

**DANCE  
COMPANY** **SYDNEY**



**SYD TUG**

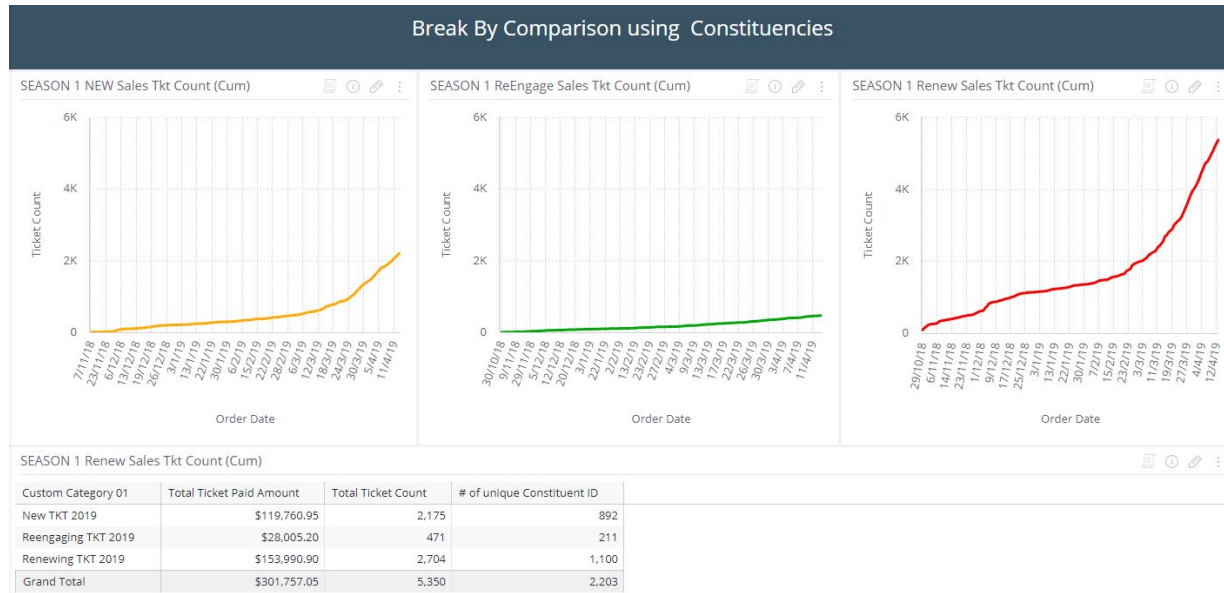
**Using Custom Categories**



# Without Custom Categories

Compare the behaviour of New, Renewing and Re Engaging customers

Previously used Lists or Constituencies to filter three separate widgets



Filter Constituencies

List

Text

Ranking

Starred

Advanced

Filter field items:

Containing

NEW

+ Add condition

Previewing 5 out of 47 results

- .ADC,C19,NEW,
- .ART,C19,NEW,
- .ART,COL,NEW,
- .ART,NEW,
- .BRD,CAP,NEW,

All items containing "NEW"

OK

Constituencies

Containing

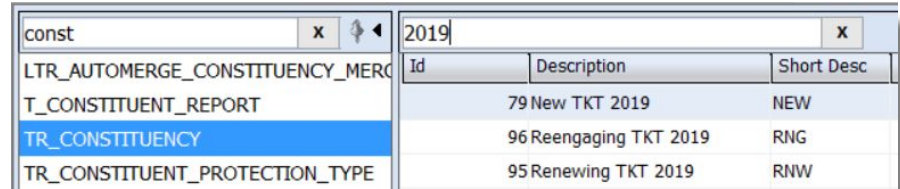
NEW

# Setup

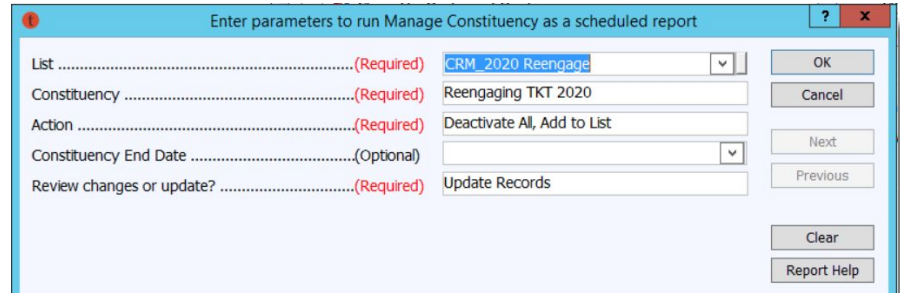
1. I run 3 dynamic lists for each customer segment:  
New, Renew, and ReEngage

NB/ They are exclusive so that no one appears in 2+ of those lists

2. I use a scheduled Manage Constituencies Utility on those lists to give those folks a Constituency overnight



Id	Description	Short Desc
79	New TKT 2019	NEW
96	Reengaging TKT 2019	RNG
95	Renewing TKT 2019	RNW



