



*Jessitura*  
**network**

# Philadelphia

## Tessitura User Group Meeting



Painted Bride Art Center

Philadelphia, PA

February 10, 2016

# Today's Agenda

- Welcome/Introductions/Updates 3:00pm
  - *Don Youngberg, VP Community*
  - *Andrew Recinos, EVP*
- Business Intelligence Discussion 3:15pm
  - *John Jakovich, VP Business Intelligence*
- Open Space Discussions 3:45pm
- Full Group Review, Q&A 4:45pm
- Networking Reception 5:00pm
- Farewells & Goodbyes 7:00pm

# Thank You

- Brian Ramos
- Som Prasad
- Jason Ward
- Ryan Lewis
- Arthur Curtis
- Michelle Harris
- Cassie Greenberg
- Ezra Wiesner
- Painted Bride Art Center
- Tessitura Network

Who are we?

*Jessitura*  
network

# Team Tessitura August 2015





**Andrew Recinos**  
Executive Vice President  
Portland, OR



**Chuck Reif**  
Sr. Vice President  
Development & Technical  
Portland, OR



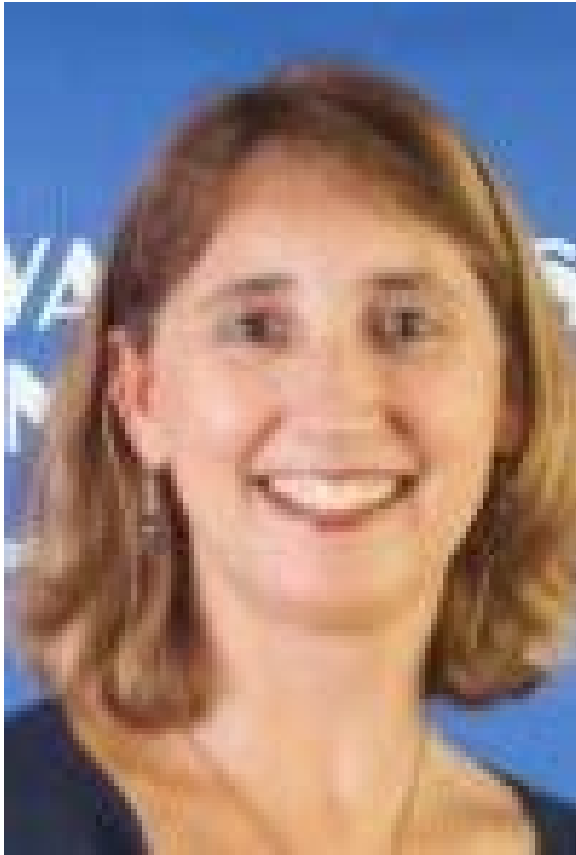
**John Jakovich**

Vice President,  
Business Intelligence  
Fort Collins, CO



**Don Youngberg**

Vice President,  
Community  
New Haven, CT



**Annie Gribbins**  
Implementation & Training  
Consultant  
Titusville, NJ



**Theran MacNeil**  
Support Administration  
Manager  
Hopewell, NJ



**Mark Rhodes**

Senior Developer  
Swarthmore, PA



**John Wozniak**

Application Support Specialist  
Wilmington, DE



**Meredith Woolard**

Conference & Community  
Specialist  
Atlanta, GA



**Tami Fox**

Services & Community  
Relations Specialist  
Mount Horeb, WI

Who are you?

*Jessitura*  
network

# Greater Philadelphia Tessitura Members



# Philadelphia Tessitura Members

- McCarter Theatre 2002
- Strand-Capitol Performing Arts Center 2003
- Kimmel Center 2004
- The Philadelphia Orchestra 2004
- Ticket Philadelphia 2004
- Pennsylvania Ballet 2005
- Academy of Vocal Arts 2006
- Wilma Theater 2006

