



# analytic Coffee! Special Topic: Contact Points & Permission 1/23/20 11:00am EST

**Date:** 23 January 2020 - All items on the board

**Time :** 17:53 (UTC+00:00)

## Facilitator

Tessitura User Groups 2

## Attendees

Justin Foo, Terry Stevens, Caryl, J. Paul FitzGerald, Yogesh, Janelle Torres, Chris Reid, Janelle Torres, Sheela, Leslie Gehring, Rachel, Terry Stevens, Gabriela J., Susan Hayes, Jess Levy, Eduardo, Karen McKeivitt, Mike, Terry Stevens, Heather Laplante, Sheela, Mike, Shirley, Amanda Hyde, Leslie Gehring, Amanda hyde, Carol Keeney, Leigh Hopkins, Paul FitzGerald, Rachel, Sheela, Colleen , Melissa Halili, Yogesh Persaud, Mindee, Jess Levy, Christine Wingenfeld, Mark DuBose, Gabi J., Nancy Atherton, Pittsburgh Consortium, Jamie OBrien, Mike, Susan Hayes, AG, Elizabeth , Kelsey Moriarty, Matti Allison, Don McKim, Karen McKeivitt, Lyric, Jonathan Smillie, Michele Keutsch, Taylor, Leah Anglum, Tara, Terry Stevens, Heidi Salter, Taylor, Tara, Beth Pantzer, Kelly Cronin, Leslie Gehring, Leslie Gehring, Gabi J., Eduardo, Matti Allison, Madeline, MIke, m

## Summary

We had a huge turn out for today's session. We covered a lot of topics about Contact Points Permissions, & Contact Point Purposes, and Interests.

We discussed:

- \* Communication plans related to rolling this out with customers.
- \* Dealing with Technical reasons to not communicate vs Permission reasons not to communicate
- \* The Tessitura Network intended uses for these features.
- \* Confusions related to use of these features with 3rd Party products like WorkFly, Mail2, MailChimp, and others.
- \* Whether to be detailed vs simple about making these categories.
- \* What it will take to transfer from our current approach to using these new features.
- \* Individual vs Household use of accounts.

## Topics discussed

How do you account for updating the "reason" for removing an address from use? For example if a piece of mail is returned as undeliverable and although you still have permission to use mail, that address is no longer valid? Also if there is a Hard Bounce, the permission for email is Yes, however that address is no longer valid. I am looking at this from a Customer Service perspective. The staff should have a simple way of deciphering the information.

Votes: 10

Suggested by: Susan Hayes

## Actions

### Comments

- **Colleen**  
For the mailing address, we have an Address Type that is Invalid which then creates a Constituency of Invalid Address and creates an icon in the header prompting someone to get an update when speaking to that constituent.
  - **AG**  
Use a stored procedure to generate CSI for hardbounces (wordfly)
  - **Sheela**  
Flag in the header if an address is bad
  - **Leslie Gehring**  
We also use a flag in the header for bad contact information so front-line staff can see at a glance there's a problem
  - **Tessitura User Groups 2**  
Heard about a custom header that uses attributes that show channel problems like mail, phone, email.
- 

Did you develop a communication plan to pro-actively ask patrons to update their preferences?

Votes: 10

Suggested by: Jess Levy

## Actions

### Comments

- **Tessitura User Groups 2**  
A suggestion about keeping the list simple.
  - **Sheela**  
Goodman Theater has four purposes for email: Performance notifications (includes pre- and post-show); Updates (i.e. marketing); Support (i.e. development); Newsletters (covers all types of newsletters)
  - **Sheela**  
Use permissions as a more over-arching "Yes" or "No"
  - **Tessitura User Groups 2**  
Here's our list of email contact point purposes: Performance Notifications (pre-show reminders, surveys), Goodman Updates (all marketing), Support (fundraising), Newsletters
  - **Christine Wingenfeld**  
People are more inclined to update preferences when there are fewer choices (ex. 4 list options.)
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What are the intended uses for  
Contact Points,  
Contact Point Purposed, Interests,  
Contact Point Categories.

