


Welcome!

Thank you to the Blank Foundation

Today's session presented by

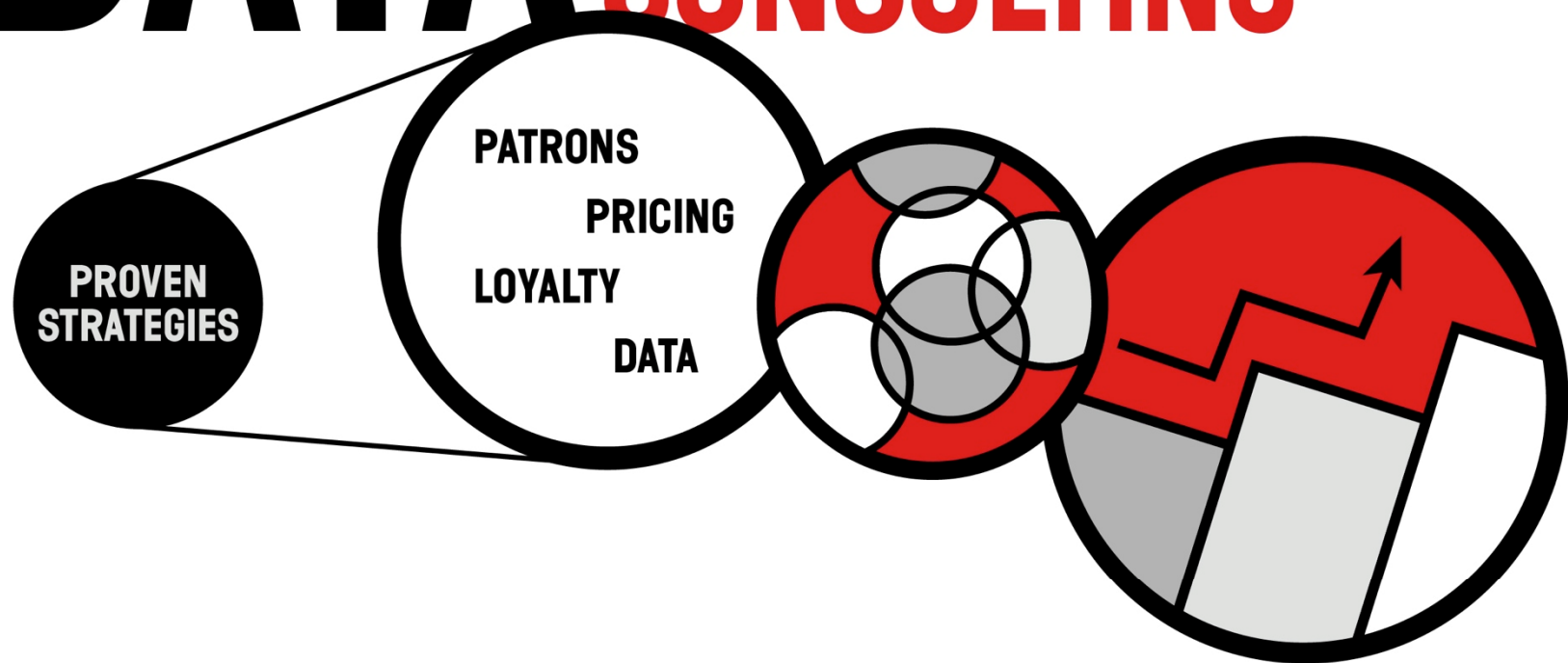
Keri Mesropov, VP of Client Services

Kate Hagen, Consulting Analyst



Copyright © 2016 TRG Arts
All Rights Reserved

DATA-DRIVEN CONSULTING



NEWYORKCITYBALLET



CIRQUE DU SOLEIL



ARTSCLUB
ALIVE ON THREE STAGES



Lincoln Center



DENVER ART MUSEUM



SEATTLE OPERA



ROUNDAABOUT THEATRE COMPANY



We Believe **Arts Help Communities** ***Thrive!***



Arts/culture strengthens communities
Learning, healing, decision-making, **fun**



We believe

a well-designed and
implemented arts/cultural
business model
enables 'the cool'





© peddecord photo 2010



"The original and unique work of art...
having the finest plots of the theatre."
—LEON BARDY
AND PAUL BERRY (1988)




W;t

A Play in

Margaret Edson

Organizations **that rely on patrons work fanatically** to develop their loyalty,
grow their net income in order to
set the stage for
COOL
things to happen.



Card Game

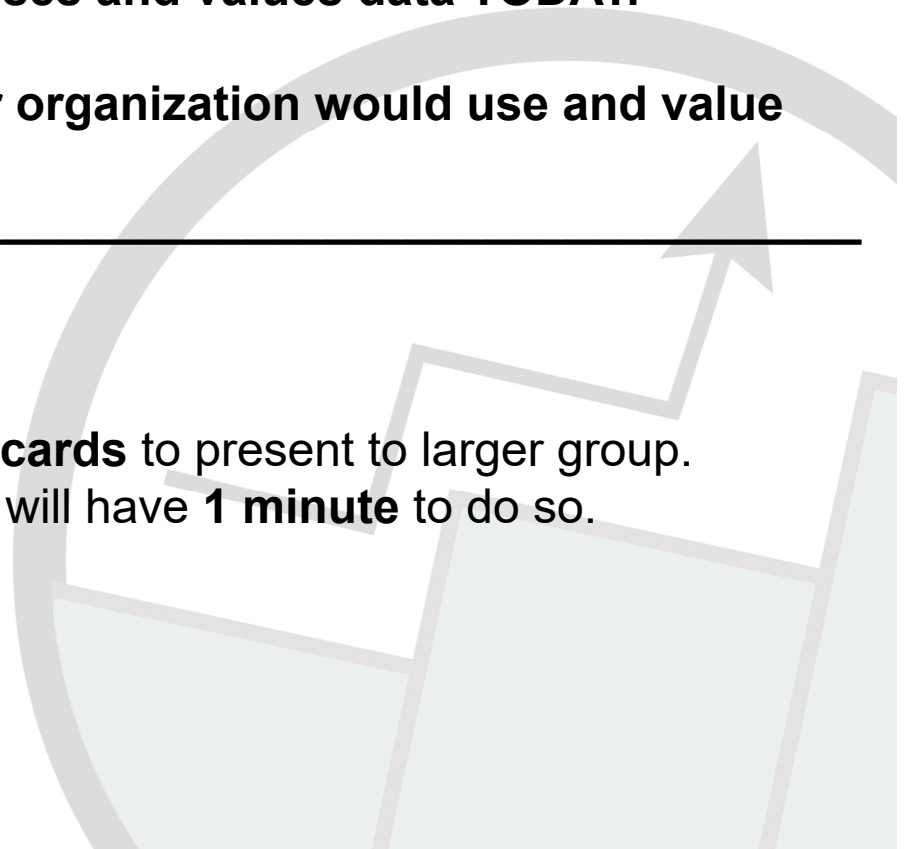
Each person CHOOSES:

One card that depicts how your organization **uses and values data TODAY.**

Another card that depicts how you **WISH your organization would use and value data.**

Discuss among your group.

Choose ONE example for EACH of the two cards to present to larger group.
Choose spokesperson to do so. Each group will have **1 minute** to do so.



How these sessions will be **optimized**

- **Teaching**
 - vs. telling
- **Interaction, small groups, dialogue**
 - With peers
 - With colleagues
 - With TRG
 - Reporting out to full group
- **F-U-N!**



Agenda

9:45 a.m. Keynote: Getting Results. What data can do for you when you ‘do’ for data.

Learn why data is so important, how to ‘ready’ it for action, and the imperative role data plays on driving results.

15 minute break

11:15 a.m. Make room for DATA: What we’ll STOP doing in order to START focusing on RESULTS.

In this session, we will explore how much time your organization is currently spending on data stewardship compared to best practices. An interactive and data-oriented discovery will illuminate how to decide what goes on your ‘stop doing’ list as you prepare to make room for data and results.

12:30 p.m. Lunch - quick break

1 p.m. Pouring the concrete: Building your foundation of ‘good data’ practices.

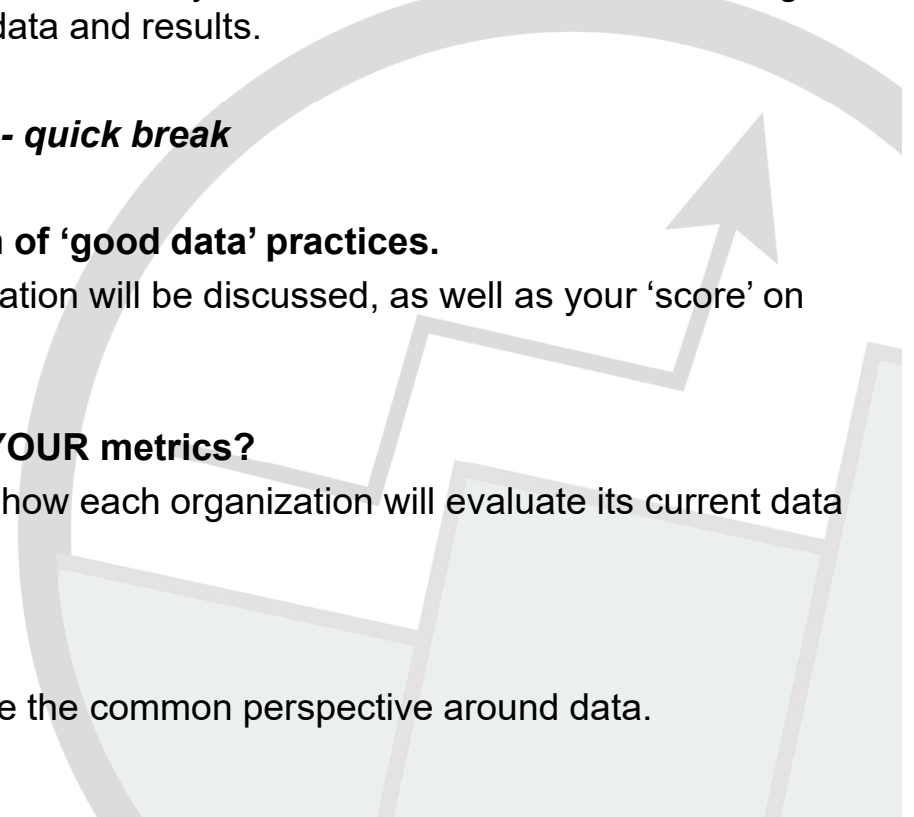
The importance of data completeness, hygiene and integration will be discussed, as well as your ‘score’ on these important data practices.

2 p.m. Discussion into Action: How will you improve YOUR metrics?

We will break out into small groups to discuss specifically how each organization will evaluate its current data basic metrics and plan to improve these numbers.

2:45 p.m. De-villainizing DATA

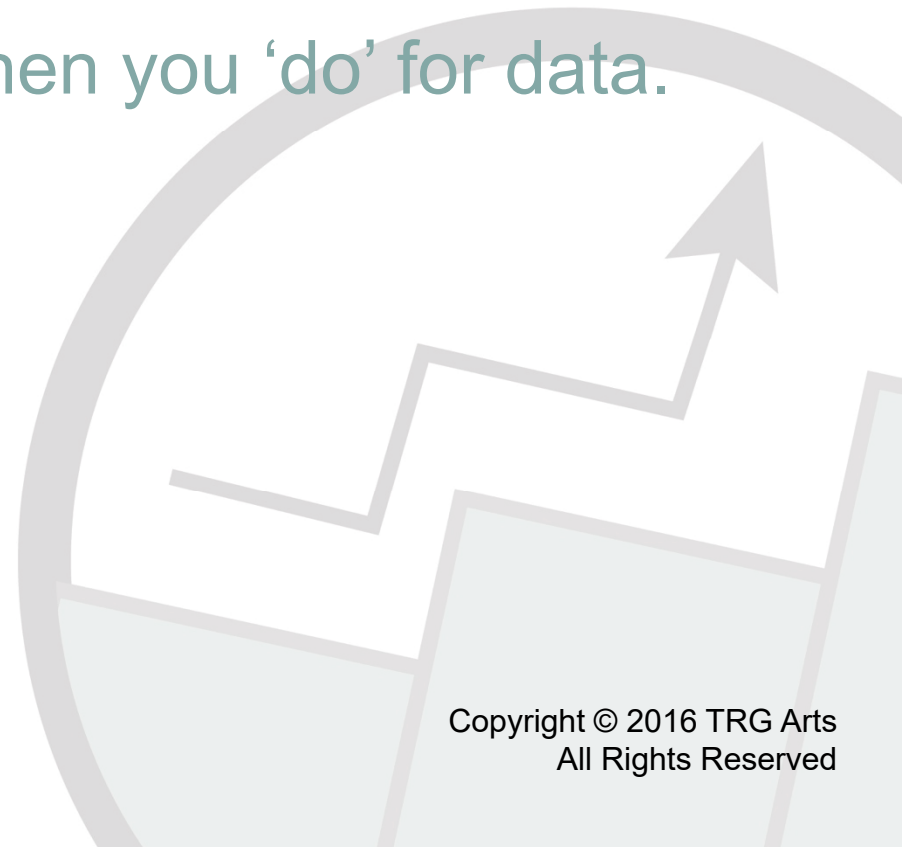
A fun, small-group activity to conclude the day and reframe the common perspective around data.



