

DIGITAL STRATEGY



HISTORIC
ENVIRONMENT
SCOTLAND

ÀRAINNEACHD
EACHDRAIDHEIL
ALBA





ENABLING HES-DIGITAL

Using the past to make a better future

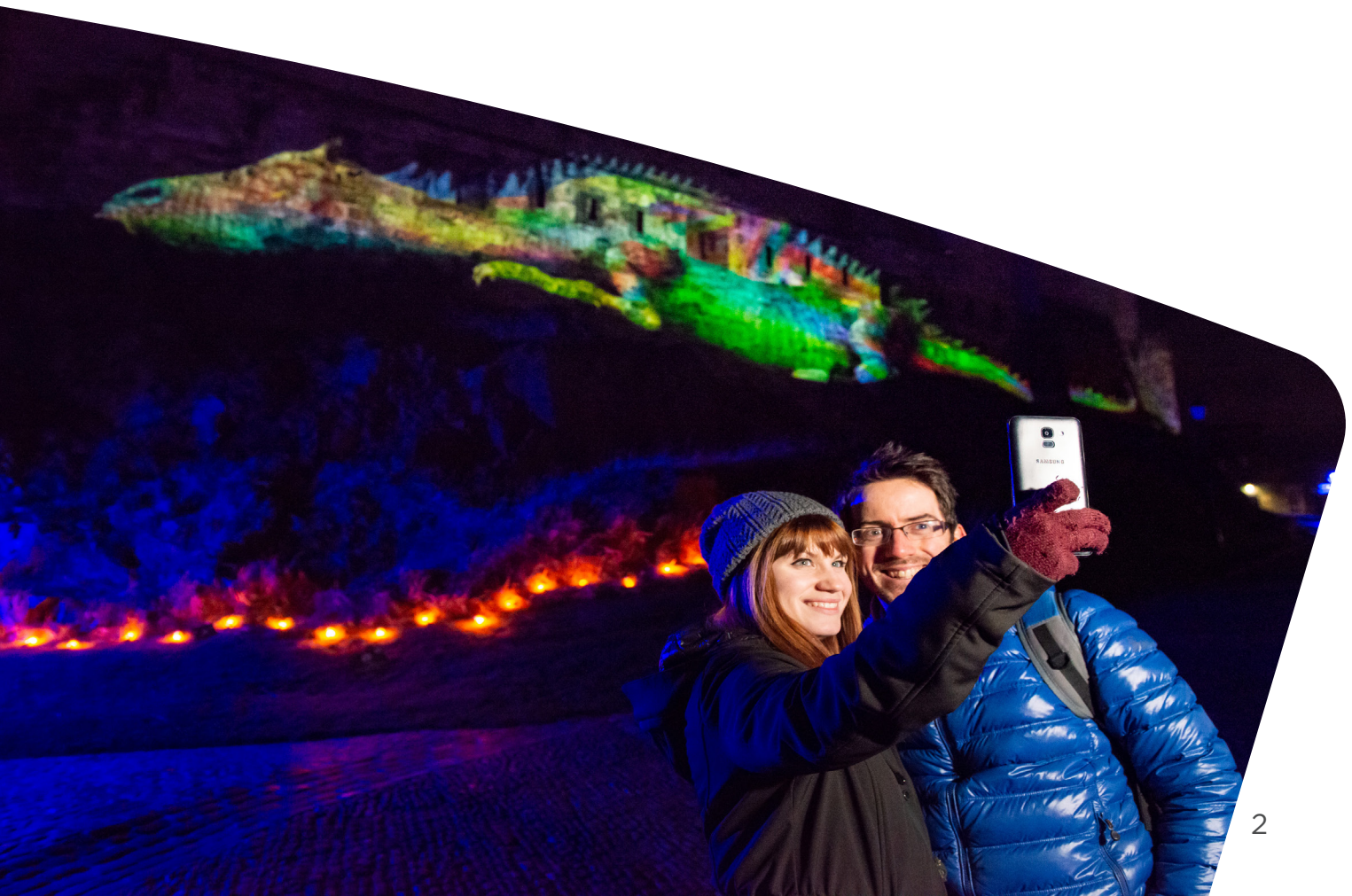
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INTRODUCING HES-DIGITAL

Historic Environment Scotland (HES) is a charity and public body leading the way in understanding, protecting and sharing Scotland's historic environment for today and the future.

