SPEKTRIX PRESENTS:

Design Next Year's Success

TUESDAY NOVEMBER 1 2022 3.00PM GMT / 11.00AM EDT / 8.00AM PDT

Presenters



SAMANTHA BAGWELL
Global Fundraising
Lead
she/her



MATT AKERS
Sector Development
Manager
he/him



SARA STEVENS
Support & Training
Consultant, Fundraising
Specialist, US
she/her



MIRIAM WRIGHT
Support & Training
Consultant, Fundraising
Specialist, UK
she/her

Agenda



Best Practice

IS YOUR DATA IN THE RIGHT PLACE FOR WHAT YOU WANT TO GET OUT OF THE SYSTEM?

We're Spektrix power users

How confident do you feel in your fundraising setup We're getting by, but there's room for growth

We're pretty confident

We need help

Take our quick poll...

Best Practices



Common Fundraising Attributes

Customer

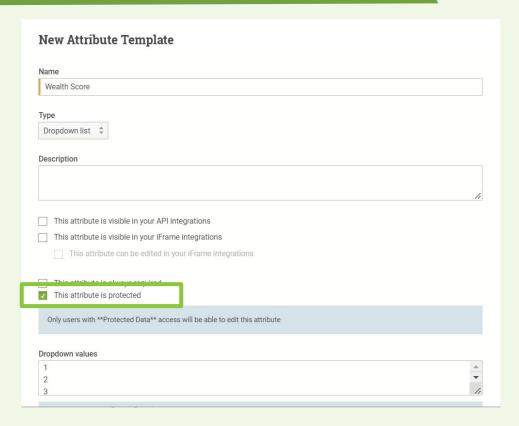
Funds or Memberships

Order

Attributes

Relationship Manager:	Miriam Wright ~
Informal Salutation:	Tommy
Wealth Score:	5 🕶
	✓ Save ★ Cancel

Protected Attributes



Filtering Attributes

+ Power Club Memberships

If you hold a membership and wish to renew it, please log in to your account before adding the item to your cart.

When you join the **+Power Club** you support Gesa Power House Theatre AND you get to experience our theatre in the best way possible. Not only does **+Power Club** participation include benefits designed to enhance your theater experience, but you can also take pride in knowing that your subscription supports this historic building as well as music, films, culture, and the performing arts in the Walla Walley.

Join now and you'll enjoy a full 12 months of exciting, high-quality entertainment with concerts, live theater, movies, comedy, children's programs, and other special events. The **+Power Club** also makes an excellent gift for any lover of the performing arts!

+Power Club Access - \$150/year

- · Advance email notice of GPHT events
- Opportunity to purchase tickets before the general public
- Wait List priority for sold-out shows
- Special +Power Club events
- Membership Period: 1 year
- Price: \$150.00
- ☑ Automatically Renew?

ADD TO CART

GIFT MEMBERSHIP

Filtering Attributes

Recurring Donations

If you hold a membership and wish to renew it, please log in to your account before adding the item to your cart.

By selecting this option, you will be donating \$5 each month to support the programs and services at Gesa Power House Theatre.

- · Membership Period: 1 month
- Price: \$5.00
- ✓ Automatically Renew?

ADD TO CART

By selecting this option, you will be donating \$10 each month to support the programs and services at Gesa Power House Theatre.

- Membership Period: 1 month
- Price: \$10.00
- ✓ Automatically Renew?

ADD TO CART

By selecting this option, you will be donating \$25 each month to support the programs and services at Gesa Power House Theatre.

- Membership Period: 1 month
- Price: \$25.00
- ✓ Automatically Renew?

