

# Heard it through the grapevine: communications across departments

Prepared by Mary Butlin (Tonica) and Ean  
Burgon (Royal Exchange Theatre)



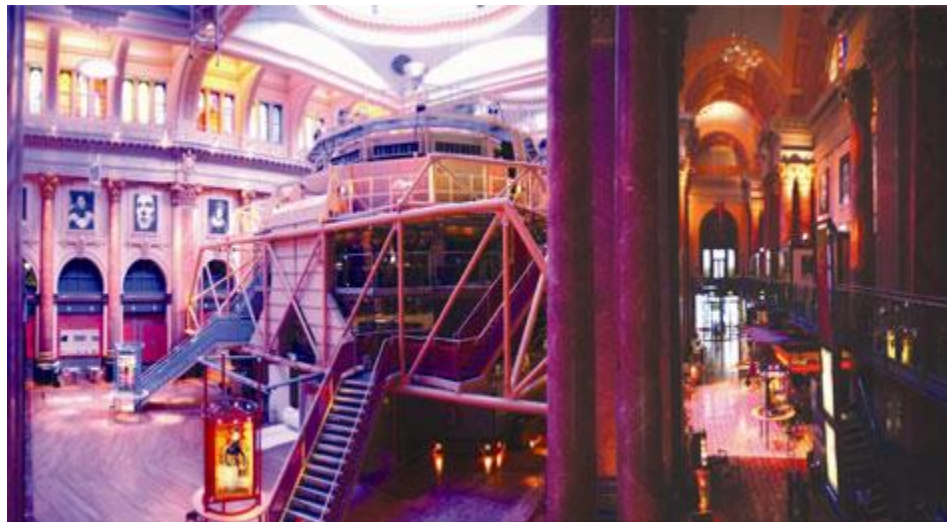
## Background

- Tonica began working with the Royal Exchange in April 2011 to help optimise the use of Tessitura, improve the database and migrate the Development and Education departments onto the system
- The Royal Exchange had been live on Tessitura for just over a year and were keen to develop a cohesive approach to the database and its use across the organisation



## Background to The Royal Exchange

- Situated in the **heart of Manchester**, the Royal Exchange is an award-winning producing Theatre with a history spanning five decades
- 206,112 tickets sold last year for two auditoria
- 188,771 records on Tessitura
- Tessitura RAMP venue; web uses TNEW; email system YMLP





## 16,044

The number of **new email addresses** available for marketing – from 10,173 to 26,217 (increase of **157%**)



## 14,540

The number of records **merged** in Tessitura to reduce duplicate mailings.

**Mail Restriction:**

## 148,323

The number of records with clear **postal data protection** preferences.

## 2

The number of **new departments** using the system.

## unlimited

The number of constituents and orders that can be imported using the Constituent Order Process and the Constituent Import Process.



## 19

The number of **Royal Exchange staff** who have new and improved Tessitura skills



