Thank you for participating in TM2! This compilation of breakout materials/notes comes from a variety of presenter and attendee notes and is not complete. If you have edits or additions, contact Sophia at smorris@proctors.org.

Conference Opening Keynote

Philip Morris, CEO of Proctors and Capital Repertory Theatre:

• A Brief History of Who Paid for Theatre:

Ancient Greece – The Choregus (an individual selected for the honor) paid to provide the public with free arts.

Ancient Rome – The state paid to provide the public with free arts.

Elizabethan England – Individuals bought arts tickets. Arts as community activity/philanthropy.

18th Century Industrial Capitalism – Individuals bought arts tickets. Arts as business/commerce.

1913 America - Corporate/personal income tax instituted. Andrew Carnegie argued for an estate tax so that the wealthy would be taxed heavily upon their death. Since the government would be taking so much private income, Carnegie included the caveat that the wealthy could decide where some of this estate tax funding went, institutionalizing a new funding stream for non-profit and charitable organizations. Individuals buy arts tickets and the arts are funded as charitable services with private and public support. This helped usher in an era of robust non-profit arts organizations and collectives, such as:

National Dinner Theatre Association – Ticket income is primary, provides entertainment and food

League of Resident Theatres (LORT) – Alliance of Equity houses, usually mixed private & public support

Modern sports are funded very differently from other entertainment forms. Ticket income could never cover the costs of the stadiums, much less operations. Often features massive governmental support and wealthy personal owners. With a very similar service as performance arts, modern athletics are simply funded/structured differently. What if we aligned these models and recognized theatre and sports as one and the same.

• Modern Economic Challenges for Theatre:

Baumol's Cost Disease: Economist William Baumol noted the rise of salaries in jobs that have experienced no increase of labor productivity in response to rising salaries in other jobs that have experienced the labor productivity growth. The cost of creating art doesn't have many efficiencies in it. While the productivity of the modern world generally goes up, this rarely applies to the arts.

It's time to seek/create smarter, industry-specific incentives. For example, tax support for how many people an organization employs, rather than increased productivity (how many robots you have). There's a significant overlap between people who create art and people who attend art – how can we strengthen those relationships? This is where TM comes in - TM helps us track and improve relationships with those who consume/appreciate art.

• Where Arts Organizations Stand Today:

American and Canadian arts organizations are mixed-funding source cultural creators and charitable service providers with material limitations on increasing traditional economic productivity. Proctors has chosen to move forward by embracing a broader mission than pure arts creation:

We are only as good as our neighborhood. Let's improve our neighborhood.

E.G. Ambassador Program – In partnership with our local City Mission (providing homelessness rehabilitation programs) and Metroplex (a municipal economic development agency), we hire our lowest-income neighbors as downtown guides for performance nights.

Expand our sphere of cultural influence.

As a suburb surrounded by cities, let us help break down traditional city lines to create a sense of shared regional culture. With Capital Repertory Theatre, we have a facility in Albany. We just completed a capital campaign and have begun restoration construction of Universal Preservation Hall. Like theREP, this will become a sister facility in Saratoga Springs.

Build a multi-disciplinary arts community that can advocate for shared needs.

We've invested heavily in a regional commission to study the Capital Region's Creative Economy. With arts partners both non-profit and private, we're are acting as a block to seek regional funding, advocate for legal changes, connect education programs to employers and seek new ways to build relationships between the many varied creative forces in the region.

Encouraged and facilitated a merger of four separate regional film commissions into a single entity, Film Upstate.

Expanding our Education program to create a lifetime of arts learning, from initial school exposure to professional development with direct connections to regional employers. Our Broadway Tech – Career Orientation Program connects high school students to Broadway show designers and technicians on site during a new tour tech.

Advocated for state tax credits for Broadway tour techs to bring more creative power and opportunities to the region.

We host 3 local public access channels.

Co-presented a SATE (Story + Architecture + Technology = Experience) conference with TEA (Themed Entertainment Association) to help unite a wide variety of entertainment industries.

Saying YES to as many crazy ideas as possible enables art to happen.

API

WHAT IS IT?

Following are slides from Artsman's introduction to the API, which among many other possible uses, is the technological foundation of Reveal, Artsman's web application for graphical dashboard insights to your database.

Learn more here:

http://help.theatremanager.com/theatre-manager-online-help/rest-api-access

Oh, but we don't just let anyone in this club...

Log in to tickets.artsman.com:443
Your login information will be sent securely.

david@artsman.com;outlet=2;patron=10

•••••••••

☐ Remember this password

Cancel   Log In

Login With Your Patron Email Address

SAVE AS YOUR TICKETS (DOT) WEBSITE

PERMISSIONS ARE BASED ON ANY EMPLOYEE RECORDS ASSOCIATED WITH YOUR PATRON RECORD

YOU CAN SPECIFY THE PATRON # AND OUTLET # TO LOG IN TO WITH EXTRA ARGUMENTS, SEPARATED BY SEMI-COLONS:

EXAMPLE: DAVID@ARTSMAN.COM;OUTLET=2;PATRON=10

DAVID@ARTSMAN.COM

OUTLET=2

PATRON=10

Permissions Are Employee Preferences

... And It Might Be Good To Think of Employees as Roles

"Roles" are the hats we all wear...

... and they could apply to multiple people.

