

Seminar: Not Another Toolkit...or 'how strategic marketing can change your (organisation's) life'

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This seminar discussed MLA's proposed new national framework for supporting museums, libraries and archives through a business-planning model of audience development. It presented a case study from the South West Pilot, which centred on rethinking service provision, based on a better understanding of audiences, current and potential.

Martin Thomas:

A note first about the title of this seminar - it refers to a comment from the Chief Executive of SWMLAC that we should talk about something that is truly engrained and embedded, rather than another 'toolkit', which has become a rather commonplace idea.

The South West set out to test a strategic marketing methodology and this pilot process was designed to try it out in real-life situations. The intention was to move from a theoretical idea of business planning and to look at how we could have a process for changing service provision and thus make something genuinely sustainable. The projects undertaken by SWMLAC are designed to accommodate and complement related work in other regions.

Strategic Marketing is an approach to planning that strengthens relationships amongst users (current, lapsed and potential). It is about embedding a process across the full range of an organisation's activities

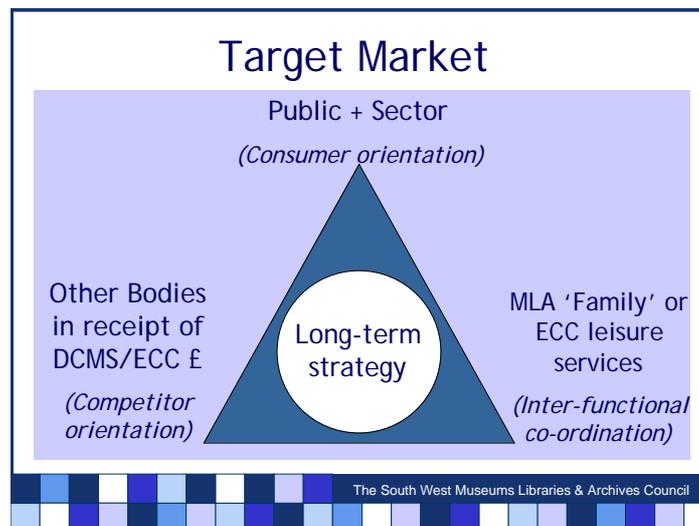
The Strategic Marketing Process involves:

- Finding out who are your users/who are not
- Finding out what people think of the service
- Prioritising target groups
- Changing the service in line with their needs
- Finding ways of targeting current, lapsed and potential users
- Evaluating these changes

The diagram below (based on the Jaworsky & Kohli concept of a market-led organisation) illustrates the three main orientations (consumer, competitor and inter-functional co-ordination). The consumer and competitor elements are about organisation wide understanding about market intelligence, which the inter-functional coordination underpins and embeds. These 3 elements need to be in

balance and revolve around a core long-term strategy for change, which I plan to explore further now.

It is worth noting the Chartered Institute of Marketing (CIM) thoughts on marketing that states that 'marketing is a management process for identifying anticipating and satisfying customers' needs at a profit'. Whilst the idea of 'profit' may seem less appropriate to parts of the cultural sector, this ethos is actually very relevant to the educational, healthcare and cultural sectors as it is about user need. These sectors, as 'high credence' sectors, with less tangible 'products' are nevertheless reliant on user engagement.



The brief

- To work with six museum, library and archive services in the South West to develop model 'exemplar' business plans based on the framework model.
- To work with twelve additional services in the South West on a more limited consultancy, to adapt the most appropriate business plan to their own service.

While this was limited in such a geographically dispersed region, the intention was that nevertheless there would be a critical mass of organisations of different economies of scale trying out this methodology.

