

Jessitura



EUROPEAN
CONFERENCE 2015

5 & 6 NOVEMBER
NOTTINGHAM

MEMBERSHIP MANAGEMENT

MANY HAPPY RENEWALS!

🎯 PRESENTERS

Eve Smith : City of Birmingham Symphony Orchestra
Martin Perks : Cheltenham Festivals
Victoria Carlin : National Theatre

🎯 CONTENT PLANNERS

Rachael Griffin : Birmingham Hippodrome
Eve Smith : City of Birmingham Symphony Orchestra



City of Birmingham
Symphony Orchestra

Eve Smith

Individual Giving Manager



Who we are
What we do
How we're funded

Our journey on Tessitura
Past – Present - Future

Who we are

Founded by Neville Chamberlain, 1920



Elgar conducts City of Birmingham Orchestra inaugural concert, 1920



1980 Simon Rattle appointed Principal Conductor



Symphony Hall opens, 1991



CBSO Centre – first purpose-built orchestral HQ in UK – opens, 1998



Andris Nelsons appointed, 2007



“A brilliant
appointment”

The Times, 2008

New music director search



Watch this
space...










What we do

91-piece symphony orchestra



Concerts for everyone

Friday Nights

 <p>Star Wars FRIDAY NIGHT CLASSICS</p> <p>Friday 16 October, 7.30pm Symphony Hall, Birmingham</p>	 <p>La vie en rose FRIDAY NIGHT CLASSICS</p> <p>Friday 13 November, 7.30pm Symphony Hall, Birmingham</p>	 <p>James Bond FRIDAY NIGHT CLASSICS</p> <p>Friday 27 November, 7.30pm Symphony Hall, Birmingham</p>
 <p>Smooth Classics FRIDAY NIGHT CLASSICS</p> <p>Friday 29 January 2016, 7.30pm Symphony Hall, Birmingham</p>	 <p>Rodgers & Hammerstein FRIDAY NIGHT CLASSICS</p> <p>Friday 19 February 2016, 7.30pm Symphony Hall, Birmingham</p>	 <p>Symphonic Disco Spectacular FRIDAY NIGHT CLASSICS</p> <p>Friday 11 March 2016, 7.30pm Symphony Hall, Birmingham</p>
 <p>Shakespeare in Film FRIDAY NIGHT CLASSICS</p> <p>Friday 22 April 2016, 7.30pm Symphony Hall, Birmingham</p>	 <p>Ben-Hur FRIDAY NIGHT CLASSICS</p> <p>Friday 13 May 2016, 7.30pm Symphony Hall, Birmingham</p>	 <p>Songs from the Movies FRIDAY NIGHT CLASSICS</p> <p>Friday 3 June 2016, 7.30pm Symphony Hall, Birmingham</p>

Matinees



Evenings



Families and schools



Choral programme: CBSO Chorus



“The CBSO Chorus are the best in the land”
The Times, 2011

Choral programme:

Youth Chorus

Children's Chorus



Young Voices



SO Vocal Community Choir



Perry Barr Community Choir



CBSO Youth Orchestra



Centre Stage: The Osborn Chamber Music Programme



Learning and Engagement:



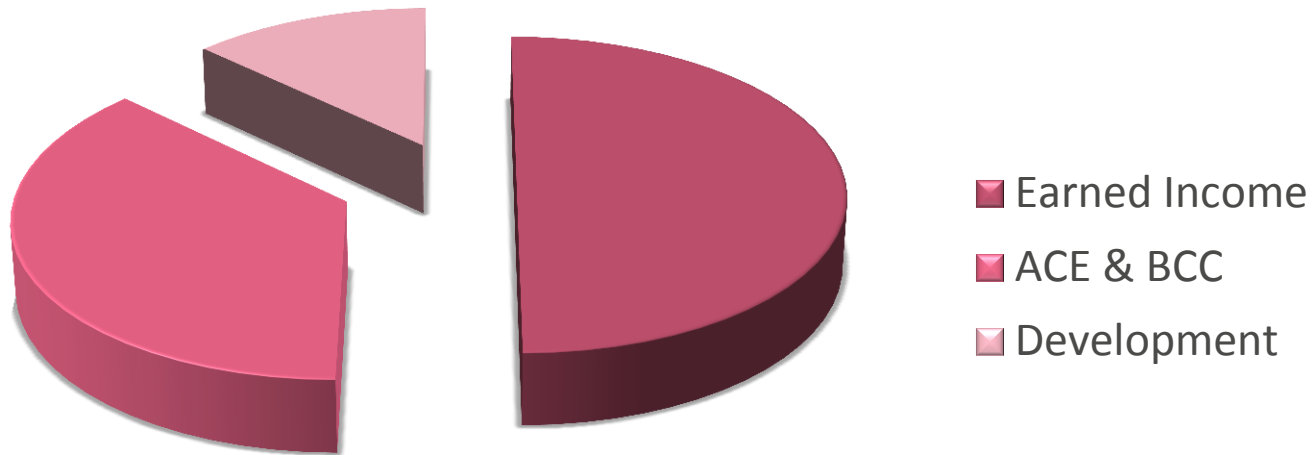
Four key priorities 2014-18

- **ARTISTIC:** To attract, nurture and enable the world's finest artistic talent
- **CONCERTS:** To reach the widest possible audience with excellent concerts
- **LEARNING:** To offer learning, engagement and talent development opportunities for the widest possible audience
- **DIGITAL:** To enable a broad, global audience to experience the excellence of our musicianship digitally.