Promoter
Box Office
Development
Personnel
Facility
Volunteer
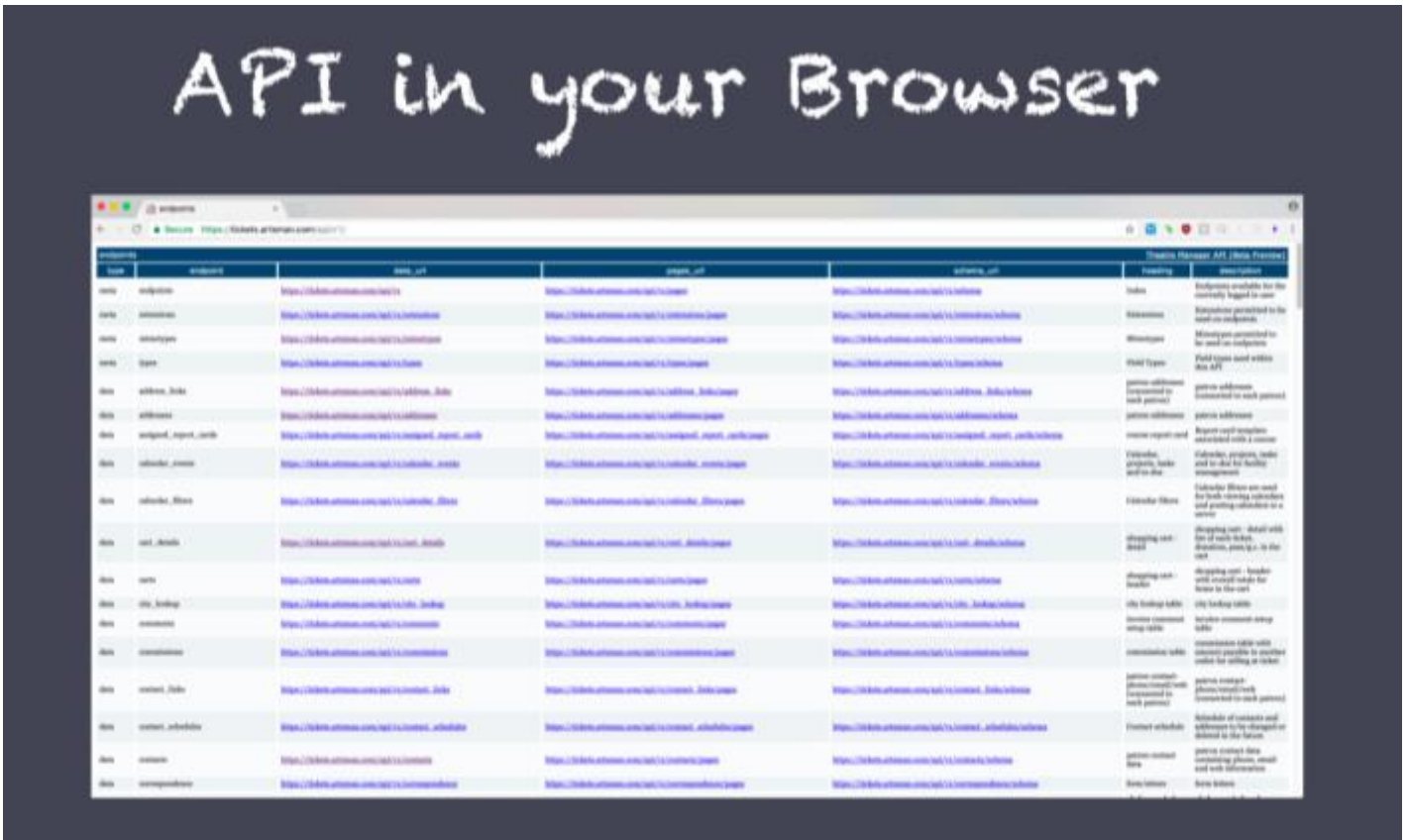
WHAT CAN IT DO?

This is a functionality that allows organizations to get creative – dream big! Some examples are:

Supports Reveal – the recently released online real-time graphic dashboard!

Connect directly to other applications, such as mail providers, and allow TM to be your source of truth while taking advantage of other application's features.

Several organizations are working on using the API to feed event and performance data directly to their Marketing website and/or calendars.

Reveal

The web-based dashboard application has been released! It's a technology preview for users to become comfortable with and use with real data, so it's open for feedback and graph suggestions. What's cool about it?