ADD TO CART

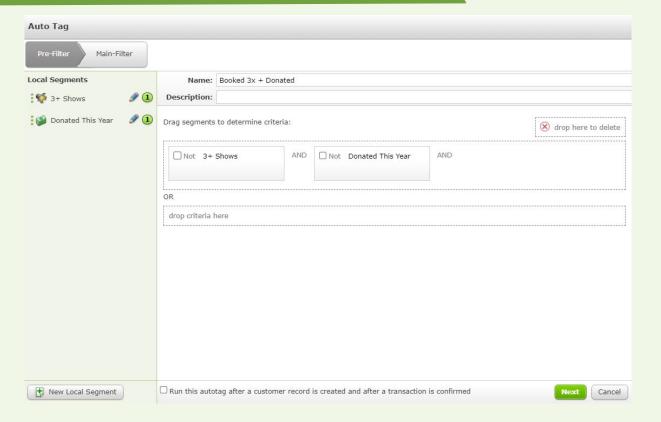
Access requirements	
☐ I'm a wheelchair user	
☐ I'm blind or visually impaired	
☐ I need to know about strobe lighting/fog/gunshots	
☐ I require Audio Description	
☐ I'm D/deaf or hard of hearing and a BSL user	
☐ I have a registered Assistance Dog	
☐ I'm D/deaf or hard of hearing and use captions	
☐ I need to sit within a Hearing Loop	
☐ I require a Personal Assistant/Companion	
☐ I require a seat close to an exit	
☐ I have an access requirement not listed here	
☐ I have no access requirements	
Interest Groups	
Which MK Gallery activities are you particularly interested in?	
□ Performances	
□ Exhibitions	
□ Cinema	
□ Music	
☐ Family Fun	
□ Everything	
☐ Accessible Events	
Save	