How we're funded

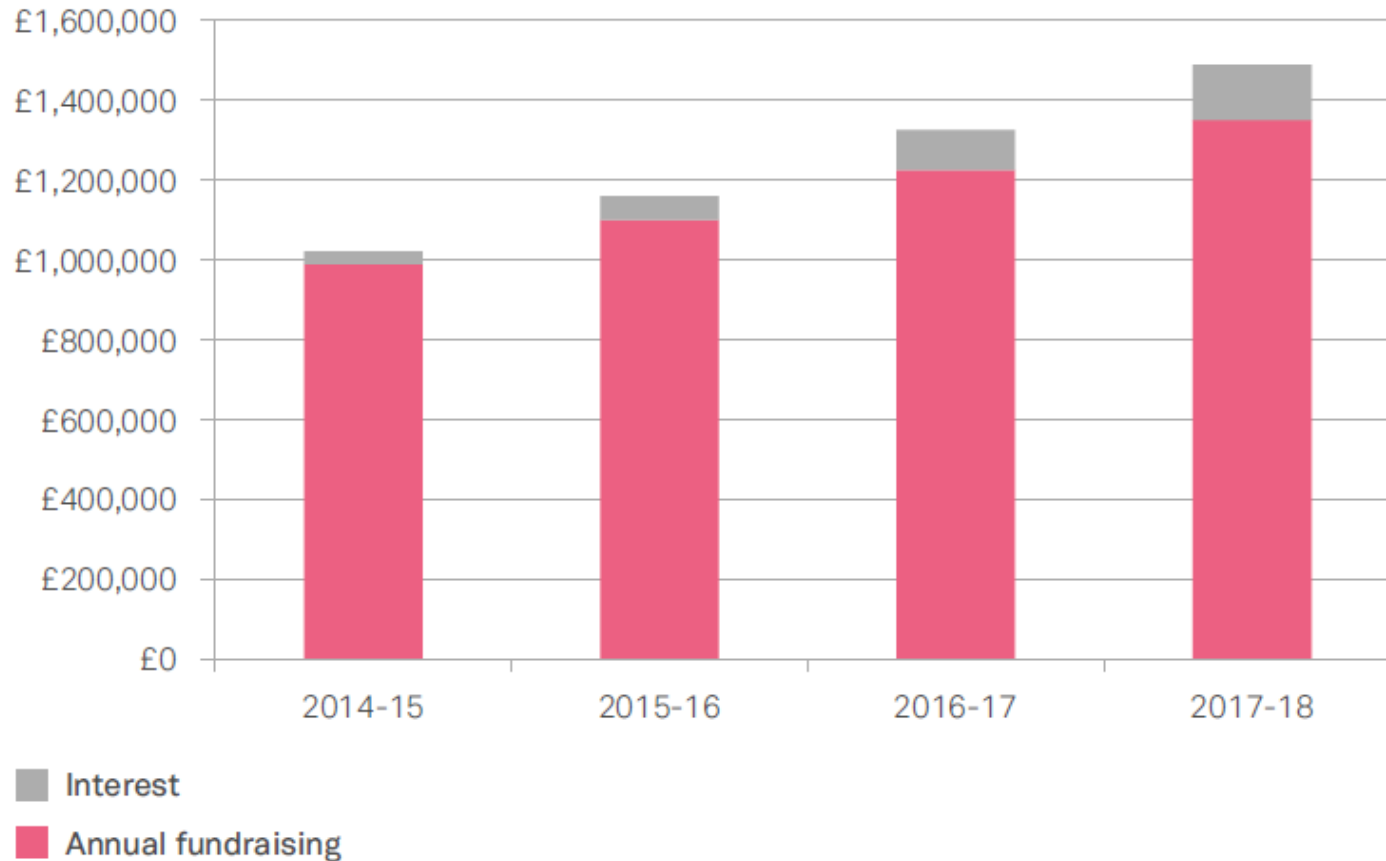
Funding mix

Income



£10 million turnover

CBSO fundraising requirement 2014-18



Individual giving

- £475,000 Individual Giving with 50% coming from memberships
- Membership made up of c. 1,200 donors giving between £40 and £10,000
- Benefits: priority booking, news and information, events
- USP: artistic team – conductors, soloists and musicians



Our journey on Tessitura

Tessitura journey to date

- Live in December 2014 on v.12.1
- Converted c. 70,000 constituents
- Phase 1 – individuals and subscribers
- Phase 2 – corporates and trusts
- Phase 3 – learning and participation

Past – Present – Future

From individual giving
(memberships) perspective

Past

Conversion

- Converted all memberships and giving history since CBSO records began
- Including around 800 direct debit payments and a further 400 memberships with cash/cheque/credit card payment

CBSO membership

CBSO Membership Organisation

Associated Membership Levels

Level	Description	Start Amt	End Amt	Initiation	Expire	Renew	Lapse
8	Benefactor	£10,000.00	£100,000.00	Today	12	2	2
7	Symphony Circle	£5,000.00	£9,999.99	Today	12	2	2
6	Concerto Circle	£2,500.00	£4,999.99	Today	12	2	2
5	Overture Circle	£1,000.00	£2,499.99	Today	12	2	2
4	Gold Patron	£650.00	£999.99	Today	12	2	2
3	Silver Patron	£450.00	£649.99	Today	12	2	2
2	Patron	£220.00	£449.99	Today	12	2	2
9	Gold Friend	£120.00	£219.99	Today	12	2	2
1	Friend	£40.00	£119.99	Today	12	2	2

CBSO membership

Additional donations

Level of membership *(please circle)*

Concessionary Friend £40+

Friend £50+

Family Friend £60+

Gold Friend £120+

Patron £220+

Family Patron £250+

Silver Patron £450+

Gold Patron £650+

Overture Circle £1,000+

Concerto Circle £2,500+

Symphony Circle £5,000+

Benefactor £10,000+

Donation

I/we would like to make a donation of £

Total annual donation: £

Tick if you would like to pay by 12 monthly instalments (Not applicable to Friends)

CBSO membership

Additional donations

I would like to make an additional gift of £_____ to support:

- Keynote concert programming** at Symphony Hall. Extra support will help us continue to bring world-class conductors and soloists to Birmingham, and to programme major operatic, choral and orchestral projects
- The **CBSO Youth Orchestra and youth choral programme**. Extra support will help us nurture Birmingham's most talented young musicians.
- The CBSO's work with **schools and families**. Extra support will help us to maintain our *Notelets* early years and Family Concerts, as well as our work in schools, bringing musical experiences to thousands of young people every year.
- The area of greatest need.

