

OPEN SPACE DISCUSSIONS

Discussion Title: Managing Communication Preferences via TNEW - how, where, when?

Convener Name: Kim Lee - Arts Centre Melbourne

Discussion Day: Wednesday 4 August **Discussion Time:** 1.45pm AEST

Participants: added at the end of this document

Useful links:

Contact Permissions/GDPR

https://www.tessituranetwork.com/en/Items/Videos/Webinars/2018/0207_GDPR

TNEW Contact Permissions Plug In

<https://www.tessituranetwork.com/en/Files/one-sheets/Plug-ins/Contact-Permissions-NA-AP>

Preferences in WordFly

<https://support.wordfly.com/hc/en-us/articles/204768684-How-do-I-set-up-Tessitura-Unsubscribe-Preferences->

Contact Point Purposes in Prospect2

<https://help.prospect2.com/article/444-integrating-contact-point-purposes>

Notes: (read in combination with the live chat pasted below)

Kim @ Arts Centre Melbourne

We are still using the Restrictions on the General Tab to manage preferences. We have both a custom website and use TNEW for subscriptions and timed entry. Preferences in TNEW are currently stored as Interests

We have also recently migrated from Mail2 to Prospect2.

Prospect2 allows us to integrate with a single Contact Permission for Email, and another Contact Permissions for SMS. And Contact Point Purposes can be linked to either Prospect2 Lists or Tags.

As part of refreshing customer communication preferences we are investigating how these can be managed in TNEW, where in Tessitura

preferences are stored and when in the TNEW purchase path/registration process this takes place.

Kate @ National Galley of Canberra

Have been on Tessitura for 12 months. Use TNEW and Wordfly.

Use the Contact Permission Plug in in TNEW.

Contact Permissions are used for 'front facing' preferences, customers can manage these themselves.

Contact Point Purposes are used for 'private' lists like comms for Members and Donors.

Tessitura (Dale) has written a utility that runs overnight to that updates Contact Point Purposes based on Contact Permission values.

Contact Point Purposes are used to manage which email to send particular comms to.

Customers can unsubscribe from the 'front' facing preferences/lists via Wordfly.

Unsubscribes from the 'private' lists is handled via the unsubscribe link in emails

Tom @ Spoleto Festival USA

What is the difference use cases between Contact Permissions and Contact Point Purposes?

Room comment: Contact Permissions designed to support GDPR requirements in the UK. Are not assigned directly to Contact Points (Email/Postal/Phone)

Contact Point Purposes can be applied to Contact Points and allow comms to be directed where the customer want them

Jeremy @ California Science Center

Current use Interests to capture preferences in TNEW

Room comment: This is the 'out of the box' way to manage preferences in TNEW

Q: Where do you place preferences in TNEW?

Kate @ National Galley of Canberra

Many options with Contact Permission plug in - currently present this in the Cart and also Checkout

Room comment: Also present these in Sign up page

Room comment: Wordfly allows orgs to select where preferences are stored. Options are Contact Permissions, Interests or Contact Point Purposes.

Room comment: There are so many different options across Tessitura, TNEW, Wordfly, Prospect2, Mail Chimp etc etc. And almost all require manual intervention or custom scrips. Needs to be cleaned up.

IT'S A HOT MESS

Jeremy @ California Science Center

How do others ensure Members and Donors still receive their comms?

Room comment: Wordfly has an override function that allows you to send to customer who have unsubscribed so you can still send them critical comms like cancelled performance information.

Q: How do others manage preferences across Household v Individual?

Room comment: Many find this a challenge. Need to be clear on your orgs business rules

Q: Do orgs send comms to entire database periodically?

Allison @ NZ Opera

Per NZ law are allowed to do thus once. Did so during lockdown. Was a lot of manual work but Box Office were happy to do this.

