

PUBLIC RELATIONS

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WELCOME & OVERVIEW

AUD Module Instructors




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Welcome back!





Overview

Module RECAP

Month 1: March 25, 2019
Workshop | Audience: An Introduction

Month 2: April 29, 2019
Skills Lab | Marketing Plan

Month 3: May 2019
Mentor Site Visits & Work on Your Individual Projects

Month 4: June 24, 2019
Workshop | Public Relations

TODAY'S Goals & Activities

Solidify ideas about how to build new audiences and maintain them through targeted marketing, positive relationships, and visitor experiences

- Homework Reporting Out: Institutional Identity & Of/By/For/All Assessment
- Museum Visitor Personas
- Communication Channels & Tactics
- Community Relations
- Building New Audiences
- Visitor Services & Experience

StEPs AUD Standards

- 1) The institution identifies current and potential audiences it serves, and makes appropriate decisions in how it serves them.
- 2) **Regardless of its self-identified communities, the institution strives to be a good neighbor in its geographic area.**
- 3) The institution demonstrates a commitment to providing the public with physical and intellectual access to the institution and its resources.
- 4) **The institution regularly promotes the institution and its activities and thinks strategically about how it shares information.**
- 5) **The institution is committed to providing a high level of basic visitor services and makes continued improvements in the delivery of those services.**

GROUND RULES



- Responsible for your own learning
- Respect confidentiality of the room
- Honor time limits
- Honor other people when speaking
- Cell phones – be cool
- Typos are okay

HOMEWORK REPORTING OUT

REMEMBER YOUR ASSIGNMENT?



INSTITUTIONAL IDENTITY EXERCISE

Develop your **Brand Statement Organizational Analysis** as a first step to building a marketing plan by asking a **museum insider** (staffer not here today) and a **museum outsider** (visitor or friend) to complete the questionnaire.

QUESTIONS FOR DISCUSSION

- ❑ How did others' responses confirm or challenge your description of your museum and its benefits?
- ❑ Who are your most important audiences and what are some ways your museum meets their needs?

GETTING PERSONAL: Creating Personas for Museum Visitors

Understanding Your Audience

Remember Your 5 Critically Important Audiences?

- What are their barriers to entry?
- How do they spend their time?
- What is their demographic / psychographic profile?
- How do they receive information?



...Dig in deep to get to know them


Getting Personal with Personas

Personas are fictitious characters created to embody specific key characteristics of target visitor. Personas allow you to package visitor information to help develop programs, marketing, and guest services. A design method to help:

- Make assumptions and knowledge about visitors explicit and thereby give your team a common language with which to talk meaningfully about visitors.
- Allow you to focus on and design for a small set of specific visitors who are different from staff or team members.
- Build empathy toward visitors in a way that data sets and reports cannot accomplish.

...A persona is a composite profile of a person based on real people who visit your museum.

Jill Anderson



Bio
Jill is a Regional Director who travels 4-8 times each month for work. She has a specific region in which she travels, and she often visits the same cities and stays at the same hotel. She is frustrated by the fact that no matter how frequently she takes similar trips, she spends hours of her day booking travel. She expects her travel solutions to be as organized as she is.

Personality
Introvert ☐ Extrovert ☒
Analytical ☒ Creative ☐
Loyal ☒ Flexible ☐
Passive ☐ Active ☒

Preferred Channels
Online ☒
Mobile ☒
Email ☒
Traditional Ads ☐

Goals
• To spend less time booking travel
• To narrow her options quickly

Frustrations
• Too much time spent booking – she's busy!
• Too many websites visited per trip
• Too terribly tech savvy – doesn't like the process

Motivations
Price ☒
Comfort ☒
Convenience ☒
Speed ☒
Loyalty/Miles ☒

Brands
Expedia
ACE HOTEL
lyft

AGE: 35
WORK: Regional Director
FAMILY: Married, 1 Child
LOCATION: Austin, TX
ARCHETYPE: The Frequent Flyer

Organized **Practical**
Protective **Hardworking**

"I'm looking for a site that will simplify the planning of my business trips."

<https://99designs.com/blog/business/how-to-create-user-personas/>

HANDS-ON ACTIVITY #1

MUSEUM VISITOR PERSONAS

10th-12th Audience
Public Museum

HANDS-ON ACTIVITY #1 – 45 minutes
Getting Personal with Museum Visitor Personas

A personas is a composite profile of a person that is based on real people who visit your museum. They are not demographic profiles, but are based on behavior and attitudes – what people do, why they do it, what they care most about, and what they want. A list of personas can be used as a tool for organizational and customer research for marketing purposes.