Associated Funds

Fund	Start Date	End Date
Ind Unrestricted	01/04/2015	31/03/2016
IndR-artistic talent	01/04/2015	31/03/2016
IndR-concerts	01/04/2015	31/03/2016
IndR-education	01/04/2015	31/03/2016
IndR-other	01/04/2015	31/03/2016
IndR-recordings	01/04/2015	31/03/2016

CBSO membership

Additional donations

Date	Type	Contribution	Amt Received	Balance	M	Campaign	Fund
14/09/2015	G	£20.00	£20.00	£0.00	N	Individuals 15-16	Ind Unrestricted
22/06/2015	G	£50.00	£50.00	£0.00	N	Individuals 15-16	IndR-artistic talent
22/06/2015	G	£250.00	£250.00	£0.00	N	Membership 15-16	CBSO Membership
20/10/2014	G	£400.00	£400.00	£0.00	N	Individuals 14-15	50k Appeal 2014 Conversion
01/06/2014	G	£260.00	£260.00	£0.00	N	Membership 14-15	CBSO Membership

Past

Day to day

- Regularly communicating with members at specific levels through List Manager
- Mostly through email for personal touch
- Can feed in to Wordfly for more corporate looking comms

Past

Reporting

- Performance Reports flag members at concerts
- Membership Details Report help identify upcoming renewals
- Activities / Patron Activity Report to monitor and log member event attendance

Past

Extractions

- Membership forms part of wider department extraction for mailing Music Stand magazine
- First major extraction for wealth screening (30,000)
 - Reimported wealth data back into Tessitura
- Second extraction informed telephone campaign (2,500) for membership drive

Present

Telephone Campaign: Aim to increase low level memberships

Campaign promoted to constituent records (Campaigns – Appeals) so success of campaign can be monitored and analysed

Moving from paper to paperless direct debits

Present

Plans for prospective new members:

Following wealth screening data return,
Plans set up for identified prospects

Already working for Bequest Patrons and
Endowment prospects, so prospective
individuals will use same format

Present

Plans: Set up

The screenshot shows a 'Plan' window with the following fields:

- Owner:** Eve Smith
- Campaign:** Planned Legacy
- Designation:** (unassigned)
- Fund:** (none)
- Type:** Bequest
- Status:** 01 - Research
- Ask:** £.00
- Goal:** £.00
- Recorded:** £.00
- Plan Source:** Current Supporter
- Priority:** 02-Medium
- Start Dt:** 15/10/2015
- By:** 00/00/0000
- Cont Total:**
- Probability:** %
- Primary Worker:** (empty field)
- Workers:** (0)
- Contributions:** (0)

TR_Plan_Type

Id	Description
2	Annual Giving
5	Bequest
3	Campaign Giving
1	Default TR_PLAN_TYPE
4	Endowment
6	Nomination

TR_Plan_Status

Id	Description
101	Research
202	Cultivate
303	Solicitation
404	Stewardship
505	Decline

TR_Plan_Source

Id	Description
-1	(Default)
4	Attendance
5	Current Supporter
6	Lapsed Supporter
2	Referral
3	Research

Present

Plans: Set up Steps

Owner: Eve Smith
Plan: Planned Legacy / (unassigned)

Step Type: Research further
Step Date: 15/10/2015
Warn Days: [Slider]
Step Description: Research further
Due Date: 00/00/0000
Priority: Medium
Worker: Bridget Blow
Completed Date: 00/00/0000
Associate ID: [Field]
Associate Name: [Field]
Attachment: Add

Notes:

TR_Step_Type

Id	Description
8	Ask / Proposal
-2	Campaign Change
11	Dev Note/Update
9	Request Advice
7	Research further
-1	Status Change
1	Talk to
6	Write to

Present

Plans: Set up Workers

TR_Worker_Role

Id	Description
3	Ambassador
4	Identifier
5	Researcher
1	Solicitor
2	Worker

TR_Worker_Type

Id	Description
1	Board Worker
5	Musician
2	Office Lead
3	Office Support

Workers:

CBSO Trustees
Dev Trustees
Senior Team
Dev Team

Future

- Automate membership renewals using Acknowledgement Letters
- Financial reconciliation between Tessitura and finance system Exchequer
- Further work in segmenting, researching and validating wealth screened data in order to reimport back into Tessitura
- T-stats analysis for 2016-17 budget setting
- Mobile app use for Development staff at concerts
- Transactional website functionality for online memberships and events (possibly TNEW?)

