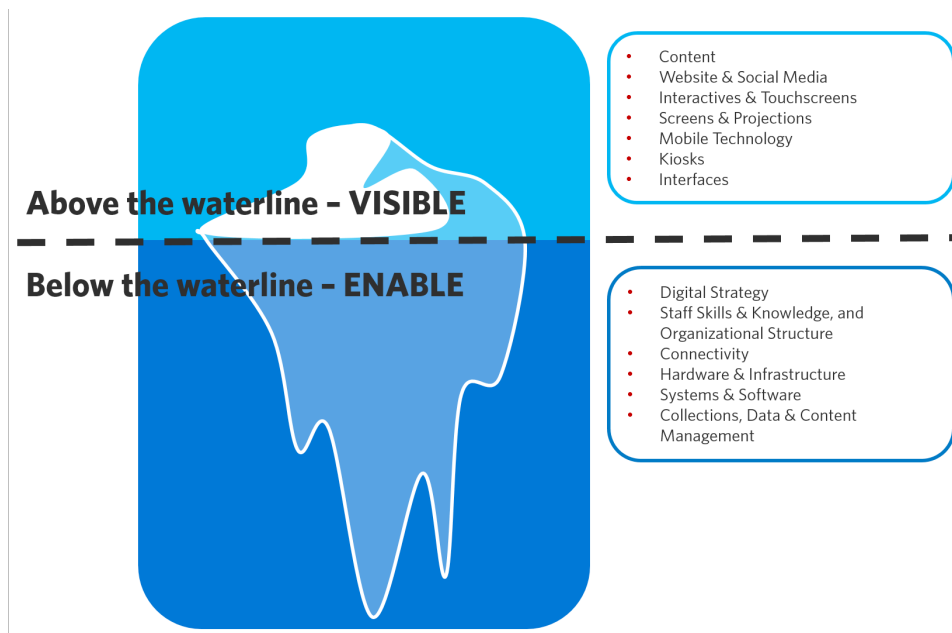- Systems & Software
- Collections, Data & Content Management

Figure 3: The iceberg diagram shows that the digital visitor experience encompasses elements that are public-facing or "visible" (above the waterline) and behind-the-scenes (below the waterline) that "enable" the visitor experience to happen. Robust strategic planning must consider both (Lord, 2018). Image courtesy of Lord Cultural Resources 2018.

PHASE 2: ASSESS

Using the agreed definitions and concepts established in the previous phase, the Lord team created a set of tools, questions, and criteria that could be used to facilitate a consistent evaluation of the existing digital visitor experience across each of the eight museums. The majority of the assessment process was conducted on-location and included:

• Pre-Visit Report Card—A rating of the presence and quality of each DCA museum's website, social media, apps, online marketing, etc.

• Journey Mapping—Using the visitor journey concept, look for basic digital facilities (e.g. Wi-Fi), consistent online and in-person experiences, pinch-points that could be eliminated with digital solutions, potential enhancements, and

Figure 4: Where does digital "live"? Museums organize digital leadership in different ways, often reflective of their digital maturity. Typically, ICT or marketing departments are responsible for digital through "centralized" models (Price and James, 2018).

necessary behind-the-scenes infrastructure.

• User Experience (UX) and Engagement Survey—Test and answer key questions about the quality of user experience and level of engagement for existing digital touchpoints (e.g. does it work? easy to use with little direction? interactive? etc.).

• Staff Focus Groups—Cross-departmental group discussions with staff to discuss role of digital, strengths, weaknesses, challenges, and opportunities, and priorities at each institution.

PHASE 3: IMAGINE

In the third phase, the Lord team collected and examined trends in contemporary audience expectations and examples of good practice in digital visitor experience, digital strategy development, and digital leadership. The purpose of this research was to learn from colleagues and peers in order to provide inspiration, to reveal potential opportunities for the DCA museums, and to consider who might be best placed to lead on implementation of the strategy, and where this should be located within the existing centralized departmental structure (see Figure 4).

Key findings were presented and discussed as part of a dynamic visioning workshop that was intended to spark discussion and help establish an overall vision for the future. Attended by museum directors and staff from each institution, as well as others from the Secretary's Office, ICT, Marketing, and Museums Resources Division, the diversity of the group allowed for a rich discussion and consideration of various digital ambitions, priorities, and challenges from a range of perspectives. To conclude the workshop, the Lord team conducted an engaging visioning exercise that asked each participant
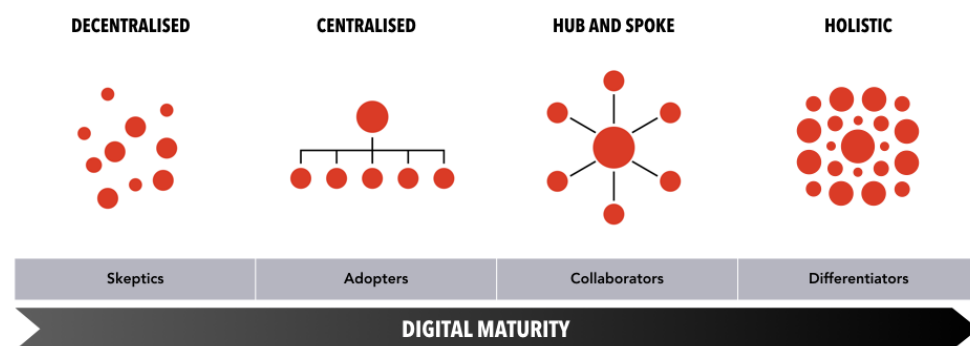
FOUNDATION: basic requirements needed to support digital technology

