

# Jessitura



**EUROPEAN  
CONFERENCE 2015**

**5 & 6 NOVEMBER  
NOTTINGHAM**

## **DATA CLEANSING**

**See the (Sher)wood  
for the trees**

### **PRESENTERS**

**Anna Coles : Wales Millennium Centre**  
**James Broderick : National Theatre**  
**Victoria Carlin : National Theatre**  
**Caspian Turner : Southbank Centre**

### **MODERATOR**

**Rich Surgay : Nottingham Playhouse**

### **CONTENT PLANNER**

**Caryl Jones : Royal Albert Hall**



CANOLFAN  
MILENIWM  
CYMRU  
WALES  
MILLENNIUM  
CENTRE®

# Data Cleansing

*How to keep a neat and tidy database*

**Anna Coles**  
SQL Support Analyst

# Session Outline

Automated Procedure



Identifying Duplicates  
Custom Report



Fix Address Errors  
Overnight Procedure



Wales Millennium Centre



*Two nightly procedures*

Identifies potential duplicates in the system BUT....

Only works on identical constituents!

Name	Const ID	Street Address	Postal Code	City	Locale	Street2
Mr Timothy Edwards	1245899	Flemingston	CF62 4QL	BARRY	South Glamor	12 Newbarn Holdings
Mr Timothy Edwards	1245898	Flemingston	CF62 4QL	BARRY	South Glamor	12 Newbarn Holdings

Identifies duplicates by:

- First 5 characters of first name
- First 10 characters of last name
- First 7 characters of first line of address
- Postcode

TimotEdwards12NewbaCF624QL

String	Count
TimotEdwards12NewbaCF624QL	2

## Automated Merge Procedure

2<sup>nd</sup>  
Procedure

*Two Nightly Procedures*

Merges the 2 records together

A points system is used to workout which record is kept and which is merged.

1000

10

2

1

<b>critierion</b>	<b>customer_no</b>	<b>status</b>	<b>keep_cust</b>
TimotEdwards12NewbaCF624QL	1245899	K	
TimotEdwards12NewbaCF624QL	1245898	D	1245899

Built to identify duplicate records that will never be picked up by our auto procedure

Name	Const ID	Street Address	Postal Code	City	Locale	Street2
Miss A Coles	1245913	West Bute Street	CF10 5LL	CARDIFF		Flat 18, Cymric Buildings
Miss Anna Coles	307051	West Bute Street	CF10 5LL	CARDIFF		Flat 18, Cymric Buildings

ID	Prefix	First Name	Middle Name	Last Name
1245913	Miss	A		Coles

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**Mailing Address**

Salutation 1: Miss A Coles  
 Salutation 2:   
 Business Title:   
 Street 2: Flat 18, Cymric Buildings  
 Street 1: West Bute Street  
 Street 3:   
 Locale: CARDIFF **CF10 5LL** RA  
 Country: United Kingdom Home Address  
 Dear: Miss Coles Gen Sal

---

**Other**

Original Source: Internet Constituent Type: Individ  
**Email: annacoles@talktalk.net** (send) Last Activity Date: 29/09

ID	Prefix	First Name	Middle Name	Last Name
307051	Miss	Anna		Coles

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**Mailing Address**

Salutation 1: Miss Anna Coles  
 Salutation 2:   
 Business Title:   
 Street 2: Flat 18, Cymric Buildings  
 Street 1: West Bute Street  
 Street 3:   
 Locale: CARDIFF **CF10 5LL** RA  
 Country: United Kingdom Home Address  
 Dear: Miss Coles Gen Sal

---

**Other**

Original Source: Internet Constituent Type: Individ  
**Email: annacoles@talktalk.net** (send) Last Activity Date: 22/09

Records identified using this criteria: **21,858**

## How do we use it?

### !! IMPORTANT INFORMATION !!

Please **do not** use this report as a tool for scheduling merges unless you fully understand the instruction below. If you are unsure, please speak to your line manager or contact the Tessitura team at Wales Millennium Centre by raising a ticket on our helpdesk.

This report will display records that have been identified as duplicates but haven't been picked up by our auto-merge procedure. This is most likely because the names don't match/we only have an initial or because the addresses are slightly mismatched. For more information on how our auto merge procedure works, please read the WIKI page below:

- [http://10.0.184.4:82/Tessitura\\_SOP.Merge-ALL-V12.ashx](http://10.0.184.4:82/Tessitura_SOP.Merge-ALL-V12.ashx)

- To use this report you must first select a letter you want to view. This will select all records with first names beginning with the letter you have chosen. This just helps to keep the volume of displayed data down.

Once the report has run, you can then see the constituent's that need their records matching so that they will merge using our auto procedure. Please check the following:

- The names on all flagged records are identical - for general housekeeping, please make sure the casing is correct on the name.
- The address fields are identical **\*\*\*PLEASE USE RAPID ADDRESS TO ENSURE WE KEEP ADDRESSES IN THE CORRECT FORMAT \*\*\***

Once all highlighted records match, they will be flagged by our merge procedure as duplicates and merged overnight.