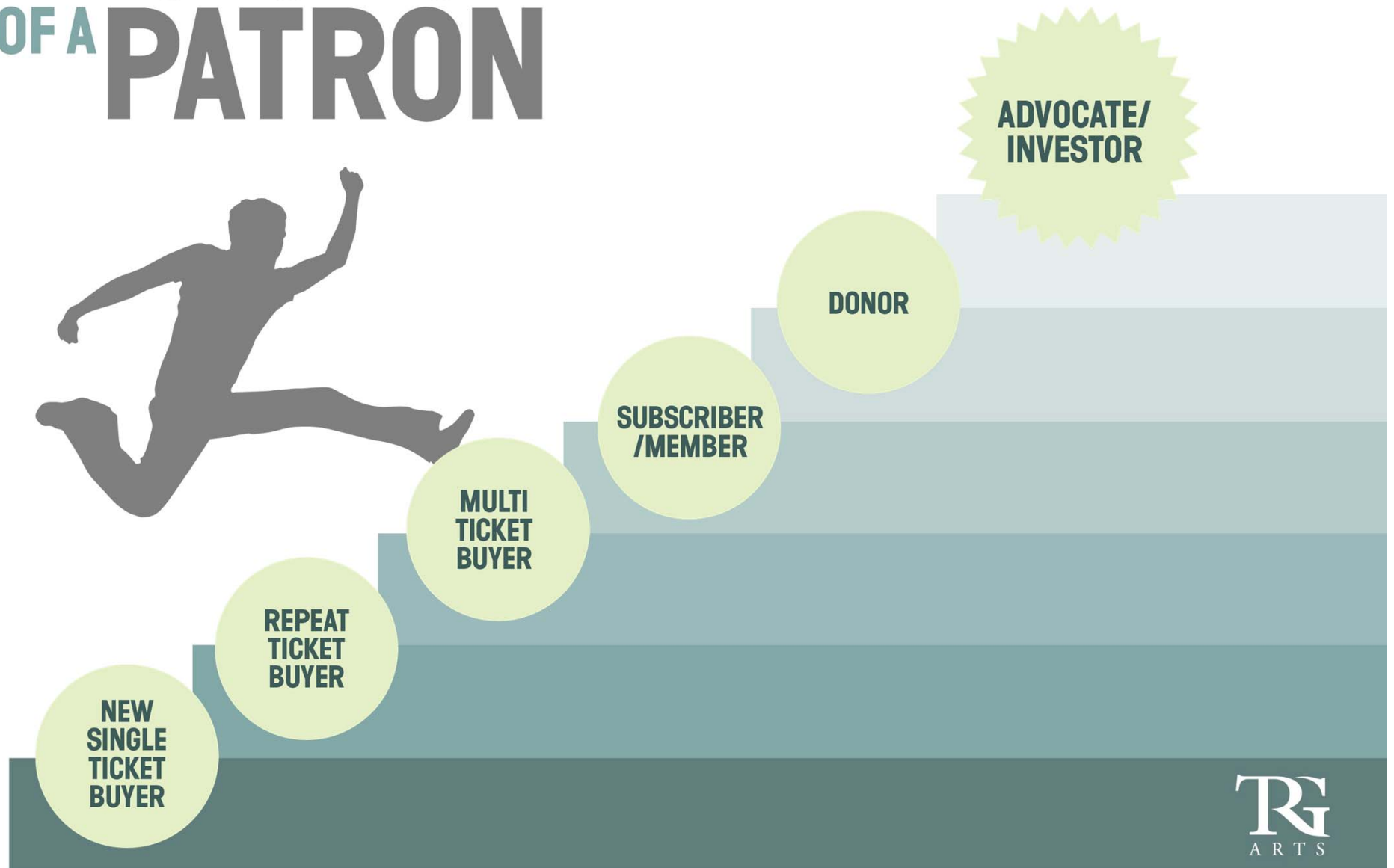
Keynote

GETTING RESULTS:

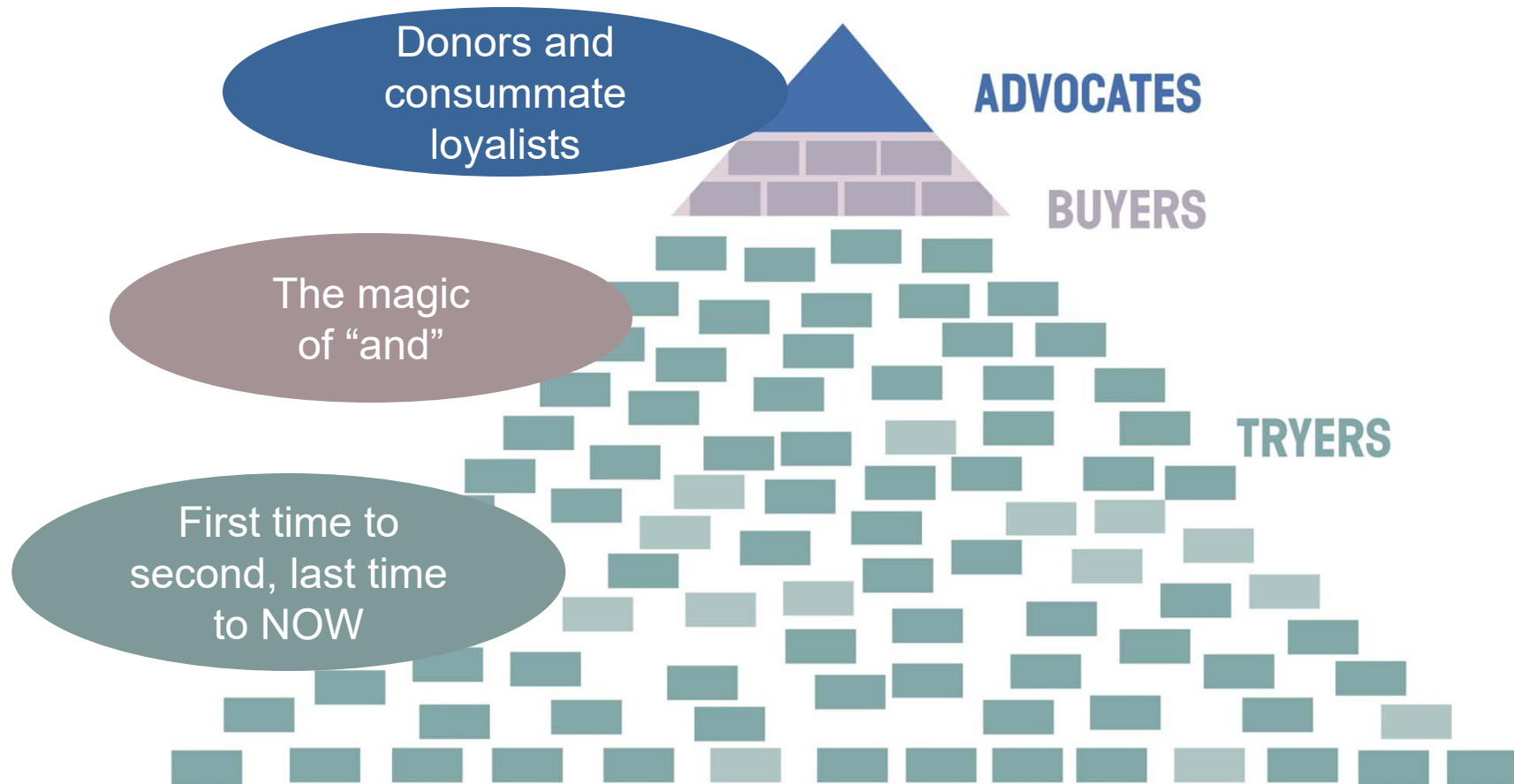
What data can do for you when you 'do' for data.



EVOLUTION OF A PATRON

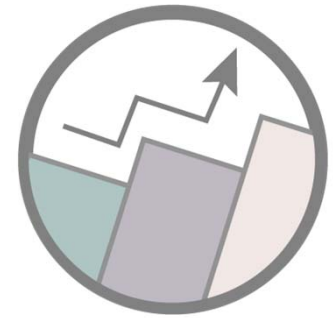


The Patron Loyalty Continuum



DATA MATTERS!

The key to growth



Data



Targeted Campaigns



Patron Insights



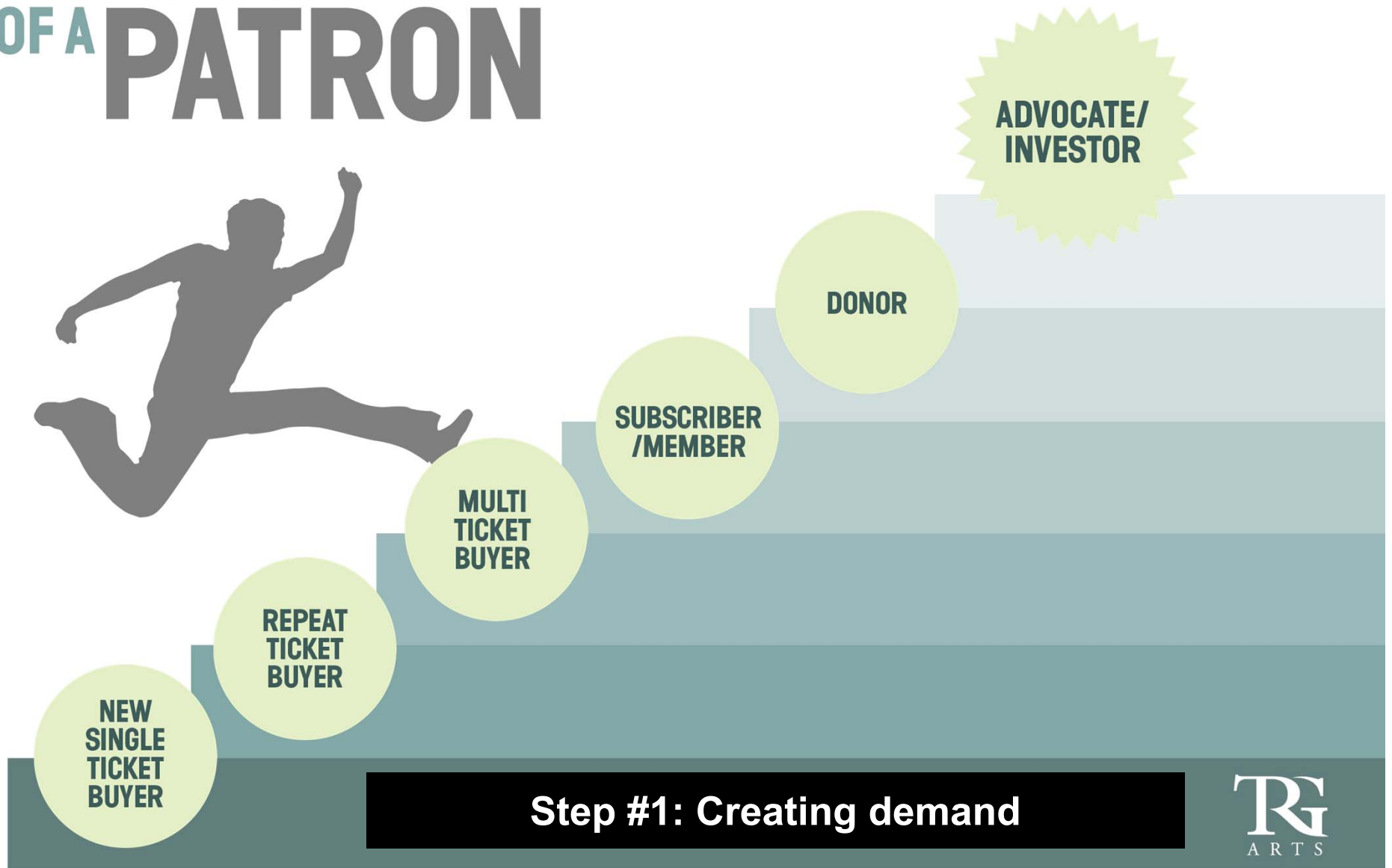
RESULTS



EpicGraphic.com

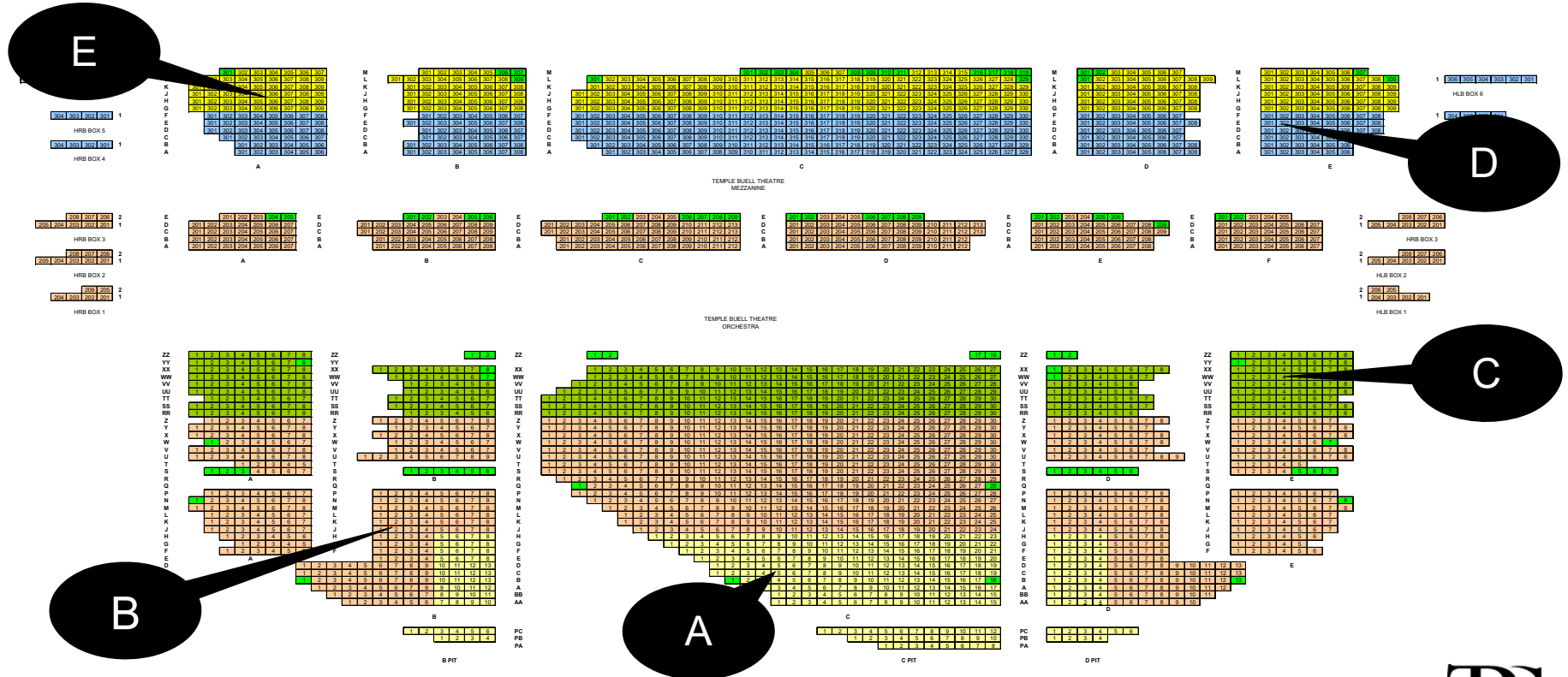
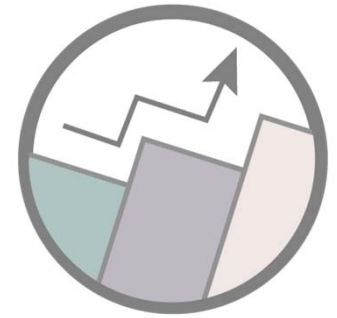
Photo by Bernard Goldbach (CC by 2.0)