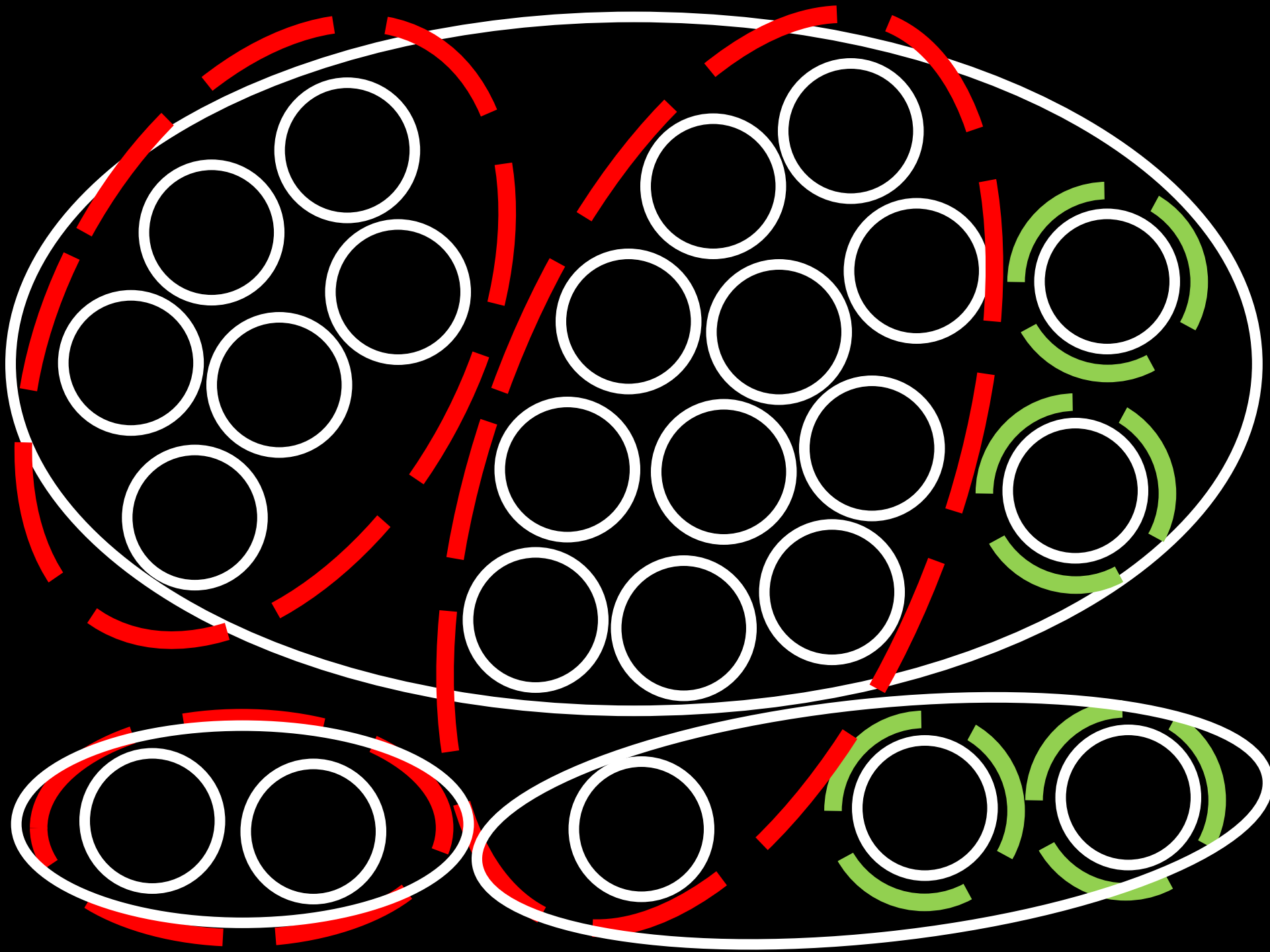
# Philadelphia Tessitura Members

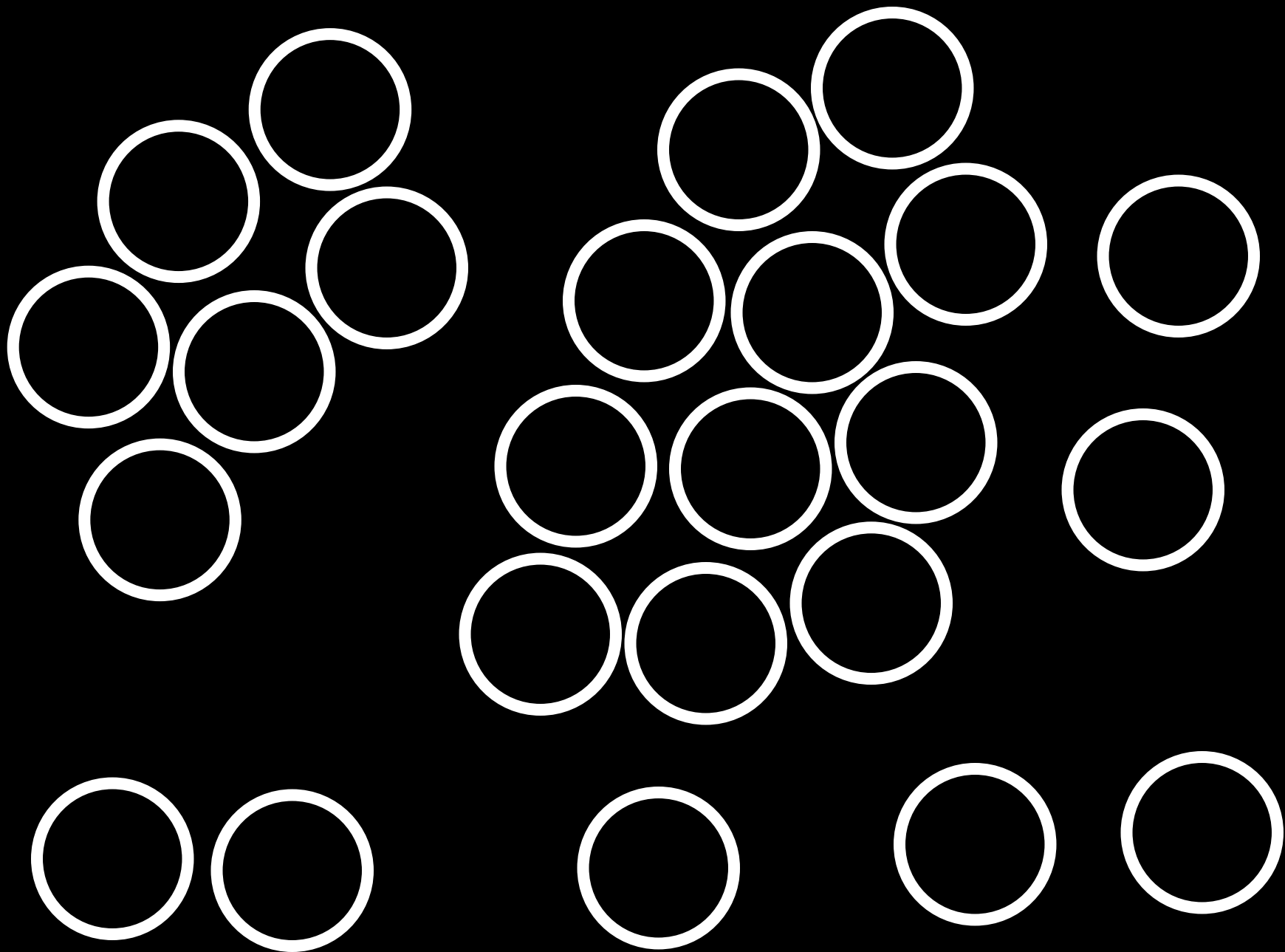
- Grand Opera House 2007
- Media Theatre for the Performing Arts 2007
- People's Light & Theatre Company 2007
- State Theatre New Jersey 2007
- Opera Philadelphia 2015
- Annenberg Center for the Performing Arts 2008
- Bristol Riverside Theatre 2008
- Philadelphia Theatre Company 2008