\*\*\*\*Our merge procedure has two parts to it. The first procedure identifies records in the database that are potential duplicates and moves them into a table for potential duplicates – this procedure runs **every night** at 03:00am and records that are sitting within this table will not show up on the report. The second procedure does the actual merge of the records into one, this procedure runs **every night** at 04:30am. So as long as you've matched 2 records on the report, they will disappear from the report overnight as they are moved into our 'potential dupes' table.\*\*\*\*

You may now move on to the next constituent.

#### What does the green tick mean?

If you see the green tick in the final column of the report, it means that the constituents record has been updated today, this most likely because someone else is/has been using the report and so this record does not need addressing. It could be that the record has been updated for another reason but it's fine to leave, as tomorrow the green tick will be gone because the update date will be in the past. This is purely here to try and avoid time wasting. If you notice a lot of green ticks we advise that you choose another letter for today as it's likely someone else is working on that letter. The green tick will only appear once you have refreshed the report, or if a user runs the report after you have started using it.

#### What do I do if the constituent only has an initial and not a complete first name?

If all flagged duplicates only have an initial then please look through the other tabs in Tessitura for evidence of their first name, these can often be found on an e-mail address, or on a transaction where the persons payment name is their first name.

# How does it work?



Name	E-mail Address	Constituent ID	Const Name	Street 1	Street 2	City	Locale	Postcode	Ignore
Zac Ashby	zac.ashby@ashby.co.uk	1245923	Zac Ashby	49 Llanmaes Road		LLANTWIT MAJOR	South Glamorgan	CF61 2XE	
		1245930	Z Ashby	49 Llanmaes Road		LLANTWIT MAJOR	South Glamorgan	CF61 2XE	
	zeusy@zeusy.co.uk	1245926	Zeus Dodd	Pencoed	13 Pen Gwern	BRIDGEND	Mid Glamorgan	CF35 6YE	
		1245933	Zues Dodd	Pencoed	13 Pen Gwern	BRIDGEND	Mid Glamorgan	CF35 6YE	
	ziam@test.co.uk	1245927	Zia Lam	12 Four Acre		LLANTWIT MAJOR	South Glamorgan	CF61 2XN	
		1245934	Z Lam	12 Four Acre		LLANTWIT MAJOR	South Glamorgan	CF61 2XN	
	zoepeters@trent.com	1245929	Zoe Peters	Clifton Lane	Peverell, Clifton Campus	NOTTINGHAM		NG11 8NS	✓
		1245936	Zoe Peters	Clifton Lane	Peverell, Clifton Campus	NOTTINGHAM		NG11 8NS	✓
	zoes@email.com	1245924	Zoe Sherwood	West Bute Street	Flat 18, Cymric Buildings	CARDIFF		CF10 5LL	
		1245931	Zoe Sherwood	Flat 18, Cymric Buildings	West Bute Street	CARDIFF		CF10 5LL	
	zaravarney@123abc.com	1245925	Zara Varney	Flemingston	12 Newbarn Holdings	BARRY	South Glamorgan	CF62 4QL	
		1245932	Zara Varney	Flemingston	12, Newbarn Holdings	BARRY	South Glamorgan	CF62 4QL	
	Zackwilliams@zack.org.uk	1245928	Zack Williams	1 Raglande Court		LLANTWIT MAJOR	South Glamorgan	CF61 1TB	
		1245935	Z Williams	1 Raglande Court		LLANTWIT MAJOR	South Glamorgan	CF61 1TB	

**Name**

**ID**  
1245929

**Mailing Address**

**Salutation 1:** Z

**Salutation 2:**

**Business Title:**

**Street 2:** P

**Street 1:** C

**Street 3:**

**Locale:** M

**Country:** L

**Dear:** Z



## Fix Address Errors

Used to fix incorrect address entry for 2 of our consortium partners

A procedure runs at midnight each night that takes any records created that day and swaps the information over.

**Day 1:** Account created, address information inserted the wrong way around:

Name	Const ID	Street Address	Postal Code	City	Locale	Street2
Chloe Shafto	1245950	13 Pen Gwern	CF35 6YE	BRIDGEND	Mid Glamorgar	Pencoed
Chloe Shafto	1245949	Pencoed	CF35 6YE	BRIDGEND	Mid Glamorgar	13 Pen Gwern

**Day 2:** Procedure has run and the addresses are correctly formatted

Name	Const ID	Street Address	Postal Code	City	Locale	Street2
Chloe Shafto	1245950	Pencoed	CF35 6YE	BRIDGEND	Mid Glamorgar	13 Pen Gwern
Chloe Shafto	1245949	Pencoed	CF35 6YE	BRIDGEND	Mid Glamorgar	13 Pen Gwern

**Day 3:** The overnight procedure has run, identified these duplicates records and merged them.

**Search Term** Id: 1245949, Show Duplicates: Yes

1245949

[ID Match with Merged ID](#)

-	Name	Const ID	Street Address	Postal Code	City	Locale	Street2
	Chloe Shafto	1245950	Pencoed	CF35 6YE	BRIDGEND	Mid Glamorgar	13 Pen Gwern

Thanks for listening!

