SPEKTRIX

HUBS 2025

WORKBOOK

NAME: ....

CHECKLIST

What have you accomplished today?

Connections and Conversations

☐ **Make a new connection** - speak with someone you've never met before.

☐ **Find someone in a similar role or department** - your nametags will help!

☐ **Share a win** - tell someone about a recent success or a creative way you have been working.

☐ **Join a conversation about a challenge** you're working through at your organization.

☐ **Plan at least one conversation to have with your team** based on something you've learned today.

Actions to take today

☐ **Identify one thing you'll implement** based on inspiration from today's sessions.

☐ **Understand what subsites are** and identify how they could improve your online experience.

☐ **Run the Donation Conversion Analysis** report to understand your own conversion rates.

☐ **Complete all of the Preparing to Activate questions on p. 14** to set yourself up for success with Dotdigital Programs.

☐ **Bookmark the Metrics Library Support Centre article** to use or share later.

VIEW THE PROGRAM

Scan this QR code to view the program and learn more about our Hubs events!

spektrix.com/events/hubs-na

MEET YOUR ON-SITE TEAM

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Want to get the most out of Spektrix?

Scan the QR code and bookmark our Get Started with Spektrix page to find answers, practical advice and support all in one place. Your Spektrix one-stop shop.

MEET OUR PARTNERS

Get to know a few of our partners who can help you get even more out of your Spektrix system - some of them are joining us today!

SalesVu

SalesVu's POS runs bars, restaurants, and shops, applying member discounts automatically via the Spektrix integration. Purchases sync to Spektrix for consolidated guest spend tracking, with inventory management tools to monitor stock, orders, and profits.

VATIC

Vatic's dynamic pricing software helps non-profit performing arts maximize revenue and increase capacity by adjusting prices based on budgeted revenue and capacity targets.

CourseStorm

CourseStorm is a class registration platform for arts education and camps, with a Spektrix integration that writes orders back for a complete view of customer engagement.

Sawyer

Sawyer makes it easy to manage classes, camps, and lessons, with payments and registration streamlined through your website and purchase data flowing into Spektrix via Zapier.

Activity Stream

Activity Stream turns event data into action with tools like dashboards, venue management, and mobile ticketing, helping over 100 Spektrix venues drive engagement and efficiency.

Kindsight

Kindsight's iwave wealth screening tools help you identify ideal donors, gauge capacity to give, and personalize outreach, all seamlessly connected to Spektrix.

Discover **even more partner integrations** that can help you achieve your goals on our **Partner Directory**

Basker
Powering live experiences

Basker is a customizable, AI-enhanced CMS built for live events, enabling you to create accessible, beautiful websites that connect audiences with your experiences.

Secure My Booking

Secure My Booking provides ticket refund protection for over 100 Spektrix organizations, increasing audience confidence while boosting revenue and satisfaction.

Digonex
Automated Dynamic Pricing

Digonex delivers algorithm-driven dynamic pricing tailored to your goals, with expert economist support to maximize revenue potential.

Jumbula
Grow with us

Jumbula manages classes, camps, and programs in one place, with a Zapier integration sending registration data directly into Spektrix.

Vet Tix
Give something to those who gave

Vet Tix provides free tickets to U.S. service members, veterans, and families, with a Spektrix integration.

Givebutter

Givebutter's free fundraising platform offers forms, events, auctions, and donor management, with Zapier integration writing donations directly into Spektrix records.

GroupTools

GroupTools streamlines group sales with event creation, attendee engagement, and data capture, all integrated with Spektrix to save time and increase conversions.

Fundraise Up

Fundraise Up boosts online giving with a modern donation experience and personalized donor journeys, syncing all gifts to Spektrix via Zapier.

Low Complexity / High Impact: Spektrix and Your Website

Checklist for low complexity solutions that have big impact

⏳ = time to invest

Ask for donations

☐ Set up or donations at checkout or review your existing setup ⏳

☐ Make a dynamic ask for donations at checkout based on the logged in customer or value of order ⏳