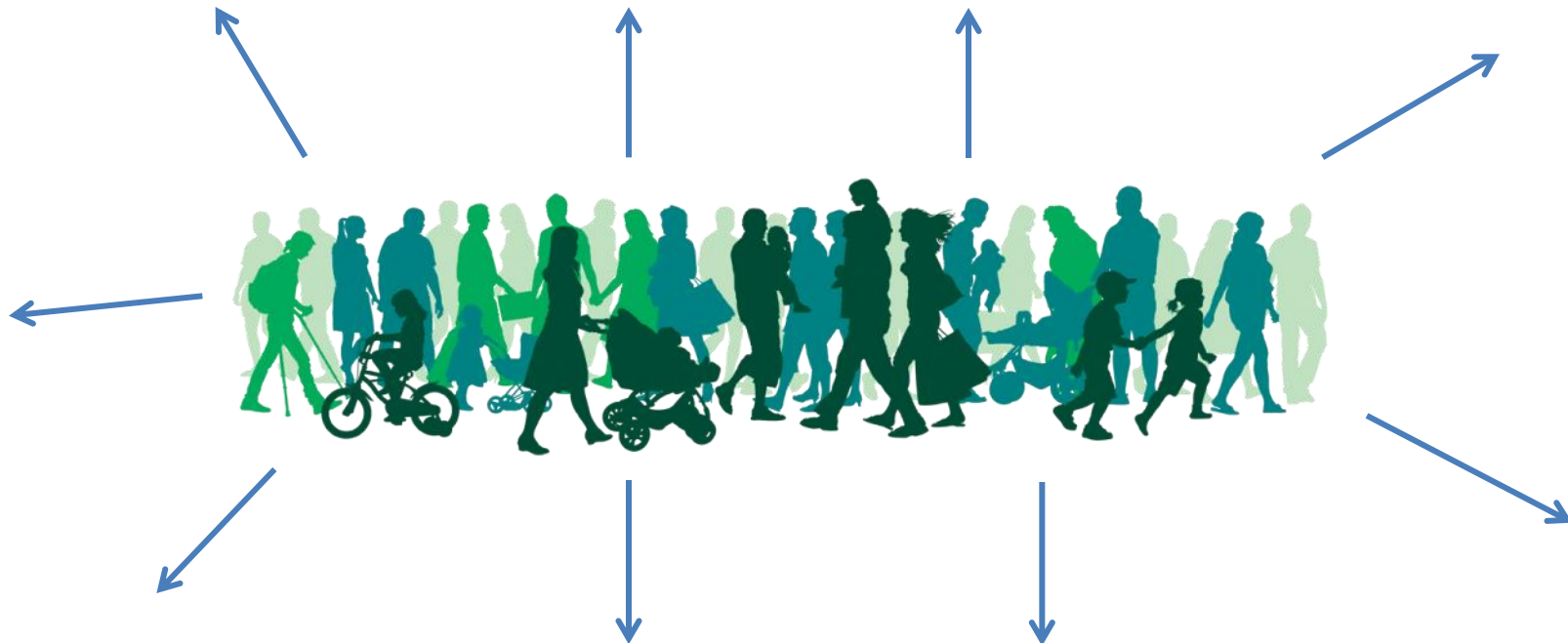
## Changing Perspective

- As well as all the practical steps to improve Tessitura (such as data protection, data audits, merging) etc., we wanted to change our perspective
- We often think about things on a per campaign basis – for example, **who should I send this leaflet/email to?**



## Considering the Constituents not the Campaign

- Instead of thinking “who should I send this leaflet/email to?” we wanted to look at the constituents on the database and consider:
  - **what would we like our constituent groups to receive and are there any groups not yet on the database?**



## Constituent Focussed Approach

- Identify those:
  - not making it into the database (e.g. front of house visitors)
  - who have opted out of communication – when did they last get the opportunity to choose?
  - in a gap – are there a group of people being protected from general marketing mailings by a Development flag but not actually being actively contacted by Development?
  - being ‘over contacted’, for example the same people being contacted by several different departments

