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Tessitura
CONFERENCE

HOSTED BY THE

RSC

2012

“Heard it through the Grapevine”

MATTHEW COLLINS



COMMUNICATIONS AND INTERACTION

Why “Heard it through the Grapevine?”

- As much about communications with the **outside** world as it is about communications **within** the organisation.
- How do we coordinate communications and also ensure that people are getting the right message at the right time?
- For Development this was of particular interest because our contacts are more likely to wear a number of RSC hats and they will be at a particular stage in a solicitation plan.

Across the RSC

Case studies

- Current departments using Tess for communications are Development, Marketing, Press, Education, Events and Exhibitions, Executive and Associate offices with plans to extend this to our Casting and Producers' teams etc.

Communications and Interaction

RSC MAILING/EMAILING COORDINATION PLAN

“It has been identified that some RSC contacts are at risk of receiving duplicate mailings: a greater level of coordination with respect to direct communication is required to prevent this. The reasons for duplicate communication include:

Many RSC department constituent groups overlap. Those receiving duplicate communication are more likely to be high-profile individuals who have extensive involvement with and across the organisation and its overlapping constituencies.

Mailing lists exist in a number of locations (not just Tessitura).

The process of manually maintaining, checking and de-duping spreadsheets is open to error.”

Mailing Coordination Plan

Standard Mailing SEGMENTS these can be used as suppressions or removed depending on the nature of the mailing and consulting with the segment "owner".

	Tessitura Segment	Constituent Groups	Owner (all other users to suppress groups listed above unless with permission from owner)	Tessitura "flag"
	EO1	ES - HRH & contacts	Michele Percy - 2609	HRH > HRH
	EO2	ES - Board	Michele Percy - 2609	Constituency in (Board Member)
	EO3	ES - Gov & former Board contacts	Michele Percy - 2609	Constituency in (Governor) OR List in (64230)
	EO4	ES - Hon/Hon Emer/Hon Life Govs	Michele Percy - 2609	Constituency in (HE Gov, H Gov, L Gov)
	AO1	ES - Associate Artists	Amanda Carroll - 2624	Constituency in (Alumni - Associates)
	023	ES - Alumni	*See below	Constituency in (Alumni – Actor/Creative Teams/Industry/Writer)
	DV1	ES - Dev Memb - SC,AC,PA,CM*	Matthew Collins - 2521	Constituency in (AC Memb, Corp Memb, Patron F, Patron SM, S Circle Friend, S Circle Memb)
	DV2	ES - Dev Other - An,P,MAG,IC,BDF	Matthew Collins - 2521	Constituency in (Anon, BDF, IC Memb, MGD, Prospect)
	DV3	ES - US Board	Matthew Collins - 2521	Constituency in (US Board Member)
	PR1	ES - Press Stakeholder	Lucien Riviere - 2281; Lucy Billiard - 2441	Stakeholder in (Courtyard PN, RST PN, Swan PN)
	ME1	RSC Members*	Jo Litt - 2557	Membership Level in ('FFO', 'FO', 'FF', 'F', 'AF', 'AO', 'A') AND Membership Status in (Active, Pending)
	MK1	Staff - current/ex	Beccy Loftus - 2302	Staff in ('RSC Ex Staff','RSC Staff') OR Price Type in (RSC Staff Ticket)
	MK2	Country outside UK	Beccy Loftus - 2302	Country not in (United Kingdom)
	MK3	Primary address at RSC	Beccy Loftus - 2302	Postal Code = CV37 6BB AND Primary Address Flag in ('Y') OR Postal Code = WC2H 9LL AND Primary Address Flag in ('Y')
	MK4	Mailed in last 14 days	Beccy Loftus - 2302	Days Since Last Mail <= 14
	MK5	Customer types not Individuals	Beccy Loftus - 2302	Constituent Type in (Cor, Gov Agcy, Grp, Hshld, School, Trst/Fdntn)
	Mk6	Audience Development Forum	Beccy Loftus - 2302	Constituency in (Audience Development Forum)
	079	RSC Key	Laura McMillan	16-25 RSC Key in (Joined)
	938	Suppress No to LCF	Matthew Collins - 2521	No To in 'RSC(LCF)'
	941	Metamorphic marked 2011 - Deceased	Beccy Loftus - 2302	Metamorphix marked 2011 in 'Deceased'
	940	Suppress Open Table	Beccy Loftus - 2302	Original Source Code in 'Import from Restaurant' and No of unique perms <= '0'
	TS1	Teaching Shakespeare Only	Melanie Whitehead - 2435	Mail List in 'Teaching Shakespeare SUPPR'
	EN1	External hires active contacts	Lucy Robertson - 2290	Constituency in (Commercial Hires)

