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Digital Project Planning Packet

Your tool-kit for planning successful
museum technology projects.

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PROJECT INFORMATION

Define your project scope to help establish what the project will and won't accomplish. This helps build consensus among stakeholders and set expectations.

Project Name

Project Scope

(1-2 sentences or 3-4 bullet points)

Out of Scope

(1-2 sentences or 3-4 bullet points)

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GOALS & OBJECTIVES

Think about how your team defines project success (and failure). Big picture, what is this project looking to achieve? Define these priorities, qualitative outcomes, and quantitative measures. Get everyone to agree on what success looks like and then aim for it!

PRO-TIP

Dig a little deeper by answering the following questions using the S.M.A.R.T method.

S

Specific

M

Measureable

A

Achievable

R

Realistic

T

Timebound

Is this project tied to your museum's strategic plan or other institutional goals?

 YES NO

Which strategic goal or initiative?

Will you evaluate this project?

 YES

 NO

Who will do this?

When will they do this?

(during beta vs. post launch)

Prioritizing with MoSCoW

MoSCoW is short for Must have, Should have, Could have, and Won't have. First, list out the project pain points you wish to solve. Then, label each one using MoSCoW. Or, just try labeling each one as a High, Medium or Low priority. Then try this exercise for qualitative and quantitative objectives.

List and prioritize the problems or pain points this project is trying to solve (and/or how this project is enhancing an experience)

Problem / Pain Point	MoSCoW / Priority Level

List and prioritize qualitative goals**(e.g. educational, entertainment, marketing, curatorial, research etc.)**

Qualitative Goals

MoSCoW / Priority Level

Qualitative Goals	MoSCoW / Priority Level

List and prioritize measurable outcomes. If possible, add actual numbers to quantify success thresholds (e.g. traffic #, engagement % and time, learning outcomes, revenue \$, etc.)

Quantitative Goals

MoSCoW / Priority Level

Specify Number or Range

Quantitative Goals	MoSCoW / Priority Level	Specify Number or Range

PRO-TIP

Ask Why 5 Times. Remember to ask why 5 times when identifying priorities. Limiting the number of high priorities or 'must haves' will help avoid stakeholders grading everything at the must-have level.

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TARGET AUDIENCE

Identifying the target audience is invaluable for thinking through the visitor experience. If you can answer these high-level questions, you're in a great place to align your goals with your visitor's goals and intentions. Use Empathy Maps and User Personas to go even deeper.

Who are you primarily targeting?

SKIMMER

SWIMMER

DIVER

PRO-TIP

Skimmer, Swimmer, and Diver are labels used to describe visitor intention and engagement time. Are you targeting visitors who will skim the surface, or dive deep? Or, swim the distance depending on interest level or visit purpose?

Elaborate:

What is the expected dwell time?

MIN TIME:

MAX TIME:

AVG TIME:

Is there a learning curve?

YES

NO

How long?

[Empty text input field]

What is primary age target?

[Empty text input field]

What is the expected subject matter expertise of the primary targeted audience?

NONE

LOW

MODERATE

HIGH

Is this for individual or group use?

INDIVIDUAL USE

MULTIPLE PEOPLE / GROUP USE

How will you accommodate multiple people?

[Empty text input field]

[Empty text input field]

Who would not be an ideal target audience?

[Empty text input field]

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FUNDING & BUDGET

Projects are typically defined and refined iteratively alongside the funding and budgeting process. While you may not have all the details worked out when you're getting quotes or writing proposals, you can get on the right track by documenting what you do know: cost drivers and funding triggers.

As of today, is this project funded:

 FULLY PARTIALLY NOT AT ALL

What is the contingency plan if funding does not fully materialize? Will the scope or launch date change? How?

What is total estimated budget?

LIKELY MINIMUM

LIKELY MAXIMUM

CURRENTLY APPROVED

How is the total budget divided?

Edit this list below to best match your project. Assign approximate dollars or, at least, percentages of the budget. Sum the dollars (or percentages).

Research/Concepting	
Design	
Software Development	
Content Production & Development	
Hardware	
Installation	
Onboarding / Training	
Rights & Reproduction / Licensing	
TOTAL	

Annual or recurring costs:

Description	Expected Cost

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KEY STAKEHOLDERS

Project Owner:

Project Manager:

Who signs off?

Core Project Stakeholders:

Consider any additional stakeholders whom may be involved in this project such as Executives, IT/AV staff, Visitor Services, and Marketing as well as external stakeholders such as vendors or board donors.