Reduce checkout time

☐ Enable and style the Express Checkout ⏳

☐ Enable Apple Pay & Google Pay ⏳ ⏳

Indicate access performances on your website

☐ Follow recipe available via the Resources ⏳

Increase your revenue with upsells

☐ Set up supplementary events to upsell ⏳

- Pre-show drinks
- Parking space
- Programs
- Ticket insurance
- Fill in with what is most relevant to the needs of your organization:
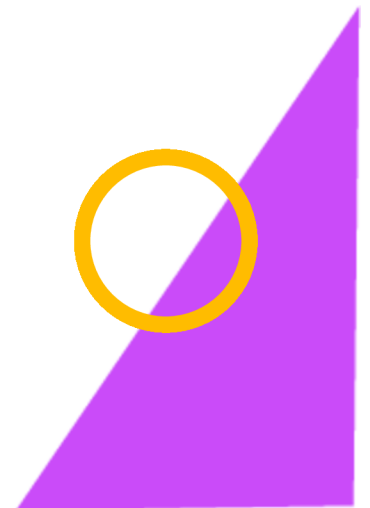
Link to an integrated platform for a specialized user journey

☐ Browse the Partner Directory to discover platforms that handle ⏳
- Classes / Courses registrations
- EPOS
- Auctions
- Groups sales
- Fill in what is most relevant to the needs of your organization:
....

☐ Onboard with integrated platforms that offer specialized user journeys ⏳ ⏳

Offer a clean frictionless purchase journey

☐ Review seamlessness ⏳
- No double scrollbars
- No blank space at the bottom of page
- Moving to the right height of the webpage as you navigate through pages
- Redirects work as expected
- Consistent styling

☐ Fix seamlessness issues
- Working with your web developer (⏳ or ⏳ ⏳ depending on what you need to change)
- Moving the purchase path to a subsite ⏳

Set up a purchase path for post-purchase upsells, or a secondary purchase path

☐ Set up one or more subsites ⏳

Scan to access **slides and further resources** from this session

Cultivating a Culture of Asking: Boosting Donations and Beyond

Bingo Card

Mark each box as we move through this exercise

Name a Seat	Program Listings	Outbound Fundraising
Curtain Speeches	FREE SPACE	Donation Asks in the Program
Fundraising Events	Post Show Donation Asks	Donor Lounges

Defining Your Unique Motivations & Mission

Write down two statements, thinking about the below:

What motivates your organization beyond
putting on great events or performances?
What do you offer that no one else does?
Why should someone care about your organization?

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Defining your Spektrix Data

What are your conversion rates?

Run the Donation Conversion Analysis Report to find out how many ticket orders also include donations. This report will break down those conversions by web sales, phone sales, and counter sales. Consider - are there any events or donations that should be excluded from this report?

What are your conversion rates?

Phone: ....

Counter: ....

Web: ....

What is your average add on donation amount?

....

What are ways you can boost some of those numbers?

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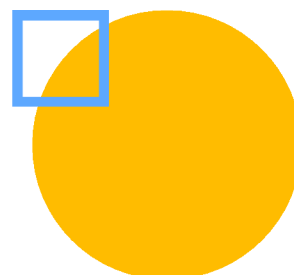
Scan to access **slides and further resources** from this session

Marketing Automations:
A Dotdigital Programs Workshop

There are 7 Program Templates available:

Birthday Program: Boost loyalty and bookings by sending a personalized birthday email.

Improving Retention: Encourage first-time visitors to return with timely campaigns that inspire their next booking.

Welcome Program: Welcome new Customers when they join your mailing list and encourage a first booking.

Lapsed Booker: Encourage customers who haven't booked in a while to come back with timely, personalized reminders.

Credit Reminder: Drive urgency and conversions by reminding customers to use their outstanding credit before it expires.

Mailing List Re-Engagement: Reconnect with inactive subscribers and encourage them to stay engaged.
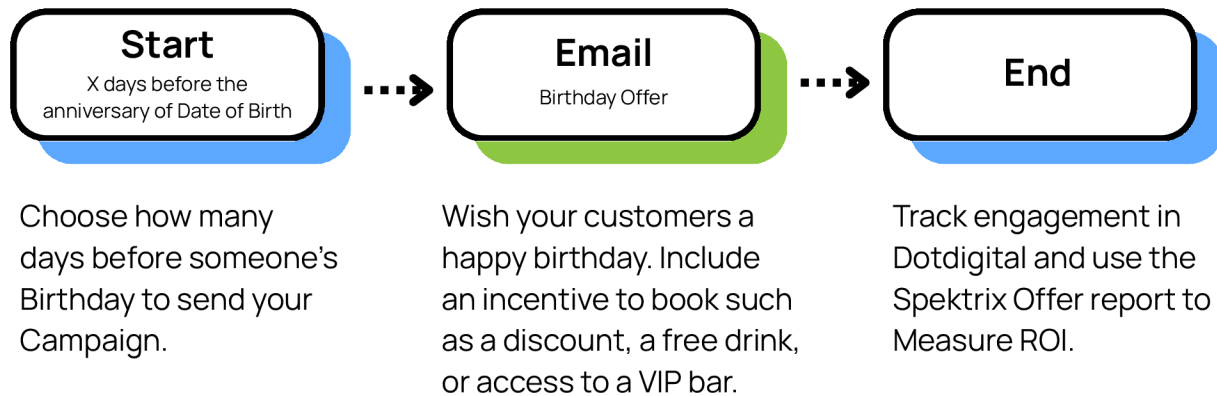
High Value Facebook Lookalike Audience: Find new high-potential customers by using your top bookers to build smarter Facebook ad audiences.