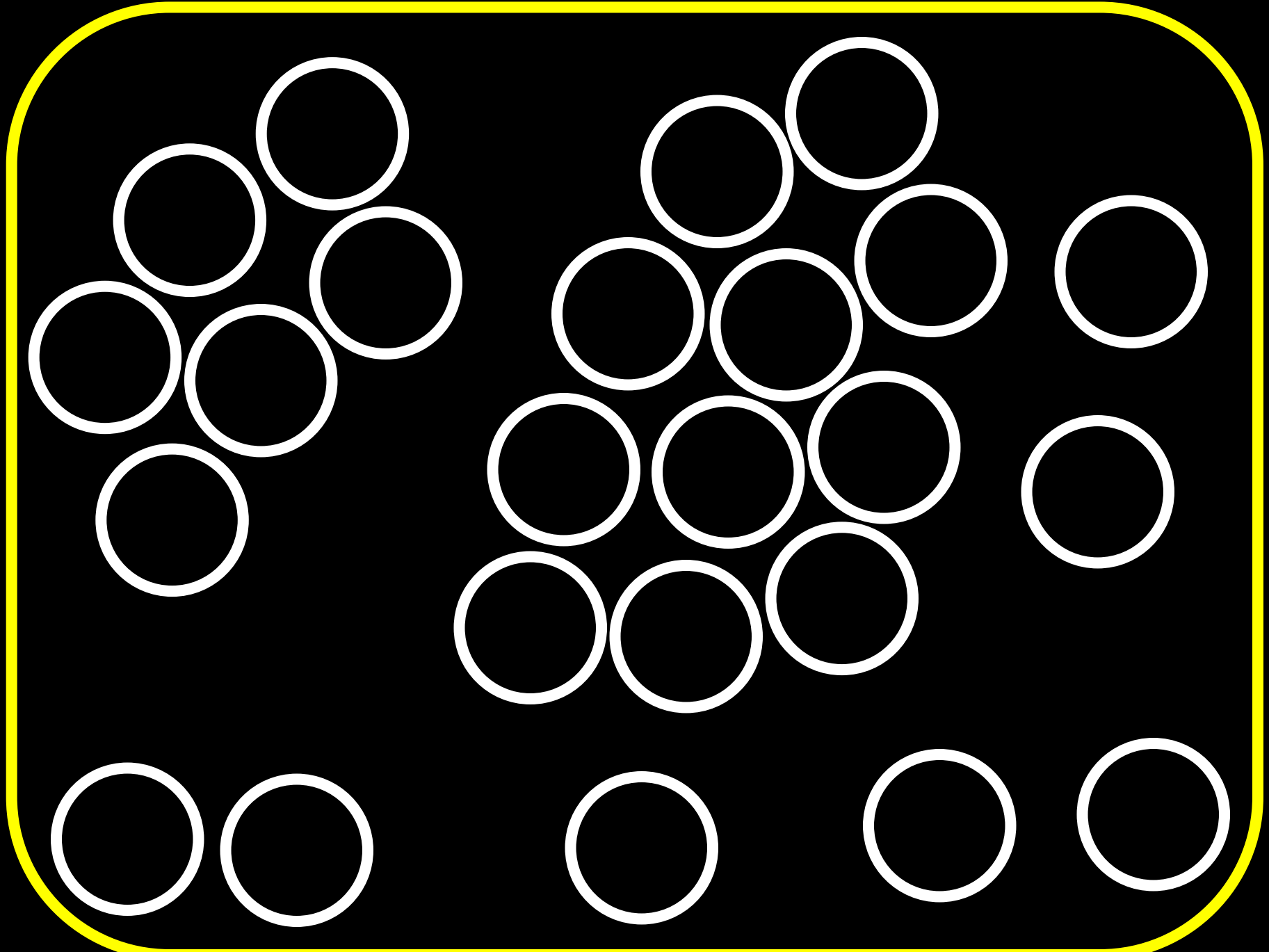
# Philadelphia Tessitura Members

- Delaware Symphony 2010
- Painted Bride Art Center 2010
- First Person Arts 2011
- Bucks County Playhouse 2012
- Fulton Theatre 2012
- 11<sup>th</sup> Hour Theatre Company 2013
- EgoPo Classic Theatre 2013
- Philly Pops 2013

Tessitura  
in Greater  
Philadelphia







Regional Tessitura User Groups

**RTUGS**

# Tessitura Learning & Community Conference



# Regional User Meetings - Goals

- Provide opportunities for Tessitura organizations to continue the face-to-face sharing, learning and collaboration that happens at the Tessitura Learning & Community Conferences (TLCC)
- Give individuals who are not able (and may never be able) to attend TLCC a chance to experience some of the camaraderie of the global gatherings.

