Digital Strategy: Check List Tool

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This check list is a simple tool to help small organizations ensure deliberate decisions are being made in the digital domain so that the commitment of resources to digital media and digital technology can be set within a sustainable and accountable context.

This is not a framework for building out a comprehensive digital strategy. It is tailored to small organizations with limited resources and serves to help develop the fundamental positioning and sections of a digital strategy.

A- Intentions

We first want to explain why we are developing a digital strategy. With such a broad subject and so many potential implications, being deliberate about what we are trying to achieve, and why, will inform how we intend to use digital.

Check the following boxes as you read and answer these questions.

Task	Check Box
Do you have a strategic plan?	
If yes, pull out the 3 strategic initiatives that you feel would most benefit from a digital strategy or that are most important.	
If no, don't worry about it!	
Do you have a Visitor Engagement strategy?	
If yes, pull out the tactics of this strategy.	
If no, don't worry about it!	
Do you have any elaborated or documented curatorial, program, interpretive, or other priorities?	
If yes, pull out the priority objectives.	
If no, consider what your intentions for using digital are. And write those down so they are explicit. You can always change or revisit them later.	
Do you have target audience demographics identified?	
If yes, list those out the top 3 and make them explicit.	
If no, think about which audience demographics you are targeting for your overall intentions as developed above. Try to be narrow.	

Thinking through a determining these intentions, being explicit about them, will be the beginning of your digital strategy.

Use the table to below to facilitate your process.

Strat Plan
[Initiative]
[Initiative]
[Initiative]

Visitor Engagement Strategy
[Tactic]
[Tactic]
[Tactic]

Other Priorities
[Priority]
[Priority]
[Priority]

Target Audience Demographics
[Target audience]
[Target audience]
[Target audience]

B- Audit

We use digital technology and digital media in a number of ways and for a number of purposes. As such, getting a handle on what you are doing, and taking account of everything in aggregate, will help develop an understanding of just how much is being done digitally so we can look to optimize efforts and be intentional in how we use digital.

Check the list to ensure you have thought of everything and add anything that you feel should be accounted for.

Business	Name	Check Box
Collections Management System		
Digital Asset Management System		
Content Management System		
Website		
Point of Purchase System *		
Enterprise Search Appliance *		
Ticketing System *		
E-Commerce *		
Digital Conferencing (Zoom, Meet, Teams, GoToMeeting, etc.)		
Office Suite (Word, PowerPoint, Excel, Google Docs, Slides, Sheets) *		
Email Client *		
Intranet		
Storage & Collaboration Tools (Dropbox, Drive, One Drive, iCloud) *		
Analytics Software/Programs		
Social Media		Check Box
Facebook		
Instagram		
YouTube		
LinkedIn		
Twitter		

TikTok	
Twitch	
Snapchat	
Tumblr	
Pinterest	
Flickr	
Reddit	
Other:	
Digital Media	**Check Box**
Do you create, store, present, manage, images?	
Do you create, store, present, manage video?	
Do you create, store, present, manage audio?	
Do you create, store, present, manage text?	
Do you create, store, present, manage AR, VR, MR, sensor-based, etc. media?	
Other	**Check Box**

* Items with the asterisks are more closely related to IT and IM than "digital" but there could be some overlap when it comes to engaging audiences or managing digital media and using these systems and tools. As such, it is better to check them off so they are explicitly accounted for, especially if they may be outsourced or be under the purview of others. For the rest of this exercise we will be focusing on the top digital layer of the technology ecosystem which largely focuses on audience engagement and access to programs, service, and communications.

Add your items to the table below, to create an index.
1. In the first column, include the item (i.e. Facebook).
2. In the second column include a numbered ranking for each (between 1 and 5) that represents the resource spend (time, budget) required to use this item (1 = low spend, 5 = high spend).
3. In the 3rd column, include a numbered ranking for each (between 1 and 5) that represents the reach and/or return received by using the item. (1 = low return, 5 = high return). If you do not have or use analytics, try to inform your answers with whatever metrics you have.

Item	Resource Spend 1 = low, 5 = high	Reach/Return 1 = low, 5 = high

- Highlight the lowest spend items (those that contain the lowest numbers in column 2).
- Highlight the highest return items (those that contain the highest numbers in column 3).
- Do any of these items match? If so, these are excellent candidates for priority in your digital strategy.

Take this newly formed index and include it in your digital strategy as an audit of properties and activities that already receive resource commitment (time and/or budget) from your organization.

C- Strategy

Now that the first 2 sections of your digital strategy are complete, it means the intentions are mapped out, and activities and tools being engaged with are confirmed, and it is time to set some strategic priorities.