Info: There is no cost for the licence of the Contact Permissions plug-in for TNEW, but there is an install/config/training charge of 4-6 hours at the standard consulting rate of USD\$190/hr. The total hours will be dependent on training and any additional config required

Live Chat:

August 4, 2021

Annika Stennert

Hello all! I am so sorry, I can't get the platform to work on my iPad and my work computer doesn't have a mic/webcam - so I will be just a photo and a chat...

1:46 PM

Nicola Cann

Hi all! Sorry I don't have a webcam on the work pc! Hi all :)

1:47 PM

Heath Wilder

Hey both

1:49 PM

Annika Stennert

Does that mean those people can still unsubscribe from those lists?

+

Thank you for mentioning that Kim!

Ah yes, understood!

But so if they unsubscribe it's a global unsubscribe?

Ah - how good!

Great! Thank you so much for clarifying!!

1:57 PM

Claire Flynn (she/her)

We do a similar thing at the Wheeler Centre to Kate. We implemented in 2019 and am keen to redo the process somewhat as we need to update script - with new purposes

1:57 PM

Jo Bramley

Kate - can the email preferences be seen in TNEW account section through using the plug in?

1:58 PM

Kate Vassallo

yes - people can login and "update preferences"



1:58 PM

Jo Bramley

@Kate Vassallo thanks



may hit you up later if that's ok? @Kate Vassallo

1:59 PM

Annika Stennert

We have two different newsletters and we use two different contact permissions for those - it makes it easy for people to unsubscribe from the correct thing.

2:00 PM

Kate Vassallo

yep totally - happy to chat to anyone, my email is on my TLCC profile :)



2:00 PM

Annika Stennert

Yes!

Yes, Kate has got it :)

We haven'

got anything on sale right now, but I am pretty sure we also have made so they show up when you check out

2:02 PM

Heath Wilder

https://www.tessituranetwork.com/en/Items/Videos/Webinars/2018/0207_GDPR



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2:03 PM

Toni Murphy (she/her)

Is anyone using wordfly itself to ask the permissions/updates preferences? Or just TNew/log in?

2:03 PM

Nicola Cann

We use interests and send out our eNewsletter and I'm concerned that some people opt out from "all emails", not realising that they're going to miss out on pre concert / post concert emails or other big announcements that they might actually be interested in. I wonder if we could solve this with using contact point purposes instead.

2:04 PM

Toni Murphy (she/her)

@Nicola Cann yep thats my concern at my new org too

2:04 PM

Nicola Cann

We also have that issue - People can opt out in wordfly but it doesn't feedback to tessitura

2:05 PM

Amy Welsh (she / her)

<https://support.wordfly.com/hc/en-us/articles/204768684-How-do-I-set-up-Tessitura-Unsubscribe-Preferences->



Set up Tessitura preferences

In this article Getting Started with the preferences integration How does the preferences integration work? Setting up preferences in WordFly Test your preference updates in Tessitura Test Tessitur...



I think this is the functionality people were referencing

2:06 PM

Annika Stennert

We got our Webcaompany to create a sign up on our Homepage that integrates with Tessitura



2:06 PM

Claire Flynn (she/her)

100% agree with that Heath



2

2:09 PM

Annika Stennert

I agree too!

2:11 PM

Kate Vassallo

Thanks @Heath Wilder - super interesting to hear about how you do that

2:11 PM

Amy Welsh (she / her)

<https://www.tessituranetwork.com/en/Files/one-sheets/Plug-ins/Contact-Permissions-NA-AP>



2:13 PM

Claire Flynn (she/her)

I have to go to a meeting (boo) thanks all

2:14 PM

Heath Wilder

we have a dance studio separate to performances and Education so I 100% get that fear

2:15 PM

Spotted your cat's tail Jo 😊



2:18 PM

Nicola Cann

Thats what we're worried about

2:19 PM

Janet Herrington

It's a lot of manual work



2:19 PM

That's the take away "Its a hot mess" 😊



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2:20 PM

Heath Wilder

I recommend trying to write a good process map to untangle your spaghetti



2

2:20 PM

Amy Welsh (she / her)

Does it need to be added to the Tess roadmap for fixing?