...

Votes: 9

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Suggested by: Tessitura User Groups 2

## Actions

### Comments

- **Tessitura User Groups 2**  
Contact Point Purposes (same as 10 check boxes for Mail Purposes) This is for this kind or that kind on communication. The What to be communicated
- **Sheela**  
Purposes: the evolution of what used to be the checkboxes of mail purposes on email/mail addresses. This contact point (i.e. address) is the one to use for this KIND of communication. Example, the customer has expressed to us that they want to receive their subscription notice at this address vs. board comms to this other address. Use in extractions to extract the contact point we want for that type of communication.
- **Tessitura User Groups 2**  
Contact Permissions. Customer telling us you are allowed to contact me through.
- **Sheela**
  - Permission: The customer has said broadly YES I give you permission to contact me via this channel.
  - Can get more granular, i.e. yes I give the development department to contact me via email but not the marketing department
- **Terry Stevens**  
Contact Point Purposes: Marks what kind of communication the constituent wants. Is attached to the email addrees, mail address, etc.
- **Sheela**
  - Interests: what the customer is interested in purchasing. Can be self-selected by the customer; but can also be coded to weigh what they are interested in based on purchase history. More of a categorization of the product themselves.
- **Terry Stevens**  
Contact Permissions: Customer is telling us what they give us permission to send to.
- **Susan Hayes**
  - Contact Purpose v Points
    - o Purpose = piece of information as a contact point (mail, email, etc) what it should be used for (i.e. specific home, season home) email reminders for only membership go to personal vs. business email etc
    - o Permission = Yes/No in regards to any form of contact (email only, phone only) or can be contacted by email for subs and mail only for memberships. Can also be narrowed further by specific genre/organization (if a consortium)
    - o Marketing = Opt in/Opt out a bit tricky but Interests can still be utilized for this purpose. A good use for contact Point purpose may be monthly newsletter

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Interested in learning how other organizations have set up their contact management. Is a detailed approach the way to go in the set up?

Votes: 8

Suggested by: Janelle Torres

## Actions

### Comments

- **Sheela**
  - "Broader is better" – not overwhelming patron OR staff with options
  - o Two super-categories: devo and marketing

- ? Within those, three smaller choices each.
- oPermissions = devo mail, marketing mail, devo email, marketing email etc
- oPurposes or interests = more granular
- oMy account page: update "I want to hear about" with checkboxes
- oWhen someone clicks unsubscribe, they get a message "really? Not at all? Or only these things?" -two step unsubscribe

- **Leslie Gehring**

Granular for specific purposes within a specific research community; more general for ticketing/marketing and development

- **Tessitura User Groups 2**

Jess suggested broader is better.

- **Jess Levy**

Our (yet to be implemented) plan is to have broad contact permissions for Marketing and Devo (Mail, Email, Phone - yes or no for each department) and then use interests for the types of email/mail they would like to receive. That is a short list of interests that will be available on line or through the unsubscribe process.

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Are we supposed to be transitioning out of using Contact Point Purposes and into Contact Permissions? If so, how are WordFly customers making this adjustment? Are Contact Point Purposes being phased out?

Votes: 8

Suggested by: Gabriela J.

Actions

Comments

- **Sheela**

Contact Permissions plug-in available for TNEW

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How granular are the options you are offering patrons when selecting interests? Education in general vs individual programs put on by Education?

Votes: 6

Suggested by: Jess Levy

Actions

Comments

- **Tessitura User Groups 2**

We think we covered this earlier

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Transitioning contact types into contact point purposes--does anyone have any recommendations?

Votes: 6

Suggested by: Leslie Gehring

Actions

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## Comments

- **Sheela**  
Migrating address types to contact point purposes would require SQL script. There is an out-of-the-box utility for managing the conversion to Contact Permissions.
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What is best practice, individual only or household and individual? What if the email is under the household currently and we check Individual?