Objectives

1. Break into your museum groups.
2. Complete a PERSONA CARD (provided) for two different critical audience members (30 minutes).
3. Share your personas – and what you learned by creating them – with the group! (15 minutes)

Materials

- Personas Cards (provided)
- Markers
- Sticky notes
- Magazines
- Other supplies for creating personas (provided)

Instructions

1. Break into your museum groups.
2. Complete a PERSONA CARD (provided) for two different critical audience members (30 minutes).
3. Share your personas – and what you learned by creating them – with the group! (15 minutes)


Personas Cards

1. Name your persona.

2. Complete a PERSONA CARD (provided) for two different critical audience members (30 minutes).

3. Share your personas – and what you learned by creating them – with the group! (15 minutes)

MORNING BREAK – 15 minutes



START SPREADING THE NEWS: Methods & Tools

How to Reach Your Audience

Once you know who your audience is, what matters to them, and where they get their information, you can **identify appropriate communications channels** to message how your museum's offerings and how those meet the audience's needs.

- Examples: **Moms** > rainy day destination for kids; **teachers** > field trips, tours, curriculum support; **tourists** > broaden/deepen your experience of the destination by exploring its history.
- Just as you create exhibits and programs with particular audiences in mind, your **marketing should be tailored** to those audiences too.
- **Repetition & frequency** are important.
 - Potential visitor gets an e-mail, sees it in social media feed, sees a flier at a local coffee shop, hears a friend talking about it.

"It's everywhere — I should pay attention."

What Are the Options?



- **Advertising / paid media:** \$\$\$, digital ads / sponsored content
- **Media relations / earned media:** Costs TIME, need good contacts, know media outlets / audiences / kinds of stories that will interest them
- **Print materials:** Relatively inexpensive, meets your audience where they live, work, play — brochure / rack card
- **Website:** Essential, 24-7 "owned media" channel, where visitors look first, think of as your "digital brochure"
- **E-mail:** Most effective digital tool as a direct, fast way to reach audience that is targetable, trackable, affordable
- **Social media:** Increase name recognition, maintain contact with supporters, reach new audiences, share benefits, establish expertise, two-way conversation
- **Other online communications:** Google Business, calendars
- **Face-to-face communications:** Speeches, presentations, tabling

Sources: Small Museum Toolkit: Museum Marketing & Strategy, and Marketing on a Shoestring Budget: Guide for Small Museums and Historic Sites

You're Already Doing It



- What marketing methods & tools have you used?
- What were you promoting?
 - A specific exhibit / program or broader museum impact?
- What worked?
 - For instance, did a press release or pitch to a reporter result in a story?
- **COMMUNICATIONS AUDIT** can help determine what's working, what isn't, and where you might reallocate your efforts and resources:
 - List all marketing efforts, target audience, goals set, results achieved.
 - Review all materials to ensure consistency in brand messaging.

HANDOUT | Do-It-Yourself Communications Audit Template

Your Website: First Impression

Start with:

- Key info: location, hours, admission, contacts (phone & e-mail)
- Benefits, offerings, calls to action, keywords to attract target audiences
- Images
- Be mobile friendly — 72.6% of Internet users will access the web solely via their smartphones by 2025 (currently about 51%)

Add:

- Ability to collect user information through web form
- Ability to add social media links
- Option to donate and register for programs online
- Ability to add Google Analytics
- Blog



Affordable platforms to consider:

- Weebly, Wix, WordPress, Squarespace

Sources: Marketing on a Shoestring Budget and World Advertising Research Center (WARC) January 2019 report



E-Newsletter: Essential Tool

- Reaches members, supporters, visitors, media—can segment
- Creates regular communication and keeps them informed
- Helps drive traffic to website
- Steps to get started:
 - 1) **Build a Contacts List:** Gather e-mail addresses at front desk, public events, etc.; create web option to sign up; encourage through social media
 - 2) **Create Content:** Identify your message & priorities; be concise; add a call to action (click through to the website, like the museum on Facebook, send a donation, come to an event, call their legislator to support a funding bill for museum services); use images; subject lines; model on e-newsletters you like
 - 3) **Determine Schedule:** Consistent, test best times and days
 - 4) **Analyze Results:** Open rates, clicks on links; use what you learn
- Affordable platforms to consider:
MailChimp, ReachMail, Mailigen, Constant Contact, Active Campaign

Source: Small Museum Toolkit and Third Sun presentation at Mountain West Arts Conference 2018

Plan an E-Mail Campaign

Use the E-mail Campaign Template to map out your strategy and schedule for regular e-mail communications with visitors and stakeholders.



