

Designing Museum Experiences



Mark Walhimer

Designing Museum Experiences

Mark

Lantern

Designing Museum Experiences

Mark Walhimer

Dedicated to museum staff and volunteers
who, every day, make the world a better place.

Published by Rowman & Littlefield
An imprint of The Rowman & Littlefield Publishing Group, Inc.
4501 Forbes Boulevard, Suite 200, Lanham, Maryland 20706
www.rowman.com

86-90 Paul Street, London EC2A 4NE

Copyright © 2022 by The Rowman & Littlefield Publishing Group, Inc.

All rights reserved. No part of this book may be reproduced in any form or by any electronic or mechanical means, including information storage and retrieval systems, without written permission from the publisher, except by a reviewer who may quote passages in a review.

British Library Cataloguing in Publication Information Available

Library of Congress Cataloging-in-Publication Data

Names: Walhimer, Mark, 1964- author.

Title: Designing museum experiences / Mark Walhimer.

Description: Lanham : Rowman & Littlefield, [2021] | Includes bibliographical references and index.

Identifiers: LCCN 2021030229 (print) | LCCN 2021030230 (ebook) | ISBN 9781538150467 (cloth) | ISBN 9781538150474 (paperback) | ISBN 9781538150481 (ebook)

Subjects: LCSH: Museum visitors. | Museums—Psychological aspects.

Classification: LCC AM7 .W34 2021 (print) | LCC AM7 (ebook) | DDC 069/.1—dc23

LC record available at <https://lcn.loc.gov/2021030229>

LC ebook record available at <https://lcn.loc.gov/2021030230>

The museum of the future is generous. Instead of categorising and packaging artworks and experiences for express consumption, it endorses the potential of uncertainty. It nurtures the transformative possibilities inherent in the contact between artwork, audience, museum and society.

The museum shows confidence in its users and creates conditions that allow visitors to see their own resources for perceiving art and the world. It does not simply collect the shapes of the world in the form of artworks and objects—it shapes the world. It is a reality-producing machine. It engages in public discourse and policy-making.

A polyphony of voices, actions and possible encounters, the museum of the future is a power that can change the world.¹

—Olafur Eliasson

NOTE

1. "What is the museum of the future?" <https://www.tate.org.uk/tate-etc/issue-35-autumn-2015/what-museum-future>.

Designing Museum Experiences Advisory Board

In preparing to write this book, I reached out to experts in the fields of user-centered design and museum diversity, equity, accessibility, and inclusion (DEAI), as well as experts in the area of informal learning research about visitor motivations and behavior based on visitor needs and interests and community impact. Thank you to the following advisory board members for your time and expertise in reviewing drafts of the manuscript and providing your invaluable feedback to help me accomplish my goal of creating a research-based “how-to” book about creating visitor experiences that are multi-cultural and follow the best user-centered design practices.

- Camille Bethune-Brown, Curator and Black History Historian, San Diego, California
- Laura-Edythe Coleman, PhD, Assistant Professor and Director of the Arts Administration and Museum Leadership Graduate Online Program, Drexel University, author of *Understanding and Implementing Inclusion in Museums* (2018)
- Fernando Costa, Assistant City Manager, City of Fort Worth
- Sergio Dávila Urrutia, Coordinador de Diseño Industrial, Universidad Autónoma Metropolitana Unidad Azcapotzalco, Ciudad de México, México
- Corinne Gordon, Historic Farm and History Specialist, Wood County Park District, Bowling Green, Ohio
- Seph Rodney, PhD, author of *The Personalization of the Museum Visit* (2018)
- Peter Scupelli, Nierenberg Associate Professor in Design and Director of the Learning Environments Lab, at the School of Design, Carnegie Mellon University
- Susan B. Spero, PhD, Museum Studies
- Ariadna Téllez, Director, Program Management at frog
- Neil Williams, Director, Experience Design, Customer Advocacy, Manulife and Former Visiting Lecturer of Museum and Exhibition Design, University of Lincoln, Hong Kong

Contents

List of Figures	xi
List of Tables	xv
Acknowledgments	xvii
Preface	xix
Foreword	xxiii