EXPANSION: enhancing successful initiatives and practices

INNOVATION: new technologies, approaches and relationships that are a priority for investment

Figure 5: A three-tiered strategic framework was developed to articulate and organize key goals and supporting strategic initiatives that comprises the digital visitor experience strategy for the New Mexico Department of Cultural Affairs (Lord, 2018). Image courtesy of Lord Cultural Resources 2018.

to submit ideas on what:

• Was on their "digital wish list".
• Was an essential for "digital success".
• "Digital don't" should be avoided.
• Significant object or story from the collection would make a great digital project.

PHASE 4: STRATEGIZE

In the final phase, the Lord team brought all the assessment results and outputs together to prioritize the opportunities that were likely to be the most advantageous for the DCA museums, and determine which critical issues were fundamental barriers to success. With regards to opportunities, it was clear that digital initiatives could be used to help unite the eight museums across common and strategic areas such as mobile ticketing, a central portal for educational resources, and providing access to the full New Mexico state collection online in one place. Strengthening and expanding an existing partnership with the Highlands University, Department of Media Arts and Technology would also bring great benefits. With regards to critical issues, actions were needed to increase digital maturity consistently across each institution to create greater equity, to break down siloed processes and work streams, and improve digital skills, attitudes, and comfort levels.

Moving forward, the Lord team worked with the project's steering committee to begin developing a set of guiding principles and core goals for the digital visitor experience strategy that would help the DCA fulfill its mission and the vision of the digital visitor experience strategy. The guiding principles developed represent a broad philosophy that will guide each of the museums as they think about developing their own digital initiatives in order to fulfill the strategy. The principles provide both a starting point

from which to begin planning, as well as a set of criteria with which to evaluate new ideas. A three-tiered strategic framework was put in place to help organize the DCA's core digital visitor experience goals (see Figure 5). To do this, the critical issues identified were transformed from negative, problem statements into positive, action-oriented or goal statements.

Core opportunities and strengths were then leveraged to create a series of four to five high-level strategies under each goal, such as; "build a 'digital-positive' culture", "use digital practices to unify the divisions in strategic areas", or "expand key performance metrics and measures of success to include digital." Overall, strategies were put in place to help the DCA address the critical issues facing the eight museums, take best advantage of high-impact opportunities, and do so in a way that maximizes efforts for greatest results.

Going forward, it will be the responsibility of each museum and various other divisions to work collaboratively with DCA's digital leadership to commit to the strategy, cultivate excitement amongst its staff for the strategy's vision. Equipped with a unified strategy and common goals, each museum and division will use the guiding principles, goals, and actions as a roadmap for developing digital visitor experience initiatives that both help to unify DCA in key areas and also enhance each museums' individual identity and appeal to their core audiences.

CONCLUSIONS

Through the experiences of the Lord Cultural Resources consultant team, in the context of the New Mexico Department of Cultural Affairs case study, this article has tried to emphasize why strategic planning for digital is important and provide a window into the process, concepts and tools

that can be used for developing a digital visitor experience strategy.

Why Consider a Digital Visitor Experience Strategy?
• Digital is not a trend it is a REALITY.
• Digital is cross-cutting and IMPACTS EVERYTHING YOU DO.
• Digital technologies change rapidly are hard to keep up with, PRIORITIZATION is key.
• Commercial entertainment, retailers and service providers are your NEW COMPETITION and influence your visitors' expectations.

When Developing Your Strategy…
• Put yourself in the visitor's shoes, map their journey.
• Reflect honestly on your own level of digital maturity, both personally as a museum professional and as an institution.
• Involve a broad and interdisciplinary team of staff in discussion.
• Ask your audience what they want.

When Writing Your Strategy, Think About…
• How can the strategy help achieve your institutions overall vision?
• What should digital do for your visitors?
• What should digital do for your organization?
• What needs to be done above and below the waterline?
• Do these digital initiatives serve a purpose?
• Who should be your digital leaders and champions?

It is hoped that readers will be able to leverage these insights in order to objectively consider their own institution's visitor experience and level of digital maturity, in what way digital technology might play a role in improving or elevating this experience, and what strategic initiatives could help to move their institution forward.

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On the cover:

Life sized sculpture of an enslaved family in chains by West African artist Kwame Akoto-Bamfo at the entrance to the National Memorial for Peace and Justice in Montgomery, Alabama. Read more about Facing Change in Montgomery, Alabama inside.