I mean... everything is edm right now so its needs fixing.

2:21 PM

Heath Wilder

Should it go through MAC



2:21 PM

Annika Stennert

I think with contact permissions it's a bit more straight forward perhaps?

Then Wordfly updates them with the date.

2:21 PM

Nicola Cann

Does anyone here email out all patrons/ticket buyers each year and ask if they want to opt back in?

2:21 PM

Jason Taylor

[@Nicola Cann](#) We email patrons 30 days and 2 days out from their implied consent expiring. (Here in Canada we have implied consent for 2 years)



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It's all autmated.

2:24 PM

Amy Welsh (she / her)

Does anyone know how to update interests on bulk?

2:27 PM

Heath Wilder

only in SQL (I can share)



2

2:27 PM

Krista Tanuwibawa

@[Amy Welsh (she / her)](VXNlc182MDg5NjMx) We have a custom utility for that

2:27 PM

Amy Welsh (she / her)

Cool. Thanks @Heath Wilder and @Krista Tanuwibawa

2:27 PM

Annika Stennert

Thank you so much Kim!



2:27 PM

Nicola Cann

Thank you everyone! This has been really useful!



2:27 PM

Heath Wilder

Yep thank you all :D (for the therapy as well)



2:28 PM

Thanks Kim and all - super helpful!

Registered Attendees:

Attendees

Michelle Boyle

Head of Philanthropy Sydney Dance Company

Jo Bramley

Application Specialist CRM & Database Auckland War Memorial Museum

Tom Brown

CRM Manager Spoleto Festival USA

Nicola Cann

Digital Marketing Coordinator Adelaide Symphony Orchestra

Laura Charles

Bookings and Sale Co-ordinator Auckland War Memorial Museum

Justin Cheek

IT Coordinator and Systems Administrator Perth Festival

Thomas Chiu

Support Consultant Tessitura Network

David Crowther

Consultant, Onboarding Tessitura Network

Andrew Dillon

Manager, Visitor Services Australian Museum

Sean Fay

Assistant Web Manager The Philadelphia Orchestra

Brenda Fehlberg

Analyst (Business and Audience Development) Melbourne Recital Centre

Claire Flynn (she/her)

CRM & Ticketing Manager The Wheeler Centre

David Geoffrey Hall

Consultant, Asia Pacific Tessitura Network

Janet Herrington

Tessitura Project Manager Lawrence Hall of Science

Catherine Hoffman

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Dana Hylton Calabro

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Jennifer Laing

Ticketing ManagerQueensland Ballet

Alison Lambert

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Jade Moore

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Toni Murphy (she/her)

Marketing & CRM ManagerBarking Gecko Theatre Company

Erin Reddekopp

Manager, Strategic Partnerships Vancouver Opera

John Rice

Director of Marketing Los Angeles County Museum of Art

Katie Springer

Ticket Services Manager Asolo Repertory Theatre

Annika Stennert

Adelaide Festival Corporation Adelaide Festival Corporation

Jeremy Stoller

Graphic & Digital Media Manager California Science Center

Krista Tanuwibawa

Marketing Specialist City Recital Hall

Jason Taylor

Database Manager Toronto Symphony Orchestra

Wendy Taylor

Email Marketing Crystal Bridges Museum of American Art

Isabel Thomas

Research & Database ManagerSeattle Opera

Kate Vassallo

Tessitura Support OfficerNational Gallery of Australia

Emma Vernon

Senior Director of Individual Giving & MembershipDallas Zoo

Lauren Watson

Manager, Annual Giving and StewardshipVancouver Symphony Orchestra

Amy Welsh (she / her)

Ticket Sales RepresentativePerth Theatre Trust

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TJ Wilkshire

Marketing CoordinatorQueensland Symphony Orchestra

Hayley Woldseth

Marketing and Communications Project ManagerLa Jolla Music Society

Nathan Zanon