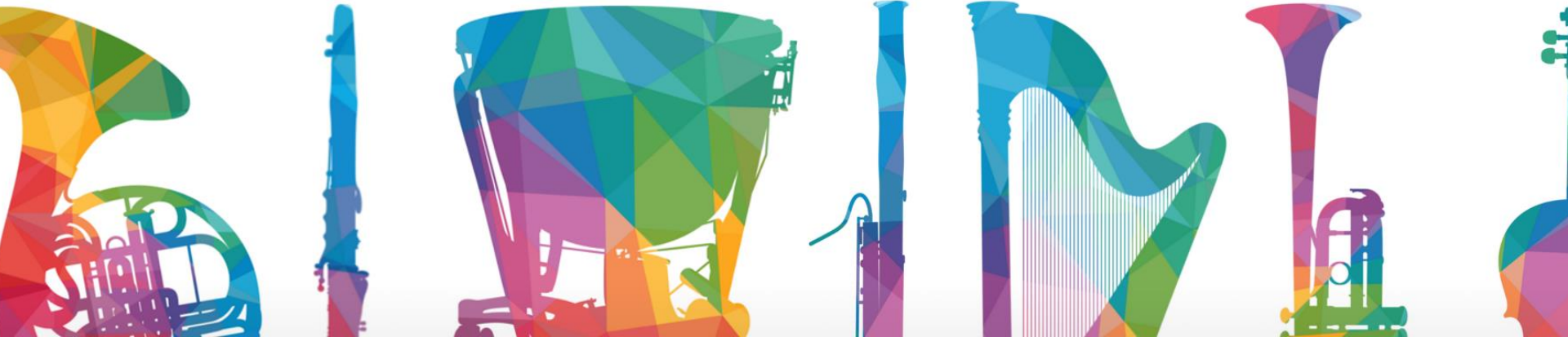


City of Birmingham
Symphony Orchestra

Eve Smith
Individual Giving Manager

esmith@cbsso.co.uk

[@evie383](#)



CHELTENHAM FESTIVALS

**JAZZ
SCIENCE
MUSIC
LITERATURE**

Martin Perks

**Box Office Supervisor &
Membership Co-ordinator**

Cheltenham Festivals

Contents Summary

- Cheltenham Festivals – who we are and what we do
- Original Membership scheme & our introduction to Tessitura
- Decision to change the scheme
- How the new system operates
- Top tips and advice

A Bit of Background - Who We Are and What We Do

- Cheltenham Festivals is a not-for-profit organisation
- We stage four Festivals throughout the year – Jazz, Science, Music and Literature
- Jazz began in 1996, Science in 2002, Music in 1945, and Literature in 1949
- Previously linked with the Cheltenham Borough Council but now independently run
- As a registered charity we have our own Marketing, Education and Development Teams

Key Facts About the Festivals

- Over 225,000 tickets issued across all four Festivals
- Cheltenham Festivals hosts more than 800 events per year
- Around 30 venues throughout Cheltenham and Gloucestershire, including many Cotswold churches and other unique venues
- Over £5.3 million annual turnover
- 40% of our audience comes from outside Gloucestershire
- We sell over £2.3m worth of tickets each year and raise approx. £2.5m in sponsorship, grants and donations

Origins of Cheltenham Festivals Membership

- Membership Scheme launched in 2009
- Own Box Office created in 2011 – separating from Cheltenham Borough Council
- Need for a new booking system with fundraising potential
- Tessitura chosen as new Box Office software – one of the first tasks was to convert Membership scheme into the new system

Membership Benefits

- Five levels of Membership: Concessionary, Associate, Individual, Joint and Family
- £15.00, £20,00, £35.00, £55.00 and £57.00
- All levels gave priority booking for each Festival
- All except Associate gave a 10% discount on tickets
- Membership lasted for a cycle of four Festivals from the date joined, rather than per calendar year

Pros and Cons of the Original Scheme

Pros

- ✓ Source of income, supplementing ticket sales etc.
- ✓ Allows regular ticket buyers to feel more involved
- ✓ Different levels to fit personal circumstances
- ✓ Value for money and generous discounts

Cons

- × Admin heavy, particularly Direct Debits
- × Became too big – even faceless
- × Too many levels – confused customer choice
- × Prices were kept the same until 2015 with overreaching discounts

Why Now?

Restructure Reasoning

- Too big and complex – the scheme needed to simplify
- Different levels confused and challenged customers and staff alike
- Stagnant pricing – to reprice....redesign!
- Overly high discounts – needed new scheme priorities
- A desire to create a clear and fairer system
- An opportunity to streamline our administrative process

Countdown to the New Scheme

- For second half of 2014 - background research began into new schemes
- This ranged from organisations with a similar product to those with a different set-up and approach
- Research found many did not offer discounts - focusing instead on advance booking
- Focus groups confirmed priority booking as a main concern
- New scheme introduced in June 2015

2015	DATE	ACTION	RESPONSIBLE
Thursday	28th May	Finalise letters	Box Office & Marketing
Thursday	4th June	Sign off letters with Finance	Marketing & CEO
Friday	5th June	Send updated web page copy to Web Team	Box Office
Monday	8th June	<p>OLD SCHEME CLOSES EMAILS down to Associate, Individual, Joint+Family</p> <p>TURN OFF TRIGGERED RENEWAL Send Enews to ALL Members notifying them of the upcoming changes. Break Updated Membership Web Pages LIVE</p>	Marketing & Web Team
Tuesday	9th June	NEW SCHEME LIVE	
Wednesday	10th June	Pull Lists of DD and Non-DD customers	Marketing
Monday	15th June	Send Letter to Direct Debit Literature Members with Call to action. Include Freepost address, DD form & Gift Aid declaration form	Marketing
Tuesday	16th June	Inactivate all Lit Direct Debits with expiry date of 2016	Box Office
Monday	22nd June	Send Enews to Non-Direct Debit Literature Members with Call to action. Tie in programme reveal	Marketing & Web Team
Saturday	27th June	Programme/early names Reveal	
Friday	3rd July	Send reminder/prompt to DD customers	Web Team
Saturday	11th July	Deadline to return DD forms	Customers!
Monday	13th July	Box Office start setting up new Direct Debits	Box Office
Monday	20th July	Lit upload	Box Office

'More Bang for Your Buck' The New Scheme Explained

- Three levels – **Bronze**, Silver and **Gold**
- **£25.00**, £50.00 and **£75.00** per year
- All levels give priority booking for each Festival
- Silver and **Gold** Memberships give a 10% discount on tickets
- Membership lasts for 12 months from the date you join

Festivals Membership

Become a Cheltenham Festivals Member and be a part of something amazing... Being a Member is one of the best ways to enjoy all that the Festivals have to offer. Be amongst the first to book, save on tickets and help support the Festivals.