- It's live and presents your data to-the-second in real-time.
- See your data in graphic form without fussing with Excel or other visualization tools – great for standard check-in metrics.
- It's online, responsive and secure. Check it from any device. All you need is an internet connection and employee access. No need to connect to a database server or locally installed application.
- It's super pretty!
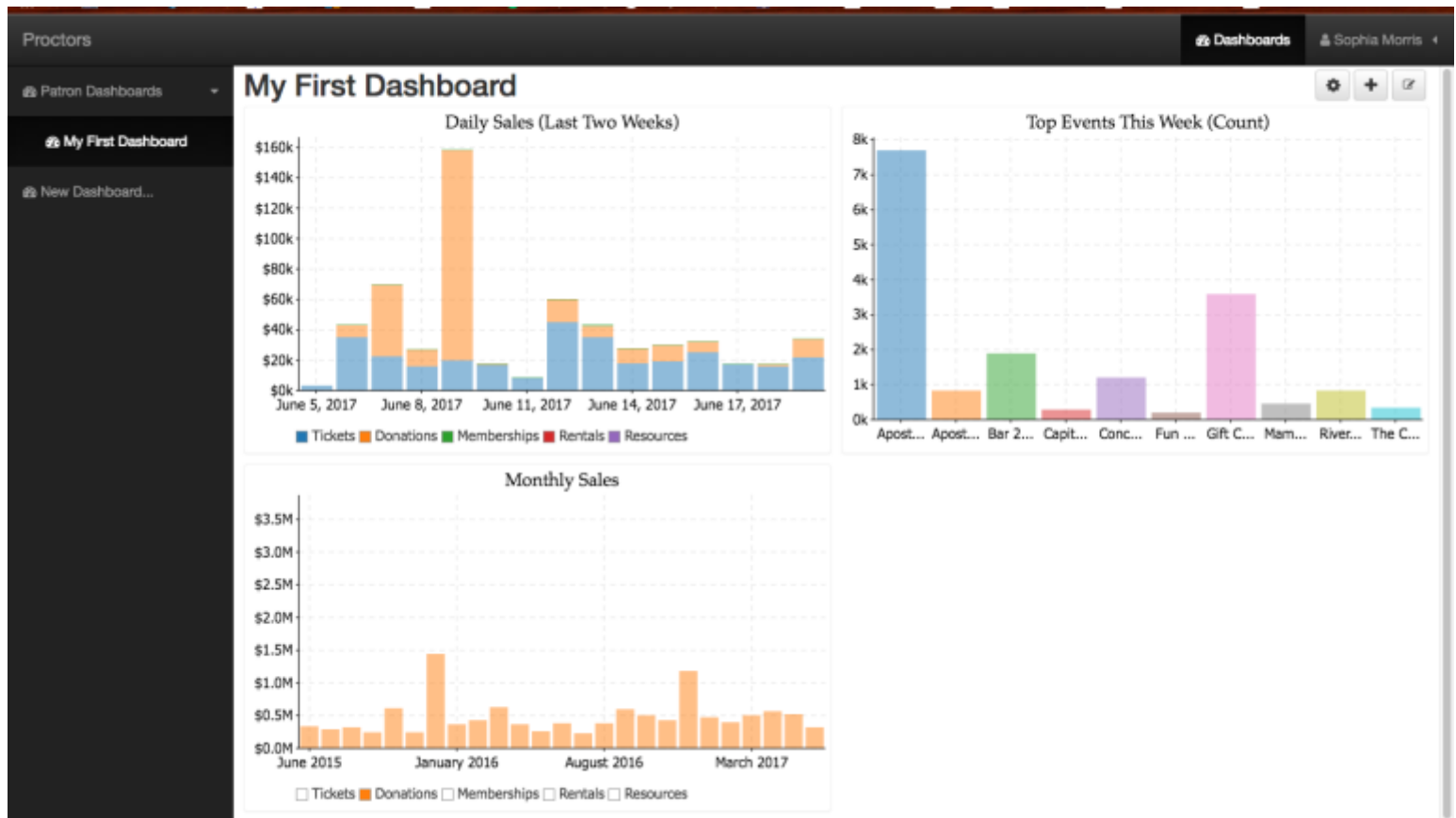
Get more info on connecting to Reveal and setting up personal Dashboards here:

http://help.theatremanager.com/reveal-dashboards

Pre-Conference Workshop

We casually discussed many topics, but spent the most time on ticket faces and calculated pick statement commands. Artsman gave us a trick to quickly find this in the online help pages –type "jst" in the search field. Here is the link to download the cheat sheet of calculation commands:

http://help.theatremanager.com/sites/default/files/images/Calculation%20Commands.pdf

Open Spaces Session 1

Michael Burns from MOPCO guided the full group through breakout topic suggestions and compilations. Three large topic groups came out of this exercise and presented their notes to the full group.

INTERNAL TM / SYSTEMS TRAINING AND COMMUNICATION

SUMMARY: larger conversations about the challenges of getting consistent patron data, getting buy-in for consolidated information systems (especially TM) all led to brainstorming about how to build more effective TM comfort and support internally.

- Use Facility Management module
- Utilize workflow notifications and other "automated" processes
- Perhaps buy more licenses and expect regular TM use by all affected employees
- Examine training processes to build a broad understanding organizational needs for minimal systems
- Provide professional development opportunities that provide positive outside interactions that reinforce organizational goals. Encourage staff to suggest professional development activities for their job.
- Use a training database so staff can play and not worry about breaking anything

• **Consistent Data Entry Best Practices**
- Getting patron info: learn to read the customers and personalize the conversation to the circumstance
    o A huge part of getting data happens in Box Office training - how do you ask patrons the question?
        ▪ To help get email addresses - "I can send e-receipt right now"
        ▪ Or "If anything happens with the show, we have a way to get reach you."
        ▪ Or "If you lose your tickets, we know they are yours."
    o Do people, internally as well as externally, know WHY your organization needs that information?

• Communication Between Departments
- All generally agreed that for key info, it is preferable to push info rather than rely on staffers pulling it. People don't like to have to search for information.
    - Many make use of TM's pending notification window and workflow notifications to let staff know about important organizational operations.
    - If not all staff sign into TM regularly and this is not something that should change organizationally, then setup notifications in some other program everyone uses. Make sure notifications have a "click to confirm view" option
- Other applications organizations are using for all-staff portals:
    - Office365, which is free to nonprofits through Microsoft (E3 program)
        - Microsoft Teams
        - Office 365 OneNote
    - Email - Setup email groups to make sharing important information to groups easy and consistent

• Too Many Systems
- Staff don't like "double entry" (having to put the information in multiple places), which usually also indicates that there are too many systems for effective organizational processes.
- Some have had problems moving show-related information away from TM, so have started replacing with TM solutions. For example, details about promotions and on-sale dates and price raises and meet & greet info, etc. now goes into the Internal Sales Notes instead of a cheat sheet or email.
- Consolidating systems is a challenge we all share. Especially hard to get buy-in from other staff members for a common goal. Push back comes from conflicting departmental goals vs larger organizational goals. Buy-in challenges led to larger conversation about TM training/education…

