

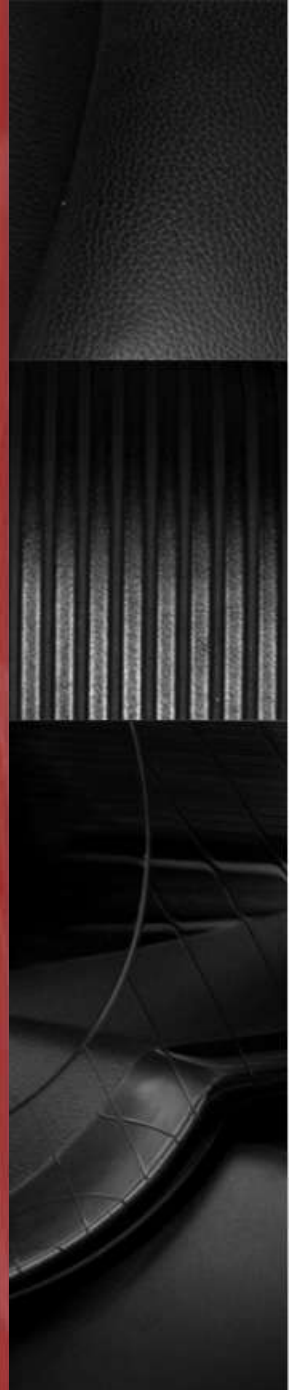
Planning, Assessment, and Implementation of Technology for the Performing Arts

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Objectives

- Identify/classify technology used by dance organizations and benefits they impart.
- Examine how to effectively assess organizational and individual needs regarding technology solutions.
- Methods for preparing your organization for the implementation of technology
- Technologies covered wikis, dashboards, content managements, cloud computing, design or redesign of websites, social media, and customer relationship management tools.




Objectives

- How to communicate to IT people – what you should make decisions on and what they should be responsible for
- Implementing the Technology – setting expectations
- Maintaining Technology – creating systemic support that makes technology work




Who is responsible for Technology?

- What departments use Tech?
- What individuals or departments in your organization benefit from Tech?
- Who is accountable for the maintenance and return on investment?




Decisions IT Dept or IT Consultants should not be making

- How much to spend
 - IT people often work with an imperfect working knowledge of what you will actually be doing with the software.
 - You know your budget priorities, stick to them.




Decisions IT Dept or IT Consultants should not be making

- What business process should be receiving IT dollars
 - Only you have the ability to effectively prioritize
 - What people or departments need to communicate better? Who would benefit most from automations? Is there the bandwidth to bring innovation to your organization?




Decisions IT Dept or IT Consultants
should not be making

- What technological capabilities need to be organization wide
 - Capabilities of staff and bandwidth need to be internally assessed




Decisions IT Dept or IT Consultants should not be making

- What do the IT capabilities (features and tools) need to be
 - Pain points of an organization and the remedy for them are something one only really learns through working with the status quo
 - Priorities should to align with the mission and performance of the programs that address it




Decisions IT Dept or IT Consultants should not be making

- What should our security and privacy risks are you willing to accept?
 - What data do you have to keep safe?
 - What is your privacy policy?



Decisions IT Dept or IT Consultants should not be making

- Who do we go to when things break down?
(who is the point person for interacting with IT)
 - This is more important than you might think. The ultimate success or failure of an new technology frequently resides with a champion within the organization that drive engagement, efficiency, and understanding



What decisions should be left to IT staff, consultant, or contractor?

- Architecture and infrastructure
 - What systems, servers, web applications, other hardware, content managements systems, and software packages)
 - In consultation with department and organization managers
- Standardization and scale



How to start

- Know where you are organizationally
 - What do you have:
 - How well does it work?
 - What do you like about it?
 - What don't you like about it?



Five types of technological management

- Chaotic – No management
- Reactive – Action when something breaks
- Proactive – A plan is in place
- Service – Plans and maintenance
- Value – IT and Tech is a priority, these organizations are the bulk of the innovators



What are the benefits?

- What benefits can Technology confer?
 - Automate
 - Inform
 - Innovate



Automation

- Complete a task (or entire process) faster, more cheaply, and perhaps with greater accuracy and/or consistency.
- Decrease the cost and time for transactions- achieve scale

Examples:

- Automate the process by which donations are tracked
- Automating ticket sales channels
- Automating financial tasks
- Automating recognition of donations



Information

- Provide information for purposes such as accounting, reporting, compliance, communication, marketing, and/or analysis.
- Usual focus is to improve decision making
- Can be at different levels of the organization

Examples

Use a data analytic method such as regression analysis to analyzing the past 10 years of giving data to determine characteristics of those most likely to increase their previous gifts by 100% or more.

Use a data mining tool to analyze past ticket sales to determine flexible pricing levels for future shows.

Use a dashboard tool to dynamically track performance of the organization based on key performance indicators.



Innovation

IT that enables the firm to gain or sustain competitive advantage

IT that supports entry into new markets or by helping to develop new products, services or business processes

Examples:

- Metropolitan Opera “Live in HD” program
- The Tate Museum’s mobile apps
- On The Boards TV



Two types of Innovation

Two types

Sustaining innovations – make an existing product or service better for the existing market.

