

## Women in Tech—March 5<sup>th</sup>, 2024

### V.16 Discussion

- Anne is going live April 19<sup>th</sup>!! Exciting!!
- Chelsea: First fully web version staff member
- Large jump to get more things on the web version. They want to get enough baked into a release and tested to make it worth it. 70 screens out now and 114 is the next. Not sure which time frame they are coming.
  - A year out for order screen to go into preview for the web version.
- Alison is on v.16!!!! Congratulations!!
  - Over-all users are super happy and finding it much easier
  - Still a huge number of defects, mostly around transactions
  - Membership tricky bits
  - The actual upgrade process went really smoothly
  - Up and running for the 10 am open
  - TNEW was up and running by noon
  - Managed it over-night
  - Tips:
    - Meticulous testing. Get users to sign-off. Don't use a spreadsheet, use something like Trello so that you can list out all your tasks.
    - Change-management communication is critical
    - Security settings—double check all of these
    - Figure out what people think they don't know... let people see the basics
    - Training was all self-served through videos that were made in-house
    - Utilize the starts on the record and in reports
    - What documentation serves a purpose for vs what training serves a purpose for... training happens first and the documentation is the second step
  - What successes are you finding with things you have to repeat in different environments?
    - Alison had a huge spreadsheet to keep track of Dev/Test/Prod
    - List of 50 something items for the morning to get things running
    - Scripted as much as they could and custom procedures were run in as one scripted job by Tessitura—shortcuts.

### Call for Proposals for TLCC closes April 10<sup>th</sup>!

- Very fun presenting and they'll help you through the process
- They are looking for people to talk about the interactions cube in Analytics
- 25% off conference registration

New York City Group looking to do something that is low impact that Jamie can host and they're thinking about doing a puzzle challenge day where they have one topic that faces them all and everyone brainstorm. Ideas for topics?

- Fraudulent tickets
- Two separate puzzles that are being solved by multiple groups

- Building a data-based culture
- How to get buy in as a broad topic
  - What isn't working for you? Get people to say what isn't working for them and then do a small group break-out situation and get people to offer solutions
- Bobbi: The business processes of the organization are often the blocker
  - Show them the end result... if you do things this way, this is what you will get in return
- SESSION IDEA FOR WIT: Bring your frustrations, things that aren't working at your organization and we will do a break out into small groups to solve the problems

#### Tips and Tricks for training a new director and immediately getting buy in

- Start with analytics, show pretty graphs and charts and work backwards from there
- Start with a basic overview, what to find where, how we use it, ignore things that wouldn't be relevant
- Ask what are they interested in to show them what we already have, show them things relevant to them, how they can better be recording interactions with patrons
- Lock 'em in a closet with only Tessitura 😊
- Try to leave Tessitura itself out of it and think of it as a benefits of the CRM, show how constituents are organized. Who are the people and what information to we have? Leave out the part that makes it feel wonky. Maybe you'll get further with this approach.
- Scenario based as much as possible. You want to track XYZ, here is how you do it. Share with them what is possible.
- Lack of awareness around plans and portfolios so start with those.
- Set myself up as the resource to go to. This is possible, there's a lot more possible, call me and we will make your hopes and dreams come true.
- Opportunity with the new director starting to engage the team as a whole, how can the rest of team support it as a whole.
- Directors are also dealing with a team and how everyone is working, allows them to have an overview of what is happening
- Encourage people to ask why... this is how we do things, but maybe it's not the best way. Encourage them to ask questions and make changes.
- People understand better when they understand why we are doing something the way we are doing things
- Get their input and how it will work for them
- New people is the best time to change business practices
- What have you done previously that has been the most important thing for you? From a data/science perspective... answer their must-haves first with the system that we are using
- Giving options also gets them to think about what they want and to engage more in the process of developing new systems - a sense of ownership!

#### Book on Buy-In: "Switch" by Chip and Dan Heath

- How much do you feel you're highlighting the wins and what you're starting to see