• Employee Development/Education VS Training
- There are always fires that need to be put out. People who like to put out fires, act quickly, etc, are the ones that are drawn to the theatre. Not necessarily the ones who like forward thinking and future planning.
- Training is not a pretty term – people don't like it and it can add stress to a learning environment
- Self-education works best to build comfort in TM. Mindset needs to come from the Department Head as part of training process – this is where you start to foster an environment that encourages self-learning
    - E.G. Encourage staff to do test webstore orders so they understand the process and can help patrons
- Building a strong professional development policy in general encourages staff to suggest ideas for TM learning
- How do you build an environment where people are learning the pieces they want to learn while making sure they know the pieces they need to know?
    - Encourage staff to sit in/follow what others experience, not just with TM. E.G. Marketing needs to sit-in on Box Office, Box Office needs to understand Development's goals and challenges.
    - Some organizations have had success with a policy that starts new admin staff in the Box Office

EXTERNAL TM / TECHNICAL COMMUNICATION

• Technical Disasters/Problems

- Technological mishaps happen. What's the best way to communicate these to external partners, patrons, etc. Some examples from users:
    o Lost Data (orders, transactions, patron info, etc) – use whatever you can to reconstruct as much as possible. It's usually worth the time to make your database as whole as possible. For example, credit card servers hold data separately and may provide invaluable data.
    o Database or Remote Access Unavailable – Do you have hard copy backup processes in place with regular training on these systems? For example, pictures of map saved or printed before walk-up or a house report saved locally until end of show.
    o Incorrectly Processed Orders (wrong tickets, money, etc) – Is it a fluke? Is there a pattern of the same problem? Take the time to find and test a solution and write a script for patron communication and always put notes back into TM for future reference.

• What Do You Do First?

- Breathe and state the problem very clearly. Stop and collect critical information using Keith's Rules:
    1. Close Visual Inspection – really "look" at the problem
    2. Check Signal Flow – follow the connectivity or data pathway step-by-step
    3. Read the Manual – is there a reference guide or past example you forgot about?
    4. Call an Expert
- Once you have confirmed the problem, make a list of key players. Who's your expert? Who can help? Who else needs to know? Who should be part of creating the solution?

• After the Disaster

- Post-mortem the disaster and your organization's response. Write down a plan for the next disaster. Who calls who in what order, who communicates with the public when, etc. Review the plan regularly – familiarity and easy recall will help staffers get out of panic mode faster.
- Review all of your backup options. Was the backup sufficient? Is there room for improvement?

TRAINING PATRONS ON TECHNOLOGY

- We can't communicate clearly with customers/patrons unless we are on the same page internally first:
    o All relevant staff need to understand how sales promotions or packages are implemented in TM
    o Need to train staff/volunteers on what online orders look like
- Getting patrons accustomed to the webstore:
    o It's OK to build a long-term training plan, so don't forget to lose track of it
    o Perhaps build a series of blasts or online BO videos to walk patrons through their online accounts
    o Keep it simple when communicating to patrons – focus on how the webstore operates like other online sales stores that patrons are likely to be familiar with.
    o Marketing pitches and how-to messages don't necessarily belong in the same place or format – try separating these needs as much as possible

KEITH'S RULES

Five Steps of Troubleshooting: A Guide to Your Technology at Work and at Home - by Keith Schmitt of Proctors

Through years of working on equipment of all kinds and gleaned from working with many others to keep that equipment running, sometimes under intense pressure, I offer these steps for keeping your stuff under control!

- Step 1: Close Visual Inspection
    - o Relax, take a breath. Simply look for the problem, you can probably see it.
    - o Everything plugged in? Power on? Button on a powerstrip on?
    - o If wireless, got bars? Can the browser connect to the web?
- Step 2：Signal flow
    - o Follow all of the pathways. You should run into the problem.
    - o What exactly does not work? Does your neighbor have the same problem?
    - o If browser works but mail does not, have you restarted the program?
    - o If the fileserver is not visible, have you tried to reconnect after seeing the browser work?
    - o If browser does not work, have you turned off and on WiFi from the menu bar?
    - o Have you rebooted, finally, your computer and the problem is the same?
- Step 3：Read the Manual
    - o Okay, at Proctors this is tough, but if the computer is working and you have access to the web from the browser, have you at least google queried the problem to see if there is something obvious?
- Step 4：Consult a Professional / Expert
    - o With any luck, this person has previously solved the problem.
- Step 5: Repeat Steps 1-4
    - o Making sure to breathe to reduce tunnel vision. Tenacity is a good thing!
    - o Sometimes the second or third time around is the trick.
- Step 6: Hand-Off to IT
    - o What's an emergency? It affects a customer OR points to a system wide problem.
    - o What's a non-emergency standstill? It only affects a few people and doesn't hold up key deadlines.
        - ▪ Use a neighboring computer for a few hours? Inform IT of a deadline so that they can prioritize.

Open Spaces Session 2

Based on group feedback from Open Spaces Session 1, five groups compiled and shared notes about building and maintaining strong internal communication, especially across a variety of TM experience levels, different TM daily use needs and general job hierarchies. Michael Burns has also included a copy of the TD April 2017 Issue, all about listening, as a summary and reference for his opening comments about effective human/language communication.

