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# OPTIMUS

## Shared event ticketing and CRM system

Report for  
Melbourne Fringe Festival  
September 2016 #4

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## Executive summary

It is widely understood many small to medium arts organisations operate with inadequate customer relationship management systems (CRMs) and related ticketing systems. The ubiquitous Excel spreadsheets are commonly used for all contact and client information from customers, audiences, artists, volunteers, members, donors, sponsors and funding bodies. Until recently there were few affordable options available for small to medium arts organisations to pursue the possibility of using more sophisticated systems than Excel spreadsheets.

A proliferation of systems and associated software companies now exist that claim to offer solutions at reasonable prices. The aim of this consultation is to investigate a process to navigate this terrain. Five similar organisations were consulted regarding their current needs. The organisations consulted were Melbourne Fringe Festival, Melbourne Writers Festival, Midsumma Festival, The Wheeler Centre and Melbourne Queer Film Festival.

The idea of a system that could be customized for a consortium of organisations with similar needs is explored. It was tested whether sharing one system would provide cost savings and efficiencies in implementation, operation and maintenance. The report finds there are no substantial advantages in a consortium approach. However, there are potential models for how organisations can work together in 'communities of interest', which can enable small to medium organisations to share knowledge, skills, training and resources.

It was found that each organisation has specific needs based on their different business systems. The business systems have evolved over time in response to availability of internal expertise and external pressures. The reality for arts organisations with limited resources is their systems are often bespoke. This leads to systems that do not always appear to be effective or efficient. Parts of the system are commonly siloed from each other. There is often duplication of tasks and manual handling of data. This results in the under-utilisation of data. Evidence from this consultation identifies this as a common issue throughout the sector.

The consultancy scoped existing systems with the aim of finding specific solutions for the five organisations. The report finds there is no single system that would meet the different needs of all the organisations. It finds that more detailed work is needed to understand the complexity of each organisation's business systems, including work flow cycles, priorities, staff culture and structures. The report recommends there is an urgent need for organisations across the small to medium arts sector to undertake this work internally and with support from experts. However, currently there are insufficient resources available in time and staff costs to enable this to happen.

The report outlines three recommendations for how further investment could support organisations to be empowered to analyse their own business systems and find their own solutions. By undertaking an evolving process of change management organisations can build new systems based around currently available technology. Based on a careful process of change management organisations can make wise choices about new systems and how they will meet their specific needs and budget. This has the potential to bring about significant improvements, efficiencies and increased revenue. These changes will have the ultimate benefit of enabling arts organisations to focus more of their resources on their core purpose of supporting artists to make great art for the people of Victoria.

## Stage One - Needs analysis

The first stage involved working with a group of small to medium organisations to establish the needs of each organisation. The organisations consulted were: Melbourne Fringe Festival, Melbourne Writers Festival, Midsumma Festival, The Wheeler Centre and Melbourne Queer Film Festival. These organisations have different structures and activities, but it was assumed they have similar needs from a ticketing and CRM system. The consultation involved a one to two hour interview with each organisation to establish the specific needs of each organisation. This involved trying to imagine future needs and uncovering some of the likely obstacles to effectively implement a new system.

### Melbourne Fringe Festival

Melbourne Fringe Festival (MFF), like many small to medium arts organisations, is in a state of flux, moving from manual systems to more-automated ones. This is an evolutionary process as human and financial resources have come available.

The festival has very particular needs associated with a large-scale annual festival condensed into a few weeks, with a peak cycle of three months per year. This means on top of seven full time staff, up to 13 part-time staff are required for three months, with 20 casuals and up to 200 volunteers at festival time. This corresponds to the 400 shows, 15 artist development workshops, 15 other events, including donor events that MFF oversees.

Historically, MFF has stored contacts in separate Excel spreadsheets maintained within each department, and they are currently centralising those contacts into one master spreadsheet. They estimate there are over 50,000 records of audience and ticket buyers with considerable duplication. MFF identified a number of issues with this system and the need to move to a more streamlined system.

Ticketing is also a critical issue for MFF and last year they moved to 3DR. This is a fringe specific system developed for Adelaide Fringe and rolled out to Perth, Sydney and Melbourne. It has an 'Open Access' component that allows artists to do their own ticket builds including event creation - setting sessions, times and prices. This is partnered with the registration process. This is a different model to the norm where the ticketing manager builds all the shows/events. Because the ticketing manager doesn't control the entire build, there can be a lack of consistency between events. There are up to 400 artists feeding into this process. A registration fee is paid through the same system and it also allows artists to manage their own complimentary tickets.

The system is cheap charging 80 cents per ticket booked including the registration process. There are problems with the system as it was developed in 1999 and has been updated on an ad hoc basis. The developer is responsive but reporting is restricted. Raw data is hard to manipulate making it difficult to do targeted marketing. Exports are to Excel and each row represents each ticket purchase. This leads to a lot of duplication and makes it very hard to build any kind of profile of customers and track their behaviour. At the end of each year, ticketing data is archived, so each year it is stored separately. This means MFF are unable to track ticket-buying behaviour year to year.

MFF recently migrated from MYOB to Xero, a cloud-based bookkeeping system that sits separately as a siloed system. Event management, invitation lists and RSVPs are all done through a series of Excel spreadsheets. Currently they do not have grant or donor tracking software. While MFF don't feel like they are "married" to any systems (other than Xero as the migration took some work), it should be noted that MFF is aware introducing another CRM would take considerable time and resources. It also understands transferring data to any new system would require a lot of data clean up.

Tickets	Email Client	Enews	Finance	Website	Registration (Third party)	Audience feedback	File storage	Project management	CRM
3DR	MS Outlook	Mail chimp	Xero	Textstem	- Survey Monkey - 3DR	- Roy Morgan - Survey Monkey (Artists)	- Server - Drop Box	Smartsheet	Excel

## Melbourne Writers Festival

Melbourne Writers Festival (MWF) has a similar cycle of workflow based on an annual festival timetable. One big difference from MFF is that all events are festival-curated. It has 4 full time, 2 permanent part-time staff year round, 6 full-time staff during peak period, 3 casual staff and about 200 volunteers during festival time. MWF is a tenant of the State Library of Victoria (SLV) who provides server space. MWF do not use Dropbox or Google Docs internally, but use them for sharing documents with venues or partners. There is a second independent server located in the MWF office, which sits outside the SLV firewall. SLV provides IT support and a routine backup service for its server.

MWF operates on a high volume scale at festival time. There are up to 500 events over 10 days (mix of public and private) involving approximately 400 artists. The festival uses FileMaker Pro (FMP) – Business Contacts Module which handles over 10,000 contacts. The system was developed several years ago and is supported by Carbon Data Solutions. FMP works well as an operational engine because it integrates all elements of the delivery of a festival including lists and schedules, reports, creating agreements, itineraries and appearance fees. Effectively it is a bespoke system, developed over a number of years in response to available resources and annual operational priorities. Due to the nature of its development, parts of the system are now not used and there is a lack of integration with other systems such as ticketing and Electronic Direct Mail (EDM).

MWF identified a number of other issues including with data integrity. There are also problems with templates and background content (e.g. sponsorship contracts) which cannot be adapted by users, or changed for individual circumstances. There is also currently no proper IT support as it sits on a non-State Library server and there is no remote access by users which is a significant issue at festival time.

MWF use the Ferve ticketing system and have for a number of years. The system has limitations identified by MWF. Exports and reports that are outside the standard sets developed and offered by Ferve to all clients need to be requested specifically. These may take time to generate and can be at an extra cost. Sessions and customers cannot be grouped or reported on by type (e.g. based on group of sessions booked, behaviour of customer, and timing of purchase). There is a lack of customer behaviour reports, so it is not possible to track purchasing trends or identify lapsed or loyal customers.

Due to security and State Library Server requirements for customer data including card details and transactions, and MWF's need for associated physical box office infrastructure, the Ferve Tickets system will continue to be used. This may be reviewed at a later date.

Lists are created in FMP and manually exported and then imported into Campaign Monitor for invitations to be

issued. VIP lists are managed in Excel (outside of FMP and Campaign Monitor). Complimentary tickets are processed through Ferve or sometimes a separate door list is created. These are created outside of the original lists so there is no tracking uptake of invitation attendance against original invite list. Other systems are also managed with Excel or manually including grant tracking. When donations are received via Ferve or by cheque, they are manually entered into FMP, which automatically generates thank you letters and receipts. Generally, there is a lack of integration between Ferve and FMP. Because of the limitations in Ferve's reporting, there is no way of looking at how else those donors are behaving. This makes it difficult to further engage and develop deeper relationships with those donors.

Each year MWF recruits three different types of volunteers: general venue support, box office support and artists' support. They register through a website portal which generates an Excel spreadsheet. The Volunteer Front-of-House Coordinator manages volunteer shifts through Excel and sends snap shots to each volunteer. This is a very manual process.

MWF Enews is distributed through Campaign Monitor with approximately 20,000 subscribers. MWF describes Campaign Monitor as highly efficient for what it does. However, a lack of integration with Ferve means there is no way of tracking conversion rates – e.g. how many customers clicked through and actually bought a ticket. Invitation lists are manually exported from FMP and imported into Campaign Monitor. People who opt-in for the Enews subscription list when buying tickets also have to be added manually.

MWF have an annual agreement, including a year-round maintenance and ongoing management of the Application Programming Interface (API) relationship with Ferve, with Floate Design Partners. This includes around 50% inkind support through a sponsorship arrangement. Floate did not build the website (which is in WordPress), but have been maintaining it since early 2015. This relationship works well.

The key issue for MWF is the lack of integration between Ferve, Campaign Monitor and File Maker Pro. They are 'making do' with FMP for the time being, but are keen to move to another project management system that allows them integration with other systems and much-needed remote access.

Tickets	Email Client	Enews	Finance	Website	Registration (Third party)	Audience feedback	File storage	Project management	CRM
Ferve	MS Outlook	Campaign Monitor	Xero	Wordpress Floate Design Partners	Website form	Survey Monkey (Audience & Artists)	- State Library Server - Internal server - Drop Box	File Maker Pro	- FMP - Excel

## Midsumma Festival

Midsumma Festival (Midsumma) operates on a very different scale. At the time of the consultation, there were no permanent staff. There are 2 contractors who work year round, 6 others who work full time during the festival with about 150 volunteers.

Midsumma is the only organisation in this consultation that currently uses Salesforce. Salesforce is a large company that is gaining traction with a number of arts companies and will be discussed in more detail later in the report. Midsumma has tried to make the most of Salesforce within the constraints of their budget, time and resources, but they would like to be using it more effectively. Salesforce use web-to-lead forms. This is an essential component of Salesforce. Web-to-lead forms capture data submitted by website visitors. The use of web-to-lead forms does lead to duplicates, as Salesforce doesn't update existing contact's details. Problems with mass emails has resulted in staff pulling lists out of Salesforce into Excel to do mass emails. All the knowledge of the system has been learnt on the go and there is a lack of training as each year staff change and company "downtime" is getting truncated.