- On-line ticketing

Disruptive innovations – create an entirely new market through the introduction of a new kind of product or service, one that is judged initially as inferior by the performance metrics that mainstream customers value.

- Disruptive technologies often enable disruptive innovations
- Use of HD by Met



Disruptive Innovation

Does my organization have the right...

- Resources to support the innovation
- Processes to innovate
- Values to innovate

If not – do you need to create a separate spin-off structure or organization (aka teams) to develop and implement the innovation.



Value of Technology

Automation - Tactical

- Predictable Value and Risk (in most cases)
- Examples: Tools that reduce time spent

Information - Tactical or Strategic

- More Value but More Risk
- Examples: Wikis, Blackboards, Social Media, and sometimes data management

Innovation - Strategic

- Highest Value but Highest Risk
- Examples: Integrative content delivery



Return on Investment

- Return on investment analysis should be calculated over the long term
 - Account for maintenance costs
 - License and Support
 - Initial Investment should be amortized
- Off set costs with savings: time, marketing capabilities, development capabilities, and accuracy



Failure to realize ROI

Why do some organizations not achieve their desired goals from the use of IT?



Failures of ROI: Technical failure

- Lack of technical support before, during and/or after implementation
- Technical infrastructure can not support the new system
- Data transfer issues not adequately identified and planned for
- System does not function as expected



Failures of ROI: Assessment errors

- Cost/benefits calculated incorrectly when justifying the system
- System is a poor fit for expected goals
- System requirements not correctly identified
- Inappropriate and/or non-measurable goals
- Lack of or incorrect performance metrics



Failures of ROI: Organizational

- Lack of senior management support
- Lack of resources
- Users lack sufficient skills to use system correctly
- Users lack motivation and/or are uninformed
- Users resist change imposed by system
- Inadequate plan for addressing and resolving problems with new system



Success with Technology isn't only about Technology

Organizational Context

Assessment and Planning around technology isn't just about planning to use a specific technology, it is part of charting the course for your organization

Role of non-IT managers:

1. Select appropriate information technologies,
2. Nurture their adoption, and
3. Ensure their exploitation to achieve organizational goals.



McAfee's Model

McAfee's model categorizes IT based on the organizational complements required, capabilities offered, and benefits to be derived.

1. Business manager's can focus on making IT decisions
2. based on the benefits to be realized by the type of
3. the technology, and the organizational complements required.



McAfee's Model

McAfee's classification of technologies based on benefits conferred

Functional IT (FIT) - IT that assists with the execution of discrete tasks

Network IT (NIT) – IT that facilitates interactions without specifying their parameters

Enterprise IT (EIT) – IT that specifies business processes



Approaching the design or re-designing of a website

- From Techsoup

- 1. Preliminary conversations**
- 2. Assemble your team or hire a Web design firm**
- 3. Inventory existing content and plan for new content**
- 4. Gather requirements**
- 5. Create design documents**
- 6. Implementation and Development**
- 7. Testing**
- 8. Launch**



Website: Preliminary conversations

- Who are you trying to reach with your Web site, and what behaviors are you trying to encourage?
- Can you maintain and update the Web site you're envisioning with your current staff and volunteers? If not, scale back your plans for now.
- Will you handle the project internally or will you hire a Web design firm?
 - If you're leaning towards the latter, use these early conversations to solicit the names of trustworthy, well-respected Web design companies.
- How much money do you have for this project? Can you get a grant for the redesign?
- Will you use a Content Management System (CMS) or a static, HTML-based Web site?



Website: **Select your team/hire a Web designer**

- Network for Good has an interesting article on Choosing a Web Design Company or Consultant that summarizes a recent thread on Progressive Exchange.
- If you have the staff resources to handle this project in-house, start assigning the various roles and tasks outlined in your project plan.



Website: Inventory existing content and plan for new content

- Assign someone to look through newsletters, file servers, brochures, listserv postings and marketing materials for content you can repurpose.
- If you have an existing Web site, assign someone to review and categorize the content, looking especially for pages that are outdated, inaccurate or incomplete.
- Even if you have a lot of existing content, the launch of a new or redesigned Web site presents a good opportunity to evaluate the quality of your external communications.



Website: **Gather requirements**

- Although you should have some idea by now of your overall goal, once you have a team in place, you need to hold another round of meetings and conversations.
- If you've hired a Web design firm, they should facilitate these discussions and ask individual departments and stakeholders what each one hopes to accomplish with the new site, and what features they want to emphasize.
- You should also bring your own examples to the table. Try to be specific about what you like and dislike about the examples you're reviewing.
- If you have an existing logo, an existing color palette or organizational design guidelines, communicate those clearly to your Web team. Let them know your overall design and communication philosophy if you have one.



Website: Create design documents

- At this point, the Web design team usually creates some prototypes and mockups to give stakeholders something concrete and specific that they can respond to.
- As mentioned previously, it's cheaper to modify your site during the initial design phase than during the implementation phase.
- To avoid confusion and misunderstanding later on, all of the major stakeholders should sign off and indicate their approval for the design before implementation begins.



