

# Tessitura



**EUROPEAN  
CONFERENCE 2015**

**5 & 6 NOVEMBER  
NOTTINGHAM**

## **CONVERTING YOUR STAFF TO TESSITURA – DEVELOPMENT EDITION STEP AWAY FROM THE SPREADSHEET!**

### **● PANEL**

**Graeme Ellis : Roundhouse**

**Gina Fletcher : Royal Exchange Theatre**

**Richie Warburton : Wigmore Hall**

### **● MODERATOR**

**Victoria Carlin : National Theatre**

### **● CONTENT PLANNERS**

**Victoria Carlin : National Theatre**

**Eleanor Roberts : The Hallé**

# STEP AWAY FROM THE SPREADSHEET! GUESTLISTS IN TESSITURA

**Graeme Ellis**

*Insight & Data Manager  
The Roundhouse*













WIN















silent  
event  
www.silentevent.co.uk



Wide ranging programme

Different shows = different teams = different methods

Departments weren't able to manage their own guestlists

Only Ticketing Managers can book in comps

Constituents on guestlists weren't being tracked in Tessitura

Other departments couldn't track guestlist availability



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## THE GUESTLIST CHALLENGE

Each department now manages their own guests

A hold for each guestlist created in Tessitura

		F	*****	F80
55E	***	E	*****	E80
55D	***	D	*****	D80
55C	***	C	*****	C80
		B	YYYYYYYYYiiiiiiiiii	B76
		A	DDDDDDDDviiiiiiii	A76

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**THE SOLUTION**

# Guestlist requests processed on the constituent record

 **Alan Rickman**  
#845746  
LEG

Address: **Nottingham Castle, Castle Place, NOTTINGHAM NG1 6EL**  
Phone: E-mail: **sheriff@nottigham.com**

Membership	<b>Active</b>	Last perf:	Total Giving:
Level: <b>Legend Membership</b>	<b>10</b>	Next perf:	
Expiration: <b>04/10/2016</b>			

General	Names	Contact Details	Plans	Relationships
History	Connections	Contributions	Transactions	Ticket History

Projects    AM Comms    Guestlist

Performance	Tickets	Guestlist	Status	Notes
05-11-2015 19:00 - Robin Hood: Prince of	2	Development	Pencilled	Would like an aisle seat

Performance

Request Status

Number of Tickets

Additional notes

Guestlist Name

**THE SOLUTION**

## Report of confirmed requests sent to ticketing team

The Roundhouse						
Guestlist Report						Page 1 of 1
Robin Hood: Prince of Thieves - Thu 05 Nov 2015 7:00PM (16930)						
Customer	Name	Guestlist	Tickets	Status	Notes	Request
845749	Mary Elizabeth Mastrantonio	Staff	2	Confirmed		GEIs 05/10/2015 14:37
845746	Alan Rickman	Development	2	Confirmed	Would like an aisle seat	GEIs 05/10/2015 12:24
845751	Christian Slater	Development	2	Confirmed		GEIs 05/10/2015 14:39
845752	Geraldine McEwan	Development	2	Confirmed		GEIs 05/10/2015 14:40
845753	Sean Connery	Development	2	Confirmed		GEIs 05/10/2015 14:41
845747	Kevin Costner	Young People	3	Confirmed		GEIs 05/10/2015 13:29

**THE SOLUTION**

# Guestlist pulls through to performance information portal

## Robin Hood: Prince of Thieves

Thursday 5 November 2015 7:00PM

Production Season: 16929  
Performance: 16930  
Promoter: Roundhouse

[Home](#) [Perf Sales](#) [Seat Map](#) **[Guest List](#)** [Visitor Services](#) [Website](#)

Development		12 holds (of which 10 remain)		
<input type="checkbox"/>	845753 Sean Connery	2	Allocated	
	845752 Geraldine McEwan	2	Confirmed	
<input type="checkbox"/>	845746 Alan Rickman	2	Allocated	Would like an aisle seat
	845751 Christian Slater	2	Confirmed	

House		8 holds (of which 8 remain)		
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Industry		16 holds (of which 16 remain)		
	845750 Morgan Freeman	3	Declined	Going to see Se7en: The Musical instead

Staff		8 holds (of which 8 remain)		
	845748 Brian Blessed	4	Pencilled	
	845749 Mary Elizabeth Mastrantonio	2	Confirmed	

Young People		20 holds (of which 20 remain)		
<input type="checkbox"/>	845747 Kevin Costner	3	Allocated	