[1] Alumni - Actor (no owner)
 Alumni – Creative Teams (Producers)
 Alumni – Industry (only if Gatekeeper indicated)
 Alumni – Writer (Literary)

Mailing Coordination Plan

■ Constituency – these define relationship to RSC and set security

EO2 | ES - Board | Michele Percy - 2609 | Constituency in (Board Member)

General	Names	Contact Details	Constituencies			Relationships	Research	Attributes
Constituency	Code	Start Date	End Date	Created	Modified			
David Tennant								
★ Board Member	BUK	18/06/2012	00/00/0000	✘	Created: 18/06/2012 14:23:27 by ACarroll at RSCA6519 Modified: 10/07/2012 10:25:32 by dbo			

■ Attribute

PR1 | ES - Press Stakeholder | Lucien Riviere - 2281; Lucy Billiard - 2441 | Stakeholder in (Courtyard PN, RST PN, Swan PN)

Stakeholder	Swan PN	✘	Created: 11/04/2008 11:08:53 by RHarris at RSC00 Modified: 10/07/2012 10:27:19 by dbo	
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Mailing Coordination Plan

- Address (internal) e.g. some Governors, Staff

MK3	Primary address at RSC	Becky Loftus - 2302	Postal Code = CV37 6BB AND Primary Address Flag in ('Y') OR Postal Code = WC2H 9LL AND Primary Address Flag in ('Y')
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Define Criteria for Segment MK3 'Primary address at RSC' (priority 220)

Criteria	Operator	Value	Search Household
Postal Code	=	CV37 6BB	<input type="checkbox"/>
Primary Address Flag	In	(1 value selected)	<input type="checkbox"/>
OR			
Postal Code	=	WC2H 9LL	<input type="checkbox"/>
Primary Address Flag	In	(1 value selected)	<input type="checkbox"/>

- Mailing date (and email date)

MK4	Mailed in last 14 days	Becky Loftus - 2302	Days Since Last Mail <= 14
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Define Criteria for Segment MK4 'Mailed in last 14 days' (priority 250)

Criteria	Operator	Value	Search Household
Days Since Last Mail	<=	14	<input type="checkbox"/>



Standard Suppressions

Case studies

■ Inform the Standard Suppressions

Extraction Manager								
5207	V11	Suppression List ASSOCIATES EMAIL	(Default Control Group)	11/07/2012	RHarris	Open	Mass Mailing	<input type="radio"/>
5214	V11	Suppression List ASSOCIATES MAIL	(Default Control Group)	11/07/2012	RHarris	Open	Mass Mailing	<input type="radio"/>
5206	V11	Suppression List BOARD & GOV EMAIL	(Default Control Group)	11/07/2012	RHarris	Open	Mass Mailing	<input type="radio"/>
5213	V11	Suppression List BOARD & GOV MAIL	(Default Control Group)	11/07/2012	RHarris	Open	Mass Mailing	<input type="radio"/>
5204	V11	Suppression List DEV EMAIL (Dev conts not exc)	(Default Control Group)	11/07/2012	RHarris	Open	Mass Mailing	<input type="radio"/>
5203	V11	Suppression List DEV EMAIL (excl Dev contacts)	(Default Control Group)	11/07/2012	RHarris	Open	Mass Mailing	<input type="radio"/>
5211	V11	Suppression List DEV MAIL (Dev conts not exc)	(Default Control Group)	11/07/2012	RHarris	Open	Mass Mailing	<input type="radio"/>
5210	V11	Suppression List DEV MAIL (excl Dev contacts)	(Default Control Group)	11/07/2012	RHarris	Open	Mass Mailing	<input type="radio"/>
5215	V11	Suppression List EDUC MAIL (excl Members)	(Default Control Group)	11/07/2012	RHarris	Open	Mass Mailing	<input type="radio"/>
5216	V11	Suppression List EDUC MAIL (Members not excl)	(Default Control Group)	11/07/2012	RHarris	Open	Mass Mailing	<input type="radio"/>
5201	V11	Suppression List MKTG EMAIL (excl Members)	(Default Control Group)	11/07/2012	RHarris	Editing	Mass Mailing	<input type="radio"/>
5202	V11	Suppression List MKTG EMAIL (Members not excl)	(Default Control Group)	11/07/2012	RHarris	Open	Mass Mailing	<input type="radio"/>
5208	V11	Suppression List MKTG MAIL (excl Members)	(Default Control Group)	11/07/2012	RHarris	Open	Mass Mailing	<input type="radio"/>
5209	V11	Suppression List MKTG MAIL (Members not excl)	(Default Control Group)	11/07/2012	RHarris	Open	Mass Mailing	<input type="radio"/>
5205	V11	Suppression List PRESS EMAIL	(Default Control Group)	11/07/2012	RHarris	Open	Mass Mailing	<input type="radio"/>
5212	V11	Suppression List PRESS MAIL	(Default Control Group)	11/07/2012	RHarris	Open	Mass Mailing	<input type="radio"/>