- We care for more than 300 sites of national importance across the country and are the largest operator of paid visitor attractions in Scotland.
- We look after internationally significant archives and artefacts containing over 1 million items relating to more than 350,000 historic sites.
- We are at the forefront of investigating and researching the historic environment and addressing climate change's future impact.
- We protect our historic places through designations and consents, promote sustainable development, and provide millions of pounds each year to local communities to repair and revitalise their historic environment.
- We provide advice and guidance about the historic environment and offer a wide range of training and learning opportunities.
- In every aspect of our work, we strive to follow our five organisational values: collaboration, professionalism, innovation, openness, and respect.



How do we plan for a different tomorrow? Doing things in new and different ways means going beyond what technology has already helped us to achieve. This is why our revised digital strategy places people and experiences at the heart of our vision.

Digital engagement requires a shift in mindset and a willingness to tackle inequalities at all levels of the sector. This strategy sets out a direction of travel to ensure the decisions we make and the services we provide become 'digital-by-design'.

Establishing HES-Digital

The vehicle that will help us navigate this transformational journey is HES Digital - a framework to deliver innovation by drawing in new, non-traditional talent and ideas, championing the variety of experiences needed to tackle the biggest challenges facing the heritage sector today. By doing so, we set out to advance the speed of research and development of digital products and services that will protect our nation's past for the future.

The Historic Environment Scotland's Digital Strategy and transformation programme fully supports the [Digital Strategy for Scotland](#), published by the Scottish Government.

The digital agenda for Scotland goes beyond the adoption of the latest digital technology but advocates digital thinking, leading organisations and businesses in innovative ways, and embracing the culture and processes of the digital age.

For Scotland to thrive in this digital world, we must:

- design and implement technology in a secure, efficient and user-centred way
- realise the potential of data to improve services, increase efficiency and deliver better outcomes
- transform our culture and the way we work through digital thinking, with an emphasis on openness, networking and agility

HES-Digital - our programme for digital transformation - will align with these objectives and embed a digital-first approach. By doing so, we can reduce costs, increase the quality of all digital services, and offer users better online experiences and access to information and data.

Historic Environment Scotland's Digital Strategy will support and help deliver the outcomes of our corporate plan, [Heritage for All](#), where the historic environment:

- makes a real difference to people's lives
- is looked after, protected and managed for generations to come
- makes a broader contribution to the economy of Scotland and its people
- inspires a creative and vibrant Scotland
- is cared for and championed by a high-performing organisation

OUR DIGITAL ACHIEVEMENTS

We are a digital-focused organisation that leads in heritage conservation, digital interpretation and signage, online education and events, and other forms of digital engagement.

In HES, we already have an effective technology platform on which to build, and teams across the organisation have already delivered many excellent digital initiatives, including:



Content on our HES and sub-brand social media channels is seen, on average, over 60 million times per year.



Our HES and sub-brand websites are visited by over 6 million unique users on average, each year.



The Rae project is digitally documenting in 3D all 336 Properties in Care and associated collections using state of the art digital technologies.



The PICAMS system provides conservation staff with the ability to log, trace and complete assessments, and for all staff to access accurate information about Properties in Care.



The Historic Environment Portal provides users with access to over 60,000 pieces of heritage information, from a complete list of designations to GIS datasets.



Users can access over 3 million archival entries covering information on collections to archaeological sites, aerial photography to industry and maritime heritage data.



Migration to the Document Centre - our electronic document record management system - has reduced the number of internal documents by 80-90% across all business areas and promotes document sharing and collaboration.



Our Agile interpretation programme produced 60 pieces of QR-coded interpretive content at 15 Properties in Care, including audio tour, orientation maps, videos and digital models.



Our blog shares in-depth HES or heritage related stories and insights. It attracts, on average, over 98,000 users and 140,000 page views per year.