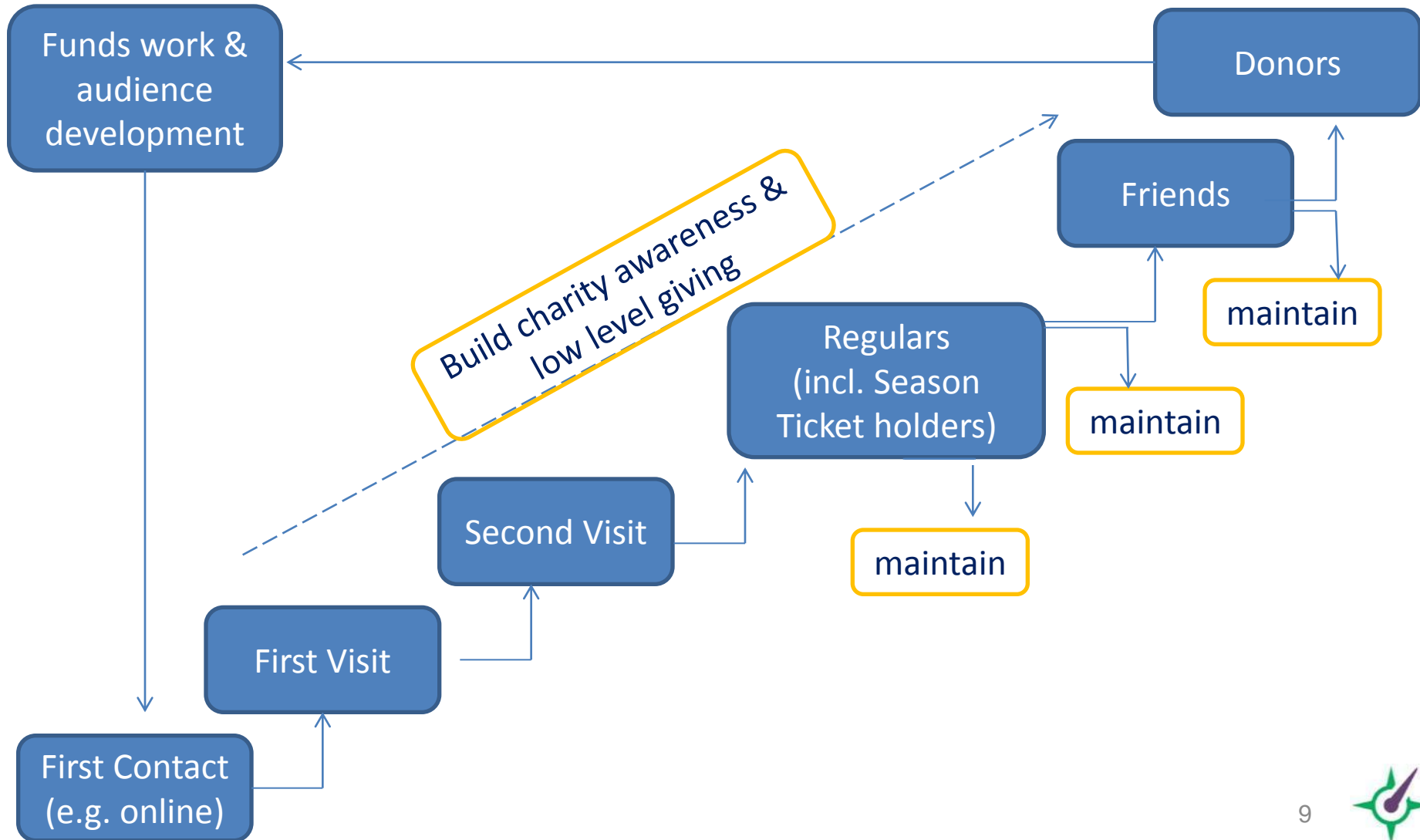


## Using the ‘Ladder of Engagement’

- A ‘ladder of engagement’ or ‘customer journey’ is a model which helps arts organisations focus on the types of activities that will help achieve their objectives
- This model is really useful when looking at the constituent focussed approach
- Using the Ladder in combination with objectives allows you to create activities at each stage
- This model can be used throughout the year to help with planning and reflect on the success of previous initiatives
- The model can also identify if there are any ‘stumbling blocks’ in encouraging audiences to engage at the next level