HANDOUT | Third Sun Communications - Email Campaign Worksheet

Reach Audiences with Facebook



- 69% of US adults use Facebook (*unchanged since 2016*)
- 73% of them visit at least once a day
- 95% of adults aged 18-29 expect a business to have a Facebook page

What You Need

- Page vs. Group
- Cover photo, about paragraph, contact information
- EVENTS: invite guests, tag partners, ask to co-host
- Boosted posts and paid ads — targeting
- Content: info relevant to followers, from other quality sources, giveaways, behind-the-scenes, interviews with featured presenters
- Schedule
- Listen and respond

Sources: Marketing on a Shoestring, and
Pew Research Center <https://www.pewresearch.org/fact-tank/2019/05/16/facts-about-americans-and-facebook/>

What About YouTube & Instagram?

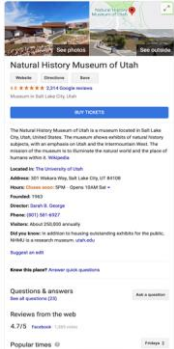
- YouTube most popular—73% of U.S. adults use it
 - All-video platform
- Instagram third most popular
 - 37% of U.S. adults use it
 - 67% of 18- to 24-year-olds use it
 - Highly visual
 - Less promotional
 - Tagging and hashtagging helps you find audience
 - Influencers phenomenon—advocates, Mommy bloggers, enthusiasts
- Start with Facebook and move on to another platform as resources allow



WANT TO DIVE DEEPER?

Minnesota Historical Society offers strategy worksheets & guidelines for web, blog, and social media at https://www.museumsandtheweb.com/blog/myotus/social_mediaweb_guidelines_and_strategy_worksheet

Get to Know Google Business



- **Google Knowledge Panel**
 - Likely gets more traffic than your own website
 - Presents everything Google knows about your business
 - Info gets used many different places
- **Start by registering your museum on Google with Google My Business** (<https://www.google.com/business/>)

Optimize Your Google Listing

- Make sure you've **claimed your business**.
- Search at business.google.com or edit from Knowledge Panel (click on "Own this business?").
- Make sure basic info is **complete and up to date**.
- Make sure info is **consistent** with your website and social media.
- Add **photos** and keep them updated. Listings with quality photos are twice as likely to engage customers.
- Add **social media URLs** under website link.
- Respond to **customer reviews**:
 - Mention your name, location, and new features to positive reviews.
 - Don't mention name and location in negative reviews (to keep it from showing up higher in search results).
- Make a post (free). Special offers. **Drive viewers** to website.
- **Check in** once a month.

Reality Check: The Checklist



Pick one activity that's most helpful — low-hanging fruit!

- Create a simple **print piece**.
- Create a simple **web presence**. Review current website, update it, make a plan for keeping it updated (assign someone to that task).
- Create a **Facebook page**, invite people to like it, create events for upcoming programs.
- Start collecting **e-mail addresses** and research e-mail marketing platforms to find an affordable one, develop a plan for a monthly e-mail to your contacts, or consider segmenting your existing list.
- Claim and update your **Google Business profile**.
- Develop a **list of media contacts** and develop a plan for regular contact.
- Start with a **communications audit**. Look at what you've done over the past year. Do your materials communicate a consistent brand identity? What's worked and what hasn't? What else might help you reach your target audiences? Use that to create a plan for next steps.

Measuring Success

Evaluate your tactics:

- Track and report the ways in which your marketing efforts created measurable results: in media exposure, higher attendance, increased member / donor numbers, etc.

These will help you:

- See what's working and what's not.
- Help your governing authority, board, and other stakeholders see the value of your marketing efforts.



HANDS-ON ACTIVITY #2

COMMUNICATION STRATEGY

100% of Audience
Public Relations
HANDS-ON ACTIVITY #2 - 20 minutes
Communication Strategy

Instructions:

- Break into your museum groups.
- Using your three to five top audience segments, match each audience with a small list of potential methods/channels (or tools/tactics) that you could use to reach them and carry out your communication strategies (10 minutes).
- Group discussion (10 minutes).

| Audience | Methods/Channels |
|----------|------------------|
| | |
| | |
| | |
| | |
| | |
| | |

©2017 American Association of Museums

- Break into your museum groups.
- Using your three to five top audience segments, match each audience with a small list of potential methods/channels (or tools/tactics) that you could use to reach them and carry out your communication strategies (10 minutes).
- Group discussion (10 minutes).

LUNCH BREAK – 60 minutes



GROUND RULES



- Responsible for your own learning
- Respect confidentiality of the room
- Honor time limits
- Honor other people when speaking
- Cell phones – be cool
- Typos are okay

HOMEWORK UPDATE 2.0: Of/By/For/All Self-Assessment

REMEMBER YOUR ASSIGNMENT?



Of/By/For/All SELF-ASSESSMENT

Complete the free, confidential **OF/BY/FOR ALL organizational self-assessment** (10 minutes) to help identify your strengths and weaknesses in being OF, BY, and FOR your community. They will send you a report.