- **• Key Concepts for Effective Human Communication**
    - What is the unwritten rule I am obeying without question?
    - SWOT Analysis (Strengths - Weaknesses - Opportunities - Threats)
    - Learning Styles & Adaptability VS Critical Items
    - Urgent / Not Urgent / Important / Not Important

- **Group 1**

  - Some Key Elements for Effective External Communication:
    - Train staffers to spin using WIIFM (What's In It For Me?). E.G. Sell donor benefits at whatever level they are at rather than focusing on what they don't get or will no longer receive
    - BO & volunteers are usually the 1st line of customer service. Recognize that patron unhappiness will affect BO and volunteer energy and vice versa.
  - Some Key Elements for Effective Internal Communication:
    - Creating a positive and open environment:
      - Balance spoon-feeding information VS expecting people to find the information they need
      - Implement a "1, 2, 3, me" policy: Ask peers/manual, then find a supervisor, then a dept head
      - Ask for others' opinions (there's no bad idea/question)
      - Encourage employees to seek professional development opportunities
      - Avoid islands by creating opportunities for staffers to connect across departments
    - Pause before speaking and set the right tone:
      - Don't assume other people know what you know
      - What information is critical? Don't overload others with unnecessary information
      - Remain calm. My emergency is not necessarily your emergency and vice versa
      - Be courteous and come from your highest place
      - How can I say yes?
      - Be honest, not mean - you can be truthful/direct AND empathetic

- **Group 2**
  - Methods for Managing Up (being able to problem solve with supervisors)
    - Use "I" statements
    - Avoid yes-no questions to encourage brainstorming and pre-emptive airing of concerns
    - Be clear about what you have tried already
    - Don't react in the heat of the moment – take time to respond
    - Refrain from using labels for individuals – remove any hint of "us VS them"
    - Find a partner who understands your goals AND the broader goals of the organization/executive – it's normal for people to have different levels of influence and it's OK to build a team of influencers who can help you hone your ideas first and then help you build a strong pitch
    - Make sure everyone knows how to sell a ticket/donation – understanding the tool you use to run your business is integral to understanding your business

- **Group 3**
  - Low Anxiety Culture Building: Routine Processes Needed to Breakdown Us/Them, Up/Down, Admin/Prod
    - De-Silo departments (Silo – when entities run parallel but don't talk to each other) with regular, though not necessarily formal, check-ins (weekly, monthly, quarterly)
      - Take time to build "round" meetings – non-hierarchical agendas or seating plans
      - Have a dedicated space for "group celebration" or "shout outs" or "cool stuff happening"

- Start each "needs solution" conversation with a reminder about how brainstorming works
- Smaller groups tend to work better
- Face-to-face, if possible, preferable to virtual meetings
- Setup consistent job shadow procedures for related department staffers to see the other side
- Find a way to scheduled non-work bonding time (esp. across different workstyle positions)
- High Anxiety Problem Communication: Possible Methods to Improve Crisis Communication
    - Make sure anything offered/available to all staff is equally accessible to <u>all</u> staff and be proactive to avoid unintended exclusion
    - Assign moderators (i.e. Jane Doe in Finance can act as third-party liaison between Marketing & BO), perhaps as rotating positions
    - Regularly remind each other the processes already in place
        - Processes don't have to be fancy, just consistent – Post-its on a chair could be effective so long as everyone is on the same page and can quickly recall the process in a crisis situation

- **Group 4**
    - LISTEN first. Talk later.
    - Find small ways to equalizing status, which aids communication
    - Preset emergency situation communication practices and "fire-alarm" systems – People on the ground shouldn't also have to figure out who to call when – give them the procedure to follow
    - Create opportunities for departments to shadow each other
    - Familiarize all staffers with SWOT Analysis (Strengths - Weaknesses - Opportunities - Threats)

MOPCO's Career Development Listening Issue

In response to some common themes that came up in the Open Spaces Sessions, Michael Burns has included a recent volume of a career development newsletter about using improve techniques to improve listening skills:

https://proctors.sharepoint.com/teams/AllStaff/_layouts/15/guestaccess.aspx?docid=0c0800ca832d74945bbdc7ef47441d253&authkey=AV5jPtIogDuLzCJj_6NH88U

Breakout Notes

DEVELOPMENT

• Some Basics to Remember

- You can have as many campaigns as you want: Setup - System Tables - Donation Campaigns
- Prospects & Soft Pledges don't hit the G/L while Hard Pledges & Donations (gift) do
- If wanted, special events or fundraisers can be setup as a donation campaign instead of an event
- Pledge/Schedule Contacts: send a letter or an email
- Billing Letters/Invoices: send pledge reminders
- Set up notifications to specific staff/board when donations are made for fast followup
- You can put pictures in Patron profile (Marketing tab) so staff know what board members, etc. look like

• Using Tasks with Donations

- Some useful applications include:
    - o Track interactions/events they attend and personal details from conversations
    - o Get as detailed as you need: E.G. put seat sponsor locations into a task and now plaques are searchable
    - o Assign follow ups to staffers or volunteers
    - o You can run reports of tasks to easily view all data on a prospect
    - o Helps to cultivate the relationships better and put your prospect/donor details in one place
    - o Make sure you hit your milestones (E.G. 7 meaningful interactions per year)
    - o Attach pledge cards, forms, letters, etc. to tasks for digitizing paper records
- Create whatever kinds of tasks you want in Code Tables
    - o Remember, if you want to pull on "Description", then setup a clean system because this is a text field and will require an exact character match
- You can assign a task en masse to everyone on a mail list
    - o This creates one task with multiple participants, so if you change any part of the task for one person in the group, it will change the description for EVERYONE in the group