Votes: 5

Suggested by: Terry Stevens

## Actions

## Comments

- **Tessitura User Groups 2**  
T\_DEFAULT contact\_per\_on\_ind\_only. (Default is Yes)
  - **Susan Hayes**
    - Contact Permissions -
      - o Can be specified for a specific contact on a record so one person may wish to be contacted and one person may not (husband/wife scenario for instance)
  - **Tessitura User Groups 2**  
GDPR has to be individual
  - **Jamie OBrien**  
Related to this (I assume), there's also a concern about having institutional agreement about using the Individual and not the Household when pulling email lists , building records, and so forth. (We need to have this discussion.)
  - **Tessitura User Groups 2**  
Contact Permission are not email, phone, mail specific.
- 

We're struggling with maintaining permissions since the decisionmakers aren't the ones on the front lines talking to the patrons/reaching out. Does anyone have ideas for the least intrusive way to do this/smallest impact on already-taxed small box office staffs?

Votes: 5

Suggested by: Mindee

## Actions

## Comments

- **Mindee**  
Mindee is in the noisiest office ever today
  - **Mindee**  
I lost my unmute?
  - **Mindee**  
I am so sorry
  - **Mindee**  
I get a bookmark menu :(
  - **Mindee**  
I \*do\* feel like Jess' topic about the comm strategy sort of answered this
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- **Mindee**  
Thank you for the help -
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## Other comments from the Google Hangout Chat.

Votes: 0

Suggested by: Tessitura User Groups 2

### Actions

### Comments

- **Tessitura User Groups 2**  
Gabriela Jirasek11:20 AM  
Here's our list of email contact point purposes: Performance Notifications (pre-show reminders, surveys), Goodman Updates (all marketing), Support (fundraising), Newsletters
- **Tessitura User Groups 2**  
T\_Default CONTACT\_PERM\_ON\_IND\_ONLY and what is best practice? The default is set to Yes, Individual only. All of our emails are set to the Household so if we keep it at default of Individual only how will we know which email their preference is referring to. The answer was contact permissions are not connected to emails at all they are in relations to a constituent record. So if we keep it at default as Yes Individual only it will be an all-or-none for us if even one of the individuals on the household says no. That would mean no one should be contacted by the method they have marked no on the entire household. It was recommended that the emails be moved to individual records which you can do under the Contact Details tab in the constituent record by clicking the blue people icon and selecting "Transfer Owner". However, this needs to be done manually for each constituent. An important point to make is the way we are currently using restrictions now under the General tab is also an all-or-none scenario. If there is a restriction it applies to all accounts within the household. Our plan then is to keep the Default marked as Yes for individual only and work at moving those emails as we service customers to their individual accounts so maybe some day in the future we can use those permissions on that individual's email rather than for the entire household. In the meantime it is business as usual where if there is a restriction it applies to the entire household for now.

I would be very interested in expanding this topic into list pulling. How do you pull lists both individual lists and household lists using contact permissions.

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## Topics voted on but not discussed

How do you keep contact point purposes up to date? How frequently do you review them?

Votes: 4

Suggested by: Leslie Gehring

### Actions

### Comments

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Transitioning out of the mail/phone/e-market restrictions - any recommendations? Do you use only Contact Permissions in their place? Some combination between Permissions and Purposes?

Votes: 4

Suggested by: Heather Laplante

[Actions](#)

[Comments](#)

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Given that T-New still seems to use Interests. How are folks gathering (or hoping to gather) the new customer preference information?

Votes: 3

Suggested by: Tessitura User Groups 2

[Actions](#)

[Comments](#)

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I have seen different uses for TR\_CONTACT\_PERM\_CATEGORY. Some are using it for organization name some are using it for type of Permission (Tickets, Development, Marketing, etc.) We like using it for type because it separates them nicely. Is this what we should be using it for?

Votes: 2

Suggested by: Terry Stevens

[Actions](#)

[Comments](#)

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