Normal Tags

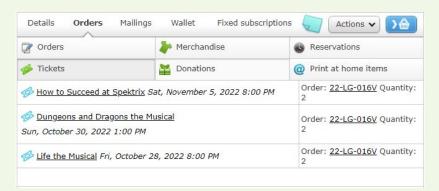
Ways to Tag

- Manually
- Bulk Tag via Customer List
- Self Select

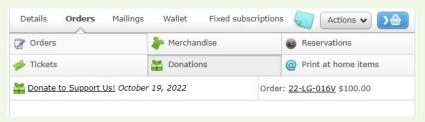
Auto-Tags

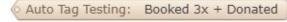


Auto-Tags









Donor levels: \$100 - \$249.99





Campaign

Capital Campaign

Sub Campaign

Individual Giving

FY23

Major Gifts

Sub Sub Campaign

Year End Appeal

Seat Naming Campaign

Target Amounts

- FY22/23 Target: 600K

- Special Events 150K

Tickets and Tables 100K

Pledge Appeal 50K

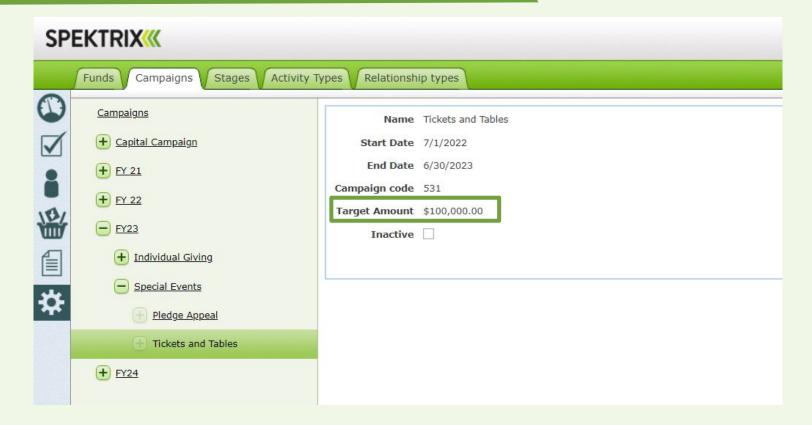
- Individual Giving 200K

Online Giving 100K

End of Year Appeal 100K

- Trusts and Foundations 150K

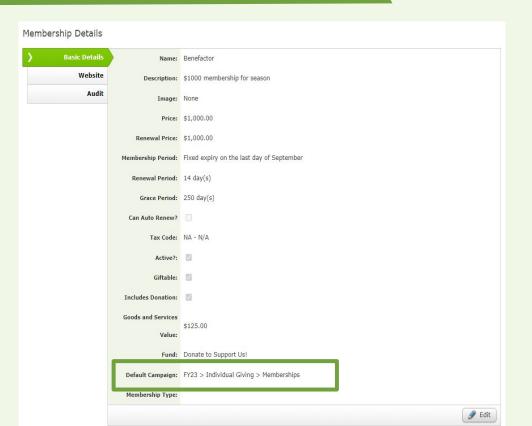