Enter parameters to run Manage Constituency as a scheduled report

List .....(Required) CRM\_2020 Reengage

Constituency .....(Required) Reengaging TKT 2020

Action .....(Required) Deactivate All, Add to List

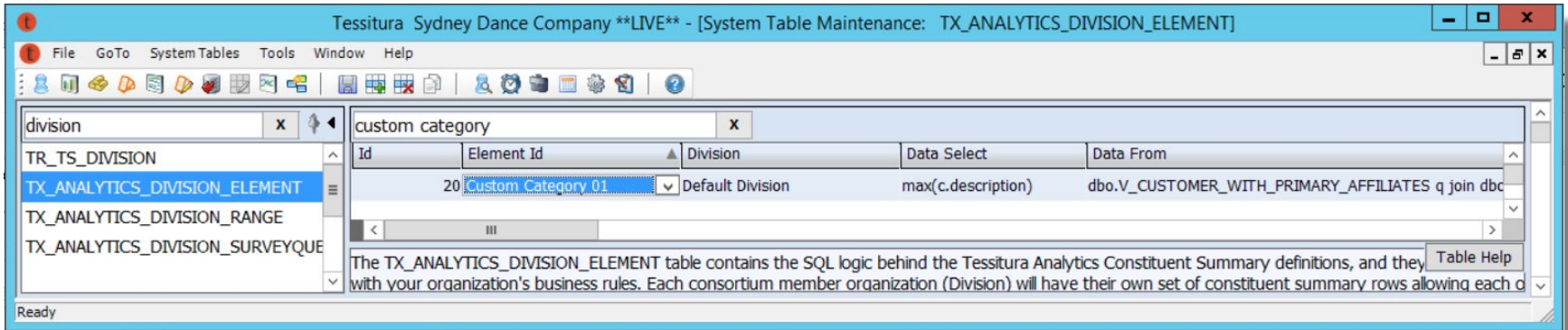
Constituency End Date .....(Optional)

Review changes or update? .....(Required) Update Records

OK Cancel Next Previous Clear Report Help

# TX\_ANALYTICS\_DIVISION\_ELEMENT

3. I have a TX\_ANALYTICS\_DIVISION\_ELEMENT/Custom Category 01 Element of
  - a. **Data Select:** max(c.description)
  - b. **Data From:** dbo.V\_CUSTOMER\_WITH\_PRIMARY\_AFFILIATES q join dbo.vx\_const\_cust\_active x on x.customer\_no=q.expanded\_customer\_no join dbo.tr\_constituency c on x.constituency=c.id
  - c. **Data Where:** c.rank=(select min(b.rank) from dbo.vx\_const\_cust\_active a join dbo.tr\_constituency b on a.constituency=b.id and a.customer\_no=x.customer\_no and b.id in (79, 95, 96)) -- those numbers are the Constituency IDs in TR\_CONSTITUENCY

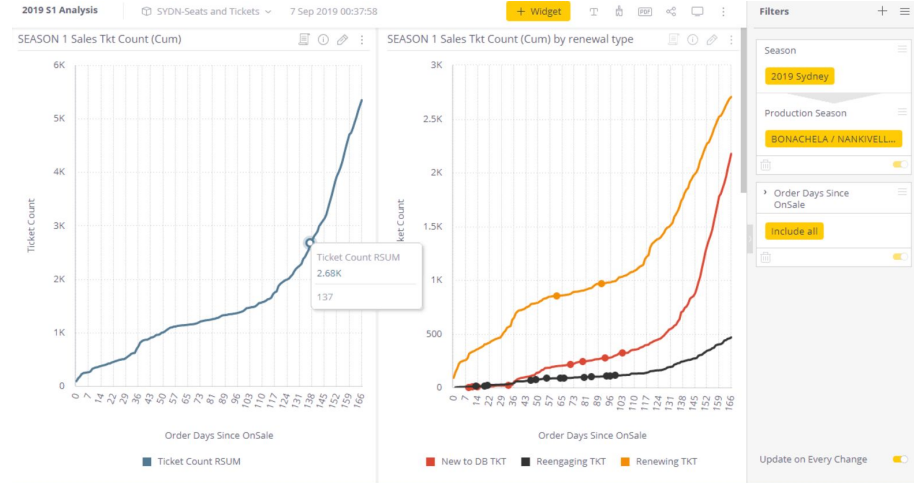


# Results

I can now use Custom Category 01 to break by or filter Renew, New, ReEngage, None or a mix on Line Graphs and pivot tables which is an incredible win for me looking at purchasing trends

I can further look at buying patterns in further segments such as Subs or Single Tickets

The screenshot shows a software interface with a 'Break by' dropdown menu set to 'Custom Category 01'. Below it, a list of categories is shown: 'New TKT 2019' (blue), 'Reengaging TKT 2019' (orange), and 'Renewing TKT 2019' (green). To the right, a 'Filter Custom Category 01 / Filter a Field' dialog box is open, showing a list of fields: 'List', 'Text', 'Ranking', and 'Starred'. The 'List' field is selected, and a search bar is present. Below the search bar, three items are listed with checkboxes: 'New TKT 2019' (checked), 'Reengaging TKT 2019' (checked), and 'Renewing TKT 2019' (checked). At the bottom of the dialog, there is a 'Star' icon, a '(none)' button, and an 'OK' button.



# Results

As an example I can look at which people are responding to discount offers (we usually hope "New").

Here we can see...

1. **\$55 Offer** was taken up solely by Renewing and ReEngaging people
2. **TodayTix** was bringing in New audiences

SEASON 1 Single Tkt Sales Count (Cum) by Discount

Price Type	Total Ticket Count		
	New TKT 2019	Reengaging TKT 2019	Renewing TKT 2019
\$55 Offer		10	90
Cast & Crew Rate	70	4	103
Dance Class	71	29	228
Entertainment Book - Comp	5	4	7
Entertainment Book - Full	5	4	7
Friends	6		18
Group	15		6
Industry Offer	11	1	14
Offer	10	3	19
Special Offer			4
STC Friends	5	2	5
Ticketmaster Offer	12	1	2
Today Tix	42		
Today Tix Rush	204		48
Grand Total	456	58	551

# Future Modifications

- I also do a similar segmentation with Subs and Single TKT for each sales year.
- These examples are ticketing lists but one could easily construct rules to tease out the giving periods for Philanthropy (and likely you already have)



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