The context for the brief

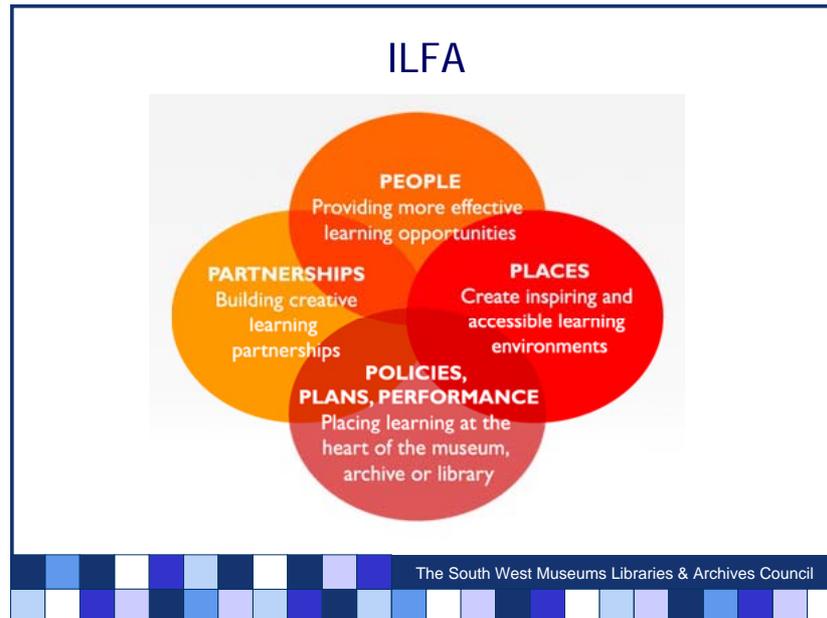
This was three-fold.

It's about **strategic aim** rather than the short-term targets. This can be thought of as the getting to Oz rather than staying in Muchkin Land.

It's about **Inspiring Learning for All** (ILFA)– the vision for inclusive learning ...across environments, services, and procedures. This has been rolling out across the country since 2004.

It's about the **New Directions in Social Policy** – work on this commenced in 2005.