Website: Implementation and Development

- After everyone has a chance to study the design documents and sign off on them, your Web developer(s) start to create the Web site. Depending on the size of your site, this will take anywhere from weeks to months.
- During this stage, you have to strike a balance between too much oversight and too little. You can ask for periodic reviews and usability tests, but too much meddling will prolong the process and increase the cost.
- Site development takes place on a testing server which resembles your live production server as much as possible. At this stage, you shouldn't make any changes to your live site.
- As you approach your launch date, be sure to communicate with any end users who might be affected by the changes to your site.



Website: **Testing and Launch**

- **Quality Assurance (QA) testing**
- **Usability testing**
- **Vulnerability testing**
- **Stress testing**

- After everyone has approved the site, and it's been thoroughly tested, you're ready to transfer it from the staging server to your production server. Back up your existing site so you can roll back if necessary. As you're migrating content and releasing new features, stay in touch with your constituents and let them know what to expect. Finally, submit your URL to all the major search engines so they know it's time to index or re-index your site.



Social Media Strategy

- Do I need social media?
- How much time and money should I spend?
- Idealware Checklist:
 - Understanding Social Media
 - Defining Your Goals and Audience
 - Evaluating Specific Tools
 - Choosing Tools to Meet Your Goals
 - Creating Your Social Media Strategy



Social Media Strategy

The key question for most nonprofits is, “What’s reasonable to expect from social media in terms of a return on your time?”

In order to answer this question you need to set some goals. Here is Idealware Social Media Worksheets SMART guidelines for social media:

- **Specific:** They need to be detailed enough for you to determine whether you’ve achieved them or not. How will you ever know if you’ve finished “building awareness?”
- **Measurable:** You should be able to quantify goals with a numeric benchmark.
- **Achievable:** Make sure your benchmarks are **realistic** based on what you’ve accomplished in the past.
- **Relevant:** If they don’t relate to your mission, it doesn’t matter if you’ve achieved them.
- **Time-Based:** Define the timeframe over which you’ll achieve these goals.



Facebook

- Facebook recently crested one billion users
- Research shows that Facebook, alone among social media sites, is worth having a presence on, JUST to have a presence.
- What can I expect from a successful effort?
 - Increasing online contact list
 - Increase web traffic aka Search Engine Optimization and Conversions
 - Occasionally Facebook can help increase ticket sales or donations
- How much time do I spend on Facebook?
 - Non-profit industry average is 2.5 hours a week.



Twitter

- What do I do with Twitter?
- Twitter has around 250 million users
- Twitter has been shown by research to be very effective at connecting with experts but it has limitations
- Only a fraction of twitter users are active. Most active twitter users only actually listen to a fraction of the people they follow.
- Use Worksheet 5 from my idealware handout for further assessment as to whether twitter is a good fit for you.



Other social media and blogs

- LinkedIn
- Foursquare
- Tumblr
- Pinterest
- Youtube
- Yelp
- Google +
- Blogs



Content Management Systems

- There are hundreds of Content Management System that are open source (aka free)
- Some of the most up to date and highly used CMS: Joomla!, Wordpress, Docuwiki, PMWiki, and Media Wiki
- Joomla! and Wordpress are used frequently for website management.
- DocuWiki, PMWiki, and Media Wiki are used as wiki management tools whether it be for internal or external wikis



Cloud Computing

- Cloud computing is a way of storing data on the internet that has many advantages and some disadvantages
- Disadvantages
 - You need access to the internet and can't work offline
 - With free clouds sometimes the terms of usage are sketchy
- Advantages:
 - Allows you to access data anywhere you have internet access
 - Saves money on physical data storage

Cloud storage is sometimes not an option. Many popular applications and websites essentially work off of a cloud computing model. There is an computing industry wide move towards cloud storage .



Dashboards

Dashboards are tools for internal collaboration. High level information:

- They use info-graphics to illustrate progress, metrics, and information on projects, programs, and engagement
- Helps save time reporting
- Alerts stakeholders to successes and failures
- Provides connectivity
- Usually incorporate from 6-10 data points
- A recent survey indicated that just over 50% of organizations implementing dashboards paid for the cost of the dashboard in around a year (large organization survey with budgets over five million)



Wikis

- Wikis can be used to share knowledge with internal and external collaborators. They can be very effective at education, training, and strategic planning activities.
- Educationally the collaborative nature of wikis allow a whole community to participate.
- Multi-media capabilities can increase efficacy of training.
- Examples
 - Creating a forum to asking for and offering physical resources
 - Document sharing and development of materials
 - A forum for sharing successes and challenges
 - A forum for creating new projects and programs



Customer Relationship Management Systems

Databases that generally handle ticketing, development, and/or finance tasks

- Sometimes all three such as Tessitura and Blackbaud
- Some allow dynamic pricing
- Some allow mobile ticketing
- CRMS on technologyinthearts.org
 - Ticketing system survey done by Technology in the Arts
 - Choosing a ticketing system in five easy steps



Questions?

- Please take handouts!
- Feel free to send me questions over email
- Check out www.technologyinthearts.org
- Tweet at @andreintransit and @techinthearts