Anna Coles  
*SQL Support Analyst*  
[anna.coles@wmc.org.uk](mailto:anna.coles@wmc.org.uk)

**National  
Theatre**

**Data Cleansing:  
Can't see the wood for the trees...**



**Victoria Carlin, Development Database Manager  
James Broderick, Box Office & CRM Systems Manager**

A photograph of the National Theatre building on the Southbank, featuring a modern, multi-level facade with a prominent entrance and a sign that reads "National Theatre". The building is set against a light sky, and a person is visible walking near the entrance. The image is framed by an orange border.

**National  
Theatre**

**On the Southbank:**  
4 Theatres in one home.  
24 productions in the last year  
987 performances in total for 1415  
700,000 tickets issued  
90% capacity achieved.

A photograph of the National Theatre building in London, showing its modern, multi-tiered architecture. The building is light-colored with dark accents. The text is overlaid on the image.

**National  
Theatre**

**On the Southbank:**

4 Theatres in one home.

24 productions in the last year

987 performances in total for 1415

700,000 tickets issued

90% capacity achieved.

**The UK and beyond:**

710,000 tickets sold in the West End

720,000 tickets for UK Tours

775,000 tickets for International and touring shows

1.2m tickets sold worldwide for NT Live broadcasts

**National  
Theatre**

## Who uses Tessitura at the NT?

**Box Office**

**Marketing**

**Front of House**

**Development**

**National  
Theatre**

## Who uses Tessitura at the NT?

**Box Office**

**Marketing**

**Front of House**

**Development**

**NT Productions**

**Director's Office**

**AANT**

**Learning**

**Finance**

## Who is recorded on Tessitura?

1,841,600 Individuals

6,758 Households

2,226 Trusts & Foundations

37,581 Edu Institutions

23,825 Businesses

We have absolutely no duplicate records...

## **Keeping our database clean**

We have absolutely no duplicate records...

**Said ABSOLUTELY NO-ONE EVER**

## **Keeping our database clean**

We have absolutely no duplicate records...

**Said ABSOLUTELY NO-ONE EVER**

We do not auto-merge .

Our merge management is currently user-led and involves cross-department collaboration...

- Increased Training Super-User to User
- CSI structure to allow front line users to flag dupes
- Consortium training & removal of certain permissions.
- User-groups re-assessed, permissions & views.

- Constituency segments to improve filtered searches
- Specific 'Find your customer' tips & tricks
- Collaboration with 'off-Tess' departments to ensure creative contact details are up to date.
- Portfolio management

Marketing use a third-party eCRM system to produce dynamic emails according to segmentation results.

Marketing use a third-party eCRM system to produce dynamic emails according to segmentation results.

The software only accepts 1 email address from Tessitura, If a constituent has the same email on 2 different records, we cannot import the second record.



**How do we identify and correct records to ensure nice, clean, useful data is both going in and out of Tessitura?**

# **The Technical Challenge**

**(That ended up not being so Technical)**

Basic SQL report:

Emailed every Monday to Marketing team for action.

The query looks for all new records created in the last 7 days and flags those with pre-existing email addresses.

Marketing then comb through, household where required and follow strict merging rules. Third party eCRM can then happily scoop up the correct record.

- Consortia CSIs
  - for smaller teams who don't have time to merge, CSI flags a duplicate, the CSI tracking report is scheduled & received by NT CRM staff. Cleaned according to rules.

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  - for smaller teams who don't have time to merge, CSI flags a duplicate, the CSI tracking report is scheduled & received by NT CRM staff. Cleaned according to rules.
- **USE YOUR USER GROUP!**
- Hold a workshop with your users and find out what each department process is for managing records, do Development household differently to Learning? Come up with a clean HOUSE solution that works for everyone.

Use your intranet to share the best practice for keeping data clean, run 'data clean-up clinics'

Find a department 'cheerleader' in each user-group. They will translate for you into terms that each dept. will understand.

Simple solutions, use eyes on the ticket desk to note incomplete records & correct them.

**DATA CLEANSING DOESN'T HAVE TO BE COMPLICATED**

**National  
Theatre**

# Thank you

Victoria Carlin, Development Database Manager  
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James Broderick, Box Office & CRM Systems Manager  
[jbroderick@nationaltheatre.org.uk](mailto:jbroderick@nationaltheatre.org.uk)

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**Upper Ground,  
London  
SE1 9PX**

# Jessitura



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## QUESTIONS?

- Please tell us who you are and where you are from.....

# Jessitura



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## WHAT'S NEXT?

🕒 **Lunch! 1.15pm – 2pm**  
**In the Royal Suite , Crowne Plaza Hotel**

🕒 **NEXT SESSION STARTS : 2pm – 3.15pm**  
**Conference Welcome in the Auditorium,  
Royal Concert Hall**