<https://www.ofbyforall.org/assess-now>



WHAT DID YOU LEARN?

COMMUNITY RELATIONS & BUILDING NEW AUDIENCES

Community Relations

The various methods organizations use to establish and maintain a mutually beneficial relationship with the communities in which they operate.



Successful Partnerships

- Can extend your reach and resources
- Can attract new patrons
- Can increase awareness and recognition



Being a Good Neighbor

Community relations is about being a good neighbor, cultivating relationships and trust within the community, and leveraging those relationships to create advocates.

- Be responsive to concerns
- Collaborate and partner
- Serve community needs



Sources: Kotler, *Museum Marketing and Strategy* and *Small Museum Toolkit*

CASE STUDY: Kirtland Temple



Photo 3.1. Kirtland Temple, located in Kirtland, Ohio. (Courtesy of Barbara Walden)

Source: *Small Museums Toolkit*

Background

- Small historic site in Kirtland, Ohio, with limited resources.
- First temple built by Joseph Smith's followers, National Historic Landmark for its religious and architectural significance.
- Hosts tens of thousands of international visitors, but locals mostly ignored it. Temple didn't value or build local ties.

Challenge

- In 1989, a local murder by a cult leader with LDS ties cast the temple in a negative light. Temple went from being ignored to being stigmatized.
- Leaders planned community-wide service at temple to de-mystify beliefs and counter false assumptions.



Photo 3.2. Annual Community Service: The annual service, held in the Kirtland Temple, began over twenty years ago as a compassionate response to a community tragedy and is led by the city's civic and religious leaders. (Courtesy of Barbara Walden)

Source: Small Museums Toolkit

Opportunity

- Kirtland's leadership recognized potential to turn stigmatized temple into a symbol of strength and unity.
- No immediate benefit—but connecting with community personalized site.
- Staff's perception of community & museum's inactive involvement locally changed dramatically—over two decades, temple staff built strong ties.
- Annual and monthly events.
- Staff members joined local Kiwanis & helped fundraise for new library.
- City officials, county politicians, neighbors began requesting tours and asking temple staff to give talks.
- Once a symbol of a tragic event, the Kirtland Temple is now perceived by local residents as a treasured historic icon and place for open dialogue.
- Local tragedy & PR fiasco > opportunity to unite community at minimal cost.

Steps They Took

- 1) Opened dialogue with neighbors.
- 2) Took an active role in local civic organizations.
- 3) Offered museum resources to meet community needs.

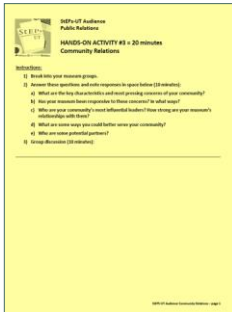
What You Can Do: Some Ideas

- Identify local community / opinion leaders, as well as local government leaders & build relationships through regular contact.
- Arrange museum open houses and tours for those community leaders.
- Be active in other local organizations.
- Make museum facilities available for community events.
- Participate in community festivals and other established events.
- Tie exhibitions and events to important anniversaries and holidays.
- Engage community in exhibition making, utilize community expertise.
- Partner with other community talent and expertise to enliven / broaden interest in exhibits — through visual art, dance, music, etc.
- Offer outreach educational programs at schools, libraries, state parks, etc.
- Participate in existing advocacy efforts and government relations / lobbying that benefit Utah museums — Utah Museums Association, UA&M Office of Museum Services, Utah Cultural Alliance, Utah Humanities.

HANDOUT | Community Relations: What You Could Do (a Few Ideas)

HANDS-ON ACTIVITY #3

COMMUNITY RELATIONS



- 1) Break into your museum groups.
- 2) Answer the questions on your handout about how well you know and serve your community (10 minutes).
- 3) Group Discussion (10 minutes)

*What are you already doing
& how can you leverage that to
work smarter not harder?*

Members, Friends & Advocates

Getting People Involved

Friends or Member Group

Involving regular visitors and supporters on a deeper level. Helps museum:

- 1) Raise funds
- 2) Find volunteers
- 3) Build audience
- 4) Make content relevant
- 5) Secure support and mediation when conflicts arise

Advocacy Group

Should reflect all elements of your community. Diverse voices can help your museum:

- 1) Speak to and reach different audiences
- 2) Ensure cultural sensitivity
- 3) Ensure relevant program development
- 4) Help with evaluation

Source: Bez and Cunningham, "Membership Matters: Establishing a Vital Membership Program in Your Museum," AASLH Technical Leaflet #237

Starting a Member Program

- Begin with **prospects you know** and **exhaust in-house sources** of contacts: past board members, volunteers, staff members, their friends and associates, researchers, collections donors, visitors, and vendors.
- **Collect contact info** of people & businesses interested in your museum.
- Use your **visitor log**.
- Make personal solicitations at the **admissions desk** and **special events**.
- Promote **gift memberships**.
- Feature on your website, in e-newsletters, other **promotional materials**.
- Determine the **tangible benefits you'll offer** that fit your audience's desires and your organization's culture—free or discounted merchandise or programs, publications, access to places, people, or information.
- **Communications** with these groups help prepare them to be advocates and ambassadors.