# Tessitura Network Mission Statement

Tessitura Network enables and inspires arts and cultural organizations of all sizes to achieve their goals by providing continually innovated technology and comprehensive services that improve their efficiency and effectiveness, and by **fostering learning, knowledge sharing and community collaboration between peers and organizations.**

# Tessitura Network Core Values

## Collaboration, Innovation, Excellence, Egalitarianism & Community

- **Collaboration** – The Network reinforces collaboration, openness, mutual respect, discovery, and inspiration in all of its activities.
- **Community** – The Network is a member-centric, community driven organization that fosters a trusted environment for member and staff involvement and participation.

# RTUGS – Opportunities to gather & collaborate between TLCCs



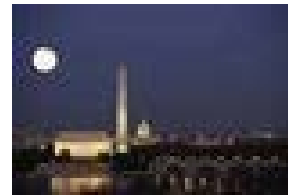
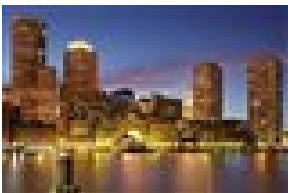
# 1 Day Mini-Conferences



SOCAL



# RTUGS – Opportunities to gather & collaborate between TLCCs



... and 20 (and growing) more TUGS



# NYCTUG at TLCC2015

# Traits of Successful Regional TUGs

- Leadership Team
  - 4-6 People
  - Multiple Organizations
  - Inter-TUG awareness
- Active Engagement
- Agreed Goals
  - Networking?
  - Brainstorming?
  - Training?
  - Social?
- Broad Participation
- Egalitarianism
  - No domination
- Institutional Support
  - Take turns hosting
- Planned Calendar
  - No ad hoc meetings
- Partner with TN Staff
  - Support & Best Practices
  - Participation

# PhilTUG – Next Steps?

- Who is interested in being a part of the leadership?



- Is there a name/moniker for the TUG?

- Can someone come up with a simple logo?



# Join Philadelphia Group on tessituranetwork.com

Leader for Arts & Cultural Technology + Services + Community

My Account | Logout

Search Site

RESOURCES SOFTWARE SUPPORT CONSULTING SERVICES PRODUCTS CALENDAR CONFERENCE ABOUT

## Local Tessitura User Groups

[Printable Version](#)  
call us: 1-888-643-5778

< Previous 1 2

### GROUPS IN THIS CATEGORY

	<b>Philadelphia Regional Arts...</b> Forum for Members of The Philadelphia Regional Arts... <a href="#">Leave Group</a>		<b>Philadelphia Tessitura Users</b> Gathering place for Tessitura users in Philadelphia... <a href="#">Join This Group</a>
	<b>Portland, Oregon</b>		<b>San Francisco Bay</b>

# Subscribe for email alerts



Gathering place for Tessitura users in Philadelphia.

## RECENT GROUP ACTIVITY

Wed, Feb 10 2016



Don Youngberg joined the group Philadelphia Tessitura Users.



Mon, Feb 1 2016



Meredith Woolard posted Headed Your Way! PhilTUG Meeting - February 10, 2016 to the Philadelphia Tessitura Users forum.

Wed, Jan 27 2016



Tami Fox joined the group Philadelphia Tessitura Users.



## Philadelphia Tessitura Users

[Home](#)

[Calendar](#)

[Discussions](#)

[Media](#)

[Members](#)

[RSS](#)

[Subscribe to email alerts](#)

## MEMBERSHIP STATUS

You are a member of this group.

[Leave Group](#)

## RELATED GROUPS



#tessnet

10 Things we are excited about in

2016

*Jessitura*  
network

# #10

## No Dues Increase in 2016

Year	Dues Increase
2013	0%
2014	0%
2015	0%
2016	0%

# #9

# Regional User Groups



Southern California



Sydney



Southern Ontario



Seattle

# #8

## RAMP Rising

Tessitura Hosted Deployment  
80% of new organizations  
Many switching from local  
Small, Medium, Large