EVOLUTION OF A PATRON



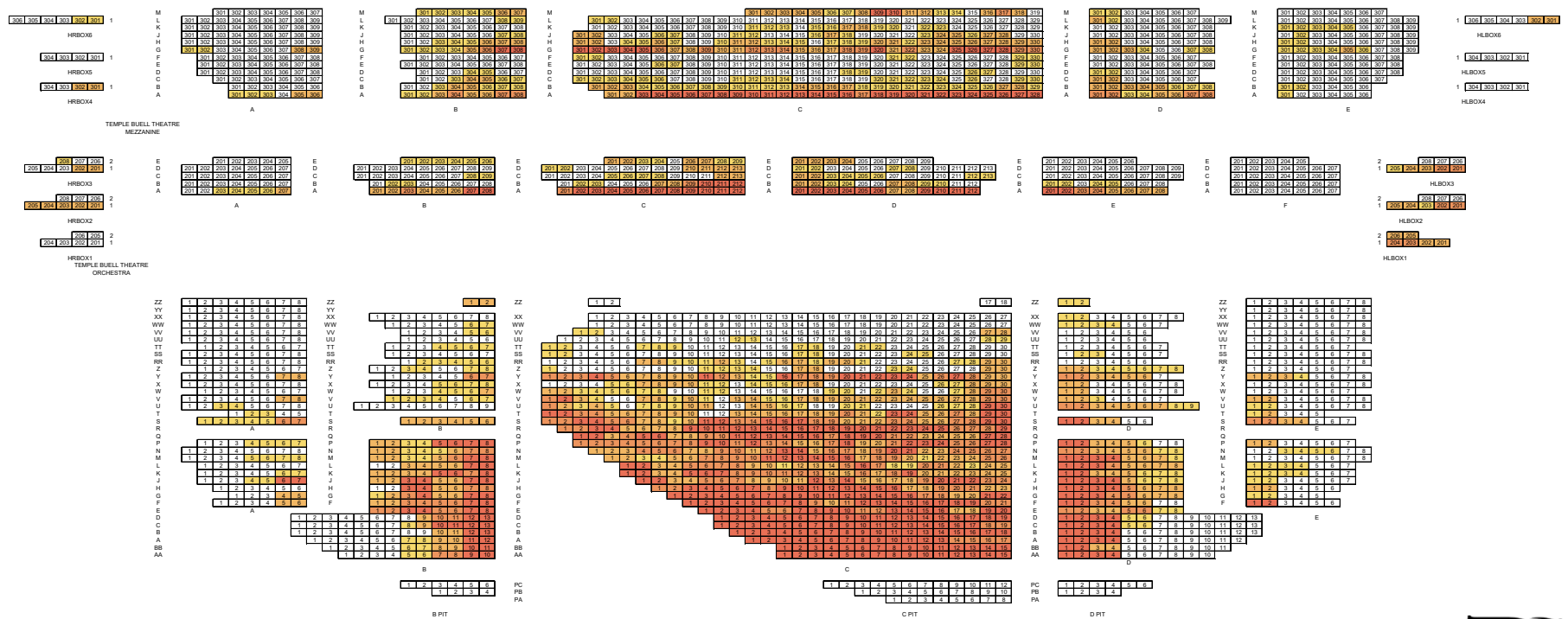
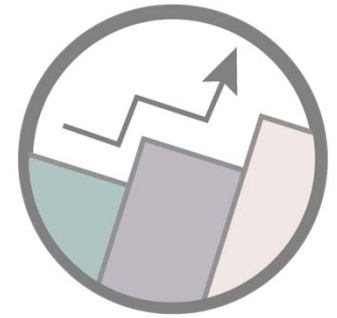
Case Study: Denver Center

Original Buell Scale of House



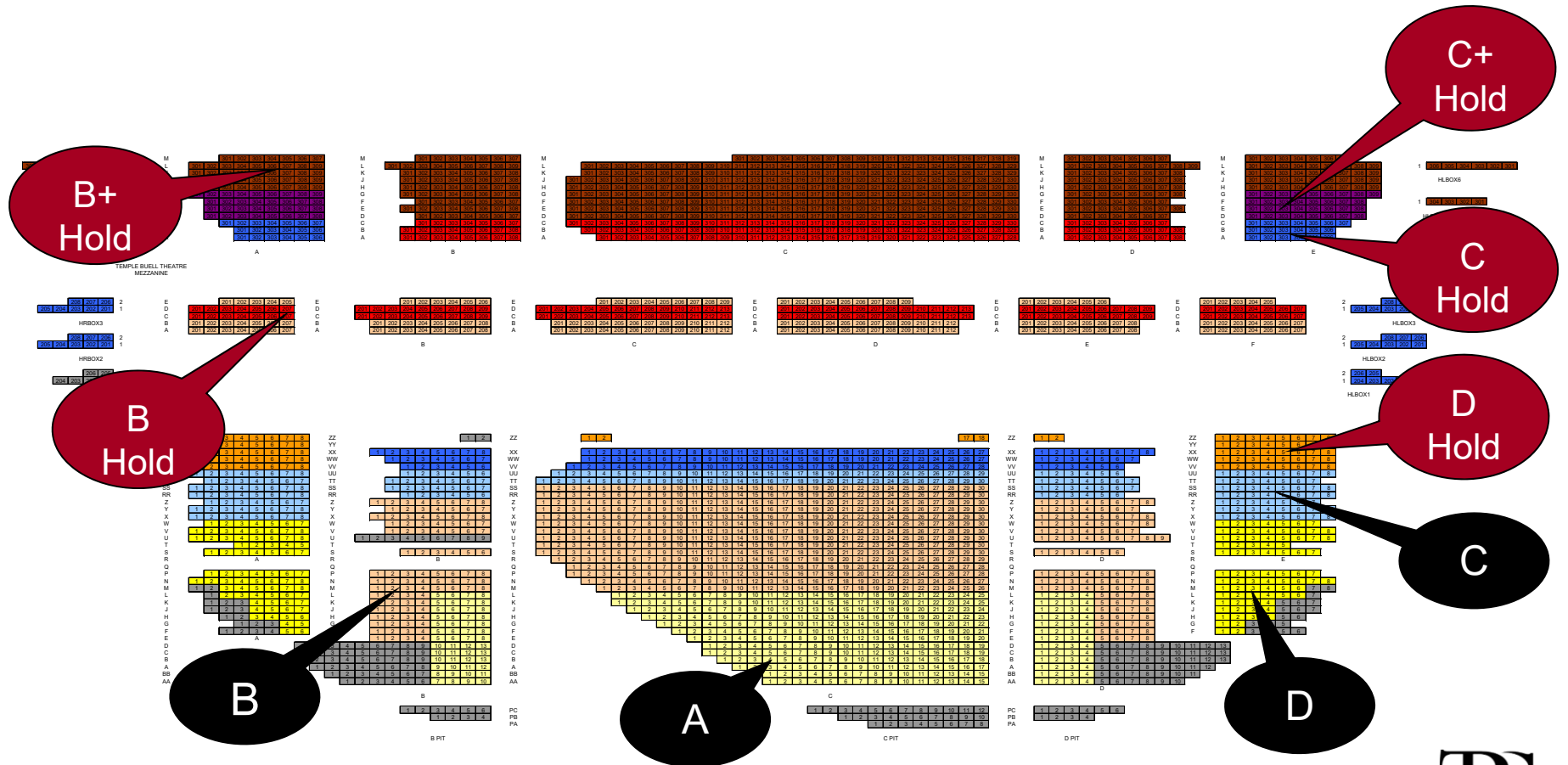
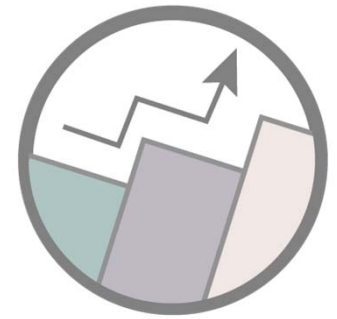
Case Study: Denver Center