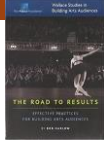


Building New Audiences

The Road to Results

- 10 case studies of arts organizations (museums, opera companies, theater, etc.) **undertook audience-building projects** for the Wallace Excellence Awards initiative.
- Identifies **common keys to success**.
- Organizations identified a **challenge related to audience**, conducted **research to learn more** about prospective new audiences, and made **changes in programs and communications** based on what they learned.
- Remained true to their **missions**.
- Important to think about because **audiences for cultural attractions are changing as are the state's demographics**. We can't continue to just do what we've always done if we want to stay relevant and viable.
- **Two examples** — although not history museums — offer relevant case studies from which we can draw ideas for **our own next steps**.

Source: Bob Harlow, *The Road to Results: Effective Practices for Building Arts Audiences* (Wallace Studies in Building Arts Audiences)



CASE STUDY: Attracting Families

The Contemporary Jewish Museum

Challenge / Opportunity

- Moved to larger space and felt pressure to fill.
- Decided to broaden and diversify by attracting more families.

Steps They Took

- 1) Developed family-friendly exhibits, tours, activities.
- 2) Created marketing materials targeted to families.
- 3) Offered free admission for children.
- 4) Partnered with preschools (teachers, students, parents) & public library.

Outcome

- In 4 years, family attendance grew from 1,300 to 22,000 a year – one-third from underrepresented demographics.



CASE STUDY: Reaching Immigrants

Fleisher Art Memorial

Challenge/Opportunity

- Demographic changes in neighborhood. Hoped to attract newly arrived immigrants to onsite programs to fulfill mission.

Steps They Took

- 1) Built on existing community relationships (offsite classes).
- 2) Focus groups > learned immigrants felt they wouldn't "fit in."
- 3) Outreach to community through mobile studio, presence at festivals, schools, and other activities in the neighborhood.
- 4) Met people in familiar settings, explained and demonstrated activities available, prepared museum to be welcoming.
- 5) Trained staff in working with multiethnic populations.
- 6) Offered bilingual drawing class when many have the night off.

Outcome

- Enrollment of neighborhood children grew 50% in four years.
- Ongoing work: gradually building a sense of familiarity with neighborhood residents that leads them to feel comfortable with the organization and visit.



What You Can Do: First Steps

- 1) Identify audiences to whom you have something to offer (existing relationships, past experience, audience research)
- 2) Identify barriers (logistical, perceptual) to overcome
- 3) Research, listen, respond
- 4) Offer multiple ways in – gateway & introductory experiences

THIS IS A LONG-TERM PROCESS

Trying to achieve dedicated attendance by group with no previous market awareness, asking potential visitors to develop new habits

Discussion

- ☐ How could you use these strategies to build on or start a new effort of your own?
- ☐ Which new audiences do you have something to offer? Native Americans, immigrants, Latinos, teens, etc.
- ☐ What are the barriers likely to be and how could you address them?

AFTERNOON BREAK – 15 minutes



GUEST SERVICES & THE VISITOR EXPERIENCE

Guest Services & Visitor Experience

- The importance of providing a positive visitor experience cannot be overstated!
- It costs 5X more to attract a new visitor than to keep one you already have.
- People will tell an average of 10 others about problems, but only 1/27 will take their complaint to the source of the problem.
- Google reviews last forever!



Source: Weaver, Stephanie, *Creating Great Visitor Experiences: A Guidebook for Museums, Parks, Zoos, Gardens and Libraries*, Left Coast Press, 2007.

Eight Steps to Great Visitor Experiences

1. Invitation
2. Welcome
3. Orientation
4. Comfort
5. Communication
6. Sensation
7. Common sense
8. Finale



Step #1: Invitation




The invitation begins when a potential visitor says, "Let's do something today." It ends when he arrives in your parking lot and spies your front door.

- a) Your website (hours, directions, phone number or reliable contact?)
- b) Your voicemail message (does it sound friendly?)
- c) Branding – more than just logos
- d) Marketing – inviting, consistent, clear, representative of your site
- e) Parking, signage
- f) Clean and litter/clutter free

[illegible]

The welcome step begins at your entrance and ends when the visitor has had contact with someone who works for you.