# #7

# TN Express Web v7

## Device agnostic



#6

# New Consulting Services



# #5

# Tessitura's Innovator Series



#4



**CULTIVATING CREATIVITY**

Washington, DC // National Harbor // August 7-11

# #3

## Version 12 is complete!

12.0 Plans

12.0 Communication Management

12.0 Pricing Management

12.1 QuickSale

12.1 Composite Tickets

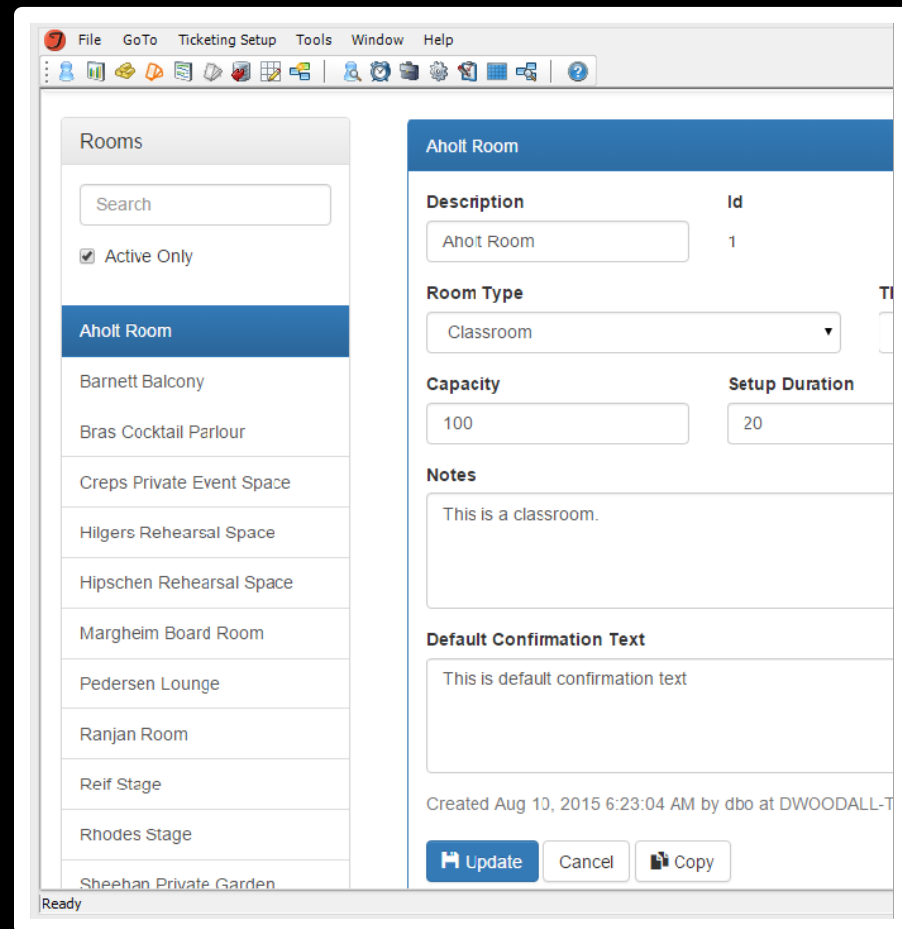
12.5 Pricing and Messaging Rules

12.5.1 EMV Compatibility

# #2

# Version 14 well on the way

Payment Processing  
Complete REST Layer  
Infrastructure Updates  
Resource Management



# #1

Introducing...

# Business Intelligence Initiative

New VP, Business Intelligence  
New Development Team in formation  
Addressing Major Roadmap Items  
Feedback effort – Today!

THANK

YOU

# Business Intelligence Initiative

# Objectives

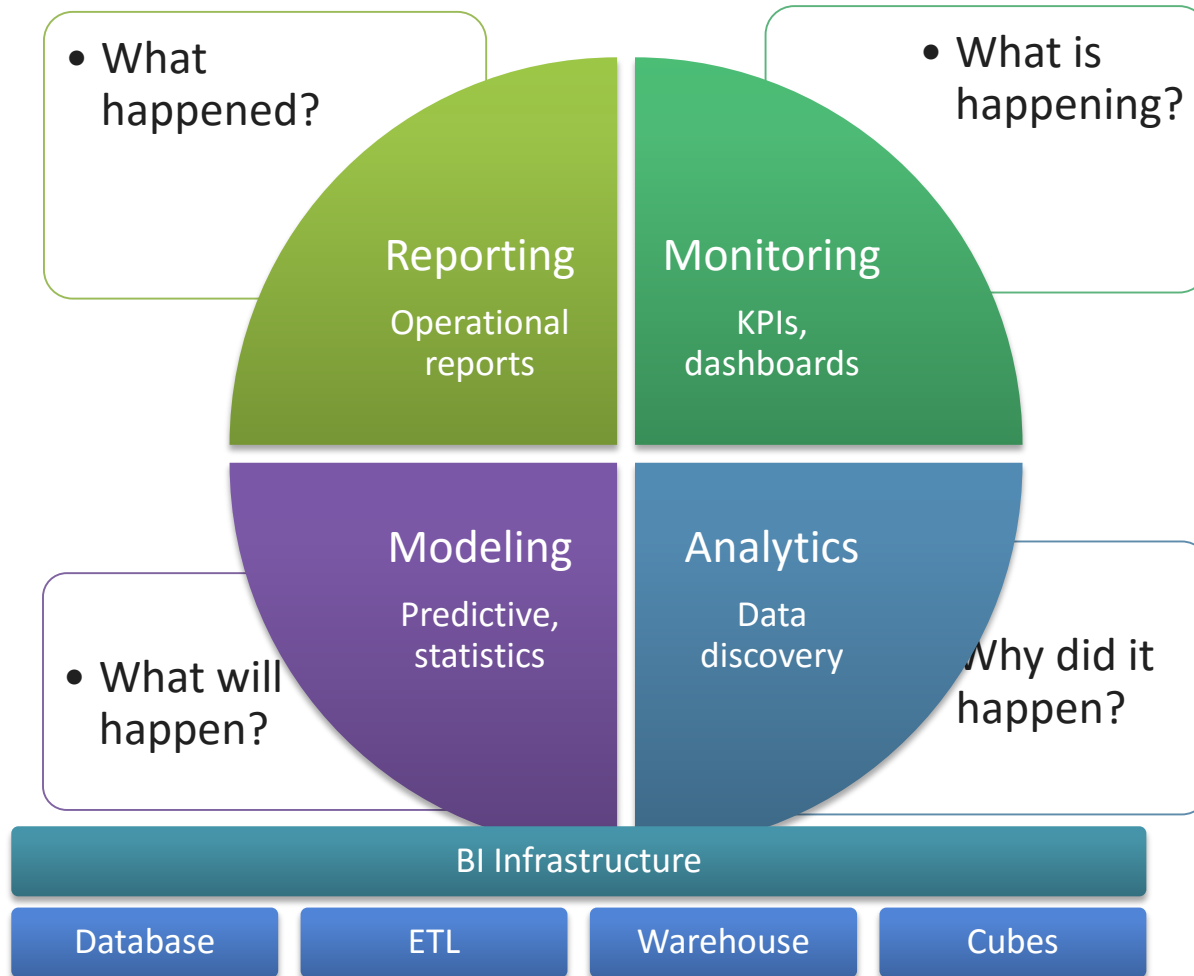
- Introduce the BI initiative
- Overview of the scope and timing
- Review BI Personas
- Group exercise