For ticketing Midsumma uses Seat Advisor Box Office (SABO). The Festival has used SABO for seven years and temporarily moved to Outtix for six months and then returned to SABO last year. The system charges 40 cents per ticket on 1400 tickets per year for a three year agreement. If the quota is not met, Midsumma have to pay the difference. Midsumma has no problem meeting this quota, as it sells up to 20,000 tickets on average during the festival and up to 2000 in off-peak events. SABO's fees are very low and Midsumma can create their own fees on top of SABO's fees to generate extra income.

However, the interface is complex and Midsumma finds the back end difficult to manage. Event producers are unable to manage their own complimentary tickets and currently there is no integration possible with Salesforce, although this is currently on SABO's 'to do' list.

Midsumma uses Salesforce to program manage approximately 150 events per festival using the web-to-lead form. This enables Midsumma to manipulate and control information as there is a lot of "toing and froing" with event producers. While a certain amount of this process needs to be manual, there could be more automation built into the system. Data for each event registered in Salesforce must then be manually entered into SABO to build an event.

Data for events is exported to CSV (Comma-Separated Values – file format used to import and export to Excel) from Salesforce, proofed for special characters and then mail merged into Word for designers to make the program and upload into the website. Clearly there could be less steps in the process. Midsumma would like to be able to export directly from Salesforce into the right format for designers and website build.

Similarly with event management, grants tracking, memberships and donations. Midsumma would like to use Salesforce but rely on a combination of Google docs and Excel. This increases manual handling and the siloing of data common to all companies consulted. SABO automatically creates tax invoices for donations made with tickets. Donations are made via invoice but receipts need to be manually raised. It is possible for this system to be automated and Midsumma is currently working to make this happen.

Midsumma uses Campaign Monitor very effectively for Enews and consider it easy to use and customise. Campaign Monitor charge by a fee per month based on number of subscribers with as many emails as you like. Midsumma has over 3,000 subscribers and produce 2 to 3 Enews during festival time. New subscribers sign in

via the website or through SABO (opt-in when purchasing tickets). They also use feedback forms via Google Forms for the event producers. Currently this system is not integrated with Salesforce.

Midsumma is currently using Asana to manage tasks. There is no formal process in the organisation for the management of tasks, so Midsumma is currently looking for something with an easier interface and are interested in potentially using a system called Pulse.

Midsumma currently use Salesforce to manage their 150 volunteers. The contacts in Salesforce work well in that it is easy to track activity. However, shifts for volunteers are currently created automatically by event registration and then volunteers are manually attached to each shift (according to availability indicated in the registration process) and then exported to Excel. Subsequent shift changes and swaps are managed in Excel outside of Salesforce.

Salesforce does work well using the web-to-lead form for Midsumma's 160 Stallholders and 20 food vendors. Stallholders register, which leads to manual raising of agreements. PLI Certificates and Food licensing is managed well with a tick box in Salesforce upon receipt (via email) with a workflow notification triggered if the box is not ticked by a certain time in the lead-up to the festival. Web-to-Lead form has issues with duplicates and new contact details not being updated in existing contacts. Unlike event producer registration, this process could be entirely automatic as there is a standard agreement for all of them.

Considering the size of the organisation and lack of resources, Midsumma has been able to implement Salesforce for a number of functions. However, as a lean organisation that relies heavily on volunteers and with little budget and time for training, they have been unable to take it "to the next level" and integrate it with their other systems.

Tickets	Email Client	Enews	Finance	Website CMS	Registration (Third party)	Audience feedback	File storage	Project management	CRM
SABO	Google mail	Campaign Monitor	Xero	Joomla	Salesforce (Volunteers Artists & events)	Google forms (Audience & Artists)	Server	Asana	-Salesforce -Excel

## The Wheeler Centre

The Wheeler Centre (TWC) operates on a very different calendar and workflow cycle to the other organisations. They program nearly 365 days of the year with approximate "seasons" in terms of programming: February, April, July and September/October. TWC has 12 full-time, 10 part-time and 20 casual staff all year. In addition 1 staff member is in regional Victoria and works via email and Google Drive. All event staff work off-site for events, however the majority of computer-based activity happens in the office. Like the Melbourne Writers Festival TWC uses the State Library of Victoria (SLV) hosted server for internal file storage, backups and technical support. Google Drive is used for editing shared documents, and Dropbox is used for sharing files that are needed offsite/after hours.

Like the other organisations in the consultation contacts are kept in various sources, including, individual Outlook-based address books and Outlook directory administered by SLV that incorporates all email addresses for TWC and other organisations within the building. The lack of a centralised address book and the inability to integrate other systems means there is a duplication of effort in keeping contacts up to date.

For ticketing TWC uses TryBooking. With external-managed events, they occasionally have to use Ticketmaster. Trybooking charges 30 cents per ticket. This year, TWC have been able to start scanning tickets through TryBooking, allowing them to track booked verses attended statistics in a much more accurate way as opposed to previously, when they had had to do a physical count of paper tickets. There is a large amount of data in Trybooking (approximately 60,000 contacts) because of the company's long history with it. TryBooking has some limitations. The booking process currently has 5 or 6 steps. TryBooking are moving towards removing some of those steps, as well as investigating the ability for customers to return their own bookings (for free events). TWC staff currently have to manually return tickets in TryBooking when they are notified via email. The reports provided do not have the ability to track buying behavior of audiences across events. TWC are also unable to import lists (e.g. complimentary ticket holders) into the system, instead they have to process them one ticket at a time.

For program management there is a Google Spreadsheet, which acts as the 'bible' for the program. A separate Google Doc is created out of this for copying on a per 'season' basis. A combination of both is used to create printed program, website listings and events build in Trybooking. These are all manually transferred. The Program Master Spreadsheet tracks information such as date, time, name of event, speakers, host, venue, booking number and ticket price. The Program Master Spreadsheet is a centralised, trusted source of information about the program that is easily accessible to all staff members. Google Spreadsheets allows simultaneous user access with no conflicted versions. Communicating changes to the spreadsheet is difficult. Changes have been bolded/flagged in different colours but this is not an ideal system.

Managing invitation lists and non-ticketed RSVPs is a challenge for TWC. The closest to a 'rough master list' is managed on an Excel spreadsheet with 900 contacts. There will be invitation lists for 50 events throughout the year. All events have a guest list and all are ticketed, free at TWC and paid/free for external events. Only select events (mainly external and paid) will have a formal invitation sent to VIPs to attend.

RSVPs are tracked on separate Excel spreadsheets for each event. This will then become the door list for the event. Ticketing, Marketing, Operations and Publicity departments all use these spreadsheets as a reference and occasionally add people to the guest list. TWC based events will have a door list, whereas external ticketed event's complimentary tickets will be manually processed via Trybooking. Currently TWC are moving towards booking all guests or complimentary tickets through Trybooking so scanning can be used to track the number of complimentary guests that attend.

TWC uses EveryDay Hero for donations, which issues receipts automatically. Receipts for donations received via cheque, direct deposits and cash are issued through Xero. Transaction data is copied and pasted into Excel. This is another data silo with no integration with ticketing. This means there is no way to work out which events donors have attended unless it is manually tracked.

Unlike the other organisations in this consultation TWC does not need or use volunteers. They do however have other specific needs, such as the management of up to 120 venue hires per year. Early stages of the venue hire are managed via email, and then it moves to the formal contract stage (based on a Word template) when dates

are confirmed and fees are accepted. The hirer also completes a Survey Monkey survey regarding technical set up for the event, which is emailed to the Production Manager and Venue Coordinator. Whenever there is a substantial fee or more complex in-kind agreement, there will be a specific contract drawn up by the Venue Coordinator. Invoices are then issued and paid prior to hire through Xero. The lack of automation gives the personal touch and the chance to a build personal relationship. However, sometimes steps are missed in terms of fully completing the contract/agreement. A lack of integration with Xero means hire/fee details need to be manually entered in order for invoices to be raised and issued.

Campaign Monitor is used for Enews with 44,000 subscribers. There are often multiple lists. There are currently four. New lists are created for new campaigns and once a campaign is complete, merged into the master list. The main limitation apart from the inability to integrate with other systems is the inability to see the conversion rate into ticketing. The Ticketing Coordinator tracks this manually as an overall clicks verses sales for each Enews.

The website is a bespoke Content Management System (CMS) called Heroku managed by web developers Ice Lab. It is easy to use, flexible for TWC's purposes and easy for audiences to use. However, TWC identified issues with lack of flexibility and design restrictions. The site was built for a program but not projects that aren't events. It is hard to drill down and find other quality content, for example podcasts.

Staff working with digital social media use Trello for project management. This is software that manages workload and enables effective communication between staff. Slack is used as a communication tool for notifying completion of stages of projects. This is new to the organisation and TWC is working on integrating it.

It is interesting to note that in 2011, TWC embarked on the development and implementation of a bespoke Microsoft CRM system. Multiple compromises were made in the development and developers were incapable of providing a stable product. The developers eventually went into administration. TWC was also going through a stage of rapid growth and effectively outgrew the system before it was even close to completion. In 2015, the system was officially abandoned.

Tickets	Email Client	Enews	Finance	Website CMS	Registration (Third party)	Audience feedback	File storage	Project management	CRM
TryBooking	MS Outlook	Campaign Monitor	Xero	Heroku	Email (venue hire)	Survey Monkey	State Library Server	- Trello - Slack	Excel

### Melbourne Queer Film Festival

Melbourne Queer Film Festival (MQFF) operates a 12 day festival each year at the end of March or early April. There are 3 part-time staff during off-peak (Programmer, Operations Manager & CEO), 4 to 5 part-time during peak (+ Festivals Assistant and one other) and up to 120 volunteers including 4 office-based interns at festival time. The festival shows 130 films over 90 screenings (short films are packaged together and some films are screened twice) at 3 venues. In the off-peak season, MQFF run a small number of events for audience engagement and fundraising, including the program launch one month before the festival.

Contacts for the organisation are held in different Excel spreadsheets. (Members, Private donors, Stakeholders, Sponsors, Festival partners, Friends of Festival, Distributors). The lack of centralisation leads to duplication of effort with same contact details needing to be updated across multiple lists.

MQFF uses Ferve for ticketing and has for four years. Complimentary tickets are processed through Ferve but VIP lists are managed outside. There are also card complimentary tickets for media requests. These are cards printed with unique numbers on them that are logged against events. There is also an ALL IN PASS which is given to sponsors and the Board. Each has a unique code that allows the holder to book tickets through Ferve for whatever events they want to see. As noted with MWF, Ferve generally works well but it has limitations particularly in access to data to work out purchase behaviours for marketing strategies.

The festival is fully curated by MQFF, however filmmakers are able to submit their films for consideration through a portal called Film Freeway. Beyond this, the process becomes manual and selections are put into Excel. There is no electronic register of comments or successful films. This means there is no central registry for all the films ever screened as part of the Festival and information is kept in separate places on a festival-by-festival basis, some in Excel and some in FileMaker Pro (which has been used by the organisation in the past).

Invitation lists and RSVPs are managed in different Excel spread sheets. Members' attendance at events is processed through Ferve where they are asked to register for the event. Sponsors and media go through the MQFF office rather than directly through Ferve. RSVPs for VIP guests and media are manually entered by the Operations Manager and/or Festival Assistant on a spreadsheet across multiple lists.