• Naming Rights

- Every room (E.G. Mainstage, GE, Conference Rooms)
- Series/Season (E.G. Broadway Subscription versus 16-17 Season)
- Major Equipment (E.G. Marquee)

• **Some Benefit Ideas from the Group**
- VIP Concierge Phone Line
- Members' Only Lounge
- Dedicated Seat holds in Every Show
- Presale Opportunities
- Backstage Tours
- Artist Meet & Greets
- Signed Show Posters/Merchandise
- Special Event Access to Watch Sound Checks or Techs

Box

n/a

Accounting

n/a

Maps/Events

n/a

Website

- You can change the vector image for seat views.
- There is a field in pricing map setup to add a seat view image in the form of a url
- Possibility of going back to pick your own to adjust seat choices.
- Can customize zoom on the responsive webpages for pick your own seats
- Patrons can now create limited profiles (if they have gone all the way through to the cart and now need to create a profile). Warning – this can make it more difficult to determine duplicates.
- Webstore page updates now on gitblit.artsman.com.
  - **If you need to customize webpages, you need to update the files whenever TM makes changes. Check to see if there are any customized pages in the TMCustom folder.**
  - TM Server will show where custom webpages are stored.
  - You can edit pages in an HTML editor or a text editor. Changes to text are simple, however, editing information in <> could mess up page functionality.
  - mailgun.com: 10,000 free emails every month SMTP with no rate limiting – it is JUST the mail server, not a design tool.

FACILITIES & VOLUNTEER MANAGEMENT

- **What is it?**
  - Facility Management is a newer module designed to help with everything that ISN'T related to Box Office
  - TM is usually more about income than expenses. This module helps with expenses. For example:
    - Attach documents to a task so you can find them easily. For example:
      - Agenda for Board Meeting
      - Stage plot
      - Front of House notes
      - Thank you letter
      - Initial and/or Signed Contract
      - Show report
    - Sign out equipment
    - Moves Management – cultivating donors by tracking to get them where you want them to be
  - Does similar things as BaseCamp
    - Tasks are a key element of the Facility Management module
    - Several tasks linked together becomes a Project
    - Very flexible – you can start at any point and build from there
- **Tasks**
  - Can create tasks from Calendar, Event, Patron Records, etc.
  - You can use several different types as a starting point and customize
  - Can make them private, for example, personal appointments out of office, to show you're not available
  - Able to filter to what is pertinent to you/your position
  - Viewing Tasks in the Calendar
    - Day view – see what everyone is doing, color code
    - Space view – see what is happening in a specific venue/space
    - Resource view – is a specific resource (piano, projector) in use
  - Any patron in the database can be added task as a participant
  - Use for scheduling staff – each shift is a separate task (can't yet log in from home)
  - For seniority, attach security in order of seniority, so that only the highest seniority can see shifts, and then change the security for next level of seniority
  - Can invite renters to a meeting, or create a task of Board Meeting – invite them, then track attendance by removing them as a participant if they did not attend
  - Access = level of security = who can see the task details

• **Some Useful Patron/Volunteer Fields**
- Gender is now a drop-down so you can customize it
- Not in Household is designed for businesses. When an individual leaves a company, for example, mark them Not in Household and it marks them as greyed so it keeps their history with the company.

• **Resources**

- Can add resources to a task or to an order. For example, the concession could be a resource, or the piano, or the sound shell, music stands, etc.
- Can have billable amounts or free of charge
- Preset flat rate or by hour rates or customize as you go
- Using Facilities Management, you can use these resources to create invoices with customizable levels of detail

• **Projects**
- Can have as many tasks as you need
- Estimate type projects do not show up in A/R. When you move into "invoice state", then will show up as A/R
- Can send invoice from estimate or invoice state
- Rental deposits can be applied – depending on your setup, there are several ways to manage payments

• **Scheduling Volunteers/Staff**
- Can track hours, schedule, positions they like to work
- Volunteers/Employees can look online to view their schedule
- As of yet, volunteers/employees cannot schedule themselves online – that is in development
- Some organizations use it for actors
- All of the fields can be changed to track what we need to track
- Time available feature can block off when they are unavailable (E.G. snow birds, surgeries, travel, etc.) or times they prefer to volunteer/work (E.G. not evenings)
- Activities may or may not be associated with an event/performance
- Associate specific activities with a call and/or end time. (E.G. house manager starts x hours before curtain)
- Role = what position they are working (which may or may not be necessary for your needs)
- Volunteer Duties is essentially a notes field. However, you can send a letter that uses these fields to remind volunteers of things they need to know specifically.
- Can send a specific letter (ie. To follow up on incidents that happened at an event)
- Able to assign a supervisor to the activity
- From the event, you can see which volunteers are scheduled (between Attendance and Revenue)
- Can add/schedule volunteers from event or remove them if they don't show up
- Can also keep track of who didn't show.

- **Awards**
  - Track the hours they volunteer and create award levels at x hours volunteered. For example, 2 tickets to a show, engraved nametag, white polo shirt with logo on it, clocks for mantel, water bottles, etc.
  - Can also assign awards not based on hours, useful for volunteer appreciation and monthly awards

SUBSCRIPTION SETUP

We covered a lot of material here based on specific organizational needs, but the key element Artsman walked us through was Combo Packages: http://help.theatremanager.com/theatre-manager-help/SeasonPackageComboPackages Combo packages can be used to help organizations with subscriptions that need to cross venues or subscriptions that may contain multiple pick-your-own options. Test and play and reach out to the group if you would like more information!