Data Reveals The Worst Thing About Visiting Cultural Organizations

Step #3: Orientation

When the visitor moves away from your greeter, the orientation step begins. It ends when she decides what to do first.

- a) Transition zone
- b) Right hand bias
- c) Maps and wayfinding



Step #4: Comfort

The comforts step is found throughout your site. It's designed into permanent structures, built-ins, exhibitions or displays, and signs.

- a) Seating
- b) Restrooms
- c) Food
- d) "Mind Comfort"
- e) Cleanliness
- f) Safety
- g) Comfort supports learning



Step #5: Communication

Everything you convey in written or spoken words is included in the communication step.

- a) Themes, big ideas
- b) Tone and voice
- c) Signs
 - o fonts
 - o bilingual?
- d) Clear, consistent, intentional verbal communication from staff



Step #6: Sensation

When you are designing your experience, or setting up visitors' interaction with staff, always remember to ask, "Is it fun?" "Does it engage all five senses?" and "Is it unexpected?"

- a) Excite the eyes
 - o Use lighting creatively
 - o Create interesting sight lines
- b) Excite the ears
 - o What does your brand sound like?
- c) Excite the nose
 - o or at least don't offend it!



Step #7: Common Sense

The common sense step provides smarter, more logical, more efficient ways to run your operation. Use visitor studies, apply trends, realign your mission if necessary, and collaborate with like-minded organizations.

- a) Your front-line staff know a lot about your visitors
- b) Keep up with trends
 - o Newsletters from professional orgs (e.g., AASLH!)
 - o AAM Museum magazine
 - o Know Your Own Bone
 - o Nina Simon's Museums 2.0 Blog
- c) Visitor studies – two-way communication!
- d) Community partnerships



Step #8: Finale

The finale is everything a visitor leaves with, both tangible and intangible.

- a) Think of the experience of having a beginning, a middle and an end (both interpretation and experience-wise)
- b) Souvenirs / Memorabilia
- c) A chance for visitors to leave their mark





Journey Mapping

Tool used to track a visitor's path and perspective through an entire experience from start to finish

- Large scale = for an entire museum visit
- Medium scale = through an exhibition
- Small scale = through a specific interactive

Benefits

- Gain the perspective of your visitor
- Reveals what you are doing well and areas to improve
- Creates a shared vision among staff

Resources= Taylor Studios and AASLH's "FSA Tips: Visitor Services Beyond the Front Desk" (*see links on Resources page*)

HANDS-ON ACTIVITY #4

JOURNEY MAPPING

[illegible]

- 1) Break into your museum groups
- 2) Choose one of the personas you created this morning and create a journey map for that persona following the handout instructions **(20 minutes)**
- 3) Group Discussion **(10 minutes)**

WRAPPING IT UP!

Quick Recap

What We Have Covered Today:

- Personas (tool for marketing & program planning)
- Identifying Methods & Tools to Reach Your Target Audience (what works / checklists)
- Building Positive Relationships to Strengthen Your Organization
- Building New Audiences to Ensure Future Relevance
- Visitor Services & Experience (steps & tools to improve)



AUD Module Overview

This Module Covered:

- Marketing & public relations
- Community relations
- Audience & visitor research
- Visitor services



AUD Recommended Resources

Bez, Marianne and Amy Cunningham, *Membership Matters: Establishing a Vital Membership Program in Your Museum*, AASLH Technical Leaflet #237

Catlin-Legutko, Cinnamon & Klingler, Stacy, *Small Museum Toolkit: Museum Marketing*, Altamira Press, 2012.

Harlow, Bob, *The Road to Results: Effective Practices for Building Arts Audiences*, Wallace Studies in Building Arts Audiences, The Wallace Foundation, 2014.

Kotler, Neil G., et.al., *Museum Marketing and Strategy*, 2nd ed., John Wiley & Sons, 2008.

Lucas, Cindy, "Reaching Teachers: Marketing Museum Education in the Twenty-First Century," *AASLH Technical Leaflet* #235 [We have this PDF – ask us if you are interested in getting a copy].

Minnesota Historical Society, Strategy worksheets & guidelines for web, blog, and social media at: https://www.museumsandtheweb.com/blog/myotus/social_mediaweb_guidelines_and_strategy_worksheet

Pitel, Deborah, *Marketing on a Shoestring Budget: A Guide for Small Museums and Historic Sites*, Rowman & Littlefield, 2016.