Donations are managed through Ferve, the website and manually. Data is entered into the Private Giving Excel Spreadsheet. The multiple pathways makes it hard to collate a definitive list of donors and there is no centralised list of all donations as they exist in separate spreadsheets year-to-year. Ferve invoice wording is inflexible and doesn't give proper thanks, so it always needs to be followed up with an email, card or phone call. Ferve doesn't send notification of a donation when it happens so the CEO has to manually check for new donations.

MQFF uses Mailchimp for Enews for over 8,000 subscribers. MQFF emails once a fortnight in off-season and more frequently (3 times a week) in the lead up to the festival and daily during the festival. Opt-in is via Ferve when purchasing tickets or through the website – and in both cases, data goes straight into Mailchimp. MQFF reports the system is reasonably intuitive and the EDM “looks good”. It reports on how many opens and click throughs but, as with Campaign Monitor with the other organisations, it is a data silo. This means MQFF have to use manual sleuth work to see EDM click throughs for donors and manually export new subscribers from Ferve and upload them to MailChimp.

The MQFF website is managed by Web developer Rhombus Digital and was built in 2008. Program information is all in Ferve and appears within the MQFF web design (“branded as MQFF”). This is through an API plug-in which means the festival program doesn't have to be manually entered onto the website. There is a blog feature on the website which is updated frequently during the Festival. It is powered by Wordpress and thus easier to update than other parts of the site, but “takes users out of our website and further away from buying tickets”. Unfortunately the hosting has problems as it drops out at critical times. MQFF considers the system out-dated and are looking at moving to self-manage through Wordpress but this will rely on available budget and the help of interns.

No system project management tools are used. Festival “Run Sheets” are managed in Excel, one sheet per day (12 sheets in all), tracking the full activity of the day, almost down to the minute (times, technical, staffing and volunteer requirements, etc). The festival’s ‘Critical Timeline’ is also managed in Excel. This maps out all the key deliverables for the Festival including sponsorship contracts and ticketing build with dates and responsibilities. This is updated as deadlines and tasks are completed and deadlines slip. Both spreadsheets require a huge time commitment and extreme attention to detail from the Operations Manager to keep it up to date. This locks down one part-time role almost completely.

Survey Monkey is used for audience surveying and volunteer registration. There were 500 respondents to a recent audience survey sent out to all ticket buyers after the Festival. The volunteer registration process captures contact information, basic demographic information, skills, and “why you’re interested”. This information gets exported from Survey Monkey at the end of the registration period and becomes the master list for Volunteers for the festival year in Excel. During the festival, there are approximately 100 volunteer shifts over 12 days (day and night shifts, plus weekend shifts) are these are all manually managed in Excel.

MQFF is very aware of the limitations they are working with. They would like to have a CRM system that could integrate manual functions and Excel spreadsheets. However, MQFF is aware that both financial and human resources are needed to build them properly and maintain them, as well as willingness and complete buy-in from all partners and users.

Tickets	Email Client	Enews	Finance	Website CMS	Registration (Third party)	Audience feedback	File storage	Project management	CRM
Ferve	MS Outlook	Mail Chimp	MYOB	Rhombus Digital	-Survey Monkey (volunteers) -Film Freeway (film makers)	Survey Monkey	Server	Excel	Excel

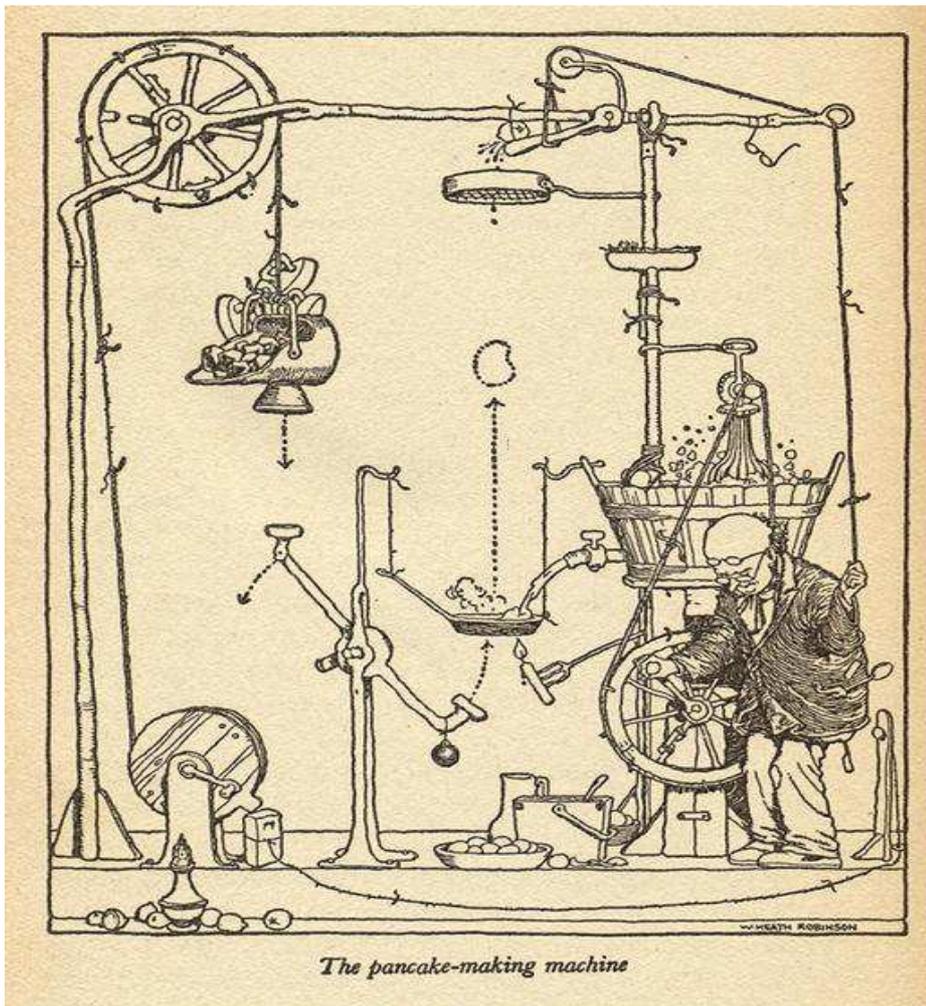
### Additional experts

Alongside a needs analysis, desktop research reviewed other similar initiatives to make sure this project is not reinventing the wheel. This involved interviewing experts in the area to uncover some of the pitfalls and short cuts to finding and managing customized software systems. Interviews were undertaken with Catherine French who uses Salesforce at Footscray Community Arts Centre and is part of the Arts West Salesforce Consortium, Clare Carmody formally from St Martins Youth Theatre and now working for Salesforce based in Paris and Jeannie Hayes who recently involved in the tendering process for a new ticketing system and the introduction of Ticketserv at Frankston Arts Centre. They all provided specific insights, which have informed the findings of this report.

## Summary

It is clear from this initial consultation that each organisation has specific needs and challenges with adapting to the digital economy. Even though these organisations have much in common, for a variety of reasons they all have different business systems that are based on particular work flow structures and management systems. Organisations evolve particular work practices over time based on the skills of particular staff, different priorities of leadership and availability of resources. This leads to systems that do not always appear to be particularly efficient or effective.

### The Pancake-making machine



In the small to medium arts sector where resources are scarce, successful systems often rely on one or two individuals within organisations to drive the introduction and maintenance of new systems. The successful adoption and integration of new systems is reliant on the people within an organisation. It does not matter how good a system is if the people who will use it are not trained and committed to making it work. Enabling the people who will use the system is a critical element for success. Any organisation with unclear work flow structures and complex systems is unlikely to have all its problems solved by a new CRM or ticketing software.

## Shared needs

In the initial consultation plan it was proposed a joint consultation session would take place to develop a prioritized list of needs and requirements with all organisations involved. This would enable the next stage of a consortium to be realized. It became clear through the process that the idea of a consortium of companies had limited value. Instead of a joint session, individual meetings took place to update each organisation on the progress of the consultation and its initial findings. The idea of the consortium was explored further when scoping existing systems at Stage Two of the consultation. The findings in relation to a consortium are elaborated on later in the report.

Four of the five companies would like a new CRM and the fifth company, Midsumma Festival, is using Salesforce but needs support to make it a more useful system. However, It was clear that all companies had different needs on how they use data and had different approaches to how they could use it better.

Similarly, the five companies had different needs and priorities with ticketing systems. All identified weaknesses in their current systems but there was no clear common solution to the varying needs and capabilities. There is interest in finding a ticketing system that integrates with a CRM system and other systems such as mass emails, Enews, donor tracking and project management. Ideally there would be a cheap, intuitive, ticketing system that can meet all these needs along the lines of Tessitura. However, despite the claims of some software companies, this system was not identified by this consultation.

## Summary table

	Fringe	Midsumma	MWF	TWC	MQFF
<b>TICKETING SYSTEM</b>	<b>3DR</b>	<b>SABO</b>	<b>Ferve</b>	<b>Trybooking</b>	<b>Ferve</b>
Third party ticket build	YES				
Third party comps management	YES				
Third party view of ticket sales	YES	YES			

<b>EMAIL CLIENT</b>	MS Outlook	Google Mail	MS Outlook	MS Outlook	MS Outlook
<b>ENEWS</b>	Mailchimp	Campaign Monitor	Campaign Monitor	Campaign Monitor	Mailchimp
<b>FINANCE</b>	Xero	Xero	Xero	Xero	MYOB
<b>WEBSITE CMS</b>	Textstem	Joomla!	Wordpress	Heroku	Rhombus Digital

### REGISTRATION (Third party)

Volunteers	Survey Monkey	Salesforce Web-to-Lead	Website form		Survey Monkey
Artists/Events	3DR	Salesforce Web-to-Lead	Self curated	Self curated	Email/telephone
Venue Hire			Email/telephone	Email/telephone	

<b>AUDIENCE FEEDBACK</b>	Roy Morgan	Google Forms	Survey Monkey	Email/social media	Survey Monkey
<b>ARTIST FEEDBACK</b>	Survey Monkey	Google Forms	Survey Monkey	Email	N/A

<b>FILE STORAGE/SHARING</b>					
Server	YES	YES	YES	YES	YES
Dropbox	YES	YES	YES	YES	YES
Google Docs	NO	YES	YES	YES	LIMITED

<b>PROJECT MANAGEMENT</b>	Smartsheet	Asana (moving to Pulse)	FileMaker Pro	Trello & Slack	Excel
<b>VOLUNTEER ROSTERS</b>	Deputy	Salesforce	Excel	N/A	Excel

## Stage Two - Scope existing systems

The needs analysis informed the brief to scope six ticketing and CRM systems now in the market place. This provides a snap shot of some of the key companies currently building a customer base with the small to medium arts sector in Melbourne. The consultants met with:

- Jeff Challis - a **Salesforce** trained consultant who now heads up AAKonsult
- Ric Benjamin from a new not-for-profit CRM system called **GoodSystems**
- Jeremy Dixon, Manager of **Tessitura**, Asia Pacific Region and Clare Haynes from the Melbourne Symphony Orchestra to find out more about how it works
- Ben Canning at **PatronManager**, who are a Gold Level partner of **Salesforce**.
- Greg Simmons, **eTapestry** and Outcomes Business Manager
- Alexander Younes, **IWannaTicket**, Ticketing Partner

### Salesforce

AAKonsult are Salesforce-specific consultants who work with organisations to start and optimise their use of Salesforce. The Nonprofit Starter Pack (NPSP) edition of Salesforce is designed for not-for-profit organisations of all sizes. It is a cloud-based, open-source product developed in partnership with the Salesforce.org community (Salesforce's non-profit social enterprise). NPSP is built specifically with the needs of not-for-profits in mind. NPSP has most of the capabilities small organisations need "out of the box".