THE GREAT ACCELERATION: COVID-19 TRENDS

During the COVID-19 pandemic, one area that saw tremendous growth was 'digital'. Digital entails everything from online customer service to remote working, e-commerce to the use of artificial intelligence (AI) and machine learning to improve operations. We see four key trends accelerated by COVID-19, and of relevance to this strategy:

01

USER ACCEPTANCE AND EXPECTATION

User acceptance and resulting increased expectation of digital services across sectors

02

REMOTE WORK

20-25% of workers in advanced economies could work remotely 3+ days a week on a long-term basis

03

DIGITISATION

2-5x growth in e-commerce as a surge in digital platforms is underway

04

AUTOMATION

Uptake in the use of robotics, robotic process automation and AI

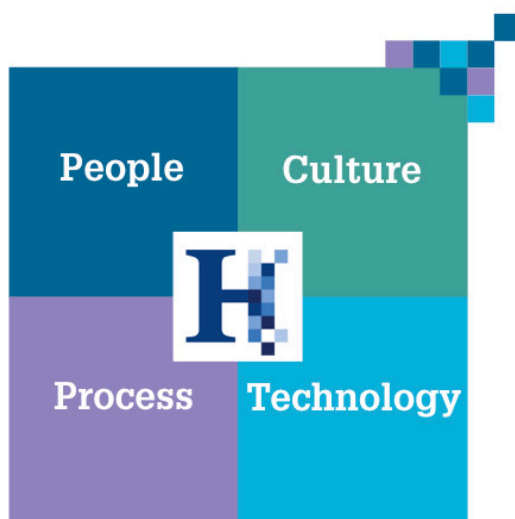
In response to the acceleration of digital during the COVID-19 pandemic, this Digital Strategy responds to the opportunities and needs that have arisen during this time. This response includes:

- A continuation in the building of our digital infrastructure, while interrogating any long-term commitments to technology vendors where there is no alignment with the Scottish Government's digital strategy.
- A faster upskilling of HES employees. Career transitions may increase by as much as 25% by 2030 to meet post-COVID scenarios.
- The creation of new worker benefits and support mechanisms through a Digital Academy and Innovation Hub.
- The building of a high-impact Digital Transformation Team; this team will not be assigned on a project by project basis but would benefit the organisation as a whole.
- An investigation into the opportunities that technological advancements offer HES, as seen with artificial intelligence (AI), machine learning, augmented reality (AR), virtual reality (VR) and other new technologies.

LEVERAGING THE DIGITAL OPPORTUNITY

Digital transformation building blocks

Digital transformation entails four building blocks which lay the foundation for an innovative and creative delivery of organisational benefits and efficiency. The four building blocks are:



Each building block is essential to the the digital transformation of HES:

People: building talent and a digitally enabled workforce are vital. Without the support of those who make up the organisation, transformation will not happen. We already see strong leadership in HES as well as digital champions, innovators, team players, supporters and a workforce who can support us as we embed a digital-first mindset.

Culture: creating a digital culture in HES is essential to our success. A digital culture will encourage all employees to look outward and engage with other heritage organisations, customers and partners to develop new digital, innovative solutions.

Process: for HES to digitally transform successfully, we need to look at end-to-end journeys. By having a full view of digital processes from beginning to end, we can consider how to better achieve our outcomes and create new approaches. Innovative thinking and the ability to experiment is critical to achieving success. By being bold, harnessing new technologies and responding rapidly to emerging developments and disruptions, we can ensure that we continue to be a high performing organisation and leader in the sector.

Technology: the provision of technology will enable us to operate and grow our digital propositions. In HES, a robust and efficient technology platform serves the operational requirements and is the ideal foundation on which to build. An important aspect to ensure is that the organisation has the infrastructure in place to introduce emerging technologies to harness the transformational opportunity.

THE HES-DIGITAL OPPORTUNITY

The opportunity for HES - considering our current capabilities, digital assets, and technology environments - is to become a global leader in the digital and heritage sectors. This entails being an organisation that is both enabled and skilled to protect the past and exploit the future.

In summary, the objectives of the HES-Digital programme are:

1. To become a global leader in the heritage and digital sectors, providing support to others within these sectors and the wider public sector landscape.
2. To grow and build digital skills across HES to allow digital value to be realised and to become a digital-first organisation.
3. To identify and support digital innovation and initiatives.
4. To reset the online customer journey and optimise the experience across various digital touchpoints.
5. To increase revenue through our digital reach and returned value.
6. To continue to provide an excellent digital technology platform for us to help meet our corporate objectives and operational requirements.

Our Digital Strategy outlines the approach to achieve these objectives and includes delivery outcomes which considers the digital pathways to success.

The strategy will be continuously developed as we engage with our people throughout the organisation and build our digital first culture.