Rooney, Jeannette, "FSA Tips: Visitor Services Beyond the Front Desk," *AASLH Blog*, August 2018 at: <https://aaslh.org/fsa-tips-visitor-services/>

Taylor Studios, *Visitor Journey Mapping – What You Need to Know at:* <https://www.taylorstudios.com/visitor-journey-mapping-what-you-need-to-know/>

Weaver, Stephanie, *Creating Great Visitor Experiences: A Guidebook for Museums, Parks, Zoos, Gardens and Libraries*, Left Coast Press, 2007. Download PDF at: <https://www.slideshare.net/sawacofo/creating-great-visitor-experiences-a-guidebook-for-museums-parks-zoos-gardens-and-libraries-pdf-110063325>

COLL Module Forecast

COLLECTION Module Covers:

- Policies
- Management
- Planning
- Institutional archives
- Collections care & preventive conservation
- Conservation treatment & documentation
- Research & public access
- Emergency preparedness



AUD & COLL Self-Assessments

- Self-assessment tool in your **Google spreadsheet**
 - ✓ Separate tab for each of the six modules
 - ✓ A column for filling out your status pre- and post-module
 - ✓ Space at bottom of each tab to indicate what projects undertaken for each module and date completed
- **Individual links** – you have your own spreadsheet
 - ✓ Jennifer has sent your link to you and your mentor
 - ✓ Ask for help if needed please

DUE DATE: AUD post-module completed by July 28

DUE DATE: COLL pre-module completed by July 15

Filling out your self-assessment is cool!

| A | | B | | C | | D | | E | | F | |
|---|--|---|--|--|--|---|--|---|--|---|--|
| SEPP-UT MODULE SELF-ASSESSMENT TOOL AUDIENCE | | | | | | | | | | | |
| INSTITUTION NAME: The Cooper Studies Ever | | | | | | | | | | | |
| Institution Name | | | | Pre-Module Assessment Data | | | | Post-Module Assessment Data | | | |
| Standards | | | | Performance Indicators | | | | Notes | | | |
| 1. Self-assessment A. Do you have the information about current and potential audience? (how & where they live, and makes appropriate decisions for how & where they live) | | | | 2. Performance Indicators A. Does the institution collect basic audience information about current visitors (e.g., overall attendance, current attendance data, visitor groups, etc.) B. Does the institution collect demographic information about current visitors (e.g., age range, zip, school grade levels, etc.) C. Does the institution utilize information to determine needs and patterns to visitors (e.g., seasonal attendance is low, most popular programs) | | | | 3. Pre-Module Assessment Data A. How many visitors did you have in the last 12 months? B. How many visitors did you have in the last 6 months? C. How many visitors did you have in the last 3 months? D. How many visitors did you have in the last 1 month? E. How many visitors did you have in the last 1 week? F. How many visitors did you have in the last 1 day? | | | |
| 4. Post-Module Assessment Data A. How many visitors did you have in the last 12 months? B. How many visitors did you have in the last 6 months? C. How many visitors did you have in the last 3 months? D. How many visitors did you have in the last 1 month? E. How many visitors did you have in the last 1 week? F. How many visitors did you have in the last 1 day? | | | | 5. Notes A. How many visitors did you have in the last 12 months? B. How many visitors did you have in the last 6 months? C. How many visitors did you have in the last 3 months? D. How many visitors did you have in the last 1 month? E. How many visitors did you have in the last 1 week? F. How many visitors did you have in the last 1 day? | | | | 6. Notes A. How many visitors did you have in the last 12 months? B. How many visitors did you have in the last 6 months? C. How many visitors did you have in the last 3 months? D. How many visitors did you have in the last 1 month? E. How many visitors did you have in the last 1 week? F. How many visitors did you have in the last 1 day? | | | |
| 7. Self-assessment A. Do you have the information about current and potential audience? (how & where they live, and makes appropriate decisions for how & where they live) | | | | 8. Performance Indicators A. Does the institution collect basic audience information about current visitors (e.g., overall attendance, current attendance data, visitor groups, etc.) B. Does the institution collect demographic information about current visitors (e.g., age range, zip, school grade levels, etc.) C. Does the institution utilize information to determine needs and patterns to visitors (e.g., seasonal attendance is low, most popular programs) | | | | 9. Pre-Module Assessment Data A. How many visitors did you have in the last 12 months? B. How many visitors did you have in the last 6 months? C. How many visitors did you have in the last 3 months? D. How many visitors did you have in the last 1 month? E. How many visitors did you have in the last 1 week? F. How many visitors did you have in the last 1 day? | | | |
| 10. Post-Module Assessment Data A. How many visitors did you have in the last 12 months? B. How many visitors did you have in the last 6 months? C. How many visitors did you have in the last 3 months? D. How many visitors did you have in the last 1 month? E. How many visitors did you have in the last 1 week? F. How many visitors did you have in the last 1 day? | | | | 11. Notes A. How many visitors did you have in the last 12 months? B. How many visitors did you have in the last 6 months? C. How many visitors did you have in the last 3 months? D. How many visitors did you have in the last 1 month? E. How many visitors did you have in the last 1 week? F. How many visitors did you have in the last 1 day? | | | | 12. Notes A. How many visitors did you have in the last 12 months? B. How many visitors did you have in the last 6 months? C. How many visitors did you have in the last 3 months? D. How many visitors did you have in the last 1 month? E. How many visitors did you have in the last 1 week? F. How many visitors did you have in the last 1 day? | | | |