#### Costs

Up to 10 NPSP licenses are free for eligible not-for-profits. After that licenses can cost from \$36/user/month to \$72/user/month, depending on the users needs. These are discounted rates. Without the NFP discount, organisations would be looking at spending \$150/user/month to \$300/user/month so there is a considerable saving.

#### Support & Maintenance

There are many online forums where administrators can get free online technical support from other administrators. There is a 'Salesforce Success Community' and, more relevant to the not-for-profits, 'The Power of Us' hub. AAKonsult can provide ongoing support at their \$1,100 a day rate. There is also a post-implementation package, which is support for ironing out the little problems. AAKonsult always encourage people to try things first and then, if they need to ask. AAKonsult guarantees an answer back within 24 hours. Some organisations book AAKonsult in for quarterly maintenance. This allows them to let questions bank up over the quarter and save them all for that day. (\$1,100 a day, as well).

#### Implementation

Generally speaking, implementation of Salesforce (SF) in a small-to-medium arts organisation would require around 5 days of AAKonsult's time at \$1,100 per day spread over a couple of weeks or months, depending on how much preparation time the organisation needs to get their data ready for migration.

This would include:

- Advice and coaching on preparing data for migration, including templates
- Setting up SF for the organisation including identification and the addition of custom fields
- Data migration
- Initial training for Super Users

#### Ticketing

AAKonsult claims that, of the ticketing systems being used by the five organisations, only Trybooking offers a 'real time' integration with Salesforce. Other systems integration might require additional development to make a daily/weekly/monthly import process. This could be achieved as an annual process, which would be complicated but a one off exertion of effort. If notes are kept on the process the first time around, it would be easier with every subsequent year.

## **Consortium**

Salesforce is used by many large multinational organisations effectively, so it is adept at managing multiple levels of security and data partitioning across a single instance of the database.

Bringing five organisations together would require more than the 10 free licenses and thus cost more than if the organisations were doing it by themselves (e.g. Midsumma have Salesforce for free currently, but joining a consortium would make it no longer free). Salesforce may be open to asking for a special deal where each organisation has 5 free licenses under the banner of the consortium. Salesforce has a very strong philanthropic philosophy at its core.

There would need to be a common process and a common language used across the five organisations and there would need to be centralised administration. However, having a centralised administrator could potentially either lead to a slave with five, competing masters or, if employed specifically by one of the organisations, a slave with one master that is more important than the other four. AAKonsult recommends that as well as a centralised administration, there also needs to be a Super User in each organisation who can do training, troubleshooting, coaching, build simple custom reports. This would apply to a consortium with any CRM or ticketing system.

As well as a single administrator there would need to be a primary administrator and a secondary. A succession plan is required in case of primary administrator is sick, on holiday or leaving the company. At this point the secondary would need to become the primary and a new secondary would need to be found. Again, this would apply to a consortium with any CRM.

Change management process would be very important with a Steering Committee for major decisions and a Change Management Body to monitor minor changes. Small organisations might struggle to give the time and attention needed to manage these processes.

Privacy would also be a big issue. While partitioning data between organisations is possible, it would add to the complexity and costs of implementation and could possibly negate any savings that might be made by having a joint system.

Integrations with a multitude of systems would also add to the complexity of implementation. For example the API relationship between Campaign Monitor and Salesforce only allows a single instance of each. Salesforce can not talk to multiple accounts at Campaign Monitor. One solution might be for all organisations on Campaign Monitor to be on the same license, but then that leads to privacy issues. Something like Xero might be easier for Salesforce to manage multiple accounts but AAKonsult questioned the value of integrating Salesforce and Xero for small organisations.

## **Advantages**

- Ranked as the #1 CRM in the world.
- 10 free licenses for NFP organisations.
- It is reasonably intuitive and easy to navigate.
- Trailhead.com online learning modules are useful and this takes the pressure off the 'train the trainer' approach.
- Generous discounts on training for not-for-profits, approximately 75% off.

## **Disadvantages**

- Adding value to Salesforce is complicated. While there is a lot of training and information available, there can be a lot of wading through it all to get the answers you want.
- There are hidden costs. While it can ostensibly be free, there are costs in the amount of time it takes to administer it. Small organisations operating with 10 user licenses don't have the 24/7 customer support that paying customers have and can be left feeling overwhelmed. Having a relationship with an external consultancy like AAKonsult can help alleviate that isolation but this has cost implications.

- Integration - while Salesforce can be integrated with many other systems, these API relationships can have additional cost implications and can be quite rudimentary.
- Salesforce's reporting functions while flexible are not as user friendly as the rest of the system.

### Other thoughts

AAKonsult believes in phased implementation. "Don't try to do everything at once". "Have a clear vision and proceed slowly". For example, an organisation moving to Salesforce might start with contacts, then add donations, grants, and ticketing. This is key for change management within an organisation (not too much change at once). A good way to plan the phased implantation is to plot everything on a graph where the X axis is 'Value to the organisation' and the Y axis is 'Effort'. Things that are high in value and low in effort, naturally fall into the Phase 1. But if something is low in value and high in effort, it might be better to leave it alone.

Taskfeed (<http://www.taskfeedapp.com/>) is the project Management tool that AAKonsult recommend. It's usually \$17.50/user/month but it offers an ongoing 50% discount to NFP. AAKonsult should also be able to negotiate a deal with Taskfeed where the first 10 licenses are free.

AAKonsult have their own Salesforce applications which manage donor/giving, events, plus an import file module which allows easy upload and de-duping of data from Everyday Hero into Salesforce, which AAKonsult thinks might be useful for ticketing. These apps have an annual fee, plus monthly fee for payment gateway for credit cards, plus per credit card transaction fee. Apparently this is competitively priced.

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## Goodsystems

Goodsystems (GS) is a cloud-based system, designed to create a "back office platform" for any not for profit (NFP) but it is not arts-specific. Goodsystems' view is that the management of staff, projects, and finances are all fundamentally the same.

There are four modules:

- CRM
- HR & Volunteer Management
- Project Management
- Finance & Accounting (this doesn't include Payroll)

Goodsystems was built specifically with Not For Profits in mind. However, the company are new to the arts. The company is keen to develop the area of the business and there is potential for a partnership to develop something really valuable for the small-to-medium arts sector.

### Costs

Full access license for Goodsystems is \$35 user per month. There is a HR only license of \$10 user per month for the HR & Volunteer module that can be separate. Volunteers don't need a license unless performing administration tasks. This would be applicable to Midsumma, MQFF and MWF's office-based interns and volunteers.

### Support & Maintenance

License fees include ongoing support via email or phone call or, if needed, Skype. It is estimated the initial set-up would take 1- 2 weeks and cost between \$5,000 – 10,000 (ex GST). GoodSystems has the ability to create webforms that feed directly into the CRM. This is good for volunteer registration and potentially audience feedback. Depending on complexity of forms, these might have to be developed by Goodsystems and this could lead to additional costs. The system enables good for volunteer shift management. It has the ability to send emails to volunteers where they can opt-in to available shifts by ticking checkboxes and submitting to the system.

## **Implementation**

This includes an initial 1- 2 day consultation to look at existing data and give guidance on how to prepare it for uploading into GoodSystems. This would include looking at Ticketing. Data cleaning is not included. That is up to the individual organisations and how long this cleaning process will take depends on how 'dirty' it is. Training of the administrator and key personnel within the organisation is managed by a 'Train the trainer' approach to enable training to be rolled out to the rest of the organisation.

## **Ticketing**

It is unclear at this stage how ticketing data imported into the system using the customized fields might be used. There is a lack of an 'instant' relationship with ticketing systems. A manual relationship exporting and importing would be required. This would be problematic during festival time.

Without seeing how ticketing data imported into the system using the customized fields might look, it is hard to see how powerful it can be. For example, with reporting, how easy would it be to identify an audience member who had bought tickets to more than 5 comedy events over the last 3 years. Could they be then added to a mailing list for a targeted EDM selling of an upcoming underselling comedy event? This may be possible but it might need a lot of set up, which would add to cost.

## **Consortium**

GoodSystems has a shared services capacity. This enables a user to easily switch between multiple organisation's databases which would be useful for a centralized bookkeeping or HR role across several organisations. Organisations could also share a system administrator. This could work in a consortium or a community of interest.

## **Advantages**

- Looks reasonably easy to use.
- Uses a train the trainer approach. Training is built into initial 1 – 2 week set up costs.
- Built-in email/calendar file share integration with Office365 and Google Apps. There are no hidden costs with API plug-ins for email, calendar and file sharing.
- It does have EDM capacity, when partnered with external HTML editor. The capacity to track open rates and click throughs is in development.

## **Disadvantages**

- There is no licensing scale. There is a flat rate per full license user, regardless of number of licenses. \$35 a month per user can add up. Organisations would need to be very selective who needed to actually use the system, and perhaps cover the rest who only need to view under one license with limited permissions.
- Lack of 'instant' relationship with ticketing systems – manual relationship (exporting and importing into GS) during festival time could be cumbersome/prohibitive.
- No online forums for peer problem-solving. Users have to go through GoodSystems for all support.
- Lack of API relationship with Mailchimp and Campaign Monitor would mean effectively 'starting over' with GoodSystems. While there is potential to import existing data from those systems into GoodSystems, it is unclear how that might look or how useful it would be.
- CRM quite simplistic, there are no different views depending on type of account.

## **Other thoughts**

GoodSystems has bookkeeping capabilities and could potentially replace Xero for everything except Payroll. There is an existing integration with KeyPay, which is a Quickbooks-based application with payroll functionality but this would mean additional costs. GoodSystems can also be used in conjunction with Xero or MYOB to replace the paper shuffle involved with those systems, for example transaction approval and expense claim approval. This removes the need for people having to physically be in the office for approvals. However, manual export/import would be required from GS into Xero/MYOB.

## Tessitura

Tessitura is an enterprise application used by performing arts and cultural organisations to manage their activities in ticketing, fundraising, customer relationship management, and marketing. It refers to itself as "arts enterprise software". Tessitura was originally developed by and for the Metropolitan Opera of New York. The Metropolitan Opera maintains ownership of the intellectual property in the original software, but established a separate organization called Tessitura Network as a not-for-profit corporation to manage the ongoing development and support of the system. Tessitura is currently being adopted by most Major Performing Arts (MPA) companies in Australia.

### Costs

Licensing prices have come down enormously over the last 5 years and is calculated on an organisation's operating costs. For a company with less than US \$3million dollar turnover, it costs \$6,000 for a perpetual license.