**THE SOLUTION**

All guestlist constituents recorded in Tessitura

Availability can be seen by everyone across the organisation

Visitor Services team can see guestlist history



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**BENEFITS**

More information in requests

Informing relevant people when guestlist tickets are scanned

On the fly updates

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**FUTURE DEVELOPMENTS**

# THANK YOU

**Graeme Ellis**

Insight & Data Manager  
The Roundhouse

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[@graemeellis](https://twitter.com/graemeellis)





**Gina Fletcher**  
**Senior Development Manager**  
**Royal Exchange Theatre, Manchester**

[gina.fletcher@royalexchange.co.uk](mailto:gina.fletcher@royalexchange.co.uk) | 0161 615 6762





- Audience of 302,123 last year for our work in Manchester, on tour and in cinema
- 15 new productions including 6 world premieres
- 16,667 tickets were £10 or under
- More than 10% of the audience were under 26





# Development Department

- 7% of our income from fundraising
- Team of 6 (5.3 FTE)
- Looking after 749 Supporters:
  - 318 Individual supporters
  - 376 Friends
  - 41 Corporate Members
  - 14 Trusts & Foundations



# Championing Tess as a CMS

- Early adopters of the non-ticketing functionality including:
  - Elevated Events
  - CSIs
  - Plans





**Ms. Gina Fletcher**

#10223839

STA

12 Month Giving:  
 Total Giving: **£24.87**  
 Memb Level:  
 Gatekeeper:

Last Production **The Skriker 2015**  
 Next Production:

**Special Event**

General

History

Memb

Event Nar

Gina Flet

DEV-Shirl

DEV-CUL

MKT Pres

DEV-GF-S

MKT Pres

MKT - Ha

DEV-GF-1

MKT Pres

DEV-Culti

DEV-HRH

MKT Pres

DEV-GF-1

MKT Pres

MKT Pres

MKT Cor

MKT Pres

MKT Cor

**Owner:** Gina Fletcher

**Event Name:** DEV-CULT-15GTRelaxedPerformanc

**Event Date:** Tue 9/06/2015 1:00 PM

**Status:**

**Attendees:**

**Confirmed:**

**Source:**

**Received:**

**Notes:**

HOME TEAM

Created: 28/05/2015 14:13:52 by Gfletche at RYLEUSE

Modified: 10/06/2015 11:44:26 by Hleah

**Guests:**

Const ID	Guest Name	Event Level	Table	Seat	Performance Seat

Add Guest

Save

Close

Add

Group by Constituent



Ms. Gina Fletcher

#10223839

STA

12 Month Giving:

Total Giving: £24.87

Memb Level:

Gatekeeper:

Special Event

General

History

Memb

Event Nar

Gina Flet

DEV-Shirl

DEV-CUL

MKT Pres

DEV-GF-S

MKT Pres

MKT

Owner: Gina Fletcher

Event Name: DEV-CULT-15GTRelaxedPerformanc

Event Date: Tu

Status: Attended

Attendees:

Confirmed: Invited

Source:

Received: No Show

Notes:

HOME TEAM

To be invited A List

To be invited B List

Wait List



# Impact on other departments

- Using Elevated Events to manage multiple Press Night guest lists
- Bruntwood Prize Launch and Ceremony invites and attendees managed through Tessitura for the first time

# Customer Service Issue

Constituent ID: 10255542

Owner: [Redacted]

Issue #: 210

Issue Date: 26/02/2014

Urgent:

Contact Method: Email

Category: Complaint

Activity Type: Complaint Fundraising Appeal

Origin: Complaint

Season: (none)

Performance: [Redacted]

Notes: Complaint regarding optional online donation

Created: 26/02/2014 17:28:59 by Gfletche at RYLEUSER1 Modified: 26/02/2014 17:28:59 by Gfletche

Reminders

## Issue Actions:

User	Date	Action Date	Action	System Date	Resolved
Gfletche	26/02/2014 17:29:29	26/02/2014	Responded		<input checked="" type="checkbox"/>

Add Action

Save

Close

# Customer Service Issue

Constituent ID: 10255542

Owner: [Redacted]

Issue #: 210

Issue Date: 26/02/2014

Urgent:

Contact Method: Email

Category: Complaint

Activity Type: Complaint Fundraising Appeal

Origin: (none)

Season: (none)

Package: (none)

(none) Complaint Data Protection

Complaint Fundraising Appeal



Notes: Complaint Other

Complaint regarding Complaint Production

Created: 26/02/2014 17:28:59 by Gfletche at RYLEUSER1 Modified: 26/02/2014 17:28:59 by Gfletche