Weekday Subscribers for The Color Purple



Case Study: Denver Center

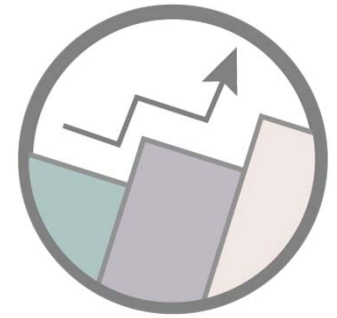
Revised Buell Scale-of-House





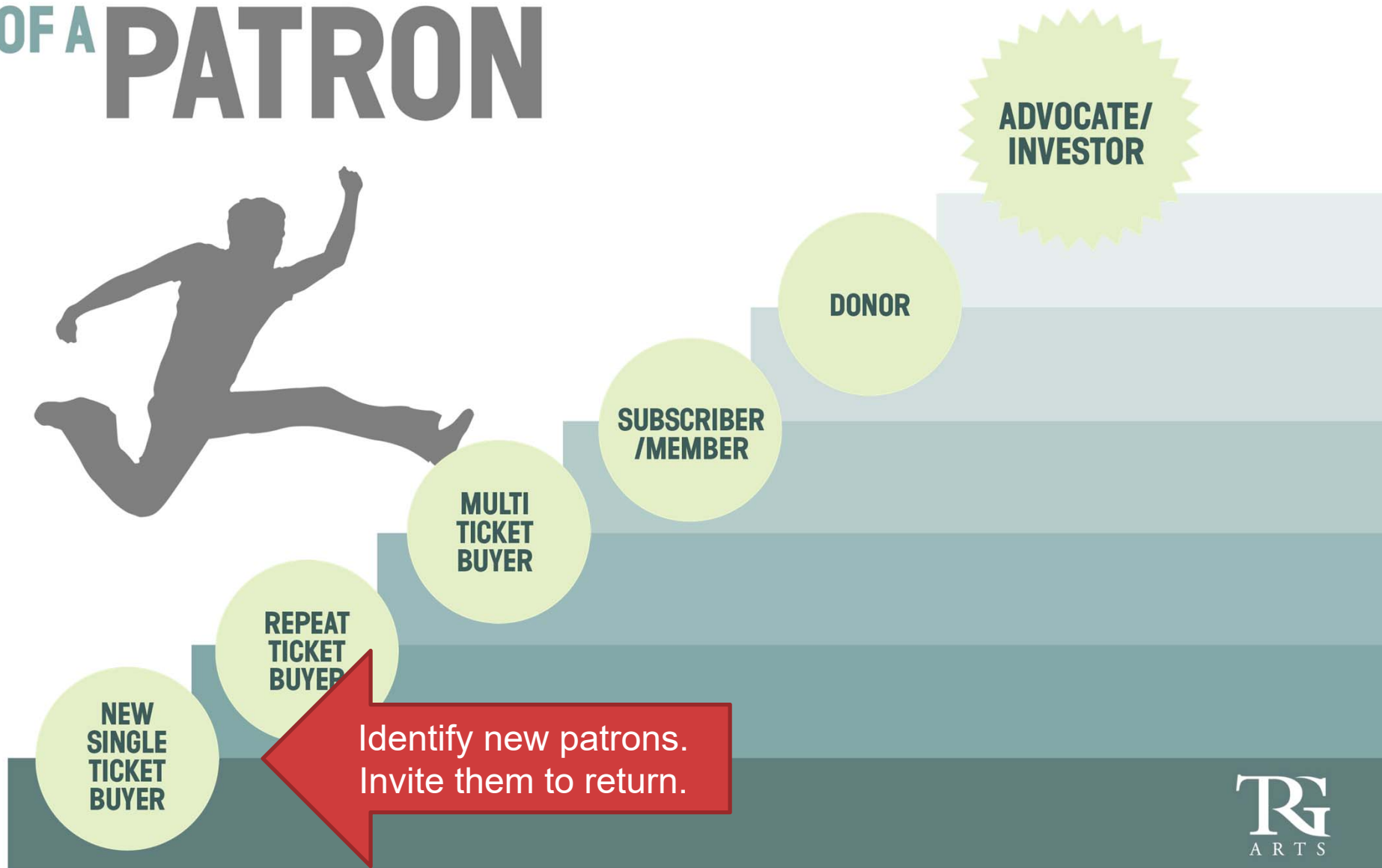
Case Study: Denver Center

Icing on the cake with Demand-based Pricing



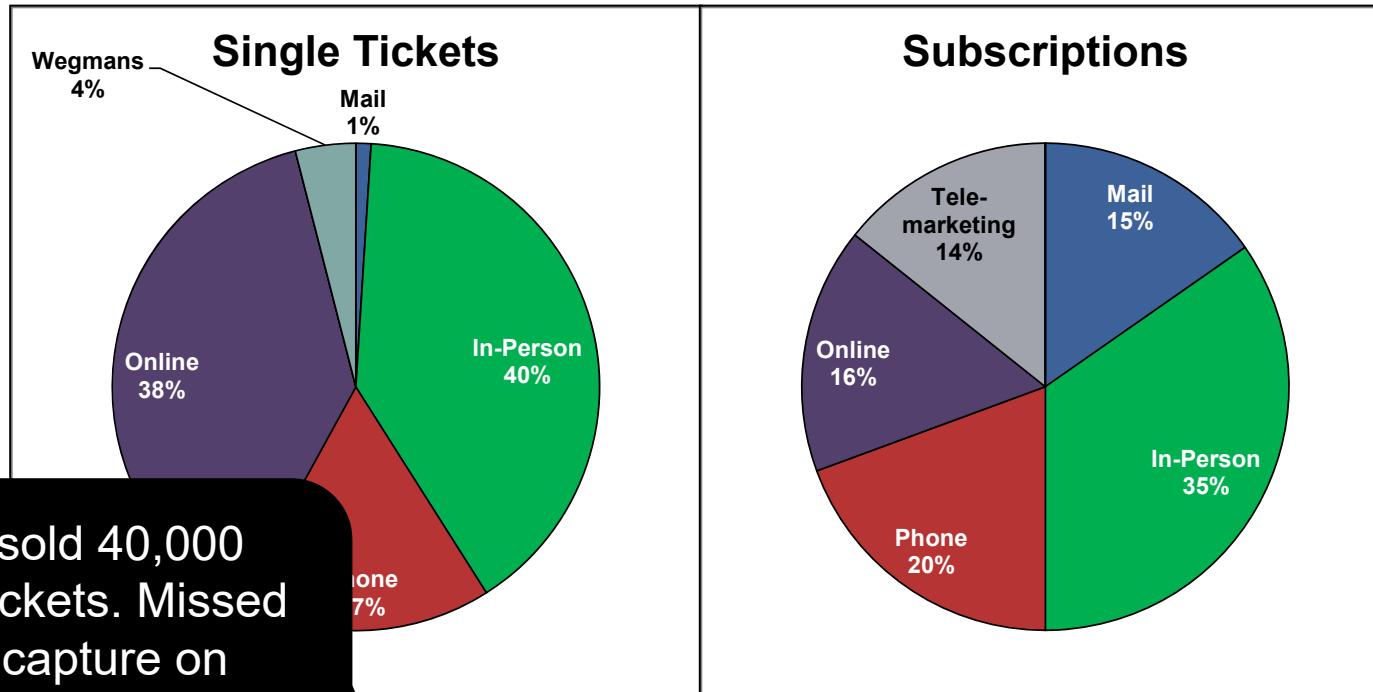
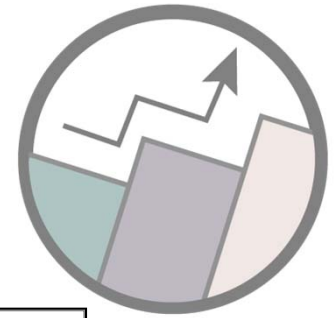
Show	Incremental Revenue
Jersey Boys	\$ 446,235
Riverdance	\$ 40,550
Wicked	\$ 422,278
Rent	\$ 21,620
Spamalot	\$ 13,205
Phantom	\$ 82,410
Chicago	\$ 22,420
South Pacific	\$ 78,382
Young Frankenstein	\$ 15,651
Fiddler on the Roof	\$ 86,480
In the Heights	\$ 20,401
Cirque Dreams	\$ 1,760
Mary Poppins	\$ 63,320
Legally Blonde	\$ 4,300
Cats	\$ 28,060
<i>Total to date</i>	\$ 1,347,071

EVOLUTION OF A PATRON



Case Study: Rochester Phil

Points of contact for patrons

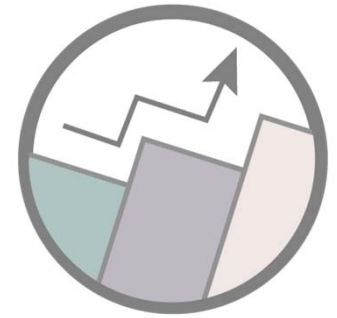


RPO sold 40,000 single tickets. Missed data capture on approx. 50% of households.

FY 2015					
Patron Type	Total HH	% with mail	% with email	% with phone	% with all three
Single Ticket Buyers	10,644	76%	60%	61%	27%
Subscribers	2,554	99%	72%	89%	62%

Case Study: Cincinnati Playhouse

Inviting new buyers back, creating same-season multi-buyers



Thank you for joining us for Christopher Durang's madcap comedy *Vanya and Sonia and Masha and Spike*. I hope you laughed out loud at the outrageous antics of these eccentric siblings.

I'd like to invite you back to the Playhouse next season with an exclusive offer. Get **HALF-PRICE TICKETS** to the beloved Tony Award-winning musical *The Secret Garden* – months before they go on sale to the general public.

Save 50 percent off full-price tickets to the following performances of the show:

Sept. 6 - 17, 2015.

Order your tickets today online at www.cincyplay.com or by calling the Playhouse Box Office at 513-421-3888 and using promo code: **SPIKE**.

Hurry! This offer is only good until June 30.

Sincerely,

Blake Robison
Artistic Director

*Good only for performances listed subject to availability. Not valid w/ 2015-16 season go on sale Monday Vanya and Sonia and Masha and



962 Mt. Adams Circle
Cincinnati, OH 45202

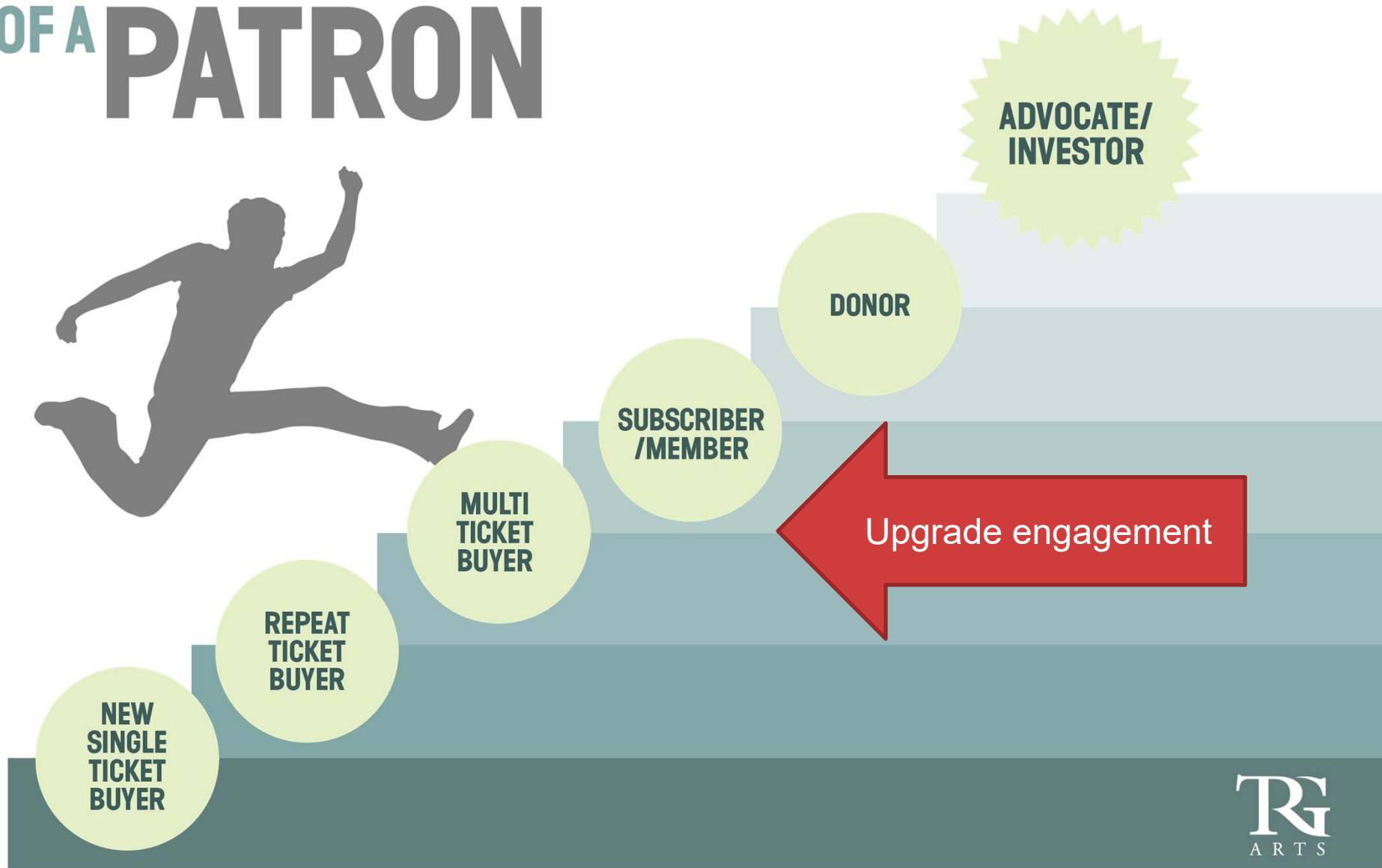


Mid-campaign:
569 multi-HHs
8.1% response rate
8% cost-of-sale
\$67,982 net revenue

AWARD®
WINNER
2007

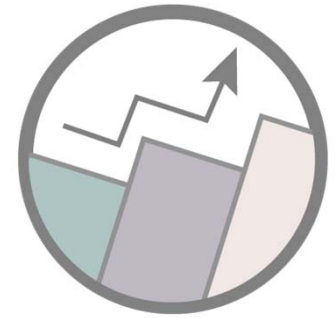
TR
ARTS

EVOLUTION OF A PATRON



Case Study: Pacific Symphony

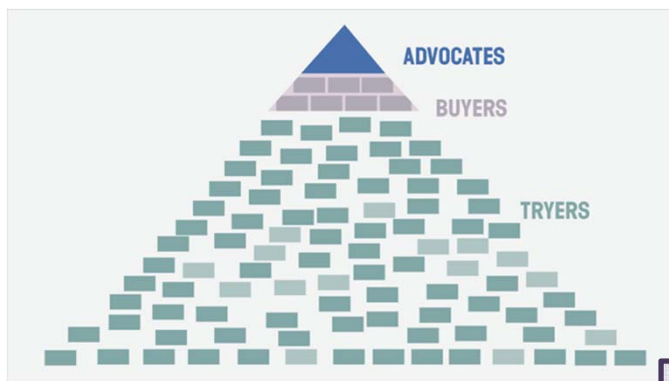
What should the next offer be?



Chamber	Classical	Connections	Family	Organ
9% HH \$1,323 avg/HH	78% HH \$10,116 avg/HH	7% HH \$2,005 avg/HH	21% HH \$1,082 avg/HH	18% HH \$363 avg/HH
5% HH \$1,079 avg/HH	60% HH \$2,697 avg/HH	13% HH \$1,349 avg/HH	11% HH \$887 avg/HH	15% HH \$186 avg/HH
1% HH \$255 avg/HH	33% HH \$258 avg/HH	4% HH \$222 avg/HH	10% HH \$225 avg/HH	6% HH \$101 avg/HH

New Audience Builders

Deepen Loyalty



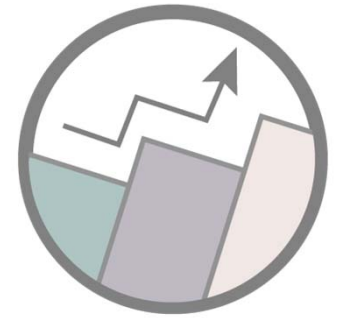
Pops	Specials	Summer	Youth
79% HH \$7,644 avg/HH	77% HH \$1,171 avg/HH	58% HH \$3,884 avg/HH	7% HH \$101 avg/HH
48% HH \$3,034 avg/HH	48% HH \$418 avg/HH	38% HH \$1,749 avg/HH	2% HH \$215 avg/HH
32% HH \$300 avg/HH	11% HH \$204 avg/HH	22% HH \$230 avg/HH	1% HH \$127 avg/HH

ARTS

Reflects 5 most recent years of data. Strings and Wind omitted because overlap with less than 1% of database.

Case Study: Toronto International Film Festival

Multi-transaction behaviors drive loyalty



Subscriber Only

	Renew
TBLB Package	44%
CTT Flex Package	9%
Festival Package	21%
Festival Flex Package	47%

2014 into 2015. No membership.

Subscriber and Member

	Renew
TBLB Package	77%
CTT Flex Package	30%
Festival Package	28%
Festival Flex Package	70%

2014 into 2015. With membership.