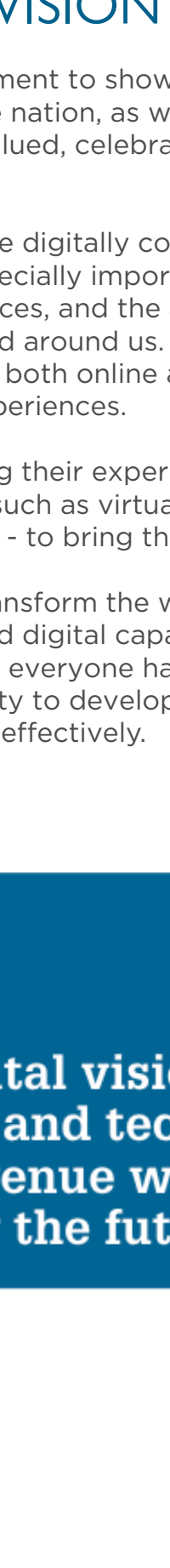
ENABLING THE DIGITAL VISION

At the heart of our digital vision is a commitment to showcase Scotland's rich historic environment to local communities across the nation, as well as a global audience. We want Scotland's heritage to be accessible, valued, celebrated, and make a real difference in people's lives.

With our audiences and HES employees more digitally connected than before, we must embrace new opportunities. This is especially important in the face of increased expectations of digital services and experiences, and the accepted use of digital channels to interact and experience the world around us. Therefore, we will look to engage audiences in new ways, link up users both online and on-site, and meet their high expectations with top quality digital experiences.

For customers, this means digitally enhancing their experience of the historic environment with innovative technologies - such as virtual reality (VR), augmented reality (AR), digital modelling and 3D printing - to bring them to life.

Delivering our digital vision requires us to transform the way we provide digital services, data and archives through enhanced digital capabilities and technologies. For those working in HES, it means ensuring that everyone has access to the right digital tools and providing them with the opportunity to develop skills that will enable them to do their jobs more efficiently, flexibly and effectively.



**An innovation-led digital vision enabled
by high-impact teams and technology to
increase reach and revenue while
protecting our past for the future.**

Developing HES-Digital

To develop HES-Digital, we need to build an organisation-wide, digital-first mindset and look for digital opportunities that will benefit from agile delivery. We also need flexibility, delivery appetite, and skills to realise each opportunity. Considering the building blocks required to deliver our strategy - People, Culture, Process and Technology - we need to:

1. Focus on the three strategic pillars identified - strategic alignment, employee experience, and customer experience - to structure and align the progress towards meeting our digital vision.
2. Form Insight Teams across HES to contribute, consider, plan and help deliver digital outcomes.
3. Introduce a rolling delivery window of 3-, 6-, 12- and 24-months, which will be reviewed and updated quarterly. Outcomes aligning with the strategic pillars will be completed and launched in the delivery windows.
4. Deliver projects in an agile manner so we can respond to a rapidly changing technological environment.
5. Continue to build a modern, best of breed technical platform adhering to Scottish Government guidelines and addressing the needs of enabling HES-Digital.

STRATEGIC PILLARS

We have placed three strategic pillars at the centre of HES-Digital to enable us to protect our heritage:

- **Strategic alignment:** includes supporting the delivery of each Directorate's strategic objectives that have a digital dimension; for example, the project may include online fundraising, enabling flexible working or system enhancement, such as the current Corporate Management Information System's next phase of development. This strategic alignment pillar aligns with the overarching transformational outcomes of organisational initiatives within HES-Digital.
- **Employee experience:** this pillar connects our people to the cultural building blocks of digital transformation. It includes the benchmarks, actions and outcomes we need to identify as well as the right digital skills, capability and mindset we need to embed across HES. This pillar will ensure that, by listening to those within the organisation, we will identify and enable innovative opportunities to be assessed and considered for delivery. It is essential that all voices are listened to as we collectively build HES-Digital.
- **Customer experience:** the journey of our customers is critical to our success and this pillar's actions put the customer - who have many differing interests and needs - first. It will also identify and introduce outcomes to optimise their interactions with HES, such as membership, e-commerce, and virtual event participation. The online visitor and Historic Scotland member experience will be a priority in HES-Digital, and we will explore innovative methods and strategies to connect offerings.