Membership levels:

Bronze	£25 per year	✓ Priority booking	Buy up to 2 full price tickets per event during priority booking.
Silver	£50 per year	✓ Priority booking ✓ Discounted tickets ✓ Third party offers	Buy up to 4 tickets per event during priority booking (1 discounted, 3 at full price).
Gold	£75 per year	✓ Priority booking ✓ Discounted tickets ✓ Third party offers	Buy up to 6 tickets per event during priority booking (2 discounted, 4 at full price).

[Join online today](#)

Mem: **M1** 31/12/2015

Mem: **M2** 31/12/2015

Mem: **M3** 31/12/2015

Top Tips - Final Thoughts and Advice

- Keep it simple!
- Get the cost right
- Clarity
- Don't be too generous
- Planning & Research
- Communication
- Be fair
- Avoid exceptions!

Martin Perks

Box Office Supervisor &
Membership Co-ordinator

[martin.perks@
cheltenhamfestivals.com](mailto:martin.perks@cheltenhamfestivals.com)

**National
Theatre**

**Membership Management
Many Happy Renewals!**



Victoria Carlin, Development Database Manager

**National
Theatre**

On the Southbank:
4 Theatres in one home.
24 productions in the last year
987 performances in total for 1415

National Theatre

← TERRACE RE

On the Southbank:
4 Theatres in one home.
24 productions in the last year
987 performances in total for 1415

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

Box Office sales contribute 58% of our income

NT Live (our broadcast scheme) brings in 7%

Trading & other income raises 11%

Box Office sales contribute 58% of our income

NT Live (our broadcast scheme) brings in 7%

Trading & other income raises 11%

Real term cuts of 25% in ACE funding since 2010

**In 2013/14 donations from individuals,
trusts / foundations and corporate support
contributed £6.5million to the NT**

Our Membership Schemes

10,000 individual members giving between £80-£200

1,500 individual members giving more than £600 yearly

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280 members in our Young Patron 21- 45 group

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280 members in our Young Patron 21- 45 group

250 Associates of the National Theatre in New York

50 Corporate members all with bespoke benefits

Corporate Membership Structure

3 membership levels that loosely fit benefits of bespoke corporate membership offers

GOLD

PLATINUM

PREMIUM

Corporate Membership Structure

3 membership levels that loosely fit benefits of bespoke corporate membership offers

GOLD

PLATINUM

PREMIUM

HAHAHAHAHAHAHAHAHA LOLZ

Corporate Membership Structure

Membership Organizations

Name: Corporate Memberships

Ctrl Grp: Development

Retroactive Upgrades

Deactivate on Adjustment

Name: Educational Memberships

Ctrl Grp: National Theatre

Associated Membership Levels

Level	Description	Start Amt	End Amt	Initiation	Expire	Renew	Lapse
PRE	Premium Membership	£30,000.01	£50,000.01	First of Next Month	12	2	3
PLA	Platinum Membership	£15,000.01	£30,000.00	First of Next Month	12	2	3
GOL	Gold Membership	£1,000.00	£15,000.00	First of Next Month	12	2	3
TBM	Team Builder Membership	£7,000.00	£11,000.00	First of Next Month	12	2	3

Level Details

Level: PRE **Rank:** 1 **Description:** Premium Membership

Category: Corporate Membership Inactive

Constituency: Premium Membership

Start Amt: £30,000.01 **Non-Deductible Amt:** £.00

End Amt: £50,000.01 **No. Issues:**

Initiation

First of Next Month

Today

First of This Month

Fixed Date 00/00/0000

Expiration

Expire: 12 Months After Initiation

Always Expire at End of Month

Renew: 2 Months Before Expiration

Lapse: 3 Months After Expiration

Reinstate: Months After Expiration

Pledge Settings

Basis Amt: £.00

Suspend: Months After Initiation

Cancel: Months After Initiation

N-Scan Limits

Adult:

Child:

Other:

Corporate Membership Structure

Reasons to mark as 'memberships'

Corporate Membership Structure

Reasons to mark as 'memberships'



Corporate Membership Reasons to mark as 'memberships'

Extraction Details

Description: Created: 04/11/2015 15:28:23 by vcarlin
 ID: 5290 TMS: Type: Control Group: Updated: 04/11/2015 17:14:37 by vcarlin

Source Defaults

Appeal No: Usage: Acquisition Cost:
 Media: Start Date: Delivery Cost:
 Source Group: End Date: Fulfillment Cost:

Communication Management

Contact Point Category: Only select constituents if they have this contact point category Remove duplicate email addresses
 Contact Point Purpose: Only select constituents if they have this contact point purpose Address marketing indicator
 Delivery Date: Allow multiple contact points per constituent Use label postal address