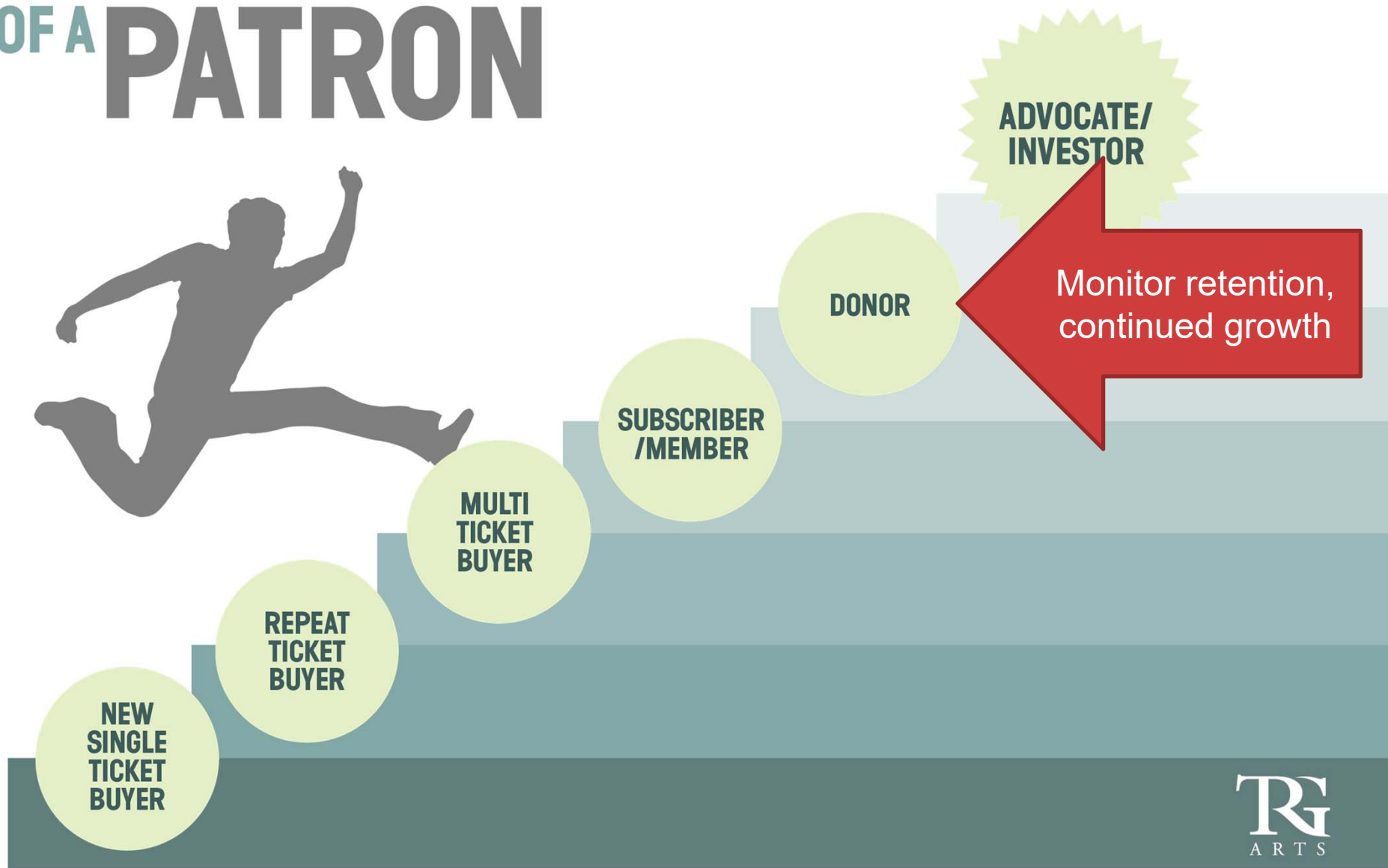
Subscriber Only

	Crossover
2015 TBLB & CTT	0%
2015 TBLB & Festival	2%
2015 TBLB & Festival Flex	6%
2015 CTT & anything else	0%
2015 Festival & TBLB	1%
2015 Festival & CTT	0%
2015 Festival Flex & TBLB	0%
2015 Festival & Festival Flex	17%

Subscriber and Member

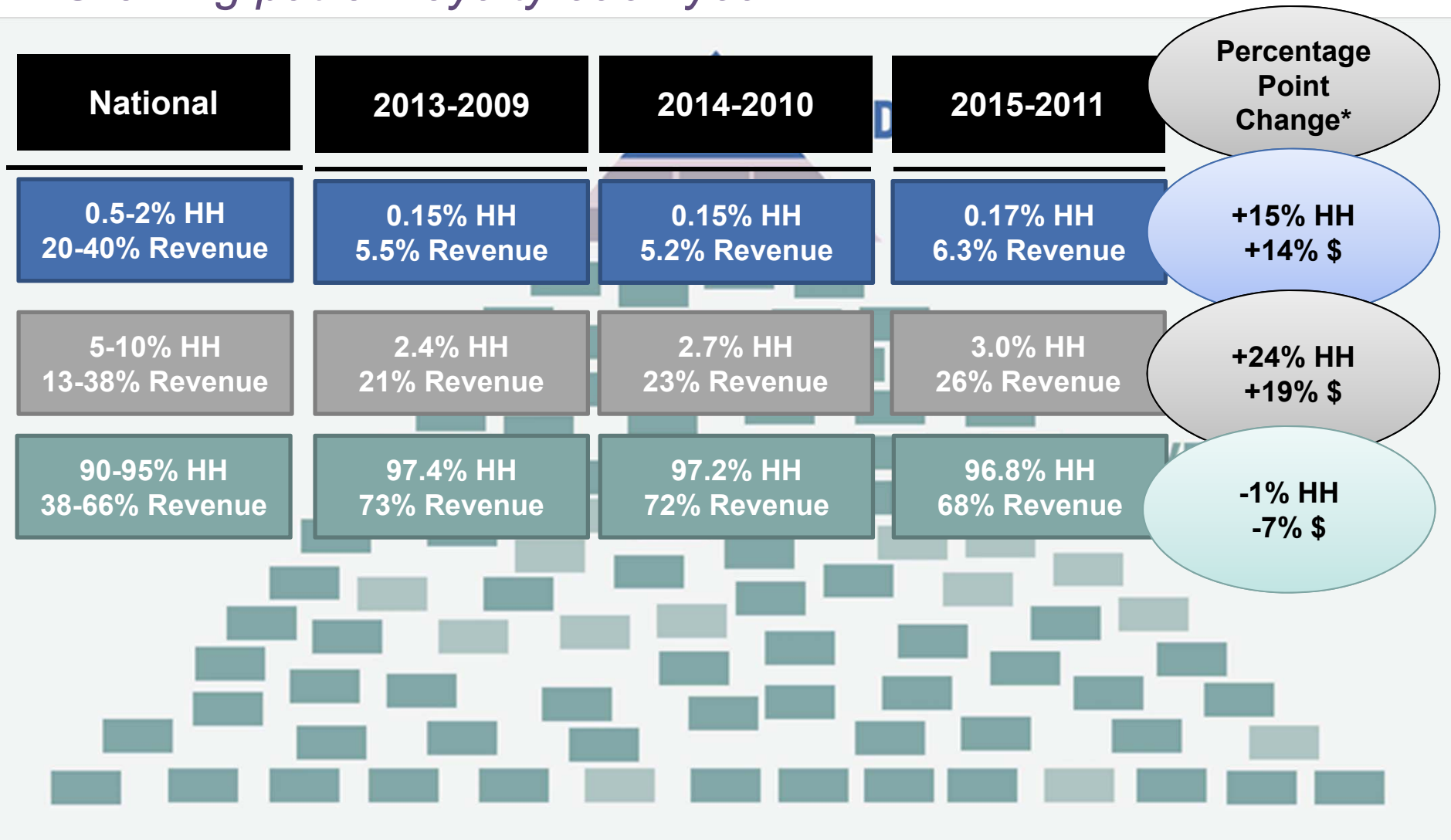
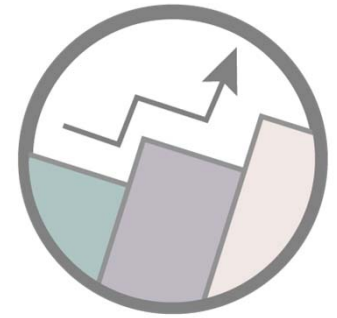
	Crossover
2015 TBLB & CTT	3%
2015 TBLB & Festival	5%
2015 TBLB & Festival Flex	42%
2015 CTT & anything else	0%
2015 Festival & TBLB	5%
2015 Festival & CTT	0%
2015 Festival Flex & TBLB	6%
2015 Festival & Festival Flex	40%

EVOLUTION OF A PATRON



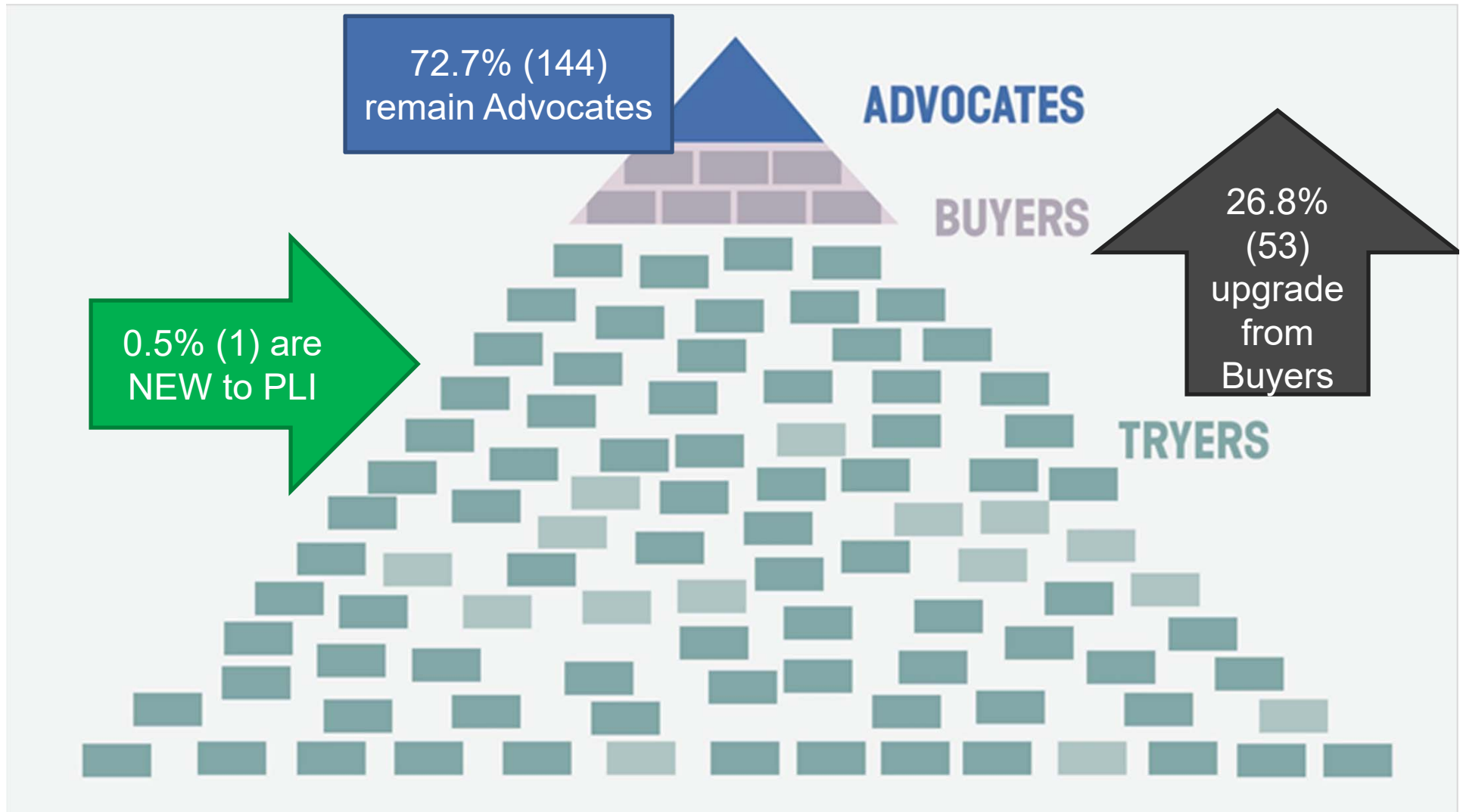
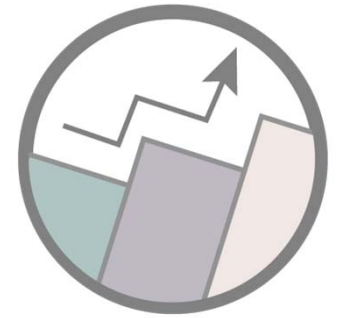
Case Study: Arts Club Theatre Company