Timing Communications

- Promotions: all of our communications are tracked through the Promotions area of Tessitura. This is crucial in ensuring that the timing of our communications are right and in avoiding duplicate communications which can be costly and annoying to the recipient!
- It also means that a chain of priority can be followed; e.g. our supporters receive information ahead of our audiences.
- Each promotion sits within an appeal on Tessitura and records each touch point with the organisation through the Contact Log.
- One way in which we avoid “over communicating” is through an agreement that no one should receive:
 - More than 2 postal mailings in a two-week period
 - More than 2 emails in a seven-day period

To achieve this we have a custom-built criteria which is included in our Standard Suppressions

BUT: you don't need a custom criteria! You can also achieve this through the following: #PIC#

Gatekeepers

- Gatekeepers are stored as an attribute and can now be seen in a pop-up box by hovering over the name in the constituent header.
- Furthermore, our ambition is to extend the knowledge we have on our constituents by using the Notes section to include Biographies and Briefing Notes accessible to a number of departments
- This, along with recently making total giving feature on the header, is incredibly important in demonstrating the role of the Development Department in the organisation, and indeed the importance of the relationship of the constituent to the organisation.

Mr Matthew Collins
#2107324
SC

Level: **SCI** **Active**
Memb. Expiration: **01/12/2013**
Total Giving: **£1.28**

Gatekeeper
Matthew Collins

History Connections Contributions
General Names Contact Det

Attributes Interests

Attribute	Attribute Value	Cre
Matthew Collins		
Birthdate	09/02/1982	Cre Mod
Gatekeeper	MCollins	Cre Mod
Mail List	Exhibitions	Cre Mod
Mail List	Music/Comedy	Cre Mod

Donor Communications

What happens in Development

- Major donor communications are tracked as Solicitation Tasks. Whilst the Solicitation track is highly confidential and hidden to most users of the system, these tasks are visible in the Contact Log.
- Why do we do this? It attaches this highly-bespoke communication to a specific fundraising strategy, a personalised Appeal if you like:

– Solicitation = Appeal
– Task = Promotion

#2 Builders' Night

Output Set Builder

Request to see the range of activity and who had been invited to:

- builders night
- builders' night rehearsal
- TYS event
- Members event

...and who had invited them or what list they were on.

#2 Builders' Night

Case studies

Royal Shakespeare Company

Patron Activity

MCollins 29/10

Activity Dates: 2010-11-2: to: 2010-11-2:

Activity Types: Event

Host: (All)

Status: (All)

Membership Level: (All)

List: MC 1029 Staff

Show Notes: Yes

Const ID	Name	Salutation	Activity Date	Host	Attendees	Performance	Solicitor	Status
Activity Type: Event								
1225803	Mr Simon Harper	Mr Simon Harper Note: NClements *Builders' Night	27/11/2010		2		JByczyns	Accepted
1259187	Miss Noma Dumezweni 3UK, G, AAR, TYS	Miss Noma Dumezweni Note: Michele Percy*Builder's Night	27/11/2010	MPercy			CJones	Invited