Part I. Shifting to the Visitor (Why)

Chapter 1:	A Changing Landscape	3
Chapter 2:	Shifting to the Visitor's Perspective	9
Chapter 3:	From Object to Narrative	21

Part II. The Museum Visitor (Who)

Chapter 4:	Personas, Diversity, and Possibilities for Behavioral Change	31
Chapter 5:	Design Thinking and Emotional Design	43
Chapter 6:	Customer-Experience Methodologies	53
Chapter 7:	Applying Customer-Experience Tools to the Museum	61
Chapter 8:	The Museum Visitor's Journey	75

Part III. Supporting the Museum Visitor Experience (How)

Chapter 9:	Museums, Politics, and Culture	83
Chapter 10:	Placemaking: Museums and the Community	91
Chapter 11:	Using Data to Create a Unified Visitor Experience	99
Chapter 12:	The Museum as a Hospitality Business	107

List of Figures

Figure 1.1.	A museum visitor at Carsten Höller’s immersive exhibit. <i>Guy Bell/ Alamy Live News</i>	3
Figure 1.2.	“Sent Away but Not Forgotten,” the Japanese Internment exhibition at the Oakland Museum of California. <i>Jeffrey Inscho</i>	4
Figure 2.1.	Creating visitor-centered experiences cycle	9
Figure 2.2.	Museum transformative experiences	10
Figure 2.3.	“Sea of Time” by Tatsuo Miyajima. <i>Everett Kennedy</i>	11
Figure 2.4.	Exterior of the Michael C. Carlos Museum. <i>Photo by the author</i>	13
Figure 2.5.	Empathy map canvas, adapted from “Updated Empathy Map Canvas” by Dave Gray, https://medium.com/the-xplane-collection/updated-empathy-map-canvas-46df22df3c8a	17
Figure 3.1.	“Spring of Wood” by Yoshihiro Suda at Museo Jumex. <i>Photo by the author</i>	24
Figure 3.2.	Evocative spaces in the Museo Nacional de las Intervenciones. <i>Photo by the author</i>	25
Figure 4.1.	Sample stakeholder persona	36
Figure 4.2.	Stakeholder map	37
Figure 4.3.	Visitor identities, adapted from J. H. Falk, <i>Identity and the Museum Visitor Experience</i> (2009)	38
Figure 5.1.	IDEO design thinking process, adapted from “An Introduction to Design Thinking,” https://web.stanford.edu/~mshanks/MichaelShanks/files/509554.pdf	45
Figure 6.1.	Range of influence, customer experience (CX), service design, experience design (XD), user experience (UX), user interface (UI)	54
Figure 6.2.	Linear design versus cyclical design	55
Figure 6.3.	Combining design thinking, lean startup, and agile, adapted from “Enterprise Architects Combine Design Thinking, Lean Startup and Agile to Drive Digital Innovation,” 2019, Gartner	57
Figure 7.1.	Mood board	62
Figure 7.2.	Sample persona diagram	63

Part IV. Future Museum Visitor Experiences (When)

Chapter 13:	Emerging Technologies and the Museum Visitor Experience	113
Chapter 14:	The Future of Museums	125

Part V. Visitor Experience Toolbox

Museum Visitor Experience Toolbox	135
Resources	153
Bibliography	157
Glossary	163
Index	173
About the Author	177

Figure 15.4. Culture canvas, adapted from “The Culture Canvas” by Javier Muñoz, <https://blog.deliveringhappiness.com/blog/how-to-keep-the-culture-conversation-going> 140

Figure 15.5. Project charter template, adapted from the Project Management Institute, <https://www.pmi.org/learning/library/charter-selling-project-7473> 140

Figure 15.6. Value proposition canvas, adapted from “Value Proposition Canvas” by Alex Osterwalder, <https://www.strategyzer.com/canvas/value-proposition-canvas> 141

Figure 15.7. Importance/influence matrix, adapted from “APMAS Knowledge Network,” <http://www.mspguide.org/tool/stakeholder-analysis-importanceinfluence-matrix> 142