Target Amounts



Default Campaigns



Default Campaigns





Someone donates

Campaigns are not required on an order



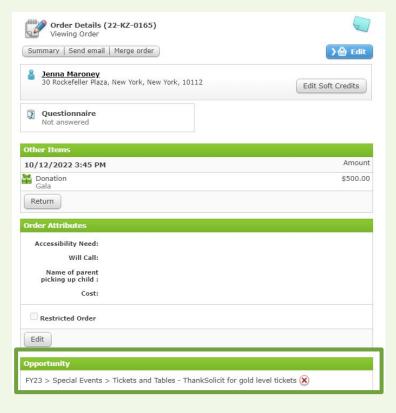
Funds

Memberships

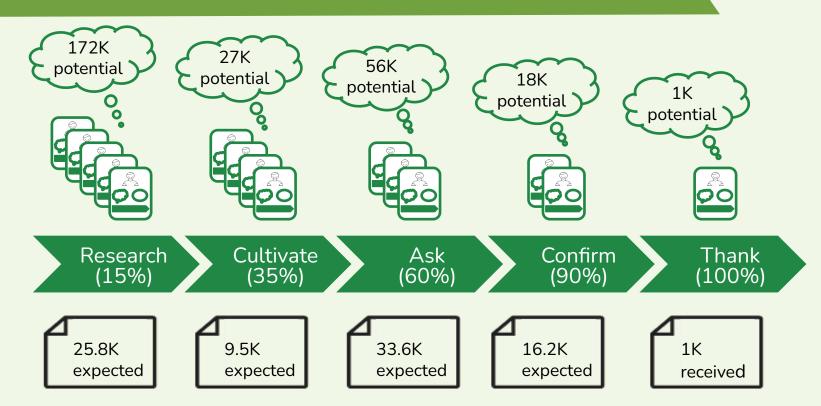


Override Default Campaign

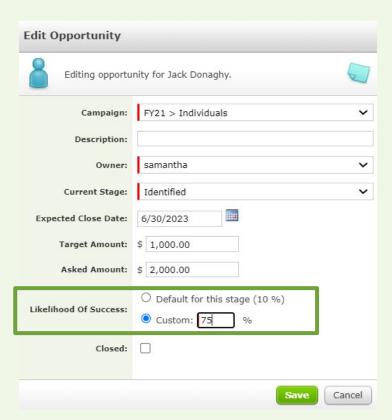
Overriding the Default Campaign

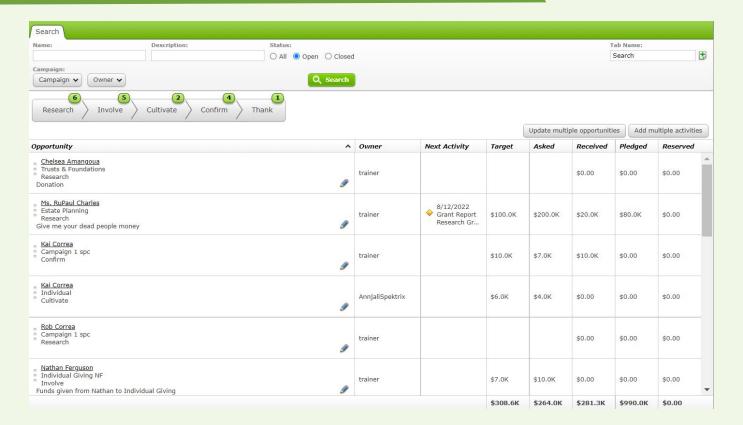


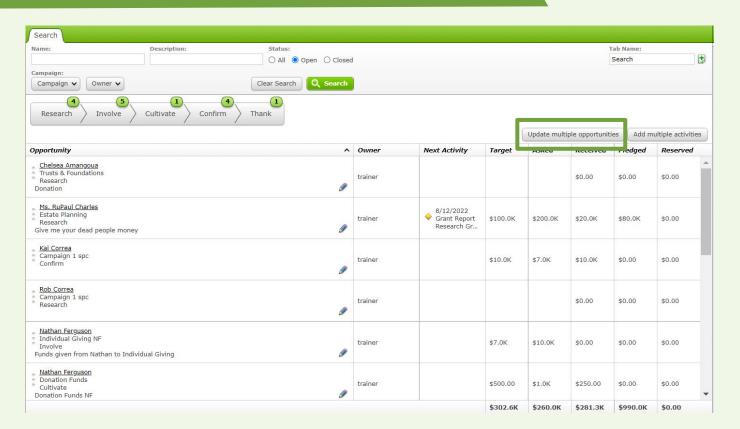
Default Likelihood of Success

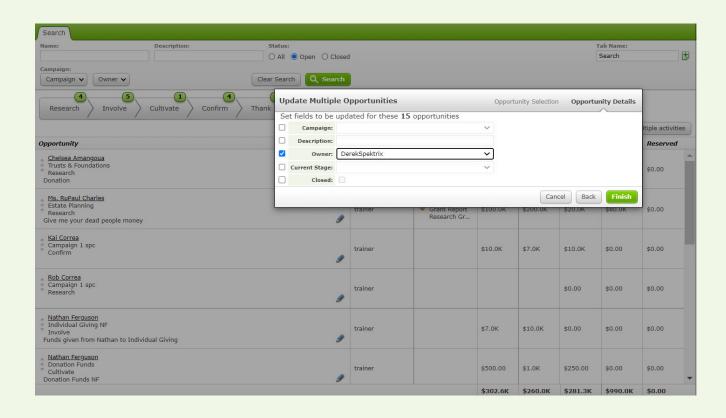


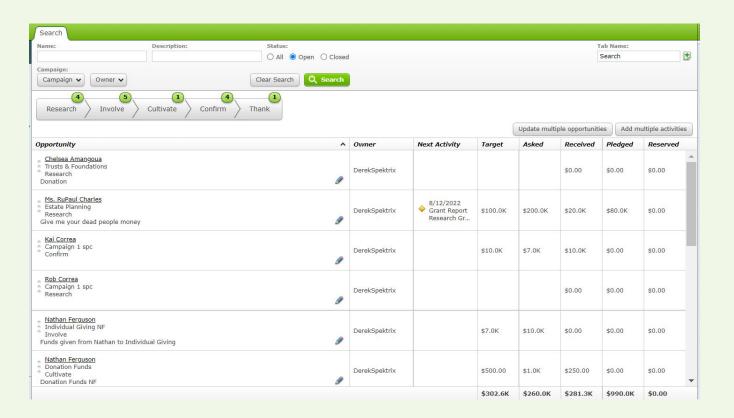
Default Likelihood of Success





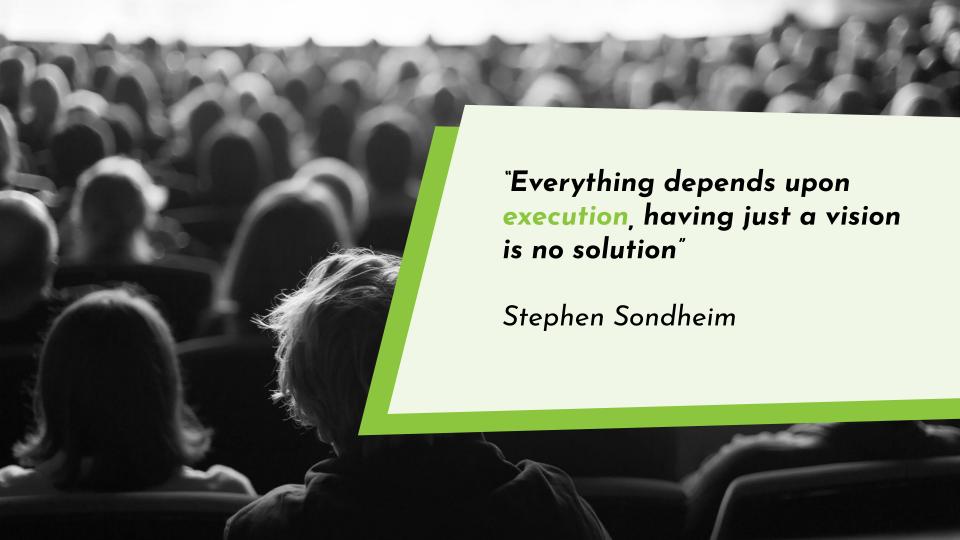






Reviewing your work

Taking the time to reflect and refocus on the work you have done



Each Month