COLL Module Checklists

|  DEPS II PARTICIPANT & MENTOR CHECKLIST IMPLEMENTATION OF COLLECTIONS (2021-2022) July 2021 to October 2023 | | |
|---|--|---|
| Activity | Due date | Notes |
| DEPS II PARTICIPANT Submission for the first round of the competition Submission for the second round of the competition | 15/07/2021 15/08/2021 | All participants must submit a completed form and 3000 word abstract/extension to meet the deadline. The abstract/extension should be submitted to the following email address: deps@cam.ac.uk |
| MENTOR'S RESPONSIBILITIES Submit a completed form to the competition Submit a completed form to the competition Submit a completed form to the competition | 15/07/2021 15/08/2021 15/09/2021 | All mentors must submit a completed form to the competition. The form should be submitted to the following email address: deps@cam.ac.uk |
| DEPS II PARTICIPANT Submit a completed form to the competition Submit a completed form to the competition Submit a completed form to the competition | 15/07/2021 15/08/2021 15/09/2021 | All participants must submit a completed form to the competition. The form should be submitted to the following email address: deps@cam.ac.uk |
| MENTOR'S RESPONSIBILITIES Submit a completed form to the competition Submit a completed form to the competition Submit a completed form to the competition | 15/07/2021 15/08/2021 15/09/2021 | All mentors must submit a completed form to the competition. The form should be submitted to the following email address: deps@cam.ac.uk |

- Checklists for each Module
- For Participants & Mentors to keep track of due dates & deliverables
 - ✓ Self-assessment due dates
 - ✓ RSVPs
 - ✓ Projects
 - ✓ Site Visits
- Increase communication and manage all the many moving parts

Getting Your StEPs Certificates



- Remember your institutional commitment
- Apply for Bronze but shoot for beyond
- Applications in your StEPs Workbook (at end of each module section)
 - Fill it out using your post-module self-assessment
 - Send to AASLH
 - If you are unsure of your organization's institutional member number, Jennifer can help connect you to AASLH
- When you get the certificate, take a picture and send it to us!



We Got Money for You!

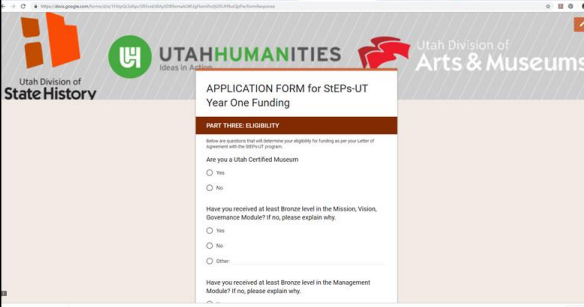
- Project funding for Year 1 projects to assist in achieving Bronze level or higher
- Up to \$1,500
- Application opens July 1 & closes August 30

Eligibility

- ❑ Are a Certified Utah Museum
- ❑ All pre- and post-self assessments completed for Year One modules
- ❑ Achieved **Bronze Level Certificates (or higher)** for each StEPs Standards module covered in Year One modules (MVG, MGMT, AUD) or provide evidence in your application that the project for which you seek funding will help you achieve a Bronze level or higher
- ❑ Have sent one to two staff members/volunteers to **attend all program-related activities** for each StEPs-UT module
- ❑ Have followed through with **workshop assignments** related to your projects
- ❑ Have participated in **mentor site visits** (month 3 of each module) and worked in **good faith with mentor**



Project Funding: Online Application

Find link at <https://artsandmuseums.utah.gov/steps-ut/>



StEPs-UT Mid-Point Evaluation

- We want to know how it's going!
- Next week Kari will be contacting the point person from each museum via email to set up a time for a **phone call**.
- Everyone who has been involved with the program and attending the workshops is invited to take an **online survey**.
- Mentors and administrators will also be contacted and interviewed.

AUD | Evaluation Conversation

Who doesn't love a survey!



Wrap-Up

- **StEPs-UT is a partnership** between the Utah Division of Arts & Museums, Utah Humanities, and Utah Division of State History, and is supported by funding from the Utah Department of Heritage & Arts, the State of Utah, and the National Endowment for the Humanities.
- Questions? Anything else? Nametags to the basket please.
- **Mentor & Mentee Break-out Groups until 5pm.**

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