Figure 15.8. SWOT analysis, adapted from SWOT Analysis by Albert Humphrey 142

Figure 15.9. Task analysis, adapted from “Task Analysis: Support Users in Achieving Their Goals,” Nielsen Norman Group, <https://www.nngroup.com/articles/task-analysis/> 143

Figure 15.10. Keyword matrix, adapted from “The SEO Keyword Research Master Guide,” <https://moz.com/keyword-research-guide> 144

Figure 15.11. Museum mission, vision, and values 145

Figure 15.12. Scenario canvas, adapted from *Business Model Generation* by Alexander Osterwalder 146

Figure 15.13. Museum touchpoint matrix, adapted from “New Representation Techniques for Designing in a Systemic Perspective” by Nicola Morelli (2007), <https://servicedesigntools.org/tools/system-map> 147

Figure 15.14. Museum storyboard canvas, adapted from “The Story Canvas,” created by Denise Withers 148

Figure 15.15. Lamina 149

Figure 15.16. Museum planning process, adapted from *The Manual of Museum Planning* by Barry Lord, Gail Dexter Lord, and Lindsay Martin (2012) 151

Figure 7.3.	Theory of change canvas, adapted from “The Development Impact and You” by Nesta, https://diytoolkit.org/tools/theory-of-change	65
Figure 7.4.	Stakeholder diagram	66
Figure 7.5.	Stakeholder analysis, adapted from the “APMAS Knowledge Network Importance/Influence Matrix,” http://www.mspguide.org/tool/stakeholder-analysis-importanceinfluence-matrix	66
Figure 7.6.	Lean canvas, adapted from <i>Running Lean: Iterate from Plan A to a Plan That Works</i> by Ash Maurya	67
Figure 7.7.	Museum visitor journey map, adapted from “Customer Journey Canvas” by Marc Stickdorn and Jakob Schneider	69
Figure 7.8.	Museum bubble diagram	70
Figure 7.9.	Museum content map canvas, adapted from “Content Strategy Canvas” by Chris Lake	71
Figure 7.10.	Museum system map, adapted from “System Map” by Nicola Morelli	71
Figure 8.1.	Museum cycle: pre-visit, visit, post-visit	75
Figure 8.2.	Ice-pick door handles welcome customers at an REI store. <i>Adam Cairns/USA TODAY NETWORK</i>	76
Figure 8.3.	A door for children at the Denver Children’s Museum. <i>Photo by the author</i>	77
Figure 9.1.	Shoes at the Holocaust Memorial Museum in New York City. <i>Giuseppe Crimeni/Alamy Stock Photo</i>	84
Figure 10.1.	Placemaking, adapted from “What Makes a Great Place?” by Project for Public Spaces, https://www.pps.org/article/what-is-placemaking	92
Figure 10.2.	Children vote with marbles in the “Our Futures” exhibit at Epicenter, Museum of Fine Arts, Green River, Utah. <i>Epicenter and the Utah Museum of Fine Arts</i>	95
Figure 11.1.	Sample museum dashboard	100
Figure 13.1.	Generations defined, 1920 to present, https://www.pewresearch.org/fact-tank/2019/01/17/where-millennials-end-and-generation-z-begins/	114
Figure 13.2.	Felice Grodin’s “Invasive Species” exhibit at the Pérez Art Museum Miami, 2017-ongoing. © Pérez Art Museum Miami	118
Figure 13.3.	The Berenson robot at the “Persona: Oddly Human” exhibit at the Musée du Quai Branly in Paris. <i>Reuters/Alamy Stock Photo</i>	119
Figure 15.1.	Community canvas, adapted from “Community Canvas,” created by Nico Luchsinger, Fabian Pfortmüller, and Sascha Mombartz, https://community-canvas.org	136
Figure 15.2.	Creating ethnographic profiles	137
Figure 15.3.	Context map canvas, adapted from “Context Map Canvas,” created by David Sibbet of Grove Consulting	139

List of Tables

Table 2.1.	Online museum reviews	15
Table 4.1.	Museum historical timeline	32-34
Table 4.2.	Museum generations	34

Acknowledgments

In 2013, I walked into Ibero University in Mexico City, wondering if I could teach at a university level. Since then, my students have given me more than I could have ever expected. I have learned that my expertise in museums is also an expertise in customer experience (CX). I have been teaching at Tec de Monterrey, Ibero, and at Georgia Tech in the industrial design departments. Thank you to my students for all that you have taught me.