Segment	SQL	Swap HH	Rel Opt	Description	Select Priority	DLoad Priority	Outside Flag	Suppr Flag	Maximum to DLoad	Random Select%	Random Extract%	Number Qualified	Number Assigned	Number Pieces	Appeal	Media	Source Group	U
001	✓	●	●	EXC - Inactives and Merged	10	10	<input type="checkbox"/>	<input checked="" type="checkbox"/>		0	0	0	0					
327	✓	✓	●	OPT - No Fundraising Emails	20	20	<input type="checkbox"/>	<input checked="" type="checkbox"/>		0	0	0	0					
011	✓	✓	●	EXC - NT Board	30	30	<input type="checkbox"/>	<input checked="" type="checkbox"/>		0	0	0	0					
004	✓	●	●	OPT - Exclude NT Postcode	40	40	<input type="checkbox"/>	<input checked="" type="checkbox"/>		0	0	0	0					
015	✓	●	●	OPT - Entry Pass	50	50	<input type="checkbox"/>	<input checked="" type="checkbox"/>		0	0	0	0					
325	✓	✓	●	EXC - CORP Exclusion Lists	60	60	<input type="checkbox"/>	<input checked="" type="checkbox"/>		0	0	0	0					
328	✓	✓	✓	INC - CORP AS Rep List	70	70	<input type="checkbox"/>	<input type="checkbox"/>	999,999	0	0	0	0					
332	✓	✓	✓	INC - CORP BM Rep List	80	80	<input type="checkbox"/>	<input type="checkbox"/>	999,999	0	0	0	0					
333	✓	✓	✓	INC - CORP SG Rep List	90	90	<input type="checkbox"/>	<input type="checkbox"/>	999,999	0	0	0	0					
334	✓	✓	✓	INC - CORP DT Rep List	100	100	<input type="checkbox"/>	<input type="checkbox"/>	999,999	0	0	0	0					

Corporate Membership Plans

Plan

Detail

Owner: [Redacted]

Campaign: Research Development

Designation: 02 Further

Fund: (none)

Type: CORP Research

Status: RRR 02 Research Complete

Ask: [Redacted]

Goal: [Redacted]

Recorded: £.00

Plan Source: Research

Priority: Medium

Start Dt: 16/06/2015

By: 00/00/0000

Cont Total:

Probability: %

Primary Worker: [Redacted]

Workers (1) Contributions (0)

Custom Data

Corporate Prospect (plan) . Developing

Notes

1st Step RESEARCH PLANS

7
Plan
?
x

Detail

Owner: [REDACTED]	Ask: [REDACTED]	Start Dt: 16/06/2015	Primary Worker: [REDACTED]
Campaign: Research Development	Goal: [REDACTED]	By: 00/00/0000	
Designation: 02 Further	Recorded: £.00	Cont Total:	Workers (1) Contributions (0)
Fund: (none)	Plan Source: Research		
Type: CORP Research	Priority: Medium	Probability: %	
Status: RRR 02 Research Complete			

Custom Data

Corporate Prospect (plan) . Developing

2nd Step GIFT PLANS

Notes

7
Plan
?
x

Detail

Owner: [REDACTED]	Ask: [REDACTED]	Start Dt: 20/06/2015	Primary Worker: [REDACTED]
Campaign: Corporate 1516	Goal: [REDACTED]	By: 00/00/0000	
Designation: (unassigned)	Recorded: £.00	Cont Total:	Workers (1) Contributions (0)
Fund: (none)	Plan Source: Board Suggestion		
Type: COR Partnership	Priority: Medium	Probability: %	
Status: SSS 03 Plan			

Custom Data

Corporate Prospect (plan) . Developing

Corporate Membership Plans

plan_sour	
TR_PLAN_SOURCE	

Id	Description	Control Group
-1	(Default)	(Default Control Group)
12	Agency	Development
4	Board Suggestion	Development
6	CAB Suggestion	Development
11	Cultivation Event	Development
2	Dev Council Suggestion	Development
13	DEV Staff Lead	Development
9	Donor Approach	Development
10	Donor Suggestion	Development
3	Executive Suggestion	Development
5	IGC Suggestion	Development
1	Research	Development
7	TWG Suggestion	Development
8	Wealth Screening	Development

Corporate Membership Plans

plan_sour			
TR_PLAN_SOURCE		Id	Description
		-1 (Default)	(Default Control Group)
		12 Agency	Development
		4 Board Suggestion	Development
		6 CAB Suggestion	Development
		11 Cultivation Event	Development
		2 Dev Council Suggestion	Development
		13 DEV Staff Lead	Development
		9 Donor Approach	Development
		10 Donor Suggestion	Development
		3 Executive Suggestion	Development
		5 IGC Suggestion	Development
		1 Research	Development
		7 TWG Suggestion	Development
		8 Wealth Screening	Development

Id	Description	Control Group
43	PPP Prospect Pool	Development
39	RRR 01 Research	Development
40	RRR 02 Research Complete	Development
41	RRR 03a Close: Assigned	Development
42	RRR 03b Closed: Not Assigned	Development
23	SSS 01 Identify	Development
24	SSS 02 Research	Development
25	SSS 03 Plan	Development
26	SSS 04 Involve	Development
27	SSS 05a Ask	Development
37	SSS 05b Asked	Development
36	SSS 06a Close: Pledge	Development
35	SSS 06b Close: Declined	Development
28	SSS 06c Close: NT Abandoned	Development
29	SSS 07 Reciprocate	Development
44	TTT Invited to Apply	Development
47	TTT Proposal - Agreed	Development
49	TTT Proposal - Re-Apply	Development
48	TTT Proposal - Refused	Development
46	TTT Proposal - Sent	Development
45	TTT Proposal - Successful	Development