DATA MINING

- **Brand New to Criteria Building?**
  - Here's a link to a TM Criteria 101 presentation that Proctors built for newbies: https://proctors.sharepoint.com/teams/AllStaff/_layouts/15/guestaccess.aspx?docid=034a9f7e600dd45cb8362e634125d1584&authkey=AefM7c93tDVNOIRDznHJFYo

- **Data Structures in TM – The Simple Diagram View**
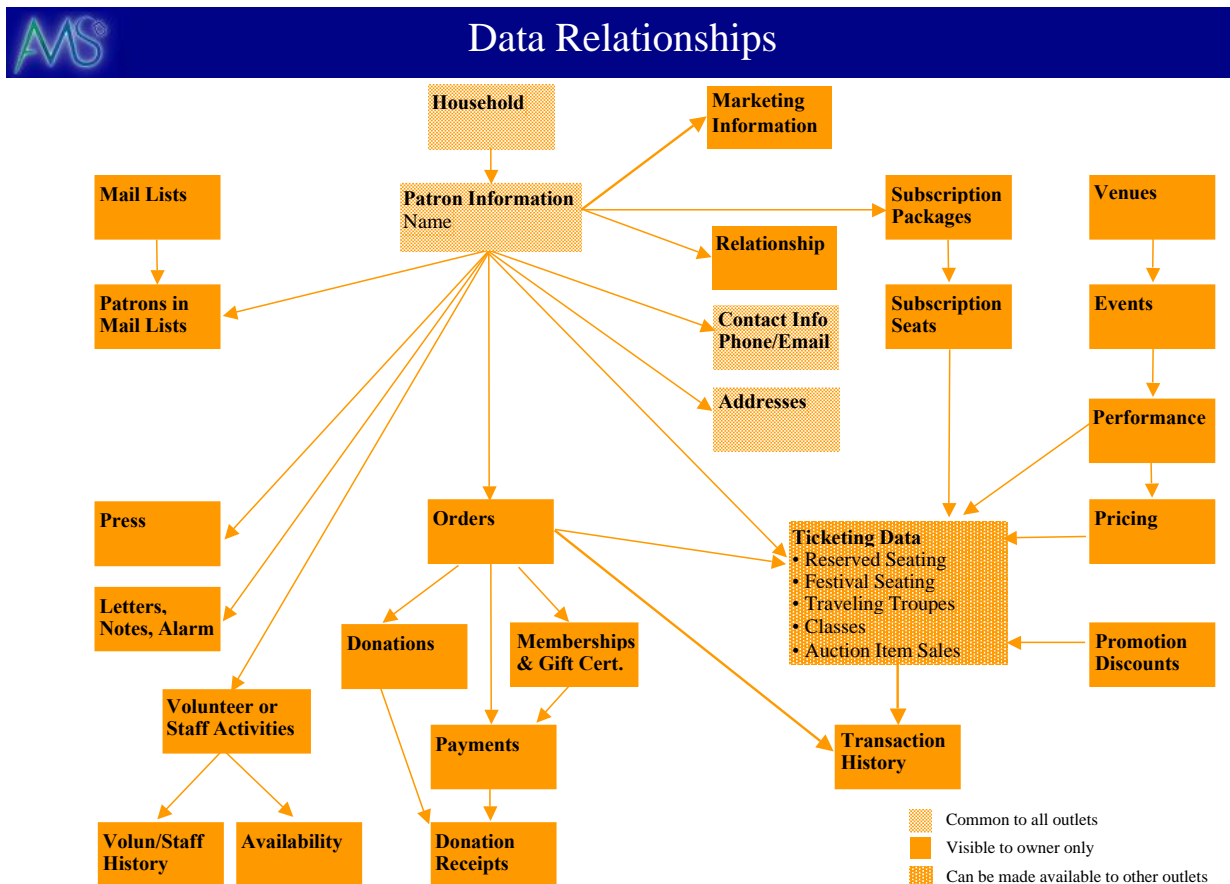
• Start with the Right Mindset
- The worst thing you can do is be in a rush or frustrated!
- Don't worry - everyone hunts and finds. Not knowing where to go first has no impact on ultimate success.
- Expect multiple attempts – Never assume your initial criteria is correct. Editing your criteria is totally A-OK.

• Setting Up Your Playground
- Start with mail lists because it has the "cleanest" output form. Great way to get familiar with criteria.
- Use custom folders to keep mail lists (and other things) organized and easy to search later.
- Make test lists to keep playing with – you will want at least two so you can reference another test list.
- If needed, lock a mail (last tab) list so that no one else can run or change it.

• Some Commonly Used Criteria Shortcuts
- Make sure your promotion setup includes consistent tagging of Ticket Type (group, subscription, regular). Promotion Ticket Type can save you from selecting specific promotions every time.
- Make sure your promotion setup includes consistent Subtotal Report Group tagging (a single letter) – great way to custom group promotions and pull them quickly.
- Ticket Scan Flag will let you report on who actually attended. (Quick "attended" option prebuilt in the Parameters tab of the Revenue Summary Quick report.)

• Checking Your Work
- In criteria-builder, if you click the calculator icon it will give you a rough estimate of the number of patrons who match that criteria! Great fast way to check what you've actually asked TM.
- ALWAYS check what you've generated. Check several patrons to make sure they match the criteria you are looking for - a few correct patrons could be a fluke.