Growing patron loyalty each year



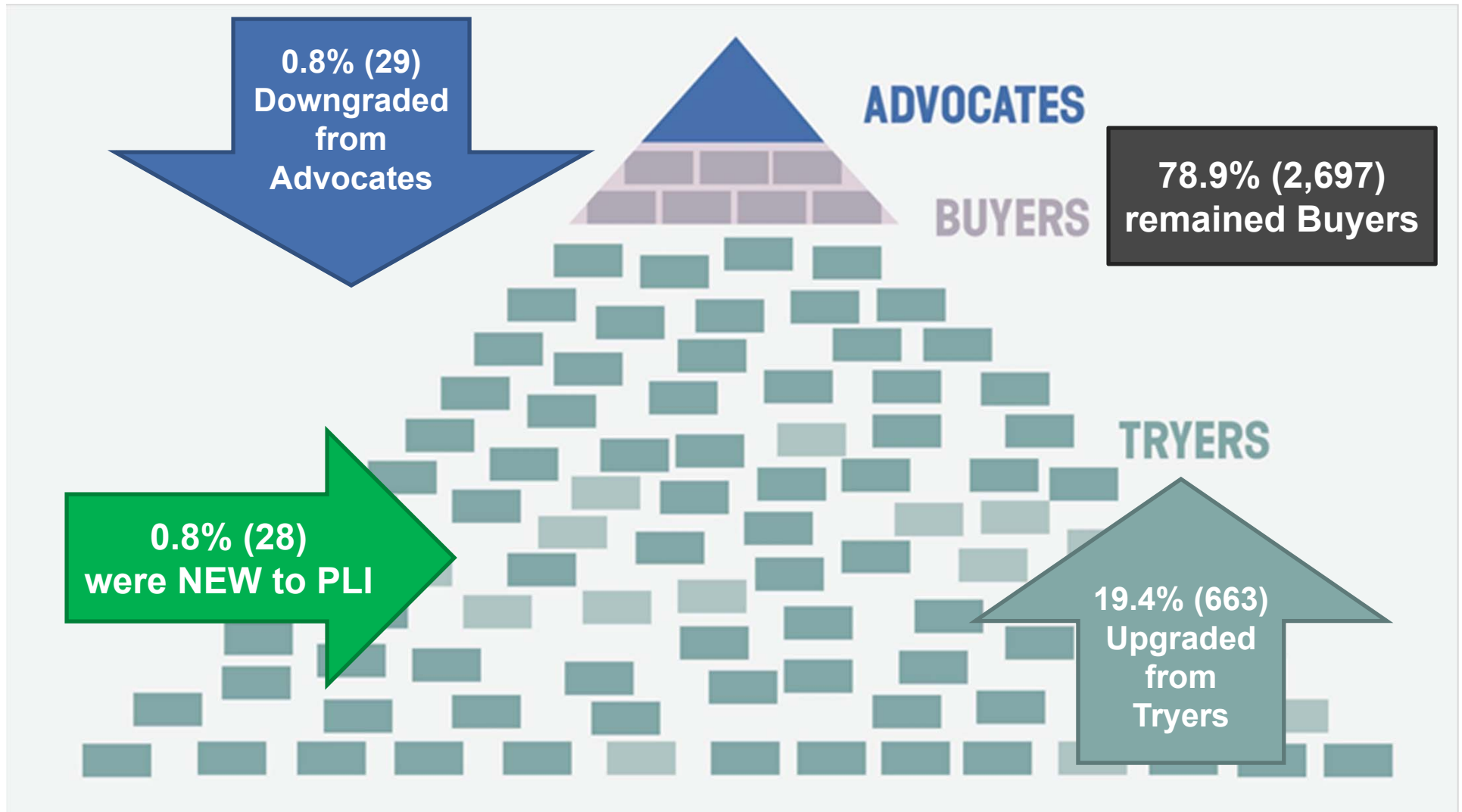
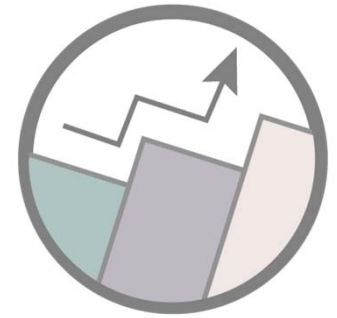
Case Study: Arts Club Theatre Company

Measuring Advocate patron movements



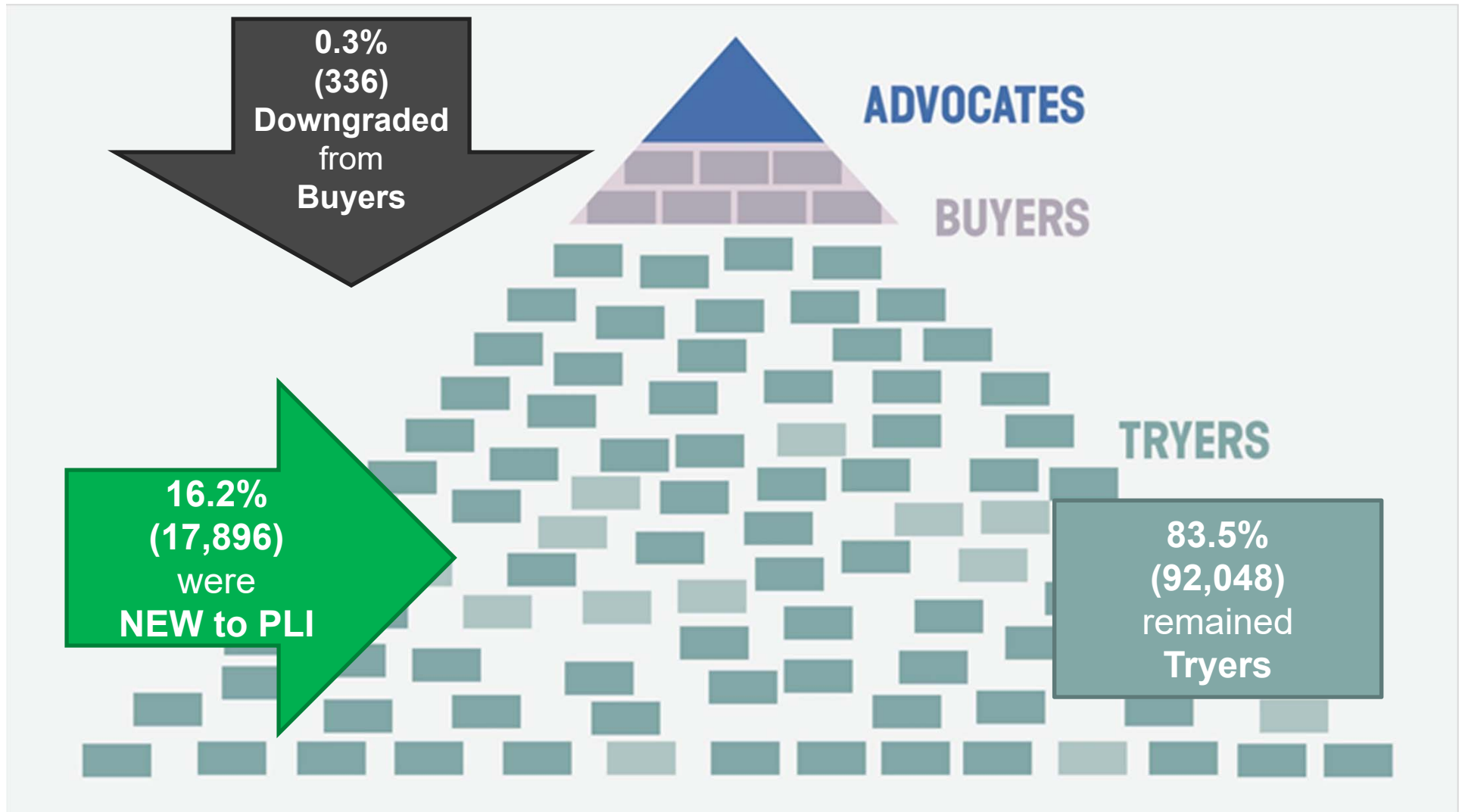
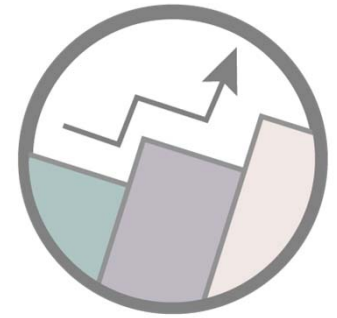
Case Study: Arts Club Theatre Company

Measuring Buyer patron movements



Case Study: Arts Club Theatre Company

Measuring Tryer patron movements



Case Study: Understanding resource needs against results

Tryers

Total Tryer HH: **104,257**
Total Tryer Revenue: **\$26,333,041**

Buyers

Total Buyer HH: **3,968**
Total Buyer Revenue: **\$10,768,195**

Advocates

Total Advt HH: **430**
Total Advt Revenue: **\$5,845,707**

Total 5-year spend by PLI group in each transaction type:

Single tickets	\$ 20,657,527	Single tickets	\$ 1,448,137	Single tickets	\$ 259,069
Subs	\$ 4,343,420	Subs	\$ 5,343,540	Subs	\$ 384,919
Donors	\$ 517,408	Donors	\$ 558,739	Donors	\$ 1,044,639
Sub-donors	\$ 814,685	Sub-donors	\$ 3,417,780	Sub-donors	\$ 4,157,079

Annually supported by:

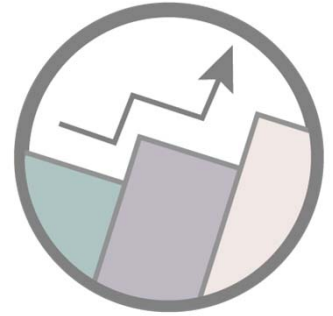
FY14 revenue	\$ 4,285,330	FY14 revenue	\$ 2,948,246	FY14 revenue	\$ 677,864
Campaign expenses	\$ 1,168,250	Campaign expenses	\$ 435,876	Campaign expenses	\$ 16,928
Payroll expenses	\$ 500,400	Payroll expenses	\$ 675,380	Payroll expenses	\$ 220,220
Headcount	12	Headcount	16	Headcount	5

Yielding:

2-year yield from 100 Tryers	\$4,851	2-year yield from 100 Buyers	\$20,300	2-year yield from 100 Advocates	\$87,065
Per capita	\$45	Per capita	\$153	Per capita	\$442
Avg renewal rate	39%	Avg renewal rate	61%	Avg renewal rate	67%
Avg cost of sale	22%	Avg cost of sale	29%	Avg cost of sale	3%

Data Drives Growth

Investing in data so that data can return for you



Admissions &
Revenue Growth

Demand-Based
Pricing

New Audience
Development

New-to-File
Retention

Multi-purchasing
“And” statements

Subscription,
Membership and
Donations

Loyalty
Upgrades &
Downgrades

Patron Base
Growth

Resource
Investment vs.
Loyalty Yield

RESULTS that enable the ‘cool.’

Make Room for Data

Creating a STOP doing list

STOP doing
EVERYTHING

You said

Top 5 Priorities for My Department

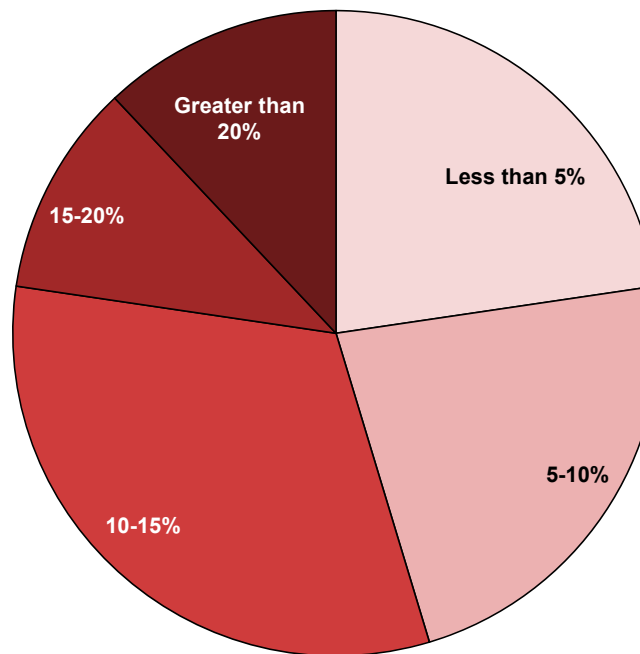


You said

Data management at your organization



Q3: Estimate percentage of organization's time dedicated to data management in a given week.



How much time is right?

To be spending on data



- **A Level** = My data is in order, solid practices are in place, I'm in maintenance mode.
 - **B Level** = I still have some gaps in my data practices and need to catch up.
 - **C Level** = I'm new or I'm newly building my database or I haven't been minding my data and it's collapsed!
-
- A level = **10-15%** of total organizational time
 - B level = **15-20%** of total organizational time
 - C level = **25%+**



How can I possibly stop doing ANYTHING?!

Focus on **RETURN**.

Shed **NON-REVENUE**-generating tasks...

Top Non-Revenue Generating Activities

Marketing department

Marketing NON-REVENUE GENERATING RESPONSIBILITIES		% OF TIME on Activity
Manage Sales & Marketing	10 direct reports; 1 indirect; box office (approx 15)	50%
Guidance/leadership for employees	Leading, motivating, disciplining of staff	50%
Season campaign content	Reading scripts, writing copy, organizing content with the designers, finalize proofs for the printer, writing letters to go with the campaign mailing throughout the year	35%
Preparing press releases, press kits and organizing supporting materials	Researching, preparing project-based media plans, writing press releases, compiling event press kits, organizing photo collections	35%
Media relations	Writing and distributing all media materials; pitching and organizing media interviews; collecting reviews and pulling quotes for ads and web.	30%
Writing copy	Content for Bill's Notes, Playboard magazine, postcards, radio and TV copy	25%
Writing copy	Content for Bill's Notes, Playboard magazine, postcards, radio and TV copy	25%
General proofing	For miscellaneous marketing purposes	25%
Opening nights	Creating and distributing opening night invitations; seating attendees with the box office; working with the box office on opening night and schmoozing afterwards and taking photos.	25%
Coordinating with media	Pitching, follow up, invites, coordination of media coverage, onsite at events	25%
Executing marketing plans	Getting materials pushed out to venues, getting materials to vendors, content to designers, data to mailhouse etc.	25%
Social media	Content creation, scheduling, and posting for blog and other social media channels	20%
General proofing	For miscellaneous marketing purposes	20%
Photo and video content creation	Organizing and executing photo shoots; editing photo selections for web and social media, and media distribution; attending dress rehearsals, directing, and editing videos for web and social media, and media distribution; managing other photo/video projects as required; managing suppliers.	20%
Writing Blog Posts	Research, writing, editing, and compiling blog articles	20%

Top Non-Revenue Generating Activities

Development department

Development NON-REVENUE GENERATING RESPONSIBILITIES		% OF TIME
Process contributions	Enter contributions (corporate, foundation, individual, special events) into database and create/issue tax receipts for receiptable contributions or acknowledgement letters for non-tax receiptable contributions. Process cheques and bank slips for deposit.	60%
Planning/execution of events for existing/prospective donors	Current donors: Plans and executes all opening night donor receptions for ADC, major donors, and corporate donors; oversees execution of all donor appreciation events including the Season Launch, backstage tours, holiday event and donor appreciation event. Prospective donors: Assists with the execution of donor cultivation events such as Prospect Events and Board calling sessions to engage with potential ADC members	45%
Research	Searches online for new silent auction donor prospects.	40%
Oversee staff of six	Has weekly meetings w/ 3 managers and a weekly department meeting	35%
Manage Corporate Partners	Maintain sponsors expectations, ensure prominent sponsor recognition, engage and deepen relations with sponsors	30%
Database management	Update and create corporate, foundation, individual and special events campaigns and appeals; create, pull and review donor lists and reports; update and personalize tax receipts and acknowledgement letters; liaise with Box Office Management re: donations issues coming in through Box Office agents; oversee and update individual donor records in database.	20%
Event Management	Work with corporate sponsors to plan and execute corporate client events	15%

Ponder and Pen

What can you STOP doing?