During one of my lectures, a student asked a seemingly simple question: “How do you create an experience?” The question took me aback. I had to come up with a simple answer at the time, but it wasn’t complete. This book is the not-so-simple answer.

Thank you to the readers of museumplanner.org and your always insightful questions. Thank you to my clients. It is my honor to be part of your museum work. Thank you to Amparo, Benjamin, Señor and Señora, Janice and Ron, and Anne and Meg, with my love.

Thank you to Charles Harmon for believing in thinking differently about museums, to Karen Trost and Keith Miller for their tireless editing, to Alvaro Alvarez for the diagrams, and to the book’s advisory board for their knowledge and commitment to helping people in the museum field understand their visitors and how to connect visitors with museum experiences.

—Mark Walhimer

Every attempt has been made to locate the copyright holders of the works reproduced herein. Any omission is unintentional.

- “Combine Design Thinking, Lean Startup and Agile” © 2021 Gartner, Inc.
- “Community Canvas” © 2021 Community-Canvas.org
- “Content Strategy Canvas” © 2021 Chris Lake
- “Context Map Canvas” © 2021 David Sibbet
- “Customer Journey Canvas” © Marc Stickdorn and Jakob Schneider
- “Empathy Map” © Dave Gray
- “Falk’s Identities” © 2021 John Falk and Lynn D. Dierking, PhD
- “IDEO Design Thinking Process” © 2021 IDEO
- “Lean Canvas” © 2021 Ash Maurya
- “Product Canvas” © 2021 Roman Pichler
- “Value Proposition Canvas” and “Business Model Canvas” © 2021 Strategyzer AG
- “What Makes a Great Place” © 2021 Project for Public Spaces

Preface

Since I started working on this book, we have experienced the COVID-19 pandemic, the Black Lives Matter protests, the furloughs of tens of thousands of museum staff due to the pandemic, and an increased focus on diversity, equity, accessibility, and inclusion in museums. These events make the work of creating visitor-centered experiences through the methodology of a customer experience (CX) approach even more important.

In preparing to write this book, I read more than twenty museum-experience-related books and was surprised that not one used the research-proven¹ approach of applying CX methodologies. This approach is long overdue. During my twenty-year career as a museum specialist and consultant, I have taken part in opening more than thirty museums and have consulted on more than one hundred museum projects worldwide. I structured this book to follow the same process as my consulting. First, we identify the problems and give the client the freedom to dream big. Then we address the questions from a new viewpoint, achieved by walking a mile in the visitor's shoes (sometimes literally).

The more I work in the museum field, the more I realize that my role as a museum consultant is to come to a detailed understanding of the museum's vision. The more clearly I understand it, the more successful my work will be. If I can create a nonjudgmental environment during our work together, participants feel more comfortable dreaming big (which I refer to as "blue sky" thinking). I pay close attention to the details and adjectives people use; these serve as the core elements for the design of powerful, visitor-centric museum experiences.

Once my client can move beyond logistical questions and start to think "blue sky," we are able to gain a new perspective. The goal is to develop a museum that can connect with visitors emotionally as well as intellectually, empowering them to change their behaviors, and ultimately their lives.

A few years ago, I conducted a workshop with a group whose goal was to create a typical science center in a twenty-five-thousand-square-foot building for a community of about fifty thousand people. The group was looking for assistance with program creation, exhibition design, and gallery development. I asked each group member to take three pieces of scrap paper and write one thing they hoped to achieve on each piece. If any of the participants put down "world-class," "high attendance," "award-winning," or something similar, I asked them to rewrite those generic objectives as "subjective objectives" that used more emotional and personal descriptions.

Once the group members had rewritten and rethought their descriptions, we posted them on the wall and looked at them as a whole. It became clear that they were *not* aiming to create a typical science center. What the founder and staff had in mind was more of an educational think tank for teaching innovation. Without our discussion about subjective objectives, the group probably would have continued on a path toward a typical science center. Instead, we planned an innovation center—a place for teaching science innovation. This approach led to a visitor-centric, community-based plan unlike any other science center in existence. The workshop participants' process resulted in a solution specific to their community.