Corporate Membership Plans

Plan [?] [X]

Detail

Owner: [REDACTED]

Campaign: Corporate 1516 [v]

Designation: (unassigned) [v]

Fund: (none) [v]

Type: COR Partnership [v]

Status: SSS 03 Plan [v]

Ask: [REDACTED] **Start Dt:** 20/06/2015 [v]

Goal: [REDACTED] **By:** 00/00/0000 [v]

Recorded: £.00 **Cont Total:**

Plan Source: Board Suggestion [v]

Priority: Medium [v] **Probability:** % [v]

Primary Worker: [REDACTED]

Workers (1) Contributions (0)

Custom Data

Corporate Prospect (plan) . Developing [v]

Corporate Membership Plans

Plan

Detail

Owner: [REDACTED]

Campaign: Corporate 1516

Designation: (unassigned)

Fund: (none)

Type: COR Partnership

Status: SSS 03 Plan

Ask: [REDACTED]

Goal: [REDACTED]

Recorded: £.00

Plan Source: Board Suggestion

Priority: Medium

Start Dt: 20/06/2015

By: 00/00/0000

Cont Total:

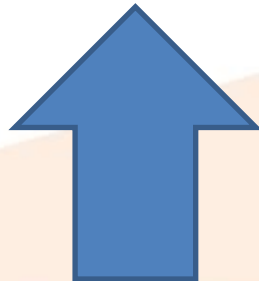
Primary Worker: [REDACTED]

Workers (1) Contributions (0)

Probability: %

Custom Data

Corporate Prospect (plan) . Developing



PITCH LIST – CORE PRIORITIES

Active
Developing
Inactive

Corporate Membership Plans

Const. Number	Constituent Name	Portfolio Manager	Prospect Attribute	Customer Type	Organisation Type	Goal	Ask	Plan Status
2023830			Inactive	2	0			
2022969			Inactive	2	0			
51342		Sarah Giles	Inactive	2	Insurance			
3089284			Inactive	2	0			
2003657			Inactive	2	0			SSS 03 Plan
13901478			Inactive	2	0			
13906720			Inactive	2	0			
13903053			Inactive	2	0			
13900702			Inactive	2	0			
3178718		Dan Turner	Developing	2	Legal			
3012102			Inactive	2	0			
13908912			Inactive	2	0			
13877754			Active	1	0			
2010461		Hannah Griffith	Inactive	2	Tourism			
2024542		Sarah Giles	Developing	2	Financial Services			SSS 04 Involv
3242215		Sarah Giles	Active	2	Technology			SSS 05a Asl
13900548		Alice Samtoy	Active	2	Property			SSS 05a Asl
13901090			Inactive	2	0			
3000296		Liz McCarthy	Inactive	2	Fashion			
13900556			Inactive	2	0			
13906621			Inactive	2	0			
2016752		Jo Royce	Developing	2	Insurance			
2014428		Alice Samtoy	Developing	2	Legal			SS 06b Close: Declined
2024543		Jo Royce	Active	2	0			SSS 06a Close: Pledge
3548955		Alice Samtoy	Active	2	Financial Services			SSS 04 Involv
63517			Inactive	2	0			
13903081		Sarah Giles	Inactive	2	Media/Advertising			
3277546		Sarah Giles	Inactive	2	Media/Advertising			
13898618			Inactive	2	0			
2017989		Alice Samtoy	Inactive	2	0			
13906701			Inactive	2	0			
2016632		Sarah Giles	Developing	2	Auto			SSS 05a Asl
2016822		Dan Turner	Active	2	Financial Services			SSS 05b Aske
13282109		Alice Samtoy	Developing	2	Financial Services			SSS 04 Involv
2016823		Sarah Giles	Active	2	Tourism			SSS 05b Aske
2002570			Inactive	2	0			
13295827		Sarah Giles	Developing	2	Utilities			RRR 01 Researc
2013919		Hannah Griffith	Developing	2	Property			
2022784			Inactive	2	0			

Corporate Membership Benefits

Bespoke Membership Benefit Tracking

**National
Theatre**

Corporate Membership Benefits

Bespoke Membership Benefit Tracking



Corporate Membership Benefits Bespoke Membership Benefit Tracking

Appeal Name: Development Source Codes	Control Group: National Theatre	Target Cust: 0	Gifts:
Goal Amount: £.00	Start Date: 18/12/2013	Successful Contacts: 335	Pledges: £0.00
Campaign: Default Source codes	End Date: 00/00/0000		Payments: £0.00
Category: Development	Status: Active		Balance: £0.00
Appeal No:	By: vcarlin		Ticketing: £213,040.00