The Tessitura Network's hosted option, **Remote Access Managed Plan ("RAMP™")**, is an elective service to deploy Tessitura Software to organisation's desktops via the Internet. If a company chooses to have Tessitura hosted by RAMP, there is a one-off cost for setting up the first five users, plus an ongoing per month cost for maintaining those users and keeping the system up to date. The users are responsible for testing the upgrades but are given a worksheet by Tessitura to work from. For example, for the first five users it costs \$4225.00 to set them up and then \$450 per month ongoing. With each set of additional five users, the set up fee is only \$1375 per group of five and an additional \$450/month ongoing.

There is also something called a non-concurrent user. So for every five users you set up, you can purchase an additional 5 non-concurrent users at \$85 each with **no** ongoing costs. This means that you can have 10 users but only 5 can be on RAMP at any one time. For example: A Symphony Orchestra has 53 users but only 15 of them are concurrent and allowed on RAMP at the same time.

### Support and maintenance

There is also an annual membership. For an organisation in the lowest band with an operation budget under US\$3million, this costs \$19,000 per year. This membership includes all the benefits of being part of the Tessitura network, for example, training and support.

These really depend on the complexity of the data you want to migrate from existing systems. For example, Sydney Writers Festival did quite a bit of the work themselves on cleaning data but in the end it took around 200 hours of Tessitura's time in setting up and training which cost \$30,000.

The sublicenses do not have to pay annual membership fees. However, the major license holder's membership fee may be affected by hosting the other organisations. For example, if the overall combined turnover goes above the US\$3 million mark, this might push the major license holder into the next band, but this extra cost can be divided across the consortium. For example, the Wellington Consortium – as individual organisations, they were all in Category A or Category B. When they combined, their operating income pushed them into Category C, but when divided 3 ways, this was less than a Category A membership.

### Implementation

The amount of training depends entirely on what and how often people are using it. It also depends on each person's existing skill set and how quickly they adopt the new system. Generally speaking 2 to 5 hours of basic training is needed for a general user and then a 'practice makes perfect' approach is required from that point on. There are lots of online courses and webcasts to help with basic training if needed. Training needs to be rolled out across the entire organisation and not just held in the control of one single enthusiast. There is a need to spread throughout the organisation the processing and training, ongoing development so that it doesn't set up a single point of 'failure'.

Tessitura is an enterprise piece of software that needs to be used across the organisation. Everybody has to be a user, or at least familiar with what Tessitura does for the organisation. This needs strong executive sponsorship. A case was cited of an arts organisation where Tessitura was being blocked by senior managers. It was discovered that those senior managers didn't turn up to training and hadn't logged onto the system in six months. A Major Performing Arts Organisation executive has reportedly said: "if it's not in Tessitura, it didn't happen".

### **Consortium**

There are at least forty consortiums around the world, including: Sydney Opera House is the main licensee for a consortium that contains Opera Australia, The Australia Chamber Orchestra, Bell Shakespeare and the Seymour Centre. In Wellington, New Zealand, there is another between the three major presenting partners: The Royal New Zealand Ballet, Royal New Zealand Opera and the New Zealand Symphony Orchestra. In Pittsburgh, there is a consortium of 30 organisations (a mix of small through to large) that share everything from toilet paper to data, with Tessitura at its heart.

One organisation would need to be the main license holder, but then the hosted organisations would need to purchase sub-licenses. These sublicenses vary in cost with some sub-licenses being sold for as little as \$1. After the first five users, there is a considerable reduction in the costs in the initial set up cost and monthly maintenance for each subsequent five users. This would apply to the entire consortium as opposed to the first five and subsequent five of each organisation.

Tessitura is extremely effective at managing control group sections and complex partitioning of data. For example, a company can share a contact at a name and address level but everything below that (donations, subscriptions, ticket purchases) can only be seen by the relevant organisation. This would allow The Wheeler Centre to only see donations to the Wheeler Centre, and MFF to only see their data.

As with other experts it was stressed that with any consortium there need to be a strong data policy with protocols in place around data entry and duplicate management. The consortium needs to be incredibly collegiate and mindful of each other's needs.

### **Advantages**

- Very powerful and well regarded system.
- New developments seem to be encompassing medium sized organisations.

### **Disadvantages**

- Expensive and complex.
- Beyond the financial and staff capacity of most small to medium organisations.

### **Other thoughts**

Tessitura has tight integration with two EDM Platforms: MailTwo (Chicago) and Wordfly (Seattle). These platforms were developed together alongside Tessitura so are truly integrated. This allows Tessitura to track Opens, Click throughs and even Conversions to sale. These are third party services that need to be purchased separately. It is believed the Smithsonian is developing a semi-integration with Mailchimp, but it's only a one-way relationship. This means it will make lists in Tessitura and push them to Mailchimp but there is no ability to view Open rates, Click throughs and it is not officially supported by Tessitura.

Tessitura API is included in license so you can customize different integrations but it is expensive to develop these and they also need to be maintained because upgrades might break the link, so it would need to be upgraded for customization. It is advised organisations would need to sit down and really question the value of how they are currently doing things. They need to consider how they are going to move forward and not just how they have been doing it for ten years. Organisations need to do as much as they can within Tessitura to make the most of it.

For project management Tessitura has integration with Artifax Event venue and event software. Perth International Arts Festival uses it but it appears the system did not cover enough detail for festival scheduling and the down to the minute detail they needed. Melbourne Festival use another third party project management tool. There is also Ungerboeck (<https://ungerboeck.com/about-us/ebms>) a German-based software company with an office in Brisbane that offer wide-reaching event and venue management software and have been used by Sydney Opera House and the Arts Centre in the past.

### **Technical considerations**

There maybe firewall issues with RAMP hosting for those organisations on the State Library of Victoria network. They will need to be sure they are allowed to access and have permissions, even accessing the Cloud can be problematic.

### **Other considerations**

Melbourne Festival was suggested as a possible host/master license holder.

### **Further notes:**

#### **Claire Hayes, Tessitura user at Melbourne Symphony Orchestra (MSO)**

Claire is an enthusiastic user of Tessitura. It should be noted that the MSO obviously operates at a significantly different scale to most small to medium organisations. There is greater volume, greater staff capacity and significantly bigger budgets.

### **Advantages**

Tessitura has very flexible and powerful ticketing capabilities. For example, in Tessitura, it is possible to change ticket prices after an event has gone on sale and track who, when, how and how much. Claire understands that Tessitura is about to launch an open API allowing 98% access to the database, which means “anything is possible” in terms of integration with other systems.

‘Out of the box’ or standard reporting options are broad, pretty and easy to use. Reports can be exported via SSRS (a server-based report generating software by Microsoft), resulting in professional looking PDFs requiring little manual manipulation. Reports can also be rendered to a URL. This allows executives who don’t want to log onto Tessitura can run the report as often as they want and access live data. This can also be used as a way of sharing data with third parties, such as presenters, event producers and artists. This means return on investment of the product can be phenomenal. There are plenty of online training modules, online support forums and webinars available. There are clear starting points for new users in ticketing, admin and development. There is a test module or mirrored database where it is possible to try stuff out on before deploying into a live environment. This is similar to similar to Salesforce’s ‘Sandbox’.

### **Disadvantages**

The structure of the database was built around the needs of large Opera companies, which some organisations find limiting. Return on investment might be phenomenal but only if it is used properly. It has to be an across organisation buy in. Claire noted “this is for serious grown-ups only”. Customised reports need to be built for you using SQL coding. This adds costs, however, in four years of using Tessitura, MSO have never had to have any custom reports built.

True expertise is hard to find and very expensive. MSO has just employed a dedicated Tessitura specialist in their development team. There are no real open access’ capabilities. An organisation like Fringe could get around it using a very carefully thought out pro forma for artists/event producers to complete giving ticketing options and then it’s a 2-3 day job for someone internally. Complimentary tickets could be managed via an event-specific promo code. Sales could be accessed by using the URL reports. Claire also advised that an organisation couldn’t expect to implement a new CRM and not change their business practices.

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## PatronManager

PatronManager is a Gold Level partner of Salesforce. They have repurposed the Salesforce Enterprise Edition (not the Non Profit Starter Pack) to help arts organisations get a 360 degree view of their patrons and develop richer relationships with them. PatronManager is entirely branded within your brand. The only thing that shows that the end user has gone into Patron Manager is the URL. No sense of having gone to a third party site.

Patron Manager's primary features are:

1. **Box office Management** – sell tickets online from a website. Manage inventory, create season and performances, build out seat-maps for seat allocation.
2. **Donations Management** – manage donations and development in a way that's specific to Arts and Culture orgs. Enables recurring donation tracking, pledge membership. This functionality is similar to the grants and donations management in the NPSP version.
3. **De-duplications Management** – there is a vast algorithm built-in to their system to help manage ongoing possibility of duplications. For example, variations on contacts, whether it is a change of name after marriage, or change of address or other contact details.
4. **Marketing** - If a patron is a seasoned subscriber and a donor, they are clearly flagged in the database so that anyone dealing with them instantly knows they are an important person to the organisation. PatronManager is very effective as a targeted marketing tool.
5. **Reports** – The system enable flexible reporting. It can run sophisticated, already customised reports. These are one or two click reports. For example, it is possible to identify first-time buyers for the last show, in the last week, or in the last year. This kind of reporting allows it to easily create mailing lists for use in MailChimp for finely targeted EDMs. It also has custom-made Dashboards with visual representations of favorite reports.

### Costs

Typically, the cost of implementation has two parts:

- Configuration of your account – setting up custom objects and processes, venue maps.
- Variable fee with data migration – this is usually based on an estimate of how much work is required to transfer the data over.

PatronManager have provisioned licenses from Salesforce at a wholesale cost so you only need to pay for your organisation's licenses with PatronManager. This is opposed to paying for a PatronManager license on top of a Salesforce license.

PatronManager was reluctant to put a dollar figure on the cost of using PatronManager. It noted that no two arts organisation are ever the same and that their pricing is based on a complex set of variables. For example, how many user licenses are needed, the organisation's operating budget, the volume of tickets that are sold, how many modules/customisations are required.

Included in a contract with PatronManager will be a certain number of user licenses, and they can usually get 2 – 4 licenses for free. Organisations can also provision future licenses on a monthly basis. This means organisations can have extra licenses during peak season for a festival and only pay for them on a monthly basis as needed.

The closest estimation obtained of annual fee costs was somewhere between 1% and 3% of an organisation's operating budget.

### Support and maintenance

The annual membership covers support and maintenance of the system. PatronManager do an 'Admin Essentials' course for their customers. This is similar to the Admin Essentials for Beginner Administrators course that Salesforce run. However, it is arts-specific and they run it for free. They believe in empowering their clients and staff to use PatronManager as well as they possibly can.

## **Implementation**

PatronManager would need to have a one-on-one conversation with an organisation to understand their specific challenges and see how they need to position the system to solve challenges. PatronManager take a lot of pride in identifying if it is the right system for an organisation. As part of this process, it sends out a survey that asks a lot of questions, such as ticket sales, number of donations per year, whether there is a subscription of membership program, what kind of data storage is required. This is to begin to work out how many hours it will take to build out the system to meet the organisation's needs.