- Take the top 3 strategic initiatives from Section A (aggregate of whatever documented priorities you have pulled out of materials or previously undocumented initiatives you have elaborated from scratch) in order to create the objectives of your digital strategy.
    1. [Initiative]
    2. [Initiative]
    3. [Initiative]

- Take the top 3 target audience demographics from Section A.
    1. [Target]
    2. [Target]
    3. [Target]

- What are the top 3 outward facing digital activities (tactics) your organization is spending its time on? (Those from the Audit index that have the lowest effort and highest reward.)
    1. [Activity]
    2. [Activity]
    3. [Activity]

- Do you see a congruency between these 3 data points?
    o For example: If a major priority is to engage students, and your top target market is educators, and your top digital activity is engaging in LinkedIn, then there is a 3-way misalignment.
        - Students and educators being different audience segments with different behavioral characteristics, different needs, different priorities. And LinkedIn being a social media platform aimed at professionals.
    o For example: If a major priority is to reach youth, and your top target market is students, and your top digital activity is engaging in TikTok, there is a strong alignment and this should be a focused tactic within the strategy.
        - Youth being the primary audience and user group of TikTok.

Using this information, create your top 3 objectives for this digital strategy. Create at least 1 tactic (activity) and an associated tool for each objective.

- Think about your strategic priorities from Section A.
- Think about your target audiences from Section A.
- Think about the digital media and digital technologies you are using that you are comfortable continuing with given their resource spend vs return from Section B.
- Use this information to inform your decision making (but note this is not a math problem).
- Be broad with your objectives and detailed with your tactics.

Example:

- Objective: Engage students remotely through social media.

    o Tactic: Create a weekly TikTok video about a collection item, related to Grade 6 course curriculum.
        ▪ Tool: TikTok

- Tactic: Host a student trivia night via Zoom over the March Break.
  - Tool: Zoom

- Tactic: Allow a student of the month to curate your Twitter feed with 1 collections post per week.
  - Tool: Twitter

Use the table in Section D to lay out your objectives, tactics (activities), and tools.

D- Application

What does success look like? Defining success criteria is critically important to inform what is being done. The performance metric can be either visitor-facing (i.e. audience reach, number of comments or likes, etc.) or business-facing (i.e. posted 1 new entry to Facebook per week, Retweeted the messages of allied organizations once per day, etc.).

[Priority 01]	Success Criteria
[Tactic A] [Tool] [Tactic B] [Tool] [Tactic C] [Tool]	[Criteria A] [Criteria B] [Criteria C]
[Priority 02]	
[Tactic A] [Tool] [Tactic B] [Tool] [Tactic C] [Tool]	[Criteria A] [Criteria B] [Criteria C]
[Priority 03]	
[Tactic A] [Tool] [Tactic B] [Tool] [Tactic C] [Tool]	[Criteria A] [Criteria B] [Criteria C]

Additional Aspects to Consider and Document

References to any relevant policies, protocols, or terms should be included within the Digital Strategy. This can take the form of titled links to relevant materials or can be inline (and cited) content. An index of related material (including dates of said materials) can ensure that versioning is managed over time.

The terms and conditions of any 3rd party systems (like social medial) need to be well understood and any terms or context that is most relevant to your organization can be included in the strategy as well.

Digital media and digital technologies also provide enormous opportunity to address inclusion and access in programs and service.

- A mobile device contains a great number of assistive technologies.
- Digital images can carry descriptions (alt text).
- Videos can be surfaced with captions and sign language.
- Digital content can be presented through various user-controlled style affordances like high-contrast, large text, zoom, text-to-speech, and more.

Consider in your success criteria how you might take advantage of digital to increase inclusion and accessibility and welcome the widest possible audience.

In many organizations there is a great conflation between digital and Information Technology (IT) and Information Management (IM). Many small organizations would be well served by outsourcing IT (anything infrastructural) and focusing their efforts on the digital aspects of the technology ecosystem.

The strategy should not be in a perpetual state of change or flux. In order to effective, it has to be consistently used and its performance criteria tracked and measured over time. That said, organizations will be prompted to do something new – based on media events, new and popular innovation, stakeholder interest or influence, or any number of reasons. When confronted with the impetus for change, the strategy allows for consideration of that change within an accountable and deliberate framework. Do not be too hesitant to adjust and update. Just do that from an informed position of what you are doing and why and see if/how this new concept might fit into your strategy.

Finally, any approval processes or governance rules should be added to the strategy. It is often the case that governance and workflow may change and that is ok.

Concluding Notes

The sum of this exercise is not a completed digital strategy, but it will elaborate the considerations that enable a small organization to be considerate of where and how efforts are being spent within a domain that is broad, deep, evolves quickly, and can be resource consuming.

A digital strategy should be revisited annually and can easily be linked to corporate planning activities.