Sources		Appeal Expenses	Premiums	Revenue Graphs	Summary Reports	Custom
Promoted	Source No	Type	Source Name	Source Date	Provider	Seg
<input type="checkbox"/>	10382	Outside	CORP Partnership Tickets	18/12/2013		
Group: Permanent codes		Media: Other		Inactive: <input type="checkbox"/>	Usage: All	Hotlist: Tkt
Start: 01/01/2014		End: 00/00/0000				
Contacts: 0	Successful: 117	Acq Cost: .0000	Delivery Cost: .0000	Fulfill Cost: .0000	Media Cost: .0000	Total: £0.00
<input type="checkbox"/>	10383	Outside	CORP Additional Partnership Tickets	18/12/2013		
Group: Permanent codes		Media: Other		Inactive: <input type="checkbox"/>	Usage: All	Hotlist: Tkt
Start: 01/01/2014		End: 00/00/0000				
Contacts: 0	Successful: 21	Acq Cost: .0000	Delivery Cost: .0000	Fulfill Cost: .0000	Media Cost: .0000	Total: £0.00
<input type="checkbox"/>	10384	Outside	CORP Partnership Event Tickets	18/12/2013		
Group: Permanent codes		Media: Other		Inactive: <input type="checkbox"/>	Usage: All	Hotlist: Tkt
Start: 01/01/2014		End: 00/00/0000				
Contacts: 0	Successful: 9	Acq Cost: .0000	Delivery Cost: .0000	Fulfill Cost: .0000	Media Cost: .0000	Total: £0.00
<input type="checkbox"/>	10385	Outside	CORP Additional Event Tickets	18/12/2013		
Group: Permanent codes		Media: Other		Inactive: <input type="checkbox"/>	Usage: All	Hotlist: Tkt
Start: 01/01/2014		End: 00/00/0000				
Contacts: 0	Successful: 6	Acq Cost: .0000	Delivery Cost: .0000	Fulfill Cost: .0000	Media Cost: .0000	Total: £0.00
<input type="checkbox"/>	10386	Outside	CORP Personal Tickets	18/12/2013		
Group: Permanent codes		Media: Other		Inactive: <input type="checkbox"/>	Usage: All	Hotlist: Tkt
Start: 01/01/2014		End: 00/00/0000				
Contacts: 0	Successful: 131	Acq Cost: .0000	Delivery Cost: .0000	Fulfill Cost: .0000	Media Cost: .0000	Total: £0.00
<input type="checkbox"/>	10387	Outside	Stewardship	18/12/2013		
Group: Permanent codes		Media: Other		Inactive: <input type="checkbox"/>	Usage: All	Hotlist: Tkt
Start: 01/01/2014		End: 00/00/0000				
Contacts: 0	Successful: 51	Acq Cost: .0000	Delivery Cost: .0000	Fulfill Cost: .0000	Media Cost: .0000	Total: £0.00
				Total:	£0.00	

Corporate Membership Benefits Bespoke Membership Benefit Tracking

	A	B	C	D	E	
1	list_desc	(All)				
2	year	(All)				
3	month	(All)				
4						
5	customer_no	display_name	Sum of Partnership Tickets	Sum of Additional Partnership Tickets	Sum of Partnership Event Tickets	Sum
6	517508		112	2	0	
7	1371992		47	0	0	
8	2000544		8	0	0	
9	2002105		12	0	0	
10	2002155		28	0	0	
11	2002281		25	34	0	
12	2002302		0	0	0	
13	2002363		59	2	0	
14	2002374		21	0	0	
15	2002389		10	0	0	
16	2002397		94	0	0	
17	2002407		34	0	0	
18	2002448		17	4	0	
19	2002450		18	0	0	
20	2002452		36	0	0	
21	2003605		39	0	0	
22	2003776		26	4	0	
23	2003972		25	0	0	
24	2010596		6	0	0	
25	2013500		0	0	0	
26	2013644		0	0	0	
27	2014065		88	0	0	
28	2016151		17	0	0	
29	2016755		2	0	0	
30	2016833		17	0	0	
31	2020048		47	20	0	
32	2020820		112	0	2	
33	2023242		0	0	0	
34	3000326		51	0	0	
35	3000665		51	4	2	
36	3082851		16	0	0	
37	3168373		18	0	0	
38	3184029		123	0	4	
39	3240385		0	0	0	
40	3248190		31	0	0	

PivotTable Field List

Choose fields to add to report:

- year
- month
- list_desc
- customer_no
- display_name
- Partnership Tickets
- Additional Partnership Tickets
- Partnership Event Tickets
- Additional Event Tickets
- Personal Tickets
- Stewardship
- total

Drag fields between areas below:

Report Filter

- list_desc
- year
- month

Column Labels

- Σ Values

Row Labels

- customer_no
- display_name

Σ Values

- Sum of Partn...
- Sum of Additi...
- Sum of Partn...
- Sum of Additi...
- Sum of Perso...
- Sum of Stewa...
- Sum of total

Defer Layout Update Update

Corporate Membership Benefits Bespoke Membership Benefit Tracking

			Num Tickets	Num Orders	Num Perfs	Avg Price Per Ticket	
Development	CORP Additional Partnership Tickets	2015	144	30	35	£46.04	
		Total	144	30	35	£46.04	
	CORP Partnership Event Tickets	2015	8	2	2	£45.00	
		Total	8	2	2	£45.00	
	CORP Partnership Tickets	2015	1,871	465	378	£35.77	
		Total	1,871	465	378	£35.77	
	CORP Personal Tickets	2015	742	196	232	£29.93	
		Total	742	196	232	£29.93	
	Total			2,765	693	558	£34.77

customer_no	display_name	Sum of Partnership Tickets	Sum of Additional Partnership Tickets	Sum of Partnership Event Tickets	Sum of Partnership Personal Tickets
2020820		112	0	2	0
2023242		0	0	0	0
3000326		51	0	0	0
3000665		16	4	2	0
3082851		18	0	0	0
3168373		18	0	0	0
3184029		123	0	4	0
3240385		0	0	0	0
3248190		31	0	0	0

T-STATS!

Questions?

Jessitura



**EUROPEAN
CONFERENCE 2015**

**5 & 6 NOVEMBER
NOTTINGHAM**

QUESTIONS?

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

Jessitura



**EUROPEAN
CONFERENCE 2015**

**5 & 6 NOVEMBER
NOTTINGHAM**

WHAT'S NEXT?

🕒 **BREAK 10.30AM – 11AM**

Refreshments are available in or near all conference rooms.

🕒 **NEXT SESSION : 11AM – 12 NOON**

KEYNOTE ADDRESS in the Auditorium at the Royal Concert Hall