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PROJECT RESOURCES

For Outside Vendor

Do you have a vendor partner identified?

YES

NO

Did you or will you be sending out an RFP? Why or why not?

Do you have a quote or estimate?

YES

NO

Describe key drivers of cost or scope changes:

Who must approve scope changes?

[Empty text box for response]

For Internal Resource

Have you written a project brief or specification?

YES

NO

If no, how are you communicating project requirements?

[Empty text box for response]

Who must approve scope changes?

[Empty text box for response]

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LIFESPAN & MAINTENANCE

These two factors are important for understanding the resources needed to successfully run your program in the long-term. Project stakeholders should have a clear sense of how long this project will be live and how it will be maintained so that end of lifespan is not evaluated as a failure.

Lifespan:

Give a specific timeframe for how long the project will live on once it's launched.

PRO-TIP

Technology changes rapidly - hardware, software, design norms and user expectations. Most tech projects have a 2-5 year lifespan.

Will you archive the project when its lifespan is over? Why and how? How much will it cost?

What are the requirements of the maintenance plan over the lifespan of the project? Check all that apply.

- software updates or upgrades
- hardware repair or replacement
- content updates
- license renewal

Who will be managing maintenance?

Will this be internal resources? Vendor or consultant resources? Describe.

Who will be managing technical maintenance?

Will this be turn-key or require internal team members? From which departments? Or, will this be provided by a vendor? Will support be remote or onsite? Describe.



TIMELINE

What stage is this project?

Early concept, firm concept, writing spec or RFP, execution, post launch, etc.

When does this project need to go live? Indicate if it's tied to an event (e.g. opening, marketing push).

In the table below, identify 5-7 major milestones.

Example milestones: kickoff, design approval, content submission, final edits, app acceptance, and launch.

Milestone Description	Date



IT/AV, CONNECTIVITY & HARDWARE

Hardware

- ◆ Will the museum be providing hardware, or will guests bring their own?

- ◆ What is the contingency plan for those without devices?

- ◆ What kind of hardware are you considering?

- ◆ Will you buy, lease, or rent?

- ◆ Who will source the hardware?

- ◆ Do you have a repair budget? If so, what is it? If not, what will you do if hardware becomes non-functional?

- ◆ Who will set up and install devices or hardware?

Connectivity

- ◆ Does the device or hardware need an internet connection? Periodically or at all times? Wifi or data cable?

- ◆ How will power (charge) be supplied to the devices?

Maintenance

- ◆ How will upgrades be handled, and are they included in the price (if performed by an outside vendor) or budget (if performed in-house)?

- ◆ What is the support/warranty for hardware or software?

- ◆ How and when will you deal with obsolescence of hardware or software?

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CONTENT PRODUCTION

Who is producing assets and content?

◆ Written Content:

◆ Copy Editing:

◆ Images:

◆ Audio:

◆ Video:

▶ Closed captions:

◆ Other Media:

◆ Translations:

[Grey response box]

◆ Who participates in edit rounds?

[Grey response box]

◆ Who has approval?

[Grey response box]

Who is responsible for securing or clearing rights?

[Grey response box]

Do you anticipate any assets requiring a longer timeline for clearance?

[Grey response box]

At what frequency do you plan to update content? (weekly, quarterly, never etc.)

[Grey response box]

Does design need to reflect the museum brand or exhibition style guide?

YES

NO

Who can provide the brand guidelines, style guide, or typicals?

[Grey response box]



LAUNCH

PRO-TIP

While the focus of many projects is concepting, design, and content development, it can be helpful to bring in stakeholders from IT/AV, Marketing/Communications, and/or Visitor's Services at the project start to set expectations and then again before launch to coordinate their slice of the project.

Staff Training

WHAT	WHO	WHEN
Software		
Hardware		

For visitor facing projects, consider training for:

WHAT	WHO	WHEN
Visitor Services Staff		
Docents		
Security Staff		

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MARKETING & DISTRIBUTION

Whether you're distributing on mobile, physical kiosks, or online, it's important to consider how you will ensure your digital project reaches your visitors. The questions below unpack your marketing communications and distribution instructions.

What are the key marketing deadlines?

Typically, this may include print deadlines, web asset deadlines, press release date, event dates, etc.

Description	Deadline

What types of printed assets will be produced?

- Posters
- Postcards
- Brochures
- _____

What types of digital assets will be produced?

- Social media
- Website
- Newsletter
- _____



Visit cultureconnectme.com to explore more tips,
tool, and project kits.

Need help thinking through your next project?
Reach out to us hello@cultureconnectme.com