When do you review?? No set approach/when asked

Each Quarter

Mid Year

End of Year

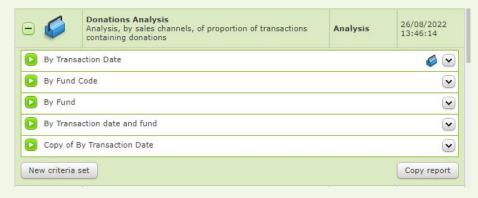
Take our quick poll...

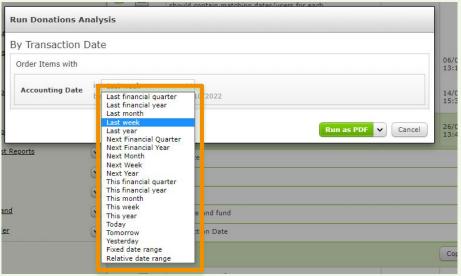


Tracking Revenue

- Donations
- Major Gifts
- Fundraising Campaigns

Donations Analysis



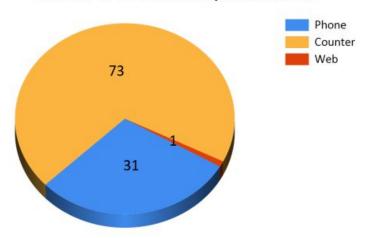


Donations Analysis

£36,360.50

Transactions from 01 July 2022 to 29 September 2022

Number of Transactions by Sales Channel



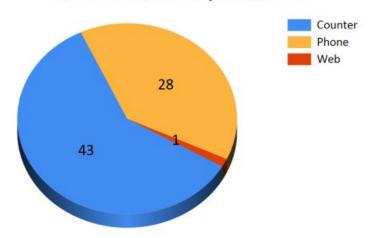
Transactions				
Counter	Phone	Web	Total	
73	31	1	105	

£57.00

£160,505.00

£196,922.50

Number of Donations by Sales Channel



Donations	•		
Counter	Phone	Web	Total
43	28	1	72
£27,287.00	£158,589.0 0	£5.00	£185,881.00