THE 3 PILLARS

Strategic Alignment

Connecting strategies to a reimagined digital direction



Aligning people, place and processes

1 Review and connect all existing departmental strategies to digital

2 Align HES digital direction with Scottish Government initiatives

3 Align HES digital direction with international innovation and partnerships

4 Introduce Strategic Backlog for digital with ownership at SMT level role

Employee Experience (EX)

(EX)

Building on culture of experimentation, innovation and conservation



Employee Experience (EX) roadmap

1 Create a sustainable, self-sufficient digital function for HES

2 Build digital capabilities for the future

3 Foster an emotional commitment

4 Start with the highest impact roles

Customer Experience (CX)

(CX)

Delighting audiences digitally, attentive to needs and expectations



Customer Experience (CX) roadmap

1 Collect rich customer insight to improve audience engagement across HES

2 Deliver excellence in quality of service to core audiences through all digital channels

3 Engage with cultural influencers and partners

4 Develop an outcome focused CX measurement framework to drive decision-making

EXEMPLAR PROJECTS

A part of HES-Digital's objectives, we will encourage and support digital innovation and initiatives that service the heritage sector, broader HES corporate priorities, and the wider public sector.

Exemplar projects have been identified and folded into the HES-Digital programme of work. These include projects with that have a specific outcome, and we will utilise the upskilled team's capabilities.

Examples of these kinds of projects are:

- Conservation-focused: digital documentation and digital innovation has significantly developed our knowledge and expertise of the historic environment, resulting in the team being identified as global leaders in this area.
- The Engine Shed, Stirling: a place to explore your built heritage. The team there deliver education through the innovative use of digital technologies, resulting in an exceptional customer experience.
- Digital technology and events: In person events, such as 'Castle of Light' and 'Spotlight on Mary', blend digital technology (like projection mapping) with immersive and inspiring on-site experiences.
- Bring Your Own Device (BYOD) site interpretation: Following pilot projects, such as the augmented reality app, 'Caerlaverock Castle Quest', COVID-19 has sparked a fast-moving and iterative programme for on-site interpretative content on visitors' own mobile devices. We have delivered progressive web applications with audio and multi-media tours, digital trails and maps, as well as QR coded videos.



LEADING DIGITAL HERITAGE AND DIGITAL PARTNERSHIPS

GLOBAL LEADERSHIP

To be a world leading, digital-first organisation, HES-Digital will build on the solid foundations already established, promote and communicate the success already achieved, and share the innovative thinking of the established Insight Teams.

Aims as a digital leader:

1. Establish our position as a digital-first organisation through our actions, approaches and delivery.
2. Implement an open digital framework to share information and provide support to other individuals, communities or organisations.
3. Connect with other like-minded groups, businesses and organisations to build and grow in knowledge.
4. Form a digital heritage mastermind group to collaborate and bring the best ideas together in a dynamic international, cross-sector team.

IMPORTANCE OF DIGITAL PARTNERSHIP

The COVID-19 pandemic necessitated the transition of in-person customer services to the provision of online experiences. This has forced many organisations and businesses to digitally transform in order to meet customer needs and survive a new digital future.

To establish HES-Digital, we will create a partnership alliance to connect with organisations to help drive change and ensure we can work in an agile, responsive manner.



ASSESSING DIGITAL SUCCESS

MEASURING SUCCESS

To understand and regularly review the progression and success of HES-Digital, a success dashboard will display success Key Performance Indicators (KPIs). A set of KPIs - updated where possible in real-time - will enable HES to keep track, drive direction and appropriate responses as we move towards meeting our objectives.

Success metric for each of the strategic pillars - strategy alignment, employee experience and customer experience - will allow the governance team to prioritise projects.

Suggested metrics include:

- digital reach, site usage and connection
- return on digital investment
- digital customer journey considering loyalty, engagement, satisfaction, retention and promoter score
- commercial growth
- organisation-wide digital skills growth
- number-of and investment-in, with a boldness metric, for new deliveries or proposed digital innovations.

HES-DIGITAL GOVERNANCE AND RISK PROFILING

The effective prioritisation of digital projects, from idea to delivery, is essential to the success of HES-Digital. Project or initiative's risk profile and the risk appetites will be reviewed and agreed.

Not all projects can be green-lighted; approvals consider a balance of fresh, bold, innovative ideas and the traditional enhancement to current systems.



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