As part of the implementation process, it will bring over most of the organisation's "institutional memory" or existing data. It provides a data template to the client and then runs a standard de-dupe package on it before importing. It is the responsibility of the client to make the incoming data as clean as possible. PatronManager grade the data from A down to D. Data has to have an A or B grade before it can go into the system. This process is distinct from the de-duping algorithm in the system, which helps manage dupes on an ongoing basis as tickets are purchased or donations are made.

## **Ticketing**

PatronManager has powerful and flexible ticketing capabilities. It has the ability to use the 'cart text' opportunity to suggest other events based on the event the ticket buyer is purchasing in real time. These suggested products can then be easily added to the cart. It has interactive seating charts. A certain number of custom-built seating charts are included in the set up, but after that they cost US\$500 per chart to develop and implement, with a 2 to 3 week turnaround. There is also a certain degree of flexibility with existing charts. For example, there is the ability to block out rows if the space is being used slightly differently. But huge variations in the seating set up would require the creation of new charts.

The billing information page is entirely customizable. This enable the company to gather any information required. There is the ability for a ticket purchaser to opt-in for Enews and donate at the point of purchase. It also enables the customer to share on social media after a purchase has been made.

The kind of Open Access system that Fringe currently uses with third parties doing their own ticket build, managing their own complimentary tickets, would be problematic. It was recommended it would be better for Fringe to hire a Box Office Manager to do those ticketing builds and manage the complimentary tickets as it would be easier to train one person properly and have them do it, rather than have to support 150 external people, who are different every year. It was also advised it would be more profitable and beneficial to have a box office manager as part of business model to offer service at a cost to the event producers/artists. It could then also "hire out" the system throughout the off-peak, offering ticketing to smaller organisations.

## **Consortium**

PatronManager would be willing to consider a group discount with annual fee, set up and training if a number of organisations signed up at the same time.

## **Advantages**

- Powerful ticketing system integrated with Salesforce.
- Donation management tracking
- De-duplications management
- Mail Chimp is the preferred EDM platform and PatronManager have developed a strong two-way relationship between the two systems.

## **Disadvantages**

- Costs - PatronManager application uses the 'for profit' Enterprise Edition of Salesforce, the free ten licenses that come from the NSPS do not apply.
- Moving from the NSPS version to PatronManager wouldn't be as straightforward, although it might reduce implementation fees.
- The relationship with EDM platforms other than Mail Chimp would need to be manually managed through export and import of data as CSV files.

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## eTapestry

eTapestry is owned by US-based Black Baud, a company that works exclusively with the philanthropic sector (NFP organisations and foundations). Their core focus is on helping NFPs improve their fundraising outcomes – donors, volunteers, stakeholders. eTapestry is a CRM platform with 8000 customers world wide (180 in Australia, Asia, New Zealand) and was built specifically for the Cloud and for small NFP organisations with limited resources, budget and time. Black Baud also own Raiser's Edge, a CRM/Fundraising platform for medium-sized organisations. It was advised that other CRMs, such as Salesforce, have a NFP 'skin' which sits on top of a larger machine so it can end up with a lot of functionality and reports that are not needed.

### Costs

eTapestry is priced using a 'good, better, best' subscription model. Each level of subscription allows unlimited number of users and is instead based on the number of contact records. Because subscription costs are calculated on the number of contacts, an organisation might just bring their core contacts into eTapestry (donors and other key stakeholders) and have the bulk of their audience contact data still sit in their ticketing system. However, this will mean it wouldn't be able to track ticket buying behaviour on any audience members who aren't already one of your core contacts.

The three levels are:

- Starter – \$200 per month for up to 1000 records
- Essential - \$300 per month for up to 5000 records
- Pro – \$500 per month for up to 20,000 records

Additional records are then charged in 'bands'

- Band of 2,500 Records: \$49/month
- Band of 15,000 Records: \$99/month

Constant Contact EDM Platform license is included in the subscription. There are other things included, depending on the level. See <http://fundraising.blackbaud.com.au/products/etapestry/pricing/> for full details.

IP Payments, a PCI Compliant Credit Card Payment Processing application, costs an additional \$500 per annum but includes 2500 transactions (donations, registration fee payments) as part of that annual fee. Additional transactions are charged at 15c per transaction.

### Support & maintenance

Training videos and materials are available online. eTapestry offer in person end-user training as part of implementation, help from a support desk and from an Account Manager included in the subscription fee. There is an active user group amongst NFP users of eTapestry in Melbourne, plus an annual conference in Sydney. It was noted that the not-for-profit sector tends to be much more open to sharing knowledge, particularly at the smaller end of the sector.

### Implementation

Typically costs around \$5,000 – \$10,000 for initial customization and implementation, depending on the amount of data that's being migrated and how much of the work can be done by the organisation themselves.

There are three options for implementation:

- Self-implemented – for those organisations that have a certified eTapestry administrator
- Instructed – where there is a staff member in the organisation who is database-savvy, this can reduce costs (with only 4 – 8 hours consultation required)

- Consultant-led – This is the most common implementation approach. Consultant runs a design process where they look at existing data and how the organisation operates and then devises a baseline configuration of user-defined fields.

eTapestry has an export function to Xero, Quickbooks and MYOB. This is a manual process by necessity. The advice from an ex-accountant is that it's best practice to do imports as batches, so they can be reviewed first. There is a de-duping functionality. New data can be imported into the CRM via the import module. This data will be queried against existing data and can be merged with or override existing data. This is done on a contact-by-contact basis.

There is a DIY form functionality that allows the easy creation of forms that can be embedded into a website. This can be for donations, volunteer registration and event registration. API integration with VolunteerHub for volunteer management allows shift allocation, sign up and shift swapping. This would be an additional cost.

In addition eTapestry has a social media finder that uses email addresses from contacts and finds their social media handles in the top seven social media platforms and brings those into the CRM. It is unable to currently track a contact's engagement with your organisation on social media but Black Baud's recent acquisition of Attentive.ly (social listening provider) will make this kind of thing possible.

### **Ticketing**

eTapestry has developed API integration with IWannaTicket ticketing system. There is also the ability to import ticketing data from other ticketing systems, such as Trybooking, via their import module. The API integration with I Wanna Ticket happened when Four Winds Festival made the relationship with IWannaTicket and told eTapestry about it. So the API relationship was effectively built around one company's specific needs for ticketing/CRM integration. This may be limited and is yet to be tested by many other organisations.

### **Consortium options**

OPTION ONE: Single instance with partitioned data

eTapestry has an Advance Security module (at an additional \$49 per month) which allows a single instance of eTapestry to be partitioned into what is effectively different databases. Obviously, a number of organisations joining together under the one instance would push the subscription up to the Pro level (with the combined number of contacts) and the cost could be distributed across the organisations according to their percentage of those contacts.

There is an example of 'Heart Kids' which, when they first signed up for eTapestry, had a federated model with a different CEO and Board in every state. They chose eTapestry as their common platform, using the advanced security module to partition the data between states.

The challenges, however, would be to have a common language and set of fields. There could be field sets defined for specific organisations, but the administration of the system could easily and very quickly become a 'complete mess' without a certain amount of commonality and a clear change management process, which would require a steering committee. This is similar to AAKonsult's recommendations.

OPTION TWO: Multiple instances with sharing of back office services

There may be some savings in organisations choosing eTapestry as a common system (as opposed to a shared system) by establishing a central administration for the different instances of eTapestry.

OPTION THREE: Multiple instances in a buying group – (Community of interest)

There may also be some savings to organisations who come together and all sign up at the same time in terms of initial consultation, training and implementation.

### **Advantages**

- Simple and NFP-focused.
- eTapestry prides itself on providing a single page of reports that are all NFP-focused and immediately useful to NFP organisations.

- Embedded integration with EDM platform Constant Contacts makes for easy creation of good looking EDMs to customized lists of contacts, all within eTapestry. The cost of using Constant Contacts is built into the eTapestry subscription.

### **Disadvantages**

- Subscription costs calculated on the number of contacts.
- No existing API integration with other EDM Platforms.
- DIY forms aren't customizable in terms of appearance. If it is necessary to create a form that looks and feels like the rest of a website, eTapestry need to paid to create it (typically, forms cost \$700 - \$1500 to create).

### **Other thoughts**

It was suggested that an organisation might start off with core contacts and then, when they've developed their donor base enough to cover the eTapestry subscription costs, to then take on the cost of pulling all ticket buying data and perhaps even all eNews subscribers into eTapestry. The organisation could then use Constant Contact for all EDMs.

An example was provided of a NFP that started with 2000 contacts in eTapestry and built them up into 65,000 contacts. Only 5,000 were 'core contacts', people who were directly engaged with their charity through advocacy and fundraising – and the others were supporters of those core contacts. For example, people who donated to the fundraising activities carried out by the core people. They decided there was value in bringing those 60,000 extra contacts into their CRM in terms of generating broader advocacy for their charity.

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## **IWannaTicket**

IWannaTicket started out in 2009 as a typical self-service platform similar to Eventbrite and Ticketbooth with a view to keeping fees down. The company has grown and realise that more organisations are requiring custom solutions. They believe their stand alone platform, while good, could do much more. Their current clients include: Botanic Gardens, Four Winds Festival and Woodford Folk Festival. They have recently developed an API integration and subsequent partnership with **eTapestry** through their work with Four Winds Festival.

### **Cost**

IWannaTicket has flexible pricing, offering the typical "per ticket" payment (\$1 per ticket is the NFP rate) as well as subscription/licenses. The company would consider offering a group discount in a consortium situation.

### **Advantages**

- Custom branding of user interface, also customisation of tickets and confirmation emails
- Donations can be made through the system at no cost to the organisation. The \$1 per ticket fee is waived. Donors would still need to pay a credit card processing fee.
- Integrates with Mail Chimp. Ticket buyers can opt-in to eNews subscription list at point of purchase and be automatically added to Mail Chimp.
- Ability to have gift vouchers for future events.

### **Disadvantages**

- IWannaTicket is just a ticketing system. Without a CRM (such as eTapestry) to integrate with, there is no way to report on ticket buyer's behaviour across events in a festival, or from festival to festival. The reporting functionality built into IWannaTicket is mainly on a per event basis, although additional reporting is currently being developed.

- It is not currently able to handle Open Access requirements of Fringe or Midsumma. It wouldn't be able to have 100+ third party users accessing different parts of the data. This could potentially be developed at additional cost.
- Currently only has integration with eTapestry. Integration with Salesforce is planned.

# Findings

## Consortium

A key question for this consultation was to scope the possibility of building a consortium to develop and share a CRM and ticketing system. It was hoped there would be a cost effective way to purchase and build a system that would meet the needs of all parties. Additional experts who were interviewed could not identify consortiums that added value or lead to efficiencies. A number of the software systems examined had the capability to work with a consortium but the consultants interviewed also highlighted the potential difficulties that arise. The Arts West Salesforce Consortium was discussed in a number of interviews and the general feedback identified a number of the key issues that make this approach not worth pursuing for the organisations in this consultation. This report finds there are two main reasons why this approach is not recommended.