Reminders

## Issue Actions:

User	Date	Action Date	Action	System Date	Resolved	
Gfletche	26/02/2014 17:29:29	26/02/2014	Responded		<input checked="" type="checkbox"/>	 

Add Action

Save

Close



# Impact on other departments

- Training for Box Office in CSI's delivered by Development
- Exploring functionality for Marketing and Operations for complaints reporting





12 Month Giving: **£15,270.00**  
 Total Giving: **£125,270.00**  
 Memb Level:  
 Gatekeeper: **Gina Fletcher x7762**

Last Production  
 Next Production:

History	Connections	Contributions	Transactions	Ticket History	Orders	Custom
General	Names	Contact Details	<b>Plans</b>	Relationships	Research	Attributes

Plans  Portfolio  Worker Setup

Plan View  S

Start Date	Campaign	Designation	Fund	Primary Worker	Created	Modified
10/09/2015	16 Trusts & Foundations New Writing - General	Trust & Foundations - 1585		<a href="#">Gina Fletcher</a>	Created: 10/09/2015 17:21:19 by Gfletche at RYL Modified: 10/09/2015 17:21:38 by Gfletche	
7/08/2015	16 Trusts & Foundations RET Local	Trust & Foundations - 1585		<a href="#">Val Young</a>	Created: 7/08/2015 16:34:08 by vyoung at RYLEL Modified: 7/08/2015 16:45:16 by vyoung	
	16 Trusts & Foundations New Writing - Int. Health Proj	Trust & Foundations - 1585		<a href="#">Val Young</a>	Created: 21/05/2015 10:17:11 by Gfletche at RYL Modified: 7/08/2015 16:15:04 by vyoung	
	15 Trusts & Foundations (unassigned)	Trust & Foundations - 1585		<a href="#">Val Young</a>	Created: 24/03/2014 10:58:34 by Gfletche at RYL Modified: 13/08/2015 17:57:48 by vyoung	
	15 Trusts & Foundations New Writing - Int. Health Proj	Trust & Foundations - 1585		<a href="#">Val Young</a>	Created: 8/12/2014 14:41:46 by Gfletche at RYLE Modified: 12/06/2015 11:09:36 by Gfletche	
	13 Trusts & Foundations (unassigned)			<a href="#">Gina Fletcher</a>	Created: 12/12/2012 16:00:48 by Gfletche at RYL Modified: 21/05/2015 21:02:46 by dbo	
17/08/2011	12 Trusts & Foundations (unassigned)			<a href="#">Gina Fletcher</a>	Created: 17/08/2011 17:53:29 by Gfletche at RYL Modified: 21/05/2015 21:02:46 by dbo	



**Gina Fletcher**  
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**0161 615 6762**

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# Spreadsheet death toll

- House Seats
- Press Seats
- PRS reporting
- Credit Card commissions (for hires)
- Development income vs. budget reporting

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Development

income vs. budget

# Challenge

- Overall fundraising target of £1.6m
- Director of Development wants an overview with drill-down

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# Challenges

- Money coming into lots of Funds
- Gift Aid

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# Challenges

- Memberships / Direct Debits
- Season Appeal – gifts spread across funds and channels (this was the catalyst)

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# Existing system

- emails
- phone calls
- multiple reports / spreadsheets
- repeated work
- arguing & tears

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# Solution

- One report for Dev, Finance & Management
- Expandable rows for detail
- SSRS for good Excel export. Had to use lots of nested reports

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# Solution

- Analysed development income streams
- Grabbed budget targets from Business Plan
- Used Designations for cross-fund appeal reporting

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7 Enter parameters to run WH Pledge Gift Detail in the Foreground