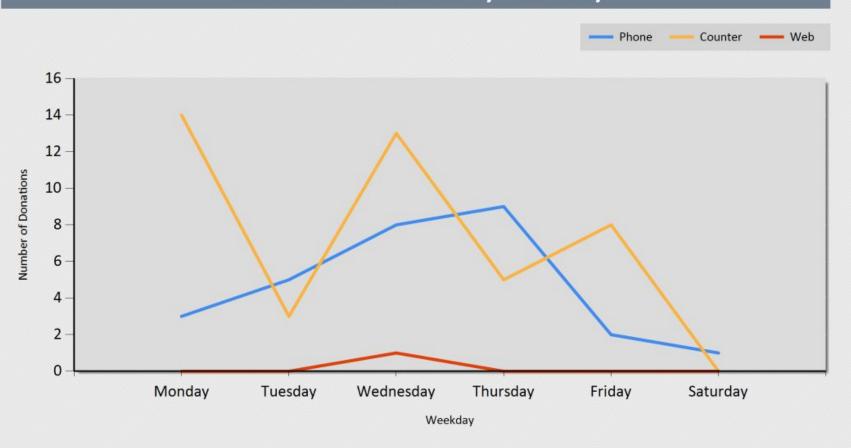
Data is key

Conversion Ratio	s			
Spent V Donated				
Sales Channel	Total Spend	Total Donated	% Converted	
Phone	£160,505.00	£158,589.00	98.81%	
Counter	£36,360.50	£27,287.00	75.05%	
Web	£57.00	£5.00	8.77%	
Total	£196,922.50	£185,881.00	94.39%	

Transactions V Donations			
Sales Channel	No. Transactions	No. Donations	% With Donation
Counter	73	43	58.90%
Phone	31	28	90.32%
Web	1	1	100.00%
Total	105	72	68.57%

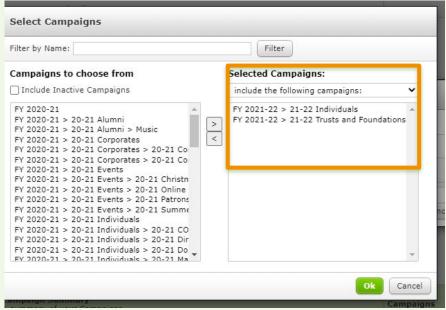
Fund Breakdown			
Fund	Number	Amount	
1309 Fund	1	£5.00	
Cats Appeal	2	£25.00	
Donate to Support Our Work!	6	£25,325.00	
Donate to Support Spektrix Theater!	1	£100.00	
General Operating Fund	1	£500.00	
Help Support our Theatre!	2	£10.00	
Spektrix Hubb Refreshment Fund	22	£106.00	
Support our Youth Theatre	3	£120.00	
We Need Your Support	28	£124,680.00	
Youth Arts	6	£35,010.00	

Number of Donations By Weekday



Campaign Summary





Campaign Summary - Get the headlines

CAMPAIGN SUMMARY REPORT

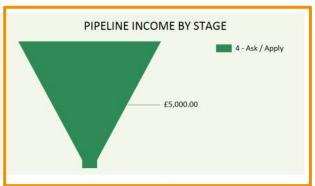
Campaign Name	Target	Donated	%	Pledged	%	Forecast	%	Total	%
FY 2021-22 > 21-22 Individuals	£300,000.00	£110,748.00	36.9%	£0.00	0.0%	£495.00	0.2%	£111,243.00	37.1%
FY 2021-22 > 21-22 Trusts and Foundations	£550,000.00	£56,760.00	10.3%	£13,250.00	2.4%	£5,000.00	0.9%	£75,010.00	13.6%
Totals		£167,508.00		£13,250.00		£5,495.00		£186,253.00	

CAMPAIGN SUMMARY REPORT

FY 2021-22 > 21-22 TRUSTS AND FOUNDATIONS

Target = £550,000.00

Start Date	01/04/2021	ITEM BRE	BREAKDOWN		
End Date Days Remaining	31/03/2022 -201		Donation - Creative Learnin		
No. of Individuals	3	£55,010.00	Pledge - Creative Learning Fund Donation - Youth Arts		
Avg Item Value	£5,770.00	£1,750.00			