Firstly, there would be no substantive cost savings from a consortium approach. The cost structures of current systems are usually based on monthly or yearly license fees per user. For example, bringing five organisations together in a Salesforce consortium would be possible on a practical level. However, Salesforce currently provides 10 free licenses for not for profit organisations. It would require more than 10 licenses for the consortium to operate effectively. In addition, there are no savings from implementation costs of transferring data or from building interface applications to link existing systems. This needs to be done on a case-by-case basis for each organisation. Each organisation would have separate and bespoke implementation needs and therefore costs. The only situation where a consortium may have cost savings is for organisations wishing to be hosted by another Tessitura licensed organisation. This might be an option for Melbourne Writers Festival. This is discussed later in the report. The costs of Tessitura are too high for most small to medium organisations, even with the considerable savings offered as a consortium.

Secondly, several challenges arise when considering how a consortium would be managed. For data to be effectively managed, it requires a very cohesive and co-operative group of organisations. The organisations in this report seemed to have similar needs. With closer examination, it was clear that each one has different business structures, work flow cycles and are already working with different software systems. Experts identified the difficulties of managing change as a consortium. It would require considerable commitment to building a process that covers all the particular needs of each company.

There would need to be a common process and a common language used across the five organisations and there would need to be a centralised administration with a key person as administrator. This person would have the authority to have overall control and to manage security controls or add fields when required. If this person is employed specifically by one of the organisations it can lead to challenges dealing with competing priorities within the consortium. It was recommended that as well as a centralised administrator, there also needs to be a super user in each organisation. This person would have to have similar skills to the centralized administrator and be able to lead training, troubleshooting, coaching and build simple custom reports. This means there are no real staff savings and the potential of doubling up on some required tasks.

In addition the amount of time each organisation would need to commit to the ongoing management of the consortium is probably beyond the capacity of most small organisations. The different sizes of organisations are likely to lead to inequalities in distributing resources. The bigger organisations will have more resources to give and smaller organisations might feel their needs are being overlooked in favour of the larger organisations. Even committing time to building a Community of Interest group (to be discussed in the next section) will stretch resources. It is recommended this be subsidised in the funding options outlined later in the report.

## Community of Interest

Despite the lack of value adding found with the ideal of a consortium, there are many advantages for similar organisations to build a Community of Interest when developing and implementing new systems. It is particularly advantageous if they use the same software and are at a similar stage of change. For example, a number of companies could take advantage of the 10 free licenses from Salesforce or sign up for Goodsystems or eTapestry and then build a Community of Interest that could meet on a regular basis. The group could discuss trouble shooting, finding solutions to specific issues and share training.

A critical issue for small to medium arts organisations is building expertise in companies with small staff numbers. Small organisations build capacity in new systems and then lose expertise when staff leave. There were several anecdotal examples of this identified during the consultation for this report. It results in very useful information/data sitting dormant and going out of date. The ongoing training of new experts/champions is vital if implementation of new systems is going to have any ongoing benefit to the sector.

There is also the potential to share staff. For example one small organisation may need an expert three days a week and another two days a week to undertake similar tasks (enter data and provide relevant reports to the marketing team) using the same system but separate data. In this scenario the employee has full time work and two organisations get part-time specialised support.

## Ticketing Systems

The consultation involved a limited exploration of available ticketing systems. It was clear from discussions that a ticketing system that would cover the needs of all five organisations within the consortium was not currently available. The development of comprehensive CRM systems has grown more quickly than Ticketing systems due to the demand from the business world. Tessitura has many powerful CRM capabilities but as discussed the cost is too high for most small to medium arts organisations. eTapestry's API integration with IWannaTicket ticketing system and its ability to import ticketing data from other ticketing systems, such as Trybooking, appears promising. However, more research would be required to ensure it meets the needs and links to other systems within each particular business model.

Clearly there is a need for a more affordable but comprehensive ticketing system for the small to medium arts sector. Technology is moving fast and even since starting this consultation it seems new players are entering this space. This report recommends caution before organisations embark on new ticketing systems that promise solutions to all problems.

## Business Systems

Small to medium, not for profit arts organisations have evolved considerably over the last 40 years. They have moved from being amateur or community based to professional organisations with support from government and private funding. This has required the increased professionalisation of boards of management and development of strategic and business plans to keep step with political expectations.

Despite these reforms, this consultation revealed the lack of development of business systems. This is understandable as these organisations have been led by the passion to create art by artists. Business systems have often evolved haphazardly over time. Development has been based on the skills of different personnel and as resources have become available. This has led to companies operating with a variety of systems, including different software programs that are siloed from each other. There is commonly considerable duplication and

manual handling of data. This results in inefficiencies and under-utilized data and customer information.

This report finds the solution to this is not the immediate adoption of yet another system that may integrate multiple tasks and centralize data. The first step in solving this extremely common problem is to provide resources in the form of time and expertise to interrogate current business systems. This is best done by the staff who actually undertake those processes and with the artists and audiences who are impacted by them. This report identifies this is a critical need within the small to medium, not for profit arts sector. The five organisations consulted could all benefit from a review of their current business processes and software solutions to address critical issues. This report offers some suggestions in relation to these challenges. However, it recommends further analysis be undertaken by each organisation to understand the specific needs and sustainable solutions for each business.

## **Change management**

Before any organisation undertakes and adopts a new system it needs to develop an effective process for change management. The successful adoption and integration of all computer-based systems is reliant on the people within an organisation. It does not matter how good a system is if the people who are to use it are not trained and committed to making it work. Enabling the people who will use the system is a vital element for success. Surprisingly this is often overlooked. Systems are imposed by senior staff without clear explanation and sufficient training.

Firstly, an organisation needs to engage with its staff and volunteers to build ownership and understanding as to why a new system is necessary and how it will improve processes. The people who are involved in the actual tasks and the direct interface with the software and customers (artists, volunteers, audiences) need to understand why change is required. They need to be part of the decision making process that decides what system is adopted, how it will be customized and how this will make tasks easier in the long term.

Secondly, training and an ongoing program of updating and retraining is essential. A new investment in infrastructure requires an ongoing investment in training and maintenance. If this is not sustainable it is highly questionable whether the initial capital investment is justified.

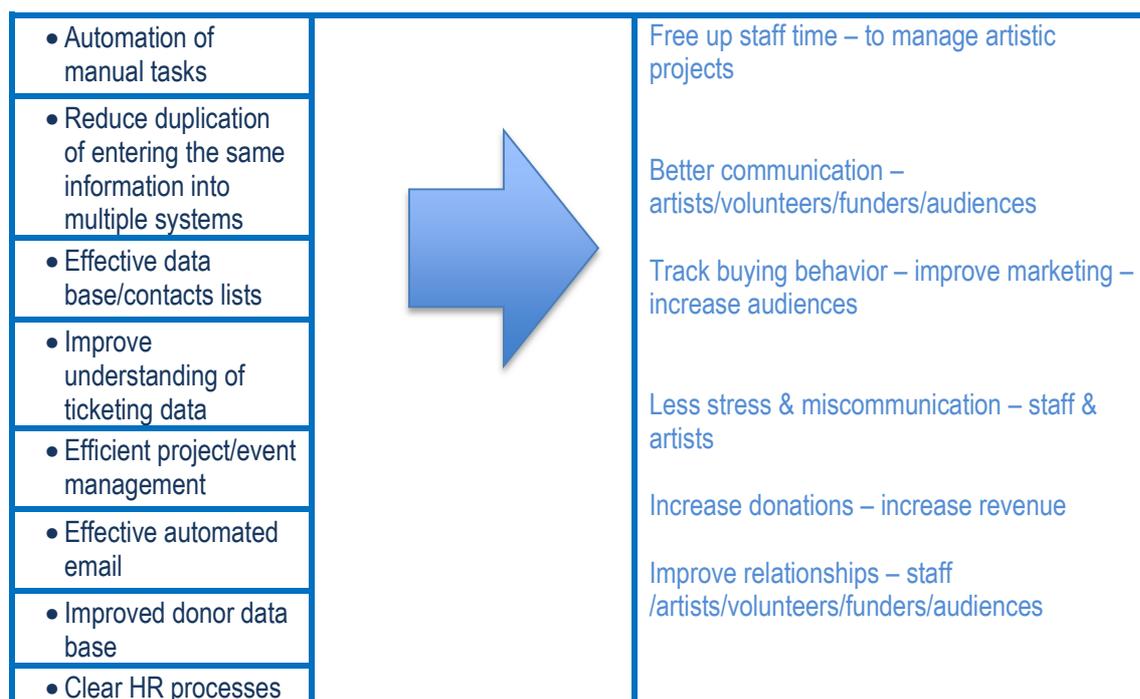
The clear advice from several experts was to not try doing everything at once. The processes that run most smoothly have a clear vision and proceed slowly. For example, an organisation moving to Salesforce might start with contacts, and then once that system is established add donations, grants, and finally ticketing.

## **Leaders and Champions**

An immediate observation was how each successful system relied on one or two individuals within organisations to drive the introduction and maintenance of new systems. As previously discussed, there needs to be a constant training process to ensure succession planning for system experts is maintained. These leaders or champions need to be constantly refreshed so when they leave the organisation, the opportunities enabled by an effective system are not lost. It is inevitable that current systems will evolve quickly over the next few years so it will also be critical that these leaders are keeping pace with these changes.

## Building business capacity

This report recognizes it is a critical issue for small to medium not for profit arts sector to build business capacity. This is not an issue that grabs the imagination of the sector. This is one of the reasons why it has been largely ignored, not only internally within organisations but as a sector. The art must always come first but there comes a point where the art and the organisations that make art are losing opportunities to operate more effectively and therefore create better art. There are considerable benefits to organisations if they improve business capacity.



## Specific findings

### Consortium – Community of Interest

Organisations should look at connecting with other arts organisations using Salesforce. Justin Butler at Abbotsford Convent is currently putting together such a group. There is a lot of power to be had in coming together for information sharing and problem solving. Currently there are a number of organisations in Melbourne dealing with the same problems in isolation. Some funding could be allocated to staff time to enable the initial setting up of this group.

### Melbourne Fringe Festival

MFF is at a stage of development where a phased implementation of Salesforce or other similar CRM could be a valuable addition to the current systems. The change process would start with transferring contacts and using it as a basic address book, with key people in the organisation having integration with their email to easily keep it up to date. Links could be created with Mailchimp, donor information and Xero.

The next stage could involve working with a Salesforce developer to import 3DR ticketing information post-Festival and the creation of some custom reports within Salesforce around that data. Following this there are possible options around managing their event registration process through Salesforce. This would best be achieved as a phased implementation and bringing in expertise at strategic moments. Salesforce does have a lot of flexibility but it does require experts at key points in the implementation.

There is potential for a Community of Interest with Midsumma (and other organisations in Melbourne) who are already using Salesforce and who share many of the open access requirements in the building of their programs.

### **Midsumma**

Midsumma is already using Salesforce but are not utilizing its capabilities. Funding would enable current staff to get proper Salesforce training ([https://www.salesforce.com/assets/pdf/datasheets/DS\\_ADM201.pdf](https://www.salesforce.com/assets/pdf/datasheets/DS_ADM201.pdf)).

Midsumma get their ten licenses for free, but the hidden cost is staff time and the organisation not being able to get the best out of the system because of lack of time and lack of knowledge. Investing in training and engaging a Salesforce expert (such as AAKonsult) would help them take Salesforce to the next level. This would be a very effective investment for Midsumma.