Putting it into Practice

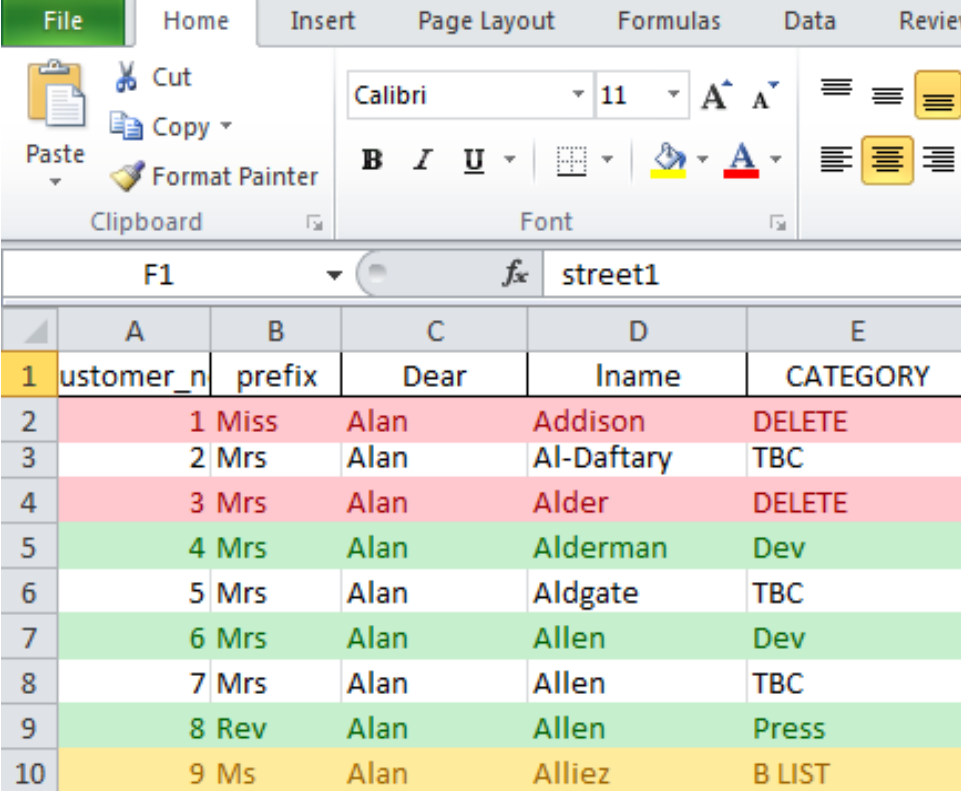
Case studies

- Communication run on a department-by-department basis, respecting the standard suppressions and mailing co-ordination plan (i.e. where communication messages are different)
- Two case studies which detail occasions when we had to communicate as an organisation:
 - reopening of our new theatre
 - announcement of our new executive team

#1 Announcement of new executive team

Spreadsheets

- Spreadsheets are still incredibly useful and universally familiar
- Individuals can edit spreadsheet and this can be reimported into Excel
- Remember to keep the ID number in your spreadsheet! This is what tells Tessitura who is in your list.
- The spreadsheet sits centrally for all departments to amend by categorising each name.



The screenshot shows the Microsoft Excel interface with the following data in the spreadsheet:

	A	B	C	D	E
1	ustomer_n	prefix	Dear	Iname	CATEGORY
2	1	Miss	Alan	Addison	DELETE
3	2	Mrs	Alan	Al-Daftary	TBC
4	3	Mrs	Alan	Alder	DELETE
5	4	Mrs	Alan	Alderman	Dev
6	5	Mrs	Alan	Aldgate	TBC
7	6	Mrs	Alan	Allen	Dev
8	7	Mrs	Alan	Allen	TBC
9	8	Rev	Alan	Allen	Press
10	9	Ms	Alan	Alliez	B LIST

#1 Announcement of new executive team

Importing a list

- Save your spreadsheet as a text tab delimited file
- Click import in List Manager
- Navigate to where the list is saved
- Indicate where the ID numbers are stored, and import

59902	MCollins	16/02/2009	09:51	DEV ALL AC not in I
59900	MCollins	16/02/2009	09:49	DEV ALL Patrons (in
59901	MCollins	16/02/2009	09:50	DEV ALL S Circle (in
167186	MCollins	29/10/2012	12:12	DEV DD in past year
143182	MCollins	14/03/2012	14:39	DEV DD's for Dev
157667	MCollins	24/07/2012	15:12	DEV Individuals+HH+
98423	MCollins	26/07/2010	12:21	DEV Join Us Direct C
88207	MCollins	30/03/2010	17:11	DEV Renewal Exclus
137552	MCollins	18/01/2012	10:23	DEV Rev Direct Deb
110846	MCollins	01/02/2011	17:04	MC 0102 Membershi
108879	MCollins	05/01/2011	10:02	MC 0105 Rev Contril