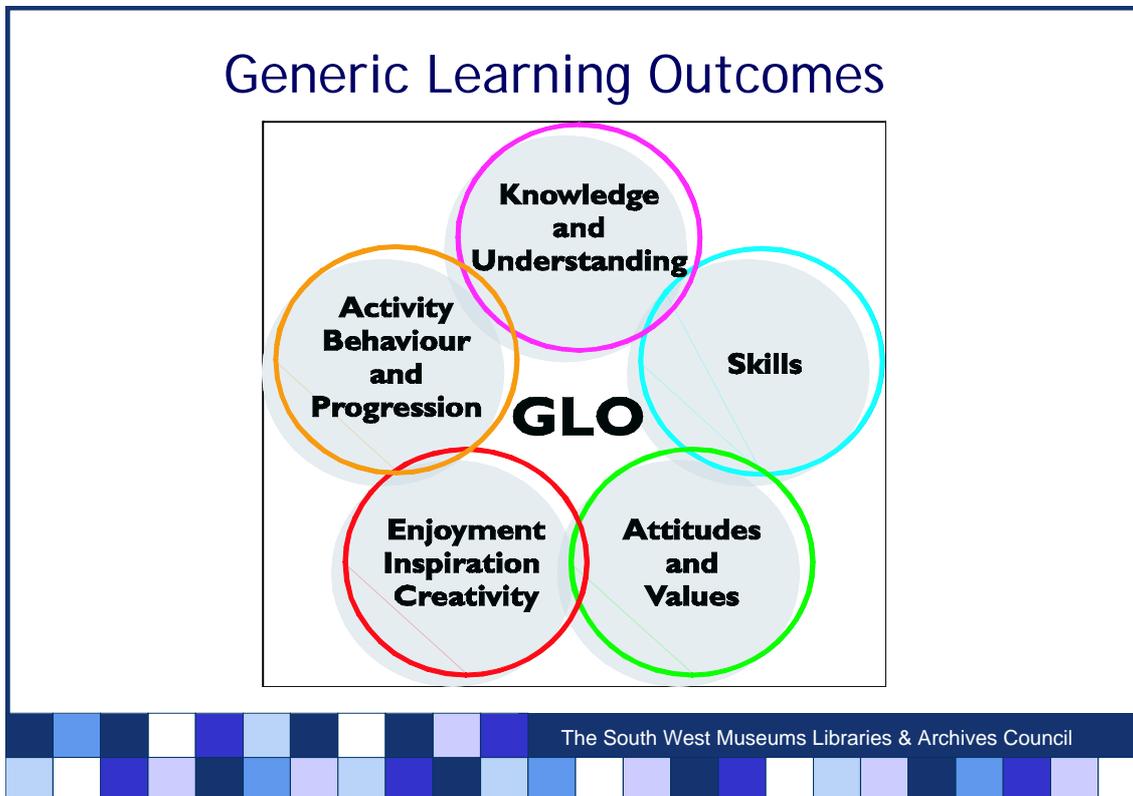
Inspiring Learning for All



An organisation that takes this on is:

- One whose culture is inclusive and receptive to learning.
- Engaging new partners and users, adopting a broad definition of learning and seeing the staff as learners too.
- Understand learning in this environment as a core role for all staff, not just the educators. Everyone focuses on the users and outcomes.
- Encouraging risk-taking – stretching for improvement as well as building on strengths.
- Carrying out external scanning to understand new agendas and trends; particularly how these might deliver new learning opportunities.
- Working differently both internally and externally with partnerships – looking to agree common objectives to enhance and enrich learning experiences.
- Supporting staff and volunteers as learners and contributors.
- A reflective organisation - continually evaluating and feeding experience back in.

ILFA covers a range of things but the Generic Learning Outcomes that have been identified bring us to evaluation. These are five outcomes that have been used in various stages to test and understand what people have learnt.



New Directions in Social Policy

This is just starting and it is about relevance and impact on communities. There are 5 major theme areas:

- Social inclusion
- Neighbourhood renewal/places
- Community cohesion/civil renewal
- Cultural diversity
- Health and disability

The critical idea here is for services to be relevant and responsive – generating services that are recognised for the value they bring to people’s lives. This increases the value of ‘culture’ itself.

These three themes of *Strategic Marketing*, *ILFA* and *Social Policy* need to *interlock*, to deliver this. They can’t be seen as disparate themes. Organisations need to consider how they fit both into and beyond their environments.

What did we want from our brief?

We wanted to provide a series of business models for museums, libraries and archives which:

- Could be *easily adapted* to most organisations within the public sector and the range of services they provide.
- Encourages participating services to take a *user led* approach.
- Provide an approach that encourages *sustainable*, rather than opportunistic development.
- Provides a '*neutral*' approach, which does not make assumptions as to service's future direction.
- *Embeds good practice* in the sector through establishment of a series of 'exemplars'.

The process started in July 2004. DBA Consulting was appointed and six very different organisations were selected in August:

- The Royal Albert Memorial Museum, Exeter
- Salisbury Museum
- Fleet Air Arm Museum
- Somerset County Library Service
- Swindon Library Service
- Dorset History Centre (the archive service covering the local authorities of Dorset, Poole and Bournemouth)

Inputs, Support and Outputs

The pilot organisations were asked to:

- Participate in developing a collective framework
- Work on the process together
- Agree to provide postcode data
- Work with and test the hypotheses
- Look at local strategies and data