	Donated		Pledged		Forecast		Total	F	Running Total		
	No.	Value	No.	Value	No.	Value	No.	Value	No.	Value	% to Target
Mar 2021	1	£1,750.00	0	£0.00	0	£0.00	1	£1,750.00	1	£1,750.00	0.3%
Apr 2021	0	£0.00	1	£2,000.00	0	£0.00	1	£2,000.00	2	£3,750.00	0.7%
Jul 2021	0	£0.00	1	£3,750.00	0	£0.00	1	£3,750.00	3	£7,500.00	1.4%
Oct 2021	1	£10,000.00	1	£3,750.00	0	£0.00	2	£13,750.00	5	£21,250.00	3.9%
Nov 2021	1	£10,000.00	0	£0.00	0	£0.00	1	£10,000.00	6	£31,250.00	5.7%
Jan 2022	0	£0.00	1	£3,750.00	0	£0.00	1	£3,750.00	7	£35,000.00	6.4%
Feb 2022	3	£25,000.00	0	£0.00	0	£0.00	3	£25,000.00	10	£60,000.00	10.9%
Mar 2022	2	£10,010.00	0	£0.00	0	£0.00	2	£10,010.00	12	£70,010.00	12.7%
Undated Items	0	£0.00	0	£0.00	1	£5,000.00	1	£5,000.00	13	£75,010.00	13.6%