1. Jot down (on your own) the **top 5** NON-revenue-generating activities you? Your org? engages regularly.
 - **THINK:** What do you spend loads of time on that does not have a direct correlation on selling tickets or raising money
 - **THINK:** Two degrees of separation between task and \$\$
2. With your group, discuss:
 - Your non-revenue generating activities
 - Are there common threads among you?
 - Together, create plans around the common threads:
 - **How will you STOP** doing the non-revenue things?
 - **How will you CREATE THE CASE** internally to do so (hint: data helps!)
 - **What will you COMMIT** to 'stop doing' by the next gathering?

We'll reconvene and report out.

Choose a spokesperson for each table.

Pouring the Concrete

Building a foundation of best practices



To build our castle ...

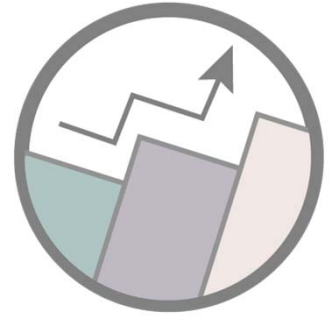
We start with the raw materials:

DATA



This Presentation

Keep in mind

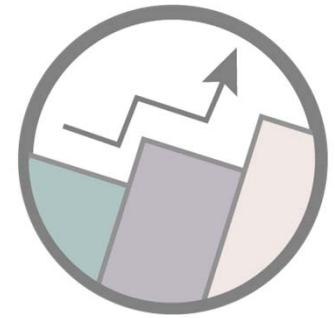


1
What does your
data say?

2
What are best
practices for data
management?

% of patron revenue

% of Patron \$ to Total \$



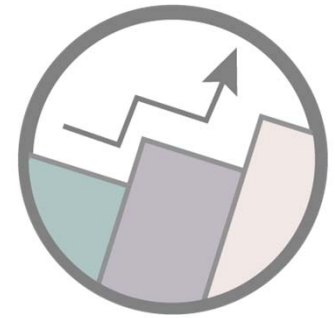
Source: your budget

Timespan: most recent season/year

$$\left(\begin{array}{l} \text{revenue from:} \quad \text{ticket sales} \\ + \quad \quad \quad \text{individual gifts} \\ + \quad \quad \quad \text{memberships/subs} \\ + \quad \quad \quad \text{events/ galas} \end{array} \right)$$

total revenue (including foundation,
corporate, government)

% of patron revenue What you said ...



88%

25%

8%

58% said:
60% or more

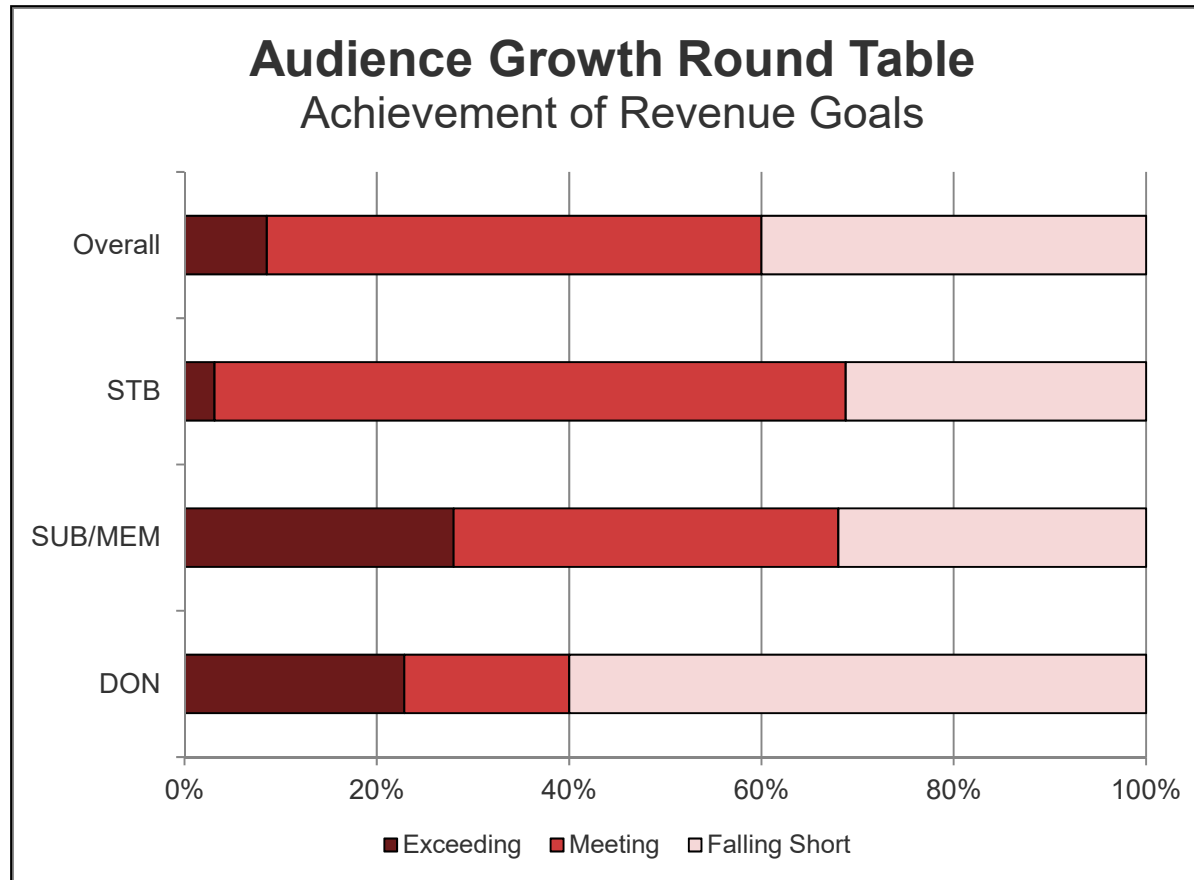
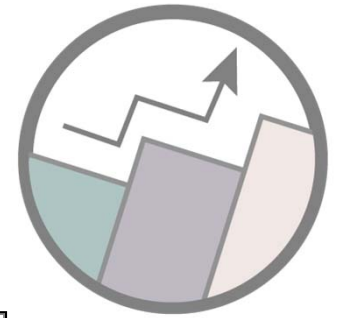
79%

40%

72%

Meeting Revenue Goals

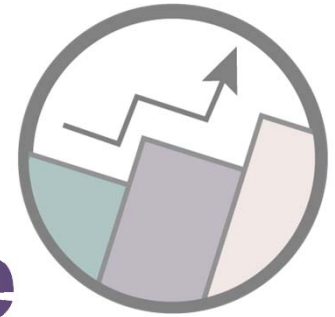
Most reaching ticket goals, but Donations behind



Where can we pour gas on the flame?
Where should we adjust strategy to change results?

% of active households

Active vs. total database



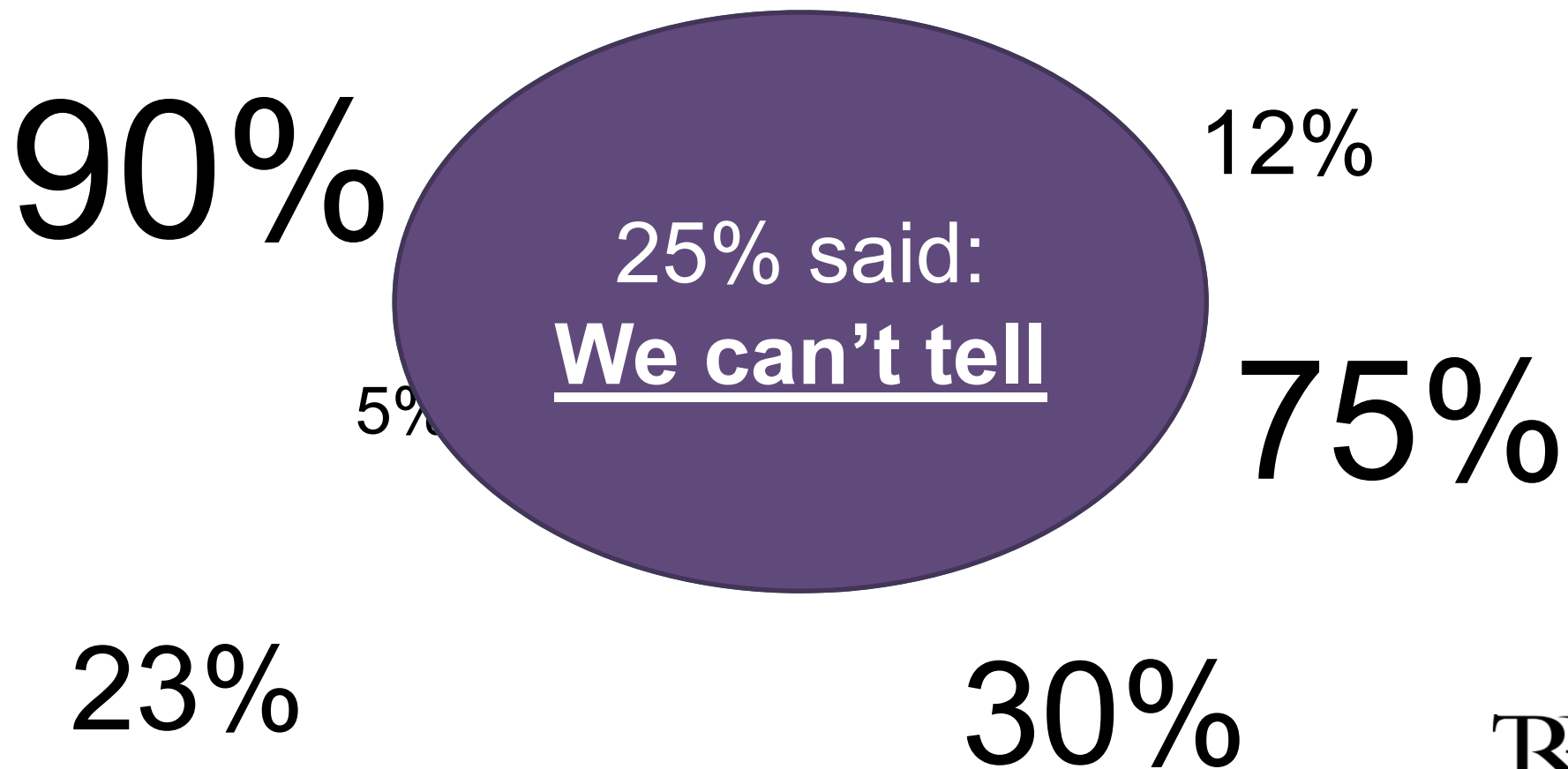
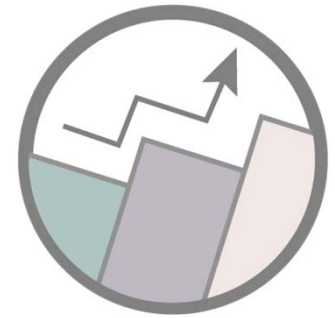
Source: your database

Timespan: most recent two seasons/years

$$\frac{\left(\begin{array}{l} \text{Transactions:} \quad \text{ticket sales} \\ + \quad \quad \quad \text{individual gifts} \\ + \quad \quad \quad \text{memberships/subs} \\ + \quad \quad \quad \text{events/ galas} \end{array} \right)}{\text{total households in database}}$$

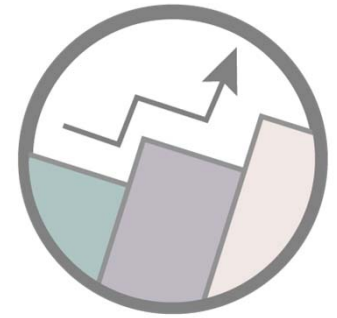
% of active households

What you said ...

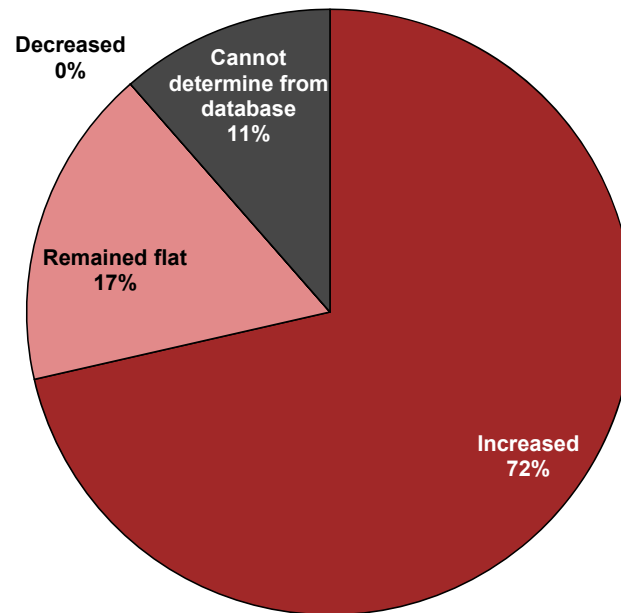


Growing the Database

Most report growing active households



Q22: Over the past five completed seasons, what has happened to the number of active patron household records in your database?