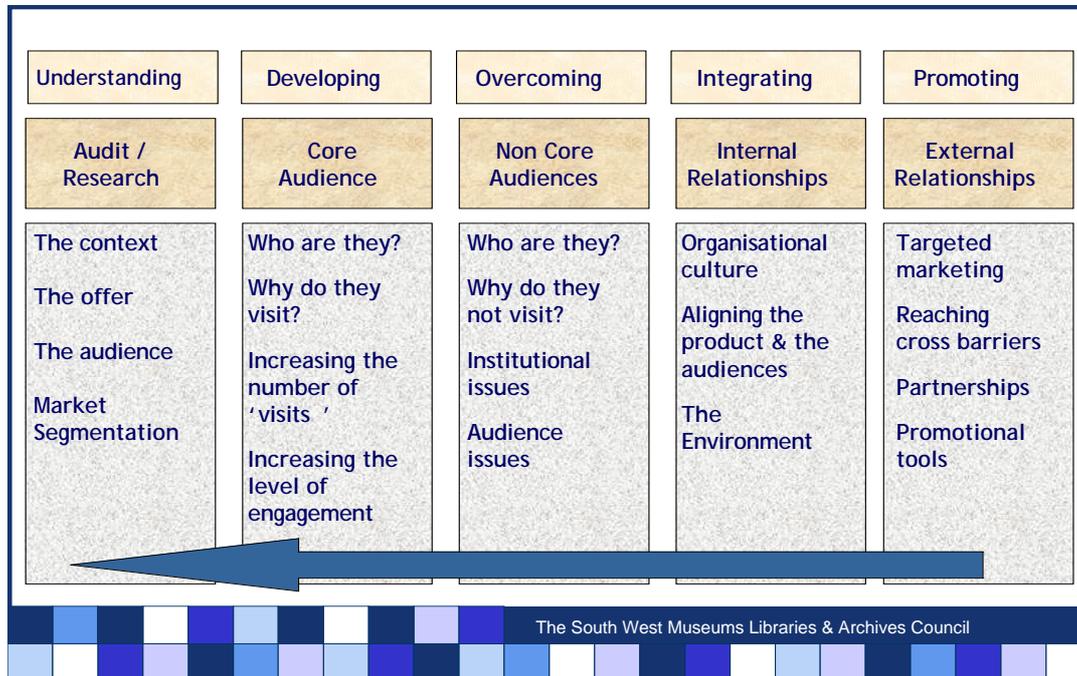
The following support was provided:

- A main contract
- National and regional information
- Market segmentation analysis
- Advice and support
- Working with pilots on the plan

The outputs were:

- A strategic marketing document and action plan
- A library of background information
- The knowledge to take the plan forward

The pillars of this approach were:



Looking more closely at this then, one can take the non-core audiences and the question about how to overcome their barriers. The following questions need to be answered:

- Who are they?
- Why don't they visit?
- Institutional issues
- Audience issues

Information sheets to support this process are available both digitally and as hard copies that cross-reference all the different strategies that are available. What is critical is establishing what is in them that is relevant to your organisation. They draw on different source documents such as:

- Government and the Value of Culture
- Art and Sports PAT 10 report to the SEU
- Libraries, Museums, Galleries, and Archives for All: co-operating across the sectors to tackle social exclusion
- Centres for Social Change: Museums, Libraries and Archives for All
- Developing New Audiences for Heritage Sector
- Arts in England: Attendance, Participation and Attitudes in 20Regional Library

To illustrate how this process happened in practice I'm going to hand over to Camilla Hampshire from the Royal Albert Memorial Museum.

Camilla Hampshire:

The Royal Albert Memorial Museum has been the pre-pilot for the strategic marketing initiative so we're a bit further down the road than the other pilots in terms of developing and implementing our plan.

This process of embedding the approach can be thought of in three stages.

The first stage was very much about fire fighting. It's a very reactive way of working when you respond to individual events as they actually happen, using the existing information about your audiences that you have to hand, very much limited by the budget and resources that are available.

The next stage is characterised by a greater willingness to engage with the issues and to address change. There is a heightened commitment to developing a tailored policy, allocating resources and incorporating elements of review and change. This is the process Exeter is currently going through, with the intention of ultimately arriving at the final stage.