Insight & Mailings

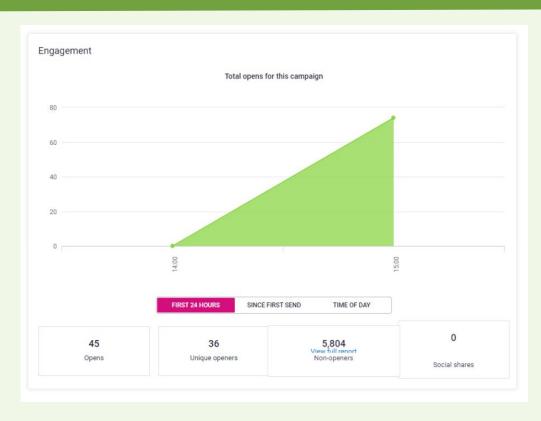


& Spektrix

Dotdigital Email report



Dotdigital Engagement report



Dotdigital Interaction report

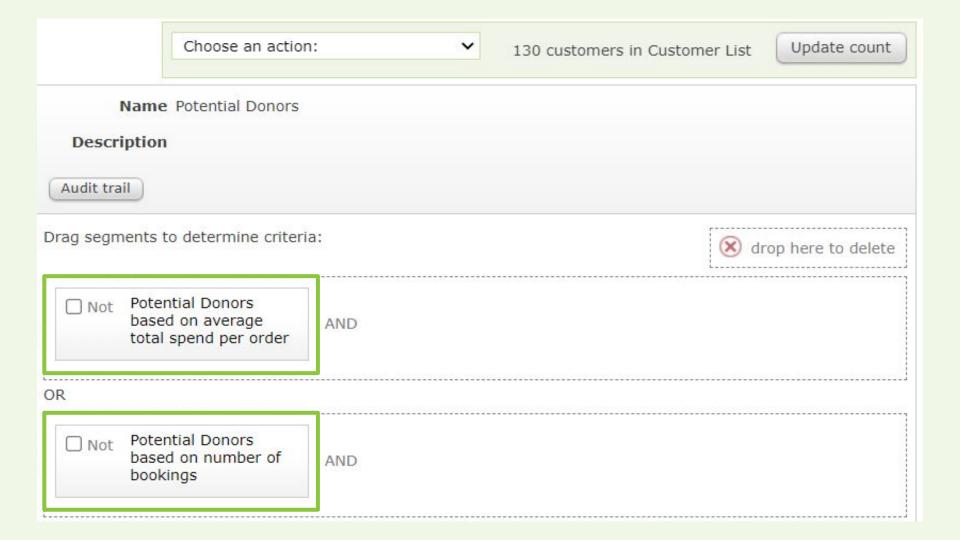


Taking the data further

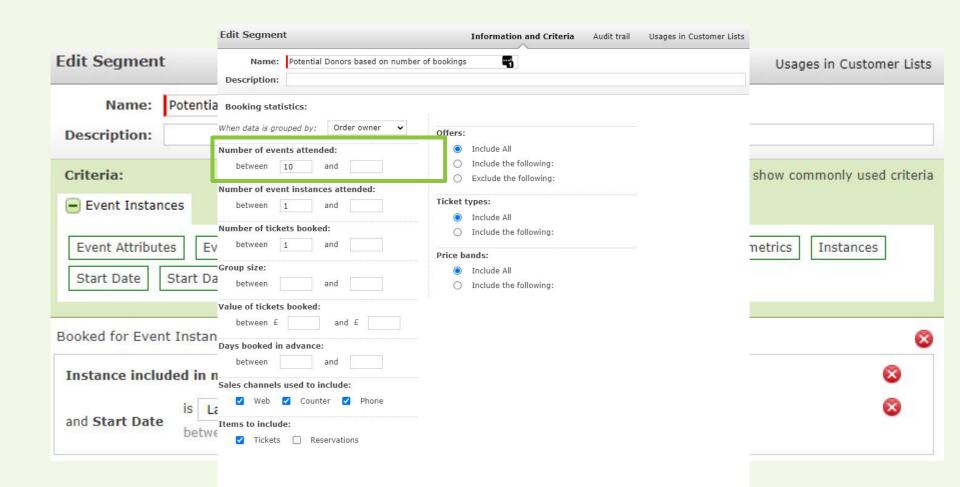


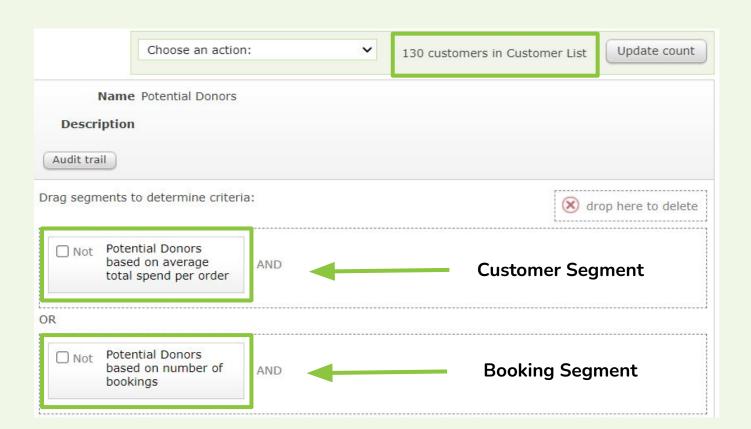
SPEKTRIX SPOTLIGHT SESSIONS:

Supercharge your Segmentation









Looking Forward

Planning for reflection and evaluation

Looking

Forward

- What are your goals?
- How will you measure the success of your goals?
- Do you have the resources to achieve your goals?



What are your goals?

ENGAGEMENT EFFICIENCY REVENUE



Engagement

GOAL EXAMPLES

- Increase donor event attendance
- Improvement in email segmentation and personalisation
- Positive donor feedback

Efficiency

GOAL EXAMPLES

- Automation of member renewals
- Automated reports and customer lists
- Create custom reports





Revenue

GOAL EXAMPLES

- % Increase in overall income
- % Increase in specific income streams
- Increase in # of members
- Increase in ticket/donation conversions

How will you measure success?

Evaluate throughout

Establish metrics of success



Direct feedback



Do you have the resource?

Staffing time

Training and Experience

Partner/Spektrix Support





Make Online Donations Easier

Spektrix

and Ten4

- Spektrix expanded our API to accept custom payments
- Our partner Ten4 enhanced their DonateFlow tool to integrate directly with Spektrix
- DonateFlow is the first fundraising product that uses our API





DonateFlow

Make Online Donations Easier

- Donors can give online without logging into their account
- Can give one-off, monthly or annual gifts at any amount
- Data is recorded in Spektrix automatically

DonateFlow



Questions?

Upcoming Events

US HUBS

ONLINE EVENTS

- Chicago Hub on November 14
- New York Hub on November 16
- San Francisco Hub on January 30

- Ticket Subscriptions and Loyalty webinar on Nov 28
- December Online System Training



SPEKTRIX

Thank You

support@spektrix.com