Patrons are essential to growth
AND
What is measured can be managed
SO
How do we optimize data to achieve success?

Do you know my name?
Data Capture

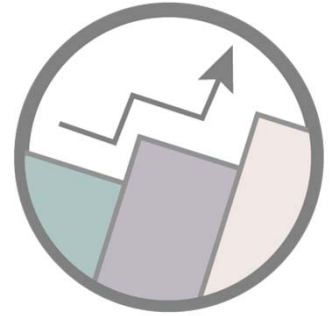
1



Photo by Dondy Razon (CC BY-SA 2.0)

Defining Data Capture

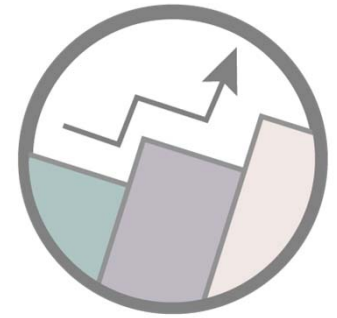
Do you know patrons by name?



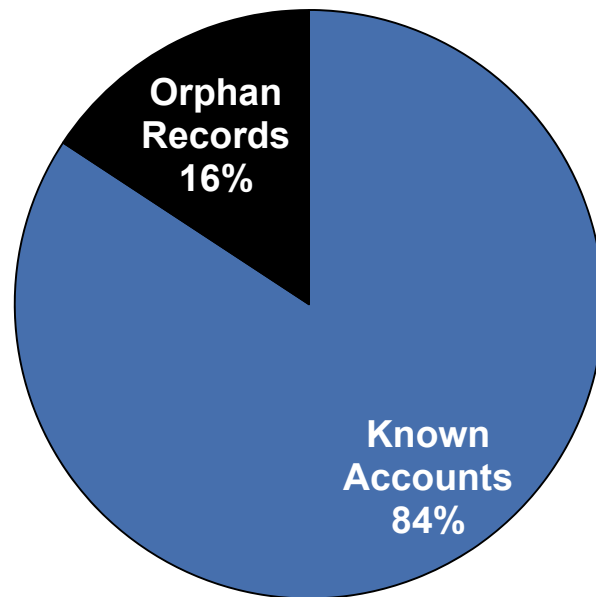
- **Capture** is the regular practice of collecting patron contact information with every transaction at the point of sale
 - A complete record includes Name, Address, Phone, Email
- **Orphan Record** = any transaction made without a patron account
 - Tickets sold via “quick sale”
 - Admissions where only a zip code is captured
 - Tickets sold into a generic account
- **Data Capture Rate** is measured by comparing the number of complete records to total records (complete + orphan records).

Case Study: NYC Ballet

Orphan records are a missed opportunity



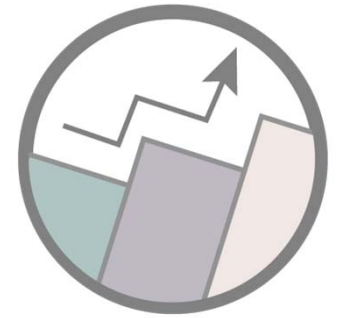
New York City Ballet Total Single Tickets Sold



Every season, **33,089**
households walked out
the door anonymously

Case Study: NYC Ballet

Impact of orphan records on sub campaign



$$\begin{array}{|c|} \hline 33,089 \\ \hline \text{Current STBs} \end{array} \times \begin{array}{|c|} \hline 1.75\% \\ \hline \text{response} \end{array} \times \begin{array}{|c|} \hline \$300 \\ \hline \text{Avg} \\ \text{order} \end{array} = \begin{array}{|c|} \hline 579 \text{ HHs} \\ \hline \$173,717 \end{array}$$

$$\begin{array}{|c|} \hline 33,089 \\ \hline \text{1-Year Lapsed} \\ \text{STBs} \end{array} \times \begin{array}{|c|} \hline 0.84\% \\ \hline \text{response} \end{array} \times \begin{array}{|c|} \hline \$300 \\ \hline \text{Avg} \\ \text{order} \end{array} = \begin{array}{|c|} \hline 278 \text{ HHs} \\ \hline \$83,384 \end{array}$$

857
more
subscribers

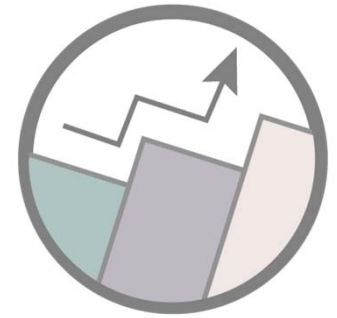


\$257,101
in revenue



Audience Growth Round Table

What's your data capture rate?



Single Tickets



Subscriptions



Donations



Before the case study,
**NYC Ballet reported
100% data collection**

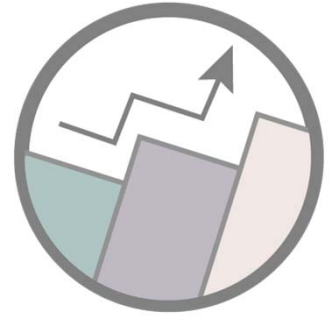
Can you reach me? Data Cleanliness

2



Defining Data Cleanliness

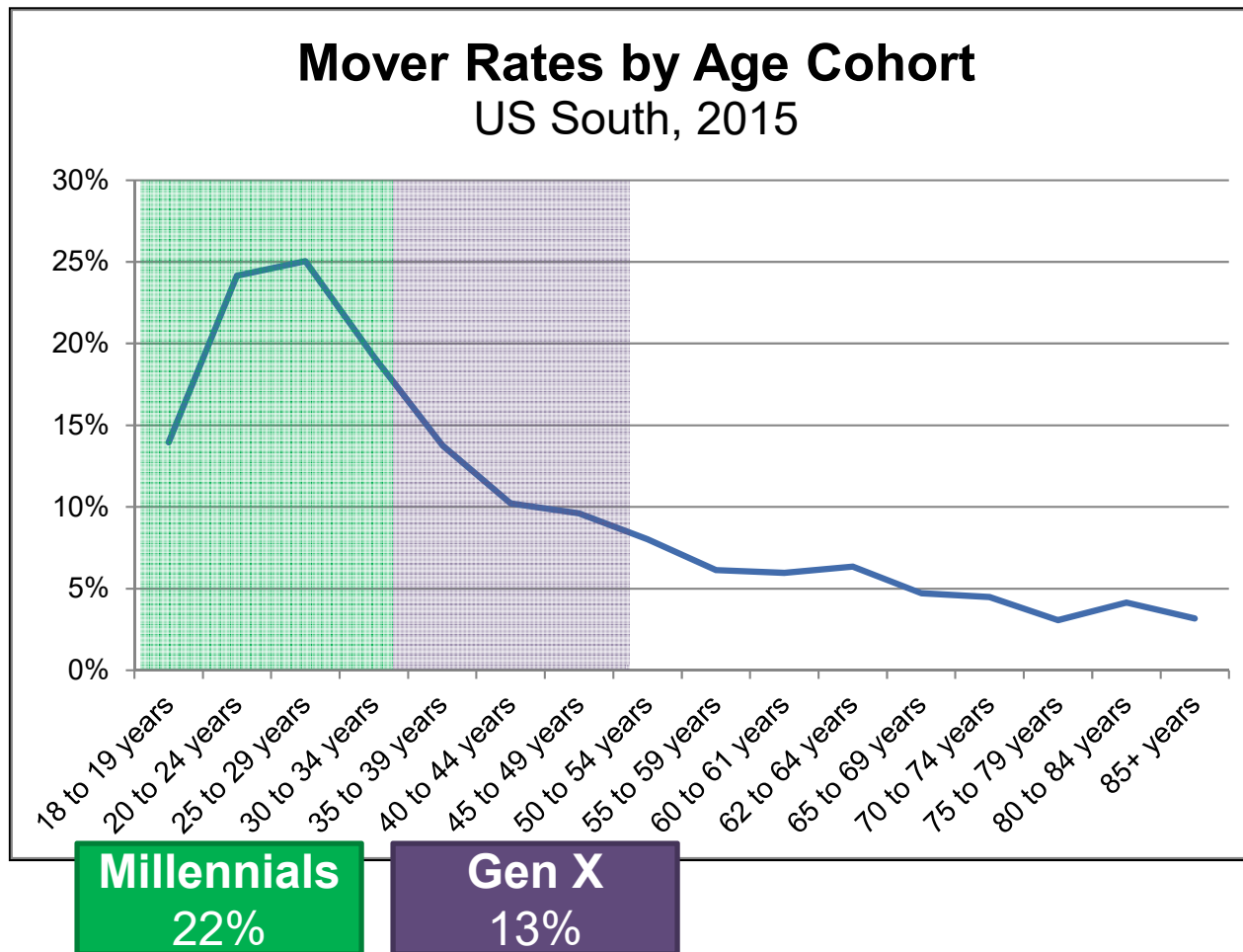
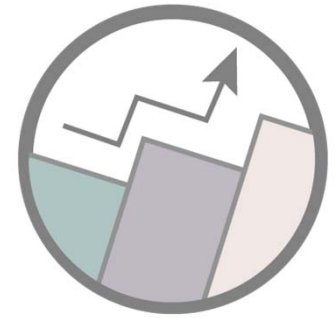
Do you regularly update patron information?



- **Cleanliness** = regularly reviewing and updating contact information associated with patron accounts
- **Questions to consider:**
 - Is account data entry consistent at your organization?
 - Are duplicate records consolidated on a regular basis?
 - Do you run National Change of Address (NCOA) and/or phone hygiene on your database? Annually? Quarterly?
 - If so, do you load the results back into your CRM?

Why Hygiene Matters

12% of households in South move annually



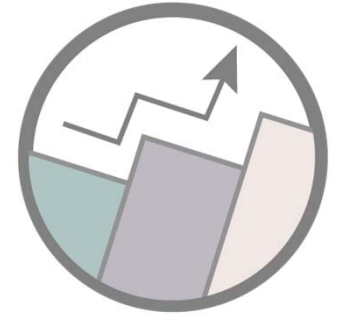
Source: US Census (<http://www.census.gov/hhes/migration/data/cps/cps2015.html>)

Can I be counted? Data Segmentation

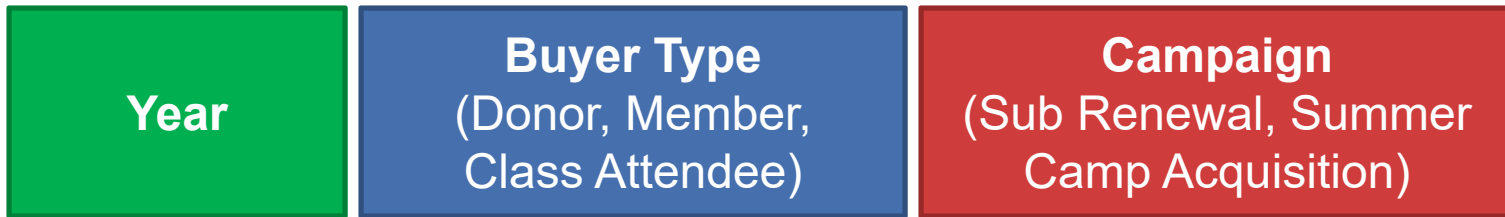
3

Defining Data Segmentation

Does your database work for you?



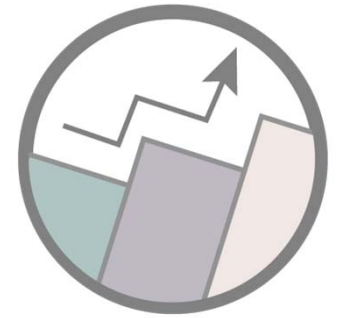
- **Segmentation** = consistent grouping of patron data using consistent naming conventions



- **Questions to consider:**
 - How do we currently engage with patrons?
 - How will we engage with patrons in the future?
 - What strategic goals does our organization have? And how do we plan to measure success?

Why Segmentation Matters

Case Study: Kansas City Repertory Theatre



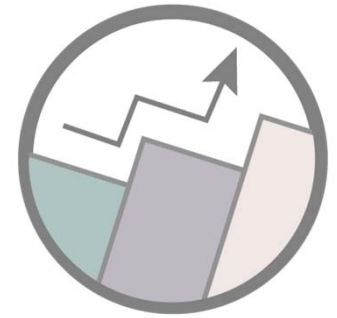
Total Costs for 2014 Annual Fund Campaign

Segment	Cost-of-Sale
Single ticket buyers	585%
Multi-buyers	270%
Lapsed subscriber non-donors	170%
Full subscriber non-donors	42%
Flex subscriber non-donors	28%
Total cost for all segments	104%

Overinvesting in nonproductive segments
caused entire campaign to lose money

Why Segmentation Matters

Case Study: Kansas City Repertory Theatre



Asked current donors to upgrade to next giving level

41% increase
in upgraded donations

Asked subscriber-nondonors to become “Super Subscribers” by giving at \$100 level

34% increase
in Friends (\$100-\$249)

Increased frequency of contact with most qualified prospects via mail, telefunding

4% increase
in donor households

14% increase in total revenue

1-2-4-WHOLE

What actions would you recommend your organization take to improve data management?

1. **Silently reflect** on the question and note your ideas (1 min).
 2. **Discuss those ideas in pairs**, building on your personal reflection time (2 min).
 3. **Share ideas in foursomes**. Notice similarities, differences (4 min).
-

4. **Discuss** among your table. What is one idea that stood out? (5 min)

Choose ONE idea that stood out to present to larger group.

Choose spokesperson to do so. Each group will have **1 minute** to share.



Before the next round table, I will