# Ladder of Engagement

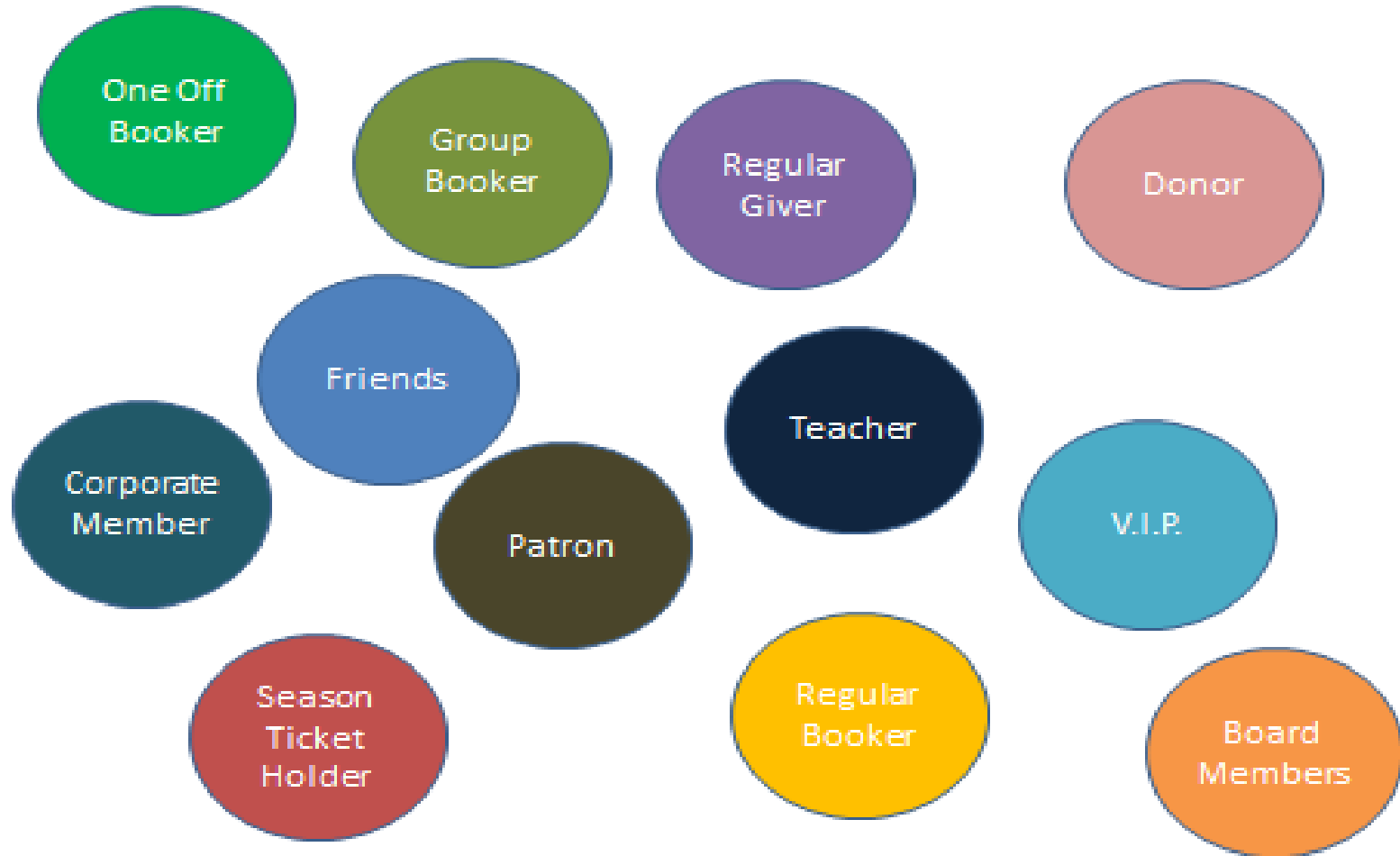


## Example Actions from the Ladder of Giving

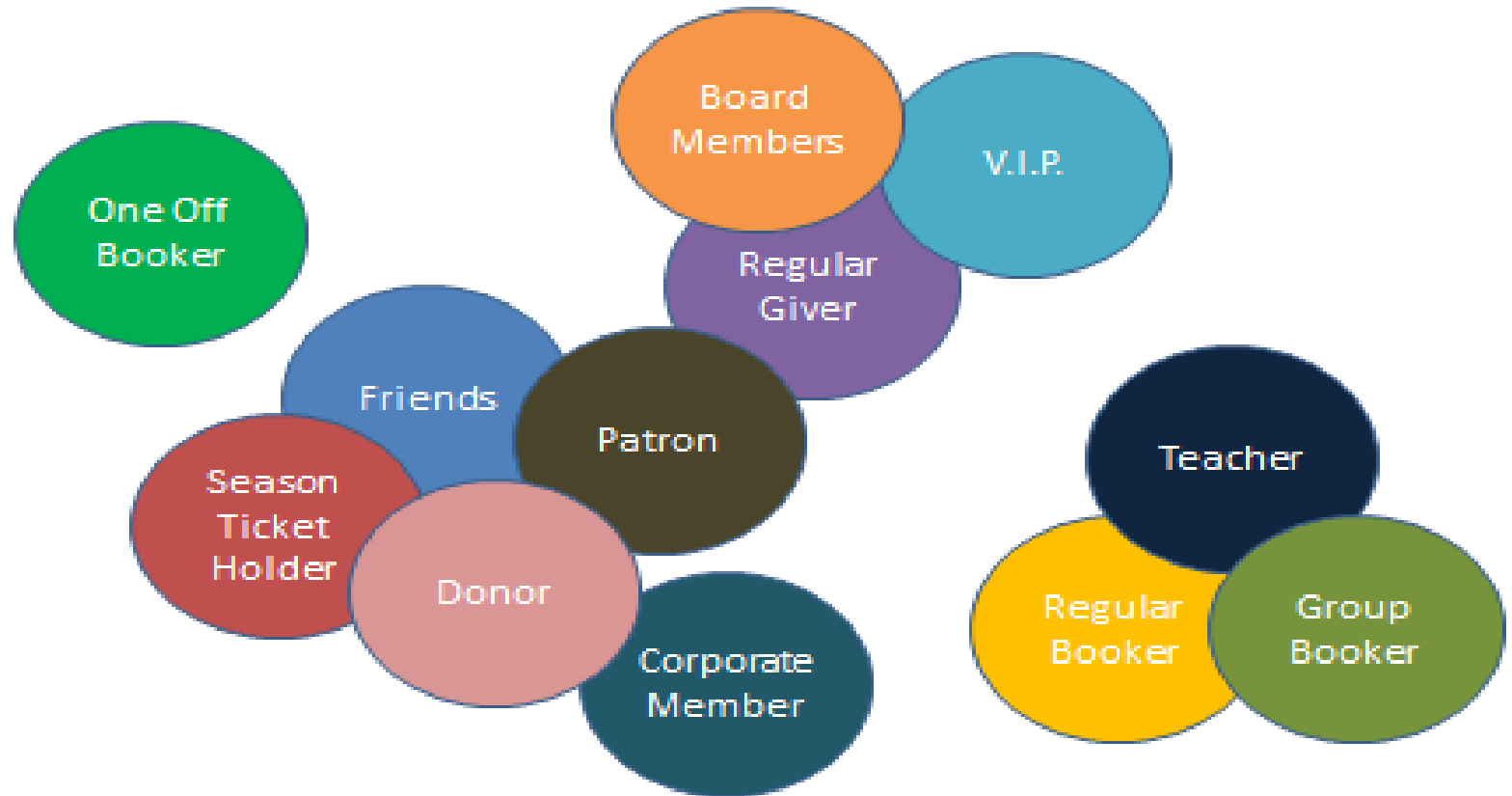
- Consider encouraging & increasing Data Capture for the first two stages
  - Email sign up on a touch screen front of house / Text to sign up to email / Direct people to Box Office to hand in a sign up card
  - Email sign up at information point
  - Card promoting email sign up, Facebook, Twitter etc. to be distributed with Coffee, Tickets, Craft Shop, to Groups, with Tickets, Room Hire etc. etc.
  - Follow each email sign up or account creation with a Welcome Email (4 X more likely to be read than other emarketing)
  - Trial sign up direct to Tessitura (using Create an Account) for 6 weeks
  - Reaching staff of Corporate Donors by encouraging email sign up



We all have these or similar "groups" in our database



But in reality they probably look something like this



**We can have one or several relationships with each of the patrons on our database. This can raise several questions when it comes to mass mailings:**

- Who is contacting which patrons?
- Who are the most important patrons?
- If they have several relationships with us which would we and they view as being the most important?
- Are we mailing them more than once with the same information?
- Is anyone contacting them at all?



## As an exercise The Royal Exchange Theatre looked at one of our main mailings of the year: Our Season Announcement.

- Gathering all the relevant departments together we spent considerable time looking at all of the different types of patrons we had and created an “order of importance”.
- We then considered if any of those groups should be contacted in a specific way by a specific department or whether they could be left as part of the mass mailing by marketing.
- However if they were to be contacted by a specific department we needed to ensure that they would receive all the relevant information for each of the relationships they had with us.
- e.g. A Patron who is also a Season Ticket Holder would be contacted by our Development Department as a Patron (this having been identified as the primary relationship) but it was important to ensure that they also received, in the same mailing, all the information being sent to season ticket holders.