Time and again, I've seen museum management ask specific logistical questions about cost and visitation without realizing that this narrow, results-oriented mindset is part of a system-wide issue.

Museum management rarely appreciates the full power of their museum. It is essential that they expand their thinking and dream beyond their current limitations. Logistical questions about issues such as cost per square foot are of no help in understanding the emotional connection between museum and visitor. Instead, I'll often point to a photo of a representative visitor and ask the workshop participant questions such as "Do you see that visitor visiting your museum?"

This book is written for people interested in starting a museum, people currently working in museums, and people interested in bettering their museum practices. Some readers may be unsure of the value of a customer-centered approach and may think this is only "marketing lingo." However, a CX approach can result in increased museum visitation by more diverse, emotionally engaged audiences who can protect the museum from market disruptions² such as the COVID-19 pandemic. A customer-centered museum constantly changes to meet the needs of audiences, resulting in emotionally invested visitors who trust the institution and will remain committed despite market disruptions. The visitor-centered approach also increases the likelihood of local community impact.

Each museum is unique to its local community, so the staff, board of directors, and visitors need to be representative of the larger local community as well. All groups must be included without implicit bias.

By the end of this book, I hope you will be able to see the visitor experience as the most important part of a museum, view the museum experience from the visitor's point of view, and have empathy for the museum visitor. To create a customer experience is to create a consistent, thoughtful, and emotionally connected museum at all touchpoints.

WHO SHOULD READ THIS BOOK?

This book is written for anyone interested in creating impactful educational experiences. This includes but is not limited to the following.

- Museum staff, board members, volunteers, and service providers: the people who define strategies for customer experiences, services, products, marketing, or technology.
- Community leaders: mayors, city council members, city managers (hired by the city council), city administrators (hired by the mayor), community development directors, urban planners, librarians, and directors of parks and recreation.
- Emerging museum professionals: newly graduated students looking for their first museum job and museum staff and volunteers with less than three years' museum experience.³
- Students: these include those studying museum studies, architecture, industrial design, marketing, business, interior design, and education. Students are the future of the museum field and of inclusive experiences.

WHAT IS IN THIS BOOK?

This book is organized into five parts. The first four parts are based on the basic questions essential to information gathering used by journalists, researchers, and investigators. (If you're reading this, you should already be familiar with "what" you're looking for, and "where.") Part V is a collection of visitor experience tools that you will need to help create a meaningful museum visitor experience.

Part I: Shifting to the Visitor (Why)

Part II: The Museum Visitor (Who)

Part III: Supporting the Museum Visitor Experience (How)

Part IV: Future Museum Visitor Experiences (When)

Part V: Visitor Experience Toolbox

Each chapter includes some or all of the following:

Next Steps: questions and exercises related to the chapter content
Key Concepts: terms used and defined in the chapter
Additional Resources: sources of additional information on the chapter topic
Notes: references and citations of source materials

The book also contains several workshop examples designed to help engage the right people at the right time to create impactful experiences.

You'll find the book's companion website at <https://www.museum-experiences.com/>.

The diagrams and other illustrations in the book are available under a Creative Commons license (when possible) for you to download and include in your own presentations. In addition to the website, readers can sign up to take online seminars and online courses at <https://museumcourses.com>.

FREQUENTLY ASKED QUESTIONS

Do I have to do all of the items in this book to orchestrate experiences successfully?

Many frameworks and tools are covered, but you will likely gravitate to those that meet your unique needs. For example, for one project you may need to create personas (chapter 4), but for another you may need a journey map (chapter 8). Try out different approaches, mix and match, and build the toolkit that works for you.

You didn't mention [insert tool here]. Does that mean I shouldn't use it anymore?

The constant addition and modification of methods and tools in our toolkits is an essential part of designing a meaningful museum visitor experience. The methods and tools presented in this book have proven to be effective for both simple and complex projects, but please check <https://museum-visitor.com> regularly for new tools and methodologies.