Program templates let you launch relationship-building automations fast. Ready to go but fully customizable, you can adapt the rules, and shape each journey around your specific goals.

Adapting a Birthday Program

A simple birthday message can drive engagement and retention by boosting loyalty, reactivating lapsed bookers, encouraging repeat attendance, and promote upcoming events.

The following is the default template and an example adaptation:

Start
X days before the anniversary of Date of Birth

Email
Birthday Offer

End

Choose how many days before someone's Birthday to send your Campaign.

Wish your customers a happy birthday. Include an incentive to book such as a discount, a free drink, or access to a VIP bar.

Track engagement in Dotdigital and use the Spektrix Offer report to Measure ROI.

Example adaptation: Add in a timely reminder email

Start
X days before the anniversary of Date of Birth

Email
Birthday Offer

Delay
Wait 7 days

Set your start rule back to give your customers enough time to redeem any offers on or around their birthday. Add a delay to give your customers enough time to book

Decision
Has the customer used the Birthday Offer?

Email
Birthday Offer Reminder

End

Check to see if the recipient has used their Birthday Offer. This can be done using an Auto Tag. If they haven't used the offer, send them a reminder email. If they have they can End the program.

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Building Programs: Know your Nodes

Here are the nodes that can be used to adapt the Program templates:

Start — Set who, when, and how often contacts join the Program

Decision — Decisions split your programs into two different routes based on rules.

Multi Decision — Multi Decisions split your programs into multiple routes.

Start rules and Decision rules can be based upon **Dotdigital Send Data**, **Auto Tags** and **Calculated Metrics**. Below is a selection of the data you can use. See the Support Centre for more information.

Dotdigital Send Data
- **Has been sent a Campaign:** Can be any campaign or a specific one.
- **Has opened a Campaign:** Can be any campaign or a specific one.
- **Has Clicked a link:** Can be a specific link in a specific campaign or a link type in any campaign.

Auto Tags
These allow for bespoke segmentation. Examples include:
- **Used a specific Offer**
- **Attended yesterday/in the last x days**
- **Purchased a Subscription**
- **Made a donation in the last x days/Over $x**
- **Booked for a particular Event**
- **Has attended multiple events in the last x days**
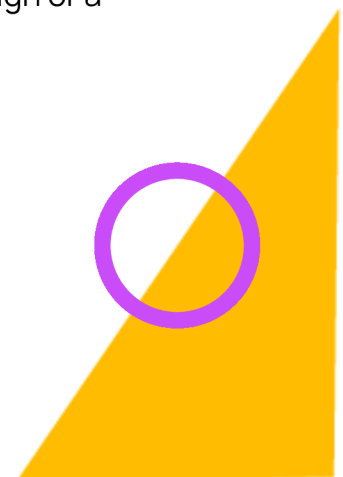
Calculated Metrics

- **Booked Once: True** if the customer has booked exactly once; **False** if none or more than once.
- **Never Booked: True** if the customer has never booked; **False** if they have.
- **Weeks Since Last Order:** Segment by more or less than X weeks.
- **Weeks Since Last Visit:** Segment by more or less than X weeks.
- **Weeks Till Next Visit:** Segment by more or less than X weeks: blank means no future visits.
- **Average Spend per Order:** Segment by less than, greater than, or equal to a set value.

Email

Used to send your contacts an Email Campaign
- Subject Line, email content and calls to action.
- Personalization such as: Formal/Informal Salutation, Customer Id and Credit Balance.
- Dynamic content can be used to change the email content for recipients based on their Auto Tags.

Delay

Used to add pauses to your program, giving your contacts enough time to react.
- Wait a set number of days.
- Wait until a set date.
- Wait until a calculated date, (For example x days before or after DATEOFBIRTH).

Meta Audience

Adds or removes a contact to a Custom Meta Audience
- Can be used for direct marketing or to create "lookalike" audiences.
- 'Lookalike' audiences find new Meta users you can market to who have similar characteristics to the customers in your audience.