This will be characterised by an active engagement with the issues, a tailored policy, a desire to integrate the approach, a willingness to commit budget and resources and to address any change issues arising. The audience development plan will be 'living', ongoing process, central to everything we do.

Background to Royal Albert Memorial Museum (RAMM)

RAMM has its origins in the mid 19th century, with permanent collections of regional and national importance. There is also an active programme of temporary exhibitions and events. As an institution we get about 200,000 visitors a year that we are proud of and work hard to sustain.

Our marketing manager, Ruth Randall is part-time to us as her whole time role involves working across the Leisure and Museums Unit. She often has to mount substantial campaigns with limited time and resources and because much of our work is project funded, with each scheme having different market research and evaluation criteria, the information we have about our audiences used to be very patchy.

But we were keen to change and this commitment to rethinking our approach needs to be seen in context. In 2001 we undertook staff restructuring and created a museum management team where marketing, visitor services and community outreach were placed on an equal footing with collections and conservation representation.

As a hub museum for Renaissance in the Regions we were also committed to contributing to the PSA target of achieving 500,000 new C2DE visitors across the country. There was a programme of marketing research funded by RAMM.

To further complicate this patchwork picture, we were also in the process of applying to the Heritage Lottery for a large capital scheme. This was rejected in January 2004, but the council were keen that we resubmit in June. This application now required an Audience Development Plan (ADP) for which no model existed, only guidelines.

In our conversation with SWMLAC about their strategic marketing initiatives, we realised there was a synergy there so RAMM became their pre-pilot.

RAMM's requirements for the ADP

It had to be a comprehensive document that dealt with both existing and potential audiences and addressed the fundamental tension between performance indicators of visitor numbers and the social inclusion agenda. It also needed to look at visitors who can be considered the 'maybes' who might be being disenfranchised by our emphasis on the hard to reach audiences. Finally it needed to consider the life cycle of visitors and the differing needs of new, established and lapsed visitors.

It had to be an over-arching document, linking up lots of other documents, touching on all areas of the organisation.

It also had to have a clear framework that was descriptive and analytical, with both planning and review aspects. This was to be a living document that shouldn't go out of date. Above all it also had to be practical and move on our thinking about audience development and to have a more sophisticated approach than had been available before.

RAMM had been very wedded to national statistics of social class prior to this exercise but we were persuaded that the Acorn Classifications would be a more sophisticated tool. These are based on census information. The initial five categories of wealthy achievers, urban prosperity, comfortably off, moderate means and hard pressed, can then be broken into considerable detail at the lowest levels. Size of group and penetration by RAMM were established. These details were then linked to drive times and mapped out. This enabled segments to be identified where RAMM were performing well and where there is potential for growth.

It is possible to convert these acorn classifications back to the national statistics, which is important, as this is methodology that MLA is still using. When we did this we found some surprising results in Exeter. For example we found we were very nearly matching the base demographics of the potential audience.

Acorn information can also be used to look at educational achievement in broad terms and family groups. We found again that we were working very closely to the base population, when the information was split down into household types.

This scope then for combining data from segmentation studies with the framework Martin has shown us, which can then be integrated into the organisation and have an impact on the way that products are developed and promoted, results in something very powerful. Cross-segmental groupings can also be considered that look at childhood, cultural background, disability and gender.

RAMM's current Audience Development Action Plan looks like a matrix. This is currently strongly focused on our Heritage Lottery Fund focused (a bid which has

now been successful). However there is still scope for this to be 'cleverer' because there is now more detail available from the segmentation studies.

Benefits of the Approach

It is still early days but to date it has proved a very effective way of working:

- It is a wonderful advocacy tool. We can now talk to stakeholders with solid evidence.
- It provides an overview of how our resources are being distributed, and gives us a foundation for detailed research & planning.
- It enables targeted audience development.
- The evaluation can feed into the framework, which ensures it's a living document.
- It enables progress monitoring so that we can identify trends.

Links and contacts:

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