Does this take a lot of time?

The more complex the problem, and the larger the organization, the more time will be needed. That said, you will find that the approaches covered here can be used to run fast and lean.

Isn't this just service design?

This book is a synthesis of best practices, including service design, user experience, customer experience, lean design, and systems thinking. You will find references to each of these methodologies distilled into best practices that are applicable to the museum visitor experience. At their core, what they have in common is user-centered design. This book will lead the reader through a hands-on process of putting thinking into action.

NOTES

1. "Customer Experience," McKinsey, accessed Nov. 13, 2017, <https://www.mckinsey.com/global-themes/customer-experience>.
2. Thales Teixeira, "Products Don't Disrupt Markets; Customers Do," accessed Oct. 27, 2020, <https://podcasts.apple.com/us/podcast/s5e9-thales-teixeira-products-dont-disrupt-markets/id1359935118>. For more research papers regarding the effectiveness of the customer experience approach, visit <https://museum-visitor.com/toolbox>.
3. "Emerging Museum Professionals," Mountain-Plains Museums Association, accessed Nov. 30, 2020, <https://mpma.net/Emerging-Museum-Professionals>.

Foreword

We must remake the world. The task is nothing less than that.

—Mary McLeod Bethune

The world is in a constant state of evolution and change. Museum methods are too. Over the past year, the closure of physical museums due to the COVID-19 pandemic challenged us to reimagine our institutions and reignite our audience engagement in innovative ways. With resiliency and agility, museums are redefining what it means to be a museum in contemporary society. We are more than a place, a building, a noun, a repository. We *are* relationships. We *are* community. We aim to *be* art and not just see it, to *inspire* history in the making and not just study it.

Museums will help remake our world by engaging with the agents of change—our visitors—in new ways, while responding to current challenges, facilitating urgent conversations, and meeting our community where they are. *Designing Museum Experiences* offers a clear path to transforming museums that are committed to an equitable society, to investing in the healing of their communities, and to eradicating racism and bias through more meaningful engagement with their visitors. The book challenges museums to live up to their fullest potential. By answering four key questions, the book leads us through this current paradigm shift, this necessary undoing, and this universal recommitment in the museum field to radically centering visitors in all we do. It is a step-by-step guide and do-it-yourself toolkit to making museums inclusive, equitable, visitor-centered spaces. This is a visionary book that aligns with museum best practices. Several terms can be interchanged for visitors—audience, guests, community, customers. The point of the book is that museums are all about *them*, not us.

For so long, museums have been object-centered and artifact-driven. We preserve art and historical artifacts. We teach with them. We place lights upon them and stanchions around them and vitrines over them. We distinguish ourselves based on which ones we hold in our collections. We have not as a whole, however, given equal attention to the people who experience museums. We have not placed them center stage in our museums. This book reminds museums that they can live up to their promise and purpose by recentring visitors in the museum experience. The visitor experience starts before they set foot on your grounds and now in the post-COVID world, sometimes an online experience with your museum is all the visitor will have. Author Mark Walhimer reminds us that museums can be all their communities need them to be. This book, written by an expert on visitor studies, offers a guide to how museums can make a difference in the world, one visitor at a time.

Throughout his career, Walhimer has helped to shape, transform, and reinvent countless museums across the globe. He has created new models and templates for visitor engagement. He knows the trusted cultural, educational, and civic roles that museums play. He has written this book with the

future of museums in mind. No other book gives this kind of practical guidance on solving the problem of visitor experiences.

He offers a thought-provoking approach to designing museum experiences, centered on change, connection, and compassion. Museums have tremendous influence in society. They must adapt and adjust to the needs of visitors. Getting out of the way in order to prioritize the visitor from design to delivery, museums must have an emotional connection with visitors.

You will think differently about museums after reading this book. But it will not stop there. This book will lead you to take action, the right action to understand and design experiences to meet the intellectual and emotional needs of visitors. When followed, the guidance from this book will enrich and enliven museums for all visitors in lasting ways that make society better. This book will help remake the world of museums.

LaNesha DeBardelaben
President & CEO, Northwest African American Museum
National Board President, Association of African American Museums