• Ready for the Next Steps?
- The STAR icon in criteria-builder is the HAVING button. You can add one HAVIG criteria per criteria line. This is a great tool for things like:
  o People who have x tix or more who didn't get the group rate
  o People who purchased at least x different shows this season but aren't subscribers
- Exporting "raw" data (as opposed to exporting a report) so you can manipulate the data in Excel. If you aren't positive what you are looking for, you can use broader criteria and filter in Excel.
  o Uncomfortable using clean data format in Excel? Here's an intro to Excel data philosophies:
    https://proctors.sharepoint.com/teams/AllStaff/_layouts/15/guestaccess.aspx?docid=07c02712c2cac4
    7e89c2e04b611248c24&authkey=AZ0S2SXUMk50ZKb9Oh0knfw
- Data imports can be used to move unsubscribes and bounces from MailChimp or Constant Contact back into TM as a do-not-email tag or a mail list.

Users Contact List

Here's contact information for those willing to have their information shared with this group. Don't be afraid to send a friendly a hello or even go old fashioned, look up a number and give a TM Buddy a phone call!

For your convenience, here's a link to a VCARD file of the contacts listed below:

https://proctors.sharepoint.com/teams/AllStaff/_layouts/15/guestaccess.aspx?docid=071a8a0859fd34a4b88f18a844 87ec7de&authkey=AWQ-lAo_-UKxbHvf-XQ8QNw

First Name	Last Name	Company	Title	Primary Email
Michael	Bacchi	Proctors	Box Office Manager	mbacchi@proctors.org
Jane	Baldauf	Proctors	Corporate Relations Coordinator	jbaldauf@proctors.org
Christina	Barber	Proctors	Controller	wbarber3@nycap.rr.com
Sarah	Barnes	Theatre Three, Inc.	Customer Service Manager	sarah.barnes@theatre3dallas.com
Dave	Bebb	Rensselaer Polytechnic Institute (RPI)	Network Administrator	bebbd@rpi.edu
Stuart	Benoit	Ticket Seller	Box Office Manager	stuart@ticketseller.ca
Barbara	Bishop-Ward	Proctors	Director of Major Gifts and Stewardship	bward@proctors.org
John	Cook	Rensselaer Polytechnic Institute	Box Office Manager	cookj4@rpi.edu
Elizabeth	Cox	Sanderson Centre For The Performing Arts	Box Office Manager	ecox@brantford.ca
Kayle	Crowley	Warner Theatre	Development Coordinator	kcrowley@warnertheatre.org
Jennifer	Cullen	Proctors	Relationships Assistant	jcullen@proctors.org
Charlotte	Danford	Stirling Festival Theatre	General Manager	generalmanager@stirlingfestivaltheatre.com
Peter	Delocis	Proctors and MOPCO	Box Office CSA	pdelocis@proctors.org
Oliver	Dow	Proctors	Director, I.T.	oliver@proctors.org
Kat	Edwards	Theatre Three, Inc.	Company Manager	kat.edwards@theatre3dallas.com
Elizabeth	Ellis	Proctors	Subscriptions Specialist	eellis@proctors.org
Nick	Fleming	Salt Lake Acting Company	Ticket Operations/Database Manager	nick@saltlakeactingcompany.org
Heidi	Halford	The Colonial Theatre Group	Director of Audience Services	heidi.halford@thecolonial.org
Catherine	Kirkaldy	Proctors	Donor Relations	ckirkaldy@proctors.org
Kayla	Kocian	Rainbow Stage Inc	Box Office & Patrons Services Manager	kkocian@rainbowstage.ca
Mary	Malinski	Tidemark Theatre Society	Ticket Centre & Rentals Coordinator	mary.malinski@tidemarktheatre.com
Danny	Martinez	Proctors	Contracts Administrator	dmartinez@proctors.org
Ruth	McLeese	Imperial Theatre Inc.	Box Office Manager	ruth@imperialtheatre.nb.ca
Marie	Militano	Proctors	Lead Subscription Specialist	marie.militano@gmail.com
Matthew	Moross	The Egg	Business Manager	mmoross@theegg.org
Sophia	Morris	Proctors	Research Specialist	smorris@proctors.org
Philip	Morris	Proctors	Ceo At Proctors	pmorris@proctors.org
Chris	Musto	Proctors	Cfo	cmusto@proctors.org
Katie	Nichols	Dancehouse	Audience Services Manager	katie@dancehouse.ca
Randale	Nunley	Warner Theatre	Rental, Production and Volunteer Manager	rnunley@warnertheatre.org
Salvatore	Prizio	Proctors	Programming Coordinator	sprizio@proctors.org
Eric	Radden	Empire State Plaza Performing Arts Center	Box Office & Community Relations Manager	eradden@theegg.org
Zach	Rhodes	Arkansas Repertory Theatre	Box Office Manager	zrhodes@therep.org
Kathy	Robinson	The Port Theatre	Ticket Centre Manager	krobinson@porttheatre.com
Heather	Rutski	Proctors	Group Sales	hrutski@gmail.com
Alison	Whitley	Arkansas Repertory Theatre	Audience Services Manager	awhitley@therep.org

Need More?

JOIN THE USERS FACEBOOK GROUP

https://www.facebook.com/groups/563772487124154/?ref=bookmarks

JOIN THE TMTIPS AND TM LUNCH-N-LEARN LIST

• To see a backlog of previous TMTips:
https://proctors.sharepoint.com/teams/AllStaff/_layouts/15/guestaccess.aspx?folderid=054795d24000c4ecdb8353d758bd83d63&authkey=AS1PFwqQWzHpSb3v2yyGRWs

• To view (or subscribe!) to the playlist of past TM Lunch-N-Learns:
https://www.youtube.com/playlist?list=PLBwdQd_jL4lLqYD1xibq13sgKr9d3j9Xl

• To be added to the email group for these community learning options, contact Sophia at
smorris@proctors.org