Tasks to develop are:

- Fixing the link with Xero
- Integrating Mailchimp and Salesforce
- Get donor, member and patrons into Salesforce
- Iron out glitches with exporting program details from Salesforce (for print program & web)
- Look at a way of manually exporting data from SABO and importing into Salesforce. A 'real time' integration with ticketing is unlikely at this stage – maybe wait for SABO to develop API or eventually look at moving to Patron Manager.

### **Melbourne Queer Film Festival (MQFF)**

MQFF is operating at a different scale. Prioritising business systems is probably more important than the implementation of a new CRM. Key systems to prioritise are:

- A project management tool to manage their Run Sheets and Critical Timeline
- Consolidate a master spreadsheet for their program that can be used for a multitude of purposes (for designers, for Ferve upload)
- Volunteer shift management tool (such as Deputy)
- Moving current website to Wordpress, to give staff more agency to make changes and to automate their 'Sweetheart' program (e.g. the power to have members complete web forms, rather than printable PDFs)

### **Melbourne Writers Festival (MWF)**

MWF's current data volumes and business practices may allow it to consider Tessitura as an option. This would require them to be hosted by another Tessitura-licensed organisation, such as Melbourne Festival as well as receive additional support as discussed in Option 2.

However, further research into the project management tools that already have integration with Tessitura is suggested. Even though Tessitura is about to launch an open API allowing 98% access to the database, which means "anything is possible" in terms of integration with other systems, it is not possible yet and many of those API relationships are yet to be built. Getting them built and maintained would be expensive. It would be important to be clear about this before investing in something as powerful and expensive as Tessitura. Having to rely on the manual migration of data across from other systems would make this investment questionable.

It is suggested MWF speak to David Geoffrey Hall at Melbourne Festival to explore the possibility of being hosted on their instance of Tessitura.

It is also suggested MWF talk to Perth International Festival about their usage and experiences with Artifax Event – one of the few project management tools that are currently integrated with Tessitura. There have been mixed reports about how useful the tool is.

Another option would be to partner and build a Community of Interest with other tenant organisations at the Wheeler Centre and adopt a common CRM system in much the same way as the tenants grouped together with migrating finance systems to Xero, with larger organisations leading the way and mentoring the smaller organisations through the process. Salesforce could be investigated as a possible option.

### **The Wheeler Centre (TWC)**

The adopting of Salesforce is an option for TWC, again with a carefully planned phased implementation. There are issues to be resolved around getting Ticketing information from Trybooking into Salesforce and building audience profiles in conjunction with Campaign Monitor. Further development is required in this area and the support of experts would be essential. Salesforce could eventually then be rolled out to other areas, such as room bookings (via Web to Lead forms), donor management and the logging and managing of audience feedback using case management functionality.

TWC are also currently in conversation with eTapestry/IWannaTicket. This could be another good option for the organisation again with a carefully planned phased implementation, particularly around which core contacts to bring into the CRM to keep initial costs down. As suggested with MWF, there is the potential to form a Community of Interest with other tenant organisations.

## Recommendations

This report proposes three recommendations to build on the findings of the consultation and provide critical support for the small to medium arts organisations at a time when the sector is experiencing considerable change. The proposed initiatives have the potential to transform the work practices within the sector and provide it with increased capacity to face the challenges of the current environment. There is potential to enable organisations to properly utilize the possibilities new digital technology has to offer. The outcomes have important economic impacts. The efficiencies created by streamlined business systems can drive improvements and yield greater return for investment. This will release more resources for artists and the creation of art.

The other key outcome is the opportunity to generate more effective data for reporting purposes and for tracking audience behavior. Consolidated and standardized data can be used to build a comprehensive view of people's engagement with the arts. This enables organisations and funding bodies to advocate for the value of the arts. It can also be used to understand audiences to assist in developing strategies to grow markets.

The report found the most effective adoption of new technology happens when it takes place through a staged process of change management. To facilitate this, it is suggested that a three stage process is developed to ensure sustainable and appropriate changes are supported and implemented.

### Recommendation 1 – Sector wide research

The report identifies managing digital data is a sector wide issue. The Organisations Investment Program (OIP) funded by Creative Victoria and the organisations it supports, offers an opportunity to build a sector wide understanding of the issues. It is recommended a facilitated forum with all OIP organisations invited, takes place to identify sector needs and actions. This would bring organisations together with a focus on pooling information, knowledge and expertise. As well as identifying high level issues it is anticipated that the forum would enable the sharing of information.

As identified in the report many organisations have similar needs and there has rarely been an opportunity to discuss this area of business in the arts. It is anticipated community of interest groups may be immediately created as a result of this forum. The forum would enable a matrix of issues, needs and immediate actions to be developed. It would establish the key priorities and the key risks facing the sector. The outcomes of this forum would inform the priorities and focus of funding support required to address identified needs.

- Information – What CRMs and ticketing systems are currently being used and how effective are they?
- Needs – What are the current needs that systems are not meeting?
- Expertise – What skills and knowledge already exist within the sector?
- Community of Interest Groups – What information and skills can be shared immediately through interest groups of organisations with similar needs?
- Standardizing data collection – How can data be gathered across the sector to assist in advocacy and audience development?

### Recommendation 2 – Funding support

There are potentially a number of funding models that could be made available for organisations to support the building of more effective and efficient CRM and ticketing systems. Ideally applicants would develop a business case for a change management process to integrate new systems or update existing systems. There would be an opportunity to support organisations to align systems, build community of interest groups, create partnerships and shared services.

Organisations will be encouraged to undertake research to ensure the support applied for is appropriate to each business model. A managed funding program would ensure the supported developments are aligned or in partnership with other organisations across the sector.

A managed funding program would also enable the possibility that some standardization of data capturing across the sector is facilitated. The funding program would aim to develop a strong, innovative and diverse small to medium arts sector in Victoria. It would assist arts organisations in building the sustainability and financial

viability of their professional practice. It could support a variety of outcomes based on the particular needs of organisations. Ideally qualified staff with business development and data management experience could manage this program.

Funding could support organisations to:

- develop a change management process
- access and compare appropriate new systems
- cover the costs of cleaning and transferring data
- pay IT experts to build bespoke integration systems
- cover initial staff training costs
- set up Community of Interest groups
- set up consortiums
- set up shared services
- build an integrated data collection system

### **Recommendation 3 – Trouble shooting and Community of Interest groups**

The final stage of the process is the ongoing maintenance of new systems. It is recommended developments are continued to be monitored. This is a constantly changing environment. For the arts sector to stay up to date it will be vital that organisations continue to develop and improve systems in an evolving cycle. A follow up forum is recommended to track the changes and evaluate the outcomes established in the initial meeting.

### **Summary**

It is the intention of this report that the recommendations suggested form the starting point for further discussions with key stakeholders to continue the work in these areas. More clearly defined aims, objectives, key performance indicators and budgets are required.

The report finds there is huge potential to improve business systems within the sector. This in turn will lead to significant efficiencies, increased income generation and improved collection of sector wide data. This allows the possibility for more resources to be channeled towards artists and the vital work they create.

## Acronyms and definitions

API - Application Programming Interface - A set of functions and procedures, and tools for building software and applications which access the data from an application, enabling it to be shared with another application.

CMS - Content Management System – A software application or set of related programs that are used to create and manage digital content. CMSs are typically used for web content management for web pages.

CRM - Customer Relationship Management systems – refers to practices, strategies and technologies that companies use to manage and analyze customer interactions and data throughout the customer lifecycle.

CSV – Comma Separated Values – file format used to import and export to Excel

EDM - Electronic Direct Mail – for example Mailchimp or Campaign Monitor

Excel – Microsoft product - data base commonly uses in Microsoft Office packages

FMP - FileMaker Pro - a cross-platform relational database application that integrates a database engine with a graphical user interface.

MFF - Melbourne Fringe Festival

Midsumma - Midsumma Festival

MQFF - Melbourne Queer Film Festival

MWF - Melbourne Writers Festival

3DR – Ticketing system used by MFF

MYOB – Mind Your Own Business - Finance software package

NFP – Not For Profit

NPSP - The Nonprofit Starter Pack edition of Salesforce

SABO - Seat Advisor Box Office – ticketing system

SLV - State Library of Victoria

TWC - The Wheeler Centre

Web-to-lead forms - captures data submitted by website visitors, used in Salesforce CRM

Xero - Finance software package – cloud based

## Consultation summary

	Task		Consulted
<b>Stage 1</b>	<b>Needs analysis</b>		
	<b>Interview 5 companies</b>		
	Melbourne Fringe	Friday 3 June 2016 Follow-up: Wednesday 8 June (via telephone) Hadley Agrez, Business & Ops Manager Abby Elisha, Marketing & Develp Manager Xanthe Beesley, Program Producer Simon Abrahams, Executive Producer	
	Melbourne Writers Festival	Monday 20 June 2016 Shona Barrett, General Manager	
	The Wheeler Centre	Monday 20 June 2016 Kendra Overall, Head of Sponsorship and Development Jaclyn Booton, General Manager Emily Harms, Head of Marketing & Communications Claire Flynn, Ticketing and CRM Coordinator	
	Midsumma	Wednesday 16 June 2016 Adrian Joanou, Operations Manager) Alan Drummond, Website & ENews Manager	
	Melbourne Queer Film Festival	Wednesday 23 June 2016 Adrian Joannou, Board member and ex-staff Friday 15 July 2016 Dillan Golightly, Manager	
	<b>Additional Interviews</b>		
	Catherine French Footscray Community Arts Centre	27 June 2016, FCAC and Arts West Consortium	
	Clare Carmody Salesforce	21 June 2016, Salesforce International Rep	
	Jeannie Hayes Frankston Arts Centre	Friday 5 August 2016, Frankston Arts Centre recent adoption of Ticketserv	
<b>Stage 2</b>	<b>Scoping existing systems</b>		
	Ric Benjamin, Good Systems - Skype	Monday 11 July 2016	
	Claire Hayes, MSO	Wednesday 13 July 2016	
	Jeff Challis, AAKonsult/Salesforce	Friday 15 July 2016	
	Jeremy Dixon Director Asia Pacific Tessitura Network	Monday 18 July 2016	
	Vincent Lim IT consultant	Thursday 14 July 2016	

	Ben Canning PatronManager	Friday 29 July 2016
	Alexander Younes Ticketing Partner, IWannaTicket	Friday 12 August 2016
	Greg Simmons, Outcomes Business Manager, eTapestry	Friday 19 August
<b>Stage 3</b>	<b>Consultation (2)</b>	
	<b>Melbourne Fringe</b>	Monday 25 July 2016 Hadley Agrez, Business & Ops Manager Simon Abrahams, Executive Producer
	<b>Melbourne Writers Festival</b>	Monday 25 July 2016 Shona Barrett, General Manager
	<b>The Wheeler Centre</b>	Monday 25 July 2016 Kendra Overall, Head of Sponsorship and Development Emily Harms, Head of Marketing & Communications Claire Flynn, Ticketing and CRM Coordinator
	<b>Midsumma</b>	Unable to meet due to scheduling constraints
	<b>Melbourne Queer Film Festival</b>	Monday 25 July 2016 Dillan Golightly, Manager