# The Roadmap

**End User Reporting Flexibility and Expansion.** This Roadmap item would look at the ability to better report on data in the system tying tactical reports, expanding T-Stats functionality, and looking at alternate reporting interfaces.

**List/Extraction/Output Unification/Overhaul.** Rethinking the functionality in Lists, Extractions, and Output Sets to better unify the functionality while making additional improvements to the ease of pulling constituents and data. Some of this work has started in the development of v12.0.

# What is Business Intelligence?



# What is the Tessitura BI Initiative?

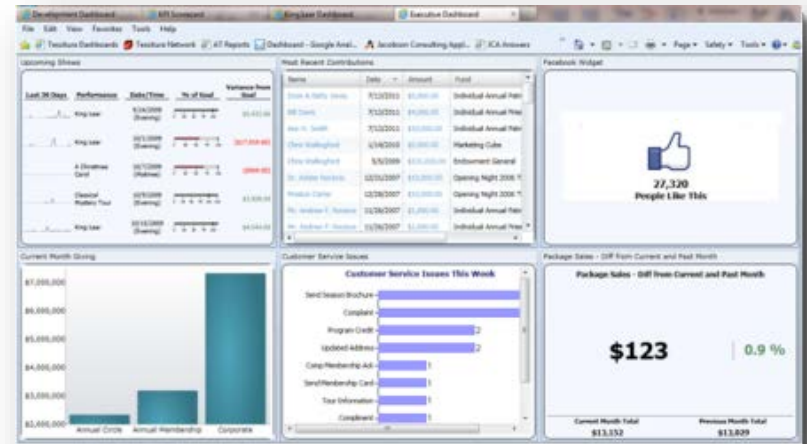
The BI Initiative's purpose is to develop a new generation of BI tools for Tessitura.

- Enhance existing tools and systems
- Enable powerful new reporting and analytics
- Provide innovative solutions

# BI Initiative Scope

All mechanisms that facilitate Tessitura data retrieval, reporting and analysis.

- List Manager
- Extraction Manger
- Output Set Manager
- SSRS (standard and custom)
- Infomaker
- Tessitura Dashboards
- T-Stats



# Items not in our immediate scope

- Data modeling and predictive analytics
- Integration with external data sources for marketing automation or event processing, sometimes known as Complex Event Processing (CEP)
- A Tessitura Network-wide data aggregation project
- Integration with Google's Universal analytics

# BI Initiative Deliverables, 12-18 months

- We are starting with a project charter, BI requirements analysis and research
- Which will inform our BI roadmap and recommendations
- Which will facilitate:
  - A more unified, holistic and accessible BI experience in Tessitura
  - An improved user experience for reporting, list management, extractions and output
  - Improved data discovery and exploration capabilities
  - An updated dashboard experience, not dependent on Silverlight
  - A comprehensive and efficient data schema to facilitate reporting and analysis
- Delivered via a browser-based UI with mobile device accessibility

# Executive Persona

<b>Examples</b>	Executive Director, Chief Marketing Officer, Development Director, Chief Finance Officer
<b>BI Content</b>	They do not create BI content. Many reporting and analytic requests Consume what is given to them.
<b>What they care about</b>	Ensuring strategic objectives for their organizations Accurate, timely data Ability to get quick answers Accountability
<b>BI Requirements</b>	Mobile Concise and clear Automated, scheduled delivery Presentation-ready, formatted and branded They consume content outside of Tessitura

# Business Manager

<b>Examples</b>	Box Office Manager, Major Gift Officer, Membership Manager, Controller
<b>BI Content</b>	They consume reports, dashboards, lists, T-Stats They create lists, alerts, will customize dashboards and reports Does not usually author reports
<b>What they care about</b>	Knowing things are running smoothly Being empowered to view and explore data to make decisions Financial reconciliation (batch, settlements) Analyzing success of campaigns
<b>BI Requirements</b>	Data exploration Parameters and configuration Automation Embedded BI

# Operational User

<b>Examples</b>	Service Representative, Marketing Associate, Development Associate, Membership Associate
<b>BI Content</b>	Create lists, extractions, segmentation
<b>What they care about</b>	<p>They take pride in their domain (membership, subscriptions, fundraising, etc.)</p> <p>Quickly getting what they need and completing their tasks (they have many)</p> <p>They want to show that they are succeeding at their assigned role</p>
<b>BI Requirements</b>	<p>Ease of use, they are not data experts</p> <p>Intuitive workflow</p> <p>Behavioral identification</p> <p>Easy to interpret what they receive</p>

# Business Analyst

<b>Examples</b>	Marketing Analyst, Business Analyst, Development Assistant, Database Manager
<b>BI Content</b>	They create and consume all of it. Reports, analytics, dashboards, ad hoc...
<b>What they care about</b>	Clean data Flexible powerful reporting tools Exploring data for new insights and answering the tough questions Self service, but can work with IT Evangelizing the importance of data driven decisions
<b>BI Requirements</b>	Data accessibility, flexibility Authoring usability Data discovery Drill through to raw data Pivot tables Formatting options

# Group Exercise

1. We will break into groups of 4-5 based on the personas: Executives, Business Managers, Operational Users, Analysts
2. Start by deciding which persona you would like to represent
3. Move to the persona's side of the room, break-up into smaller groups
4. In your group, answer these 3 questions as your persona:
  1. What's the first thing your persona thinks about when they get to the office?
  2. What are examples of reporting or analysis that would make your life easier, but are difficult or elusive?
  3. What are examples of reporting or analysis in Tessitura that work well for you?
5. Each group will discuss and pick the top 2-3 answers to share
6. Your group will report back to everyone

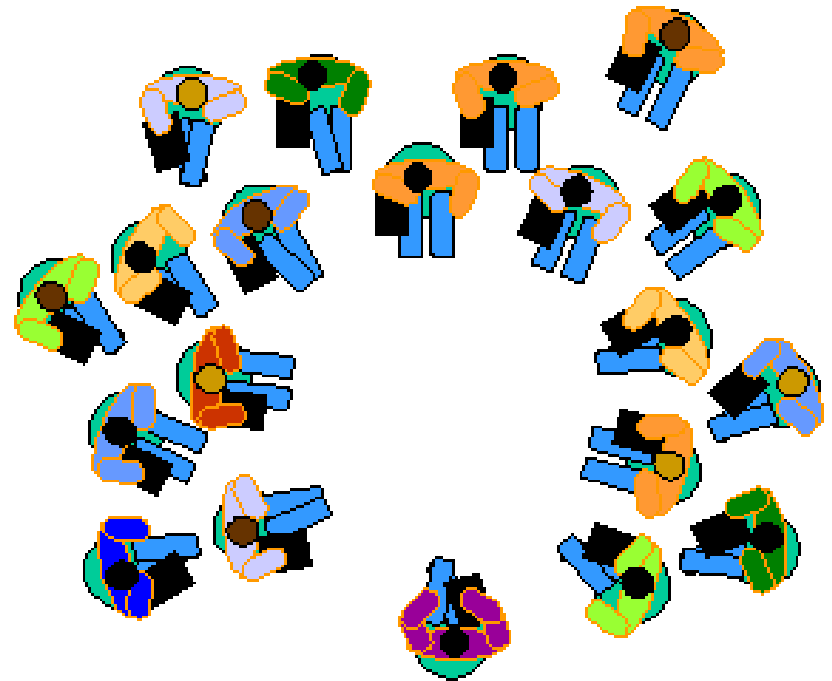
# As your persona, answer these questions:

1. What's the first thing you think about when you get to the office?
2. What are examples of reporting or analysis that would make your life easier, but are difficult or elusive?
3. What are examples of reporting or analysis in Tessitura that work well for you?

# Open Space Discussions

# Open Space Discussions

- Who will you meet?
- What will you talk about?
- Propose a topic.
- What do you want to know? Explore?



# Potential Groupings?

- Education?
- Marketing?
- Ticketing?
- Development?
- Finance/Administration?
- Digital/Web?
- Information Technology?
- Other?

# Potential Topics for Discussion?

- BI Topics
  - Reporting
  - T-Stats
  - Dashboards
- Email
- Ticketing
  - Season Setup
  - Bulk Setup
  - Packages
  - Flex
- Development
  - Managing Plans
  - Use of Tabs
  - Contribution Processing
  - Events (including online)
- Marketing
  - Promo Codes
  - Contact Purposes
- Executives

# Logistics

- Could someone scribe?
- Recap topics? Ideas?
- Aha moments?
  
- We will reconvene at 4:45pm.



Open Space  
Discussions  
Recap?

# Group Recaps?

- Topic or two?
- More need for Discussion?
- Networking Reception?
- Convene another meeting?

# TLCC2016

(Shameless Plug)



**CULTIVATING CREATIVITY**

**Washington, DC // National Harbor // August 7-11**



# Tessitura Learning & Community Conference

- August 7-11, 2016 (Sun–Thu)
- Washington, DC at National Harbor
- Gaylord National
- 250+ Topical Sessions
- 5 General Sessions
- 3 Evening Networking Events
- 12 Meals & 8 Breaks

How many  
people?