End

Where contacts exit the program end.
- Can be renamed, for example "Successful", "Booked", "Renewed", "Unsuccessful" etc.

Preparing to Activate

? **Which of the Program Templates could have the biggest impact on your organization right now?**
Think about where you're seeing drop-offs or opportunities to re-engage customers.

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....

? **Who would you target first in this automation, and what would you want them to do?**
New mailing list sign-ups you want to convert into bookers, Donors who haven't attended an event in over a year, high spending customers with an upcoming birthday.

....

....

? **What message, content or offers would make this program truly valuable to your audience?**
What would actually get someone to click, book, or return?

....

....

? **If this program worked perfectly, what would success look like?**
Higher retention rate among new donors, shorter time between first and second bookings, increase in average spend.

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Scan to access **slides and further resources** from this session

Behind the Metrics:
Defining your Spektrix Data

Bright Ideas

Work through the scenarios from the Reporting Session. Remember to use the Metrics Library in the Support Centre when you need more information about a particular metric!

Which events did first time attendees come to see?

How? Add a new Criteria Set to the Ticket Sales Analysis Report
Wrapper: Tickets

Metrics: Event Instances > Start Date = Whatever you choose!
Event Instances > Instance Included in Metrics = ✅
Returned = ❌
First Visit = ✅

By First Visit and Instance Date

Tickets with

Returned ☐

and **Event Instances**

Instance included in metrics ☑

and **Start Date**

is [Relative date range ⌄] between [____] [today ⌄] and [____] [end of time ⌄]

between 13/05/2025 and end of time

and **First Visit** ☐

Q: What is the top event attended by first time visitors?

....

Q: Why do you think this particular event might have attracted so many new bookers?

....

....

If customers who attended this event are returning, what have they booked for?

How? Run a Customer List through the Ticket Sales Analysis Report

Create a new Customer List
Segment: Purchasing
Wrapper: Tickets

Metrics: Events = Your top event
Instance Included in Metrics = ✅
Returned = ❌
First Visit = ✅

Run through the Ticket Sales Analysis report with the same new Criteria Set
Wrapper: Tickets

Metrics: Event Instances > Start Date = Relative from Today until End of Time
Event Instances > Instance Included in Metrics = ✅
Returned = ❌
First Visit = ❌

By First Visit and Instance Date

Tickets with

Returned ☐

and **Event Instances**

Instance included in metrics ☑

and **Start Date**
is [Relative date range ▾] between [ ] [today ▾] and [ ] [end of time ▾]
between 13/05/2025 and end of time

and **First Visit** ☐

Q: Which events are returning customers booking for?

....

Q: Are returning customers booking the same type of event or are they branching out?

....

Based on your findings, set up cross-selling using recommended events on your website to encourage reattendance. Repeat these steps for your top events to maximize audience retention.

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What is the average spend of first-time bookers vs. returning customers?

How? Build a custom CSV Report
Report Type: Customer
Criteria Set Wrapper: Individuals
Criteria Set Metrics: Is Active = ✅
Never Booked = ❎

Run Average Spend of Customers

Is Active and Booked at least once

Customers with

Is Active	☑
and **Never Booked**	☐

Run as Excel (unformatted .xlsx) ▾ | Cancel

Ensure Report is in Grouped Mode

Output Column Metrics: Booked Once
Aggregate Column Metrics: Average Spend Per Ticket (Dropdown = Average)
Average Spend Per Order = (Dropdown = Average)
Show Count? = ✅

Output Columns:
Groups:

Booked Once ❌

Aggregate columns:

Avg Spend Per Ticket Average ▾ ❌
Only Include Values:
From:
To:
☑ Include Column

Avg Spend Per Order Average ▾ ❌
Only Include Values:
From:
To:
☑ Include Column

☑ Show Count?
Filter count:
Min:
Max:

Q: What is the average ticket price of first time bookers? ....

Q: What is the average ticket price of return bookers?....................................

Q: What is the average order price of first time bookers?................................

Q: What is the average order price of return bookers?....................................

Q: What do the differences in values tell you about the spending habits of these customers?

....

Based on your findings, add some dynamic content to Dotdigital using your average spend metrics to encourage particular offers or memberships.

Scan to access **slides and further resources** from this session

Continue the conversations
you started at Hubs

The **Spektrix Online Community** is launching soon!

Connect with Spektrix users across the sector to ask questions, share ideas, and keep the momentum going all year round.

You'll find:

| Forums for peer support | Curated resources | Webinars and events | And more! |