Season ..... (Required) 2015-2016

Show Notes ..... (Required) Yes

- OK
- Cancel
- Next
- Previous
- Clear
- Report Help



# Wigmore Hall Pledge Gift Detail

Date: 9/14/2015 4:02:16 PM

Run by richie

<input type="checkbox"/> <u>Concert</u>	Contribution	Received	Balance	Gift Aid
73 Gifts Reported for Budget Concert				
<input type="checkbox"/> <u>Corporate Membership</u>	Contribution	Received	Balance	Gift Aid
2 Gifts Reported for Budget Corporate Membership				
<input type="checkbox"/> <u>Friend</u>	Contribution	Received	Balance	Gift Aid
486 Gifts Reported for Budget Friend				
<input type="checkbox"/> <u>Learning</u>	Contribution	Received	Balance	Gift Aid
10 Gifts Reported for Budget Learning				
<input type="checkbox"/> <u>Learning (M4L)</u>	Contribution	Received	Balance	Gift Aid
4 Gifts Reported for Budget Learning (M4L)				
<input type="checkbox"/> <u>Mailing List</u>	Contribution	Received	Balance	Gift Aid
86 Gifts Reported for Budget Mailing List				
<input type="checkbox"/> <u>Other Fundraising</u>	Contribution	Received	Balance	Gift Aid
498 Gifts Reported for Budget Other Fundraising				
<input type="checkbox"/> <u>Rubinstein</u>	Contribution	Received	Balance	Gift Aid
2 Gifts Reported for Budget Rubinstein				

2015-2016 Actual	Contribution	Budget	+/-
Concert	£1,000,000	£1,000,000	£0
Corporate Membership	£100,000	£100,000	-£100,000
Friend	£1,000,000	£1,000,000	-£1,000,000
Gift Aid	£100,000	£100,000	-£100,000
Learning	£100,000	£100,000	-£100,000
Learning (M4L)	£100,000	£100,000	-£100,000
Mailing List	£100,000	£100,000	-£100,000
Other Fundraising	£100,000	£100,000	-£100,000
Rubinstein	£100,000	£100,000	-£100,000
Special Projects	£100,000	£100,000	-£100,000
<b>Total</b>	<b>£1,000,000</b>	<b>£1,000,000</b>	<b>(£1,000,000)</b>



Learning (M4L)						Contribution	Received	Balance	Gift Aid
4 Gifts Reported for Budget Learning (M4L)									
Mailing List						Contribution	Received	Balance	Gift Aid
97 Gifts Reported for Budget Mailing List									
Other Fundraising						Contribution	Received	Balance	Gift Aid
Annual Fund Appeal									
Name	Date	Fund	Designation	Donor Credit					
1017885 Anonymous Anonymous £1k CAF voucher sent to JG, rec'd no 28/7/15. AP	28/07/2015	Annual Fund	Season Appeal		£1,000.00	£1,000.00		£250.00	
1005427 [Redacted] July appeal	13/07/2015	Annual Fund	Season Appeal		£100.00	£100.00			
1009791 [Redacted] £500 donation rvcd via bank transfer on 5.06.15. 'Wish it could be more'. Allocated to 1516 season appeal. IHK	05/06/2015	Annual Fund	Annual Fund		£500.00	£500.00			
1001637 [Redacted] £200 to 1516 season appeal. Attended DL15	23/03/2015	Annual Fund			£200.00	£200.00			
1075960 [Redacted] £100 donation to 15/16 Season appeal follow ing invitation to DL15. IHK 18.02.15	18/02/2015	Annual Fund			£100.00	£100.00			
1014399 [Redacted] £250 cheque from Carole Armstrong for 1516 season appeal. Was not invited to DL	02/03/2015	Annual Fund		Carole Armstrong	£250.00	£250.00			
1007703 [Redacted] £250 CAF voucher from Artemis Trust to 1516 season appeal. Did not attend DL15	26/03/2015	Annual Fund		Anonymous	£250.00	£250.00		£62.50	
1014777 [Redacted] £250 donation to 15/16 season appeal follow ing DL15 on 11 Feb 15. IHK 17.02.15	17/02/2015	Annual Fund		Anonymous	£250.00	£250.00		£62.50	

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# Next?

- Ushers scheduling
  - Online
  - Mobile friendly
  - Accommodating swaps
  - And assignments
  - Not using seating cos it's boring

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# Next?

- Show report
  - House Managers report
  - Comments
  - Income from CDs, etc
  - Ushers hours
  - Encores and timings for PRS
  - etc.

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# Thanks!

- Richie Warburton
  - [rwarburton@wigmore-hall.org.uk](mailto:rwarburton@wigmore-hall.org.uk)
- David Taylor
  - [dtaylor@wigmore-hall.org.uk](mailto:dtaylor@wigmore-hall.org.uk)
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  - [@wigmore\\_hall](#)

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# Jessitura



**EUROPEAN  
CONFERENCE 2015**

**5 & 6 NOVEMBER  
NOTTINGHAM**

## QUESTIONS?

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

# Jessitura



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## WHAT'S NEXT?

- This is now the end of the day, we wish you all safe travels and we hope that you have enjoyed TEC15!
- Don't forget to collect your luggage from the cloakroom at the Crowne Plaza Hotel