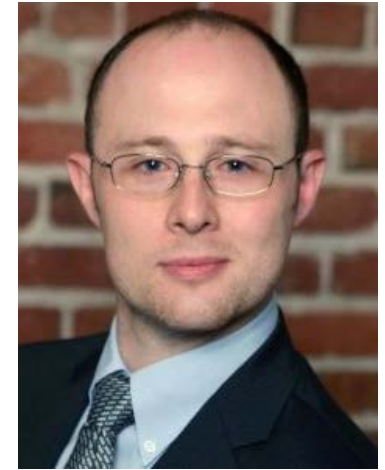
1700?

1800?

1900?

# TLCC Planning Committee

- Opera Philadelphia
  - **Brian Ramos** (FIN Co-Chair)
  
- Philly Pops
  - **Jason Ward** (EDU)



# TLCC2016 – Mini-Magic

- Anything you would like to share...
- Two Special Categories...
  - Quicksale Screens
  - Ticket Formats

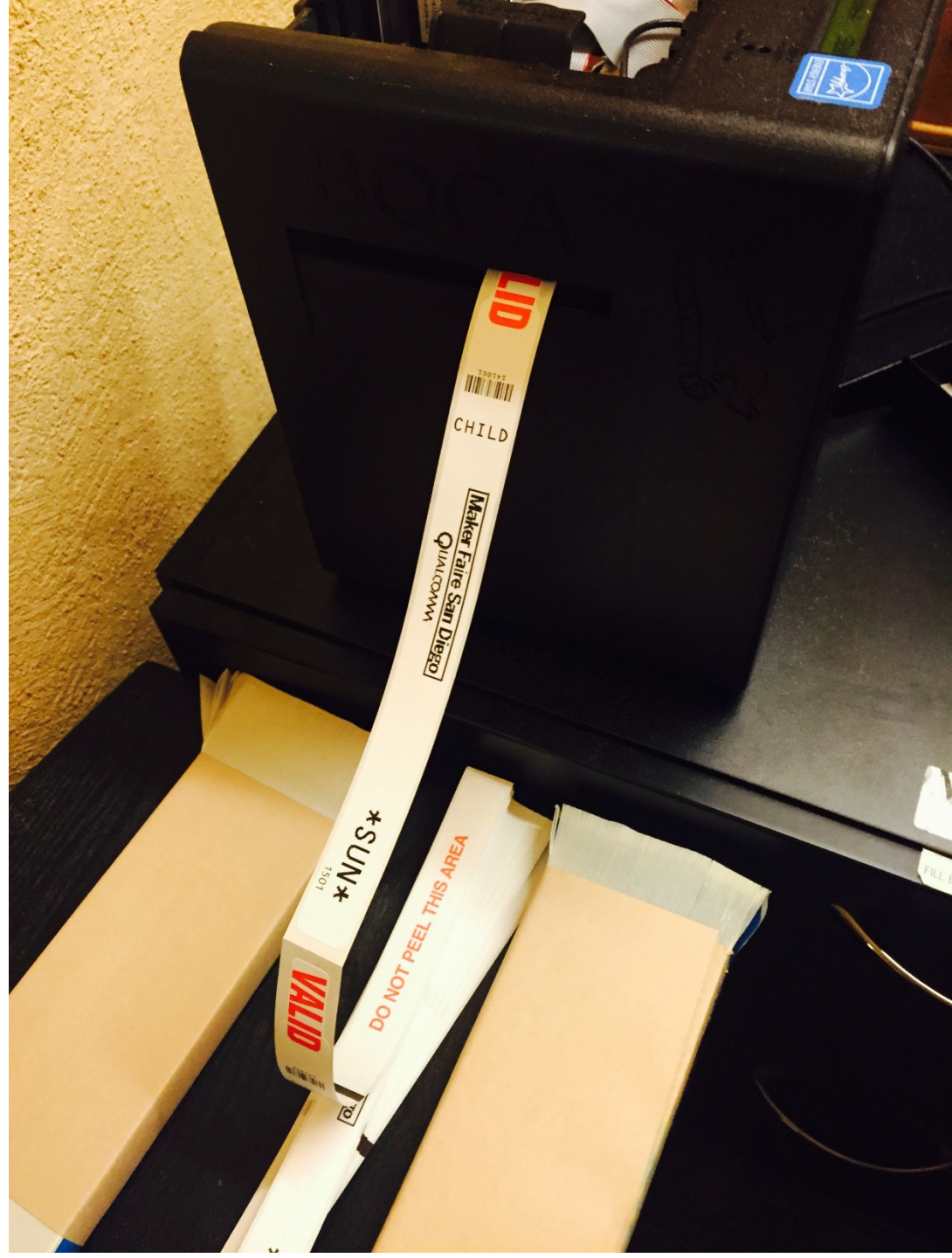
**Mini  
MAGIC!**

SIMPLE. SMART. CREATIVE. TESSITURA





# Maker Faire “Tickets”



# TLCC2016 – Next Steps

- Make your Hotel Reservations
- Consider Presenting, Moderating or being a Guru
- Watch for TLCC Registration – opens March 1
- Mini-Magic Ideas????

**TLCC2016** 

Networking  
Reception  
(‘til 7:00pm)



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