Import List

First Data Row: 2 Customer No Column: 1

Create New List

List Name: DEV Contacts for Announcement

Category: (unassigned)

Control Group: (Default Control Group)

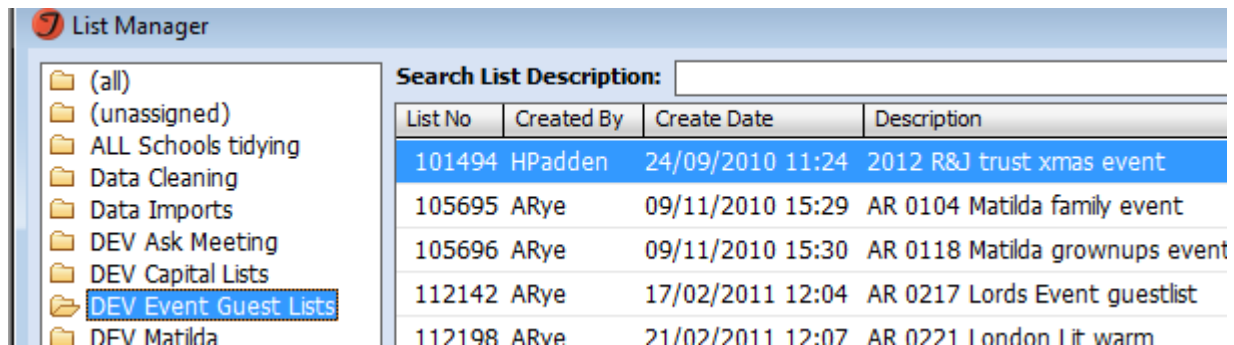
TMS TStats
 Dynamic Inactive

Save Cancel

List Manager

Case studies

- Folders in list manager

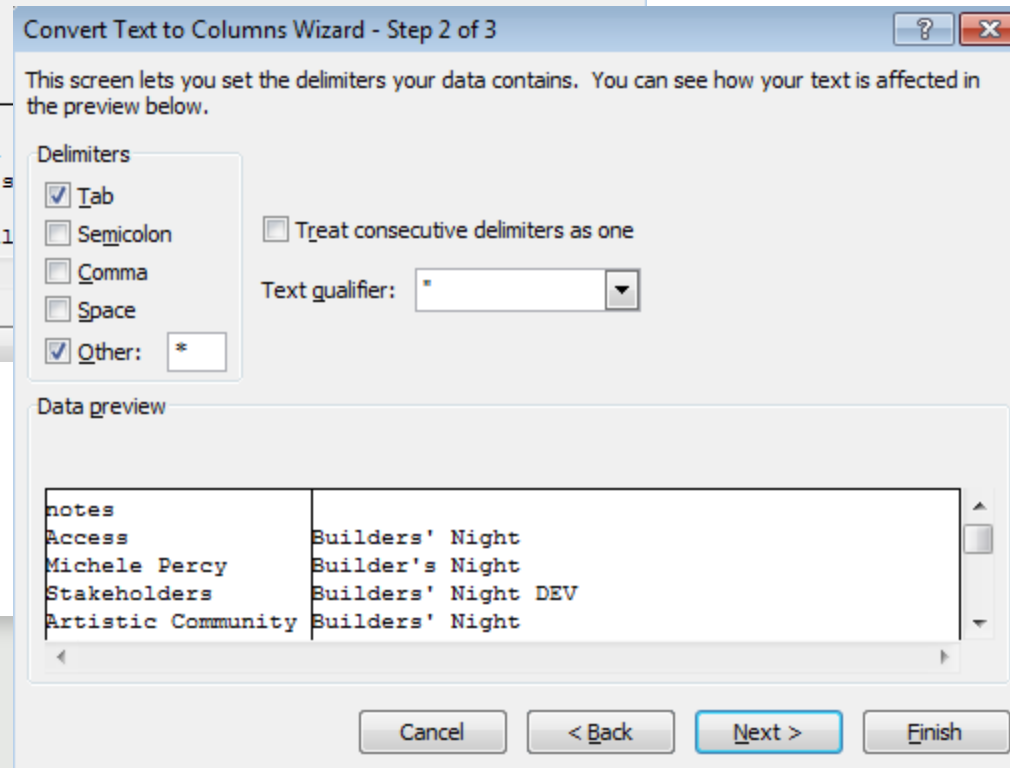
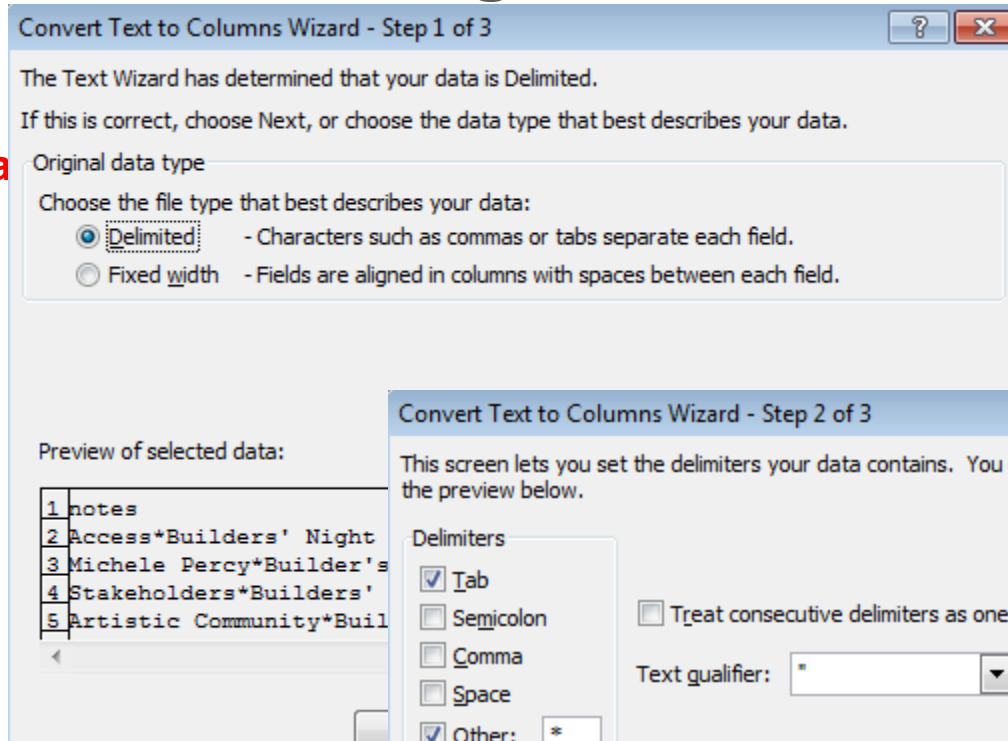


The screenshot shows the 'List Manager' application window. On the left is a folder tree with the following items: (all), (unassigned), ALL Schools tidying, Data Cleaning, Data Imports, DEV Ask Meeting, DEV Capital Lists, **DEV Event Guest Lists** (highlighted), and DFV Matilda. On the right, there is a search bar labeled 'Search List Description:' and a table with the following data:

List No	Created By	Create Date	Description
101494	HPadden	24/09/2010 11:24	2012 R&J trust xmas event
105695	ARye	09/11/2010 15:29	AR 0104 Matilda family event
105696	ARye	09/11/2010 15:30	AR 0118 Matilda grownups event
112142	ARye	17/02/2011 12:04	AR 0217 Lords Event guestlist
112198	ARve	21/02/2011 12:07	AR 0221 London lit warm

#2 Builders' Night

Ca



#2 Builders' Night

Output Set Builder

We followed our format of using an asterisk to identify the list they fall We created custom elements in Output Set builder (TR_QUERY_ELEMENT) which output the notes specific to an activity on a particular date (i.e. output activity notes where event date = 5 Dec 2010)

Each of these elements was represented by a column on the final spreadsheet, making it readable and useful to spot duplications and gaps.

	A	C	E	F	G	H
1	tomerr	fname	20-Nov	22-Nov	05-Dec	06-Dec
2	1	Ian			TYS List	
3	2	Claire	Exec Director List	Development List		Member list
4	3	Dan				
5	4	Christopher			TYS List	
6	5	Leonard	Development List			
7	6	Paul			TYS List	
8	7	Neil	Press List			Member list
9	8	Richard	Exec Director List			
10	9	Michael			TYS List	
11	10	Amy				

THANK YOU