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File GoTo Reports Tools Window Help

				019 - Foreign Address	11	
				006 - No Mail and No Post check box	1,298	
015	Returned mail or Gone Away	50	1,345	1,269	013 - Inactive accounts & Deceased	3
				019 - Foreign Address	1	
				006 - No Mail and No Post check box	68	
				014 - Incomplete Address	4	
016	NONE address or M2 7DH postcode	60	10,000	273	013 - Inactive accounts & Deceased	963
				019 - Foreign Address	11	
				006 - No Mail and No Post check box	1,719	
				014 - Incomplete Address	7,034	
018	Staff and Actors	70	373	16	006 - No Mail and No Post check box	204
					016 - NONE address or M2 7DH postcode	153
017	Press and Guests	80	150	61	006 - No Mail and No Post check box	69
					014 - Incomplete Address	6
					016 - NONE address or M2 7DH postcode	14
020	board members	90	14	4	006 - No Mail and No Post check box	6
					018 - Staff and Actors	2
					017 - Press and Guests	2
021	vip	100	143	62	006 - No Mail and No Post check box	64
					014 - Incomplete Address	4
					016 - NONE address or M2 7DH postcode	1
					018 - Staff and Actors	2
					017 - Press and Guests	6
					020 - board members	4
022	corp des mkr	110	10	7	006 - No Mail and No Post check box	3
023	patrons	120	7	3	006 - No Mail and No Post check box	2
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024	ind mems	130	12	3	006 - No Mail and No Post check box	6
					021 - vip	1
					023 - patrons	2
025	friends	140	330	312	006 - No Mail and No Post check box	13
					018 - Staff and Actors	2
					021 - vip	1
					023 - patrons	2
026	corp bkrs	150	11	1	006 - No Mail and No Post check box	10
027	seas tix ss12 aw 11	160	1,972	1,603	006 - No Mail and No Post check box	327
					015 - Returned mail or Gone Away	5
					016 - NONE address or M2 7DH postcode	3
					023 - patrons	1
					025 - Friends	33
028	reg givers	170	414	189	013 - Inactive accounts & Deceased	1
					006 - No Mail and No Post check box	131
					015 - Returned mail or Gone Away	3
					016 - NONE address or M2 7DH postcode	1
					018 - Staff and Actors	1
					023 - patrons	2
					025 - Friends	29
					027 - seas tix ss12 aw 11	57
029	teacher ex forum	180	102	96	006 - No Mail and No Post check box	6
030	teachers (list 1 & 2)	190	1,215	1,055	019 - Foreign Address	8
					006 - No Mail and No Post check box	105
					014 - Incomplete Address	5
					021 - vip	1
					025 - friends	1
					029 - teacher ex forum	40

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We used extraction manager to create a “Segmentation Priority List” this gave us a fairly clear picture of where some of our relationship crossovers occurred.

So here we could see that 2 of our Friends are also Patrons and we could quite easily identify who they were and ensure that they were contacted once, in a way suitable to there primary relationship, but receive all the relevant information

## So, does the theory work in practice?

- We found that by using lists and being very strict about promoting our mailings we could achieve most of the aims of the exercise
- We concentrated on the “higher levels of importance” where the numbers are, in the main, fairly small
- Timing was of the essence and by ensuring that the planned individual department mailings were all ready at the same time dealing with the multiple relationship patrons was not too much of an issue
- Marketing were then able to use the promoted mailings as a suppression when it came to building their lists for “lower level of importance” groups.
- A follow up exercise after the event meant that we could use the promotions to check that all the patrons originally identified as to be included had in fact been mailed



## What benefits did this have?

- We were able to track that we were only mailing each patron once
- No one was being missed on the assumption that they were being mailed by someone else
- We felt that mailing people under the guise of what we, or more importantly sometimes what they, thought of as their primary relationship with us showed a more joined up approach to dealing with them as individuals rather than as a 'type' of customer
- This hopefully could lead them to feel more valued and as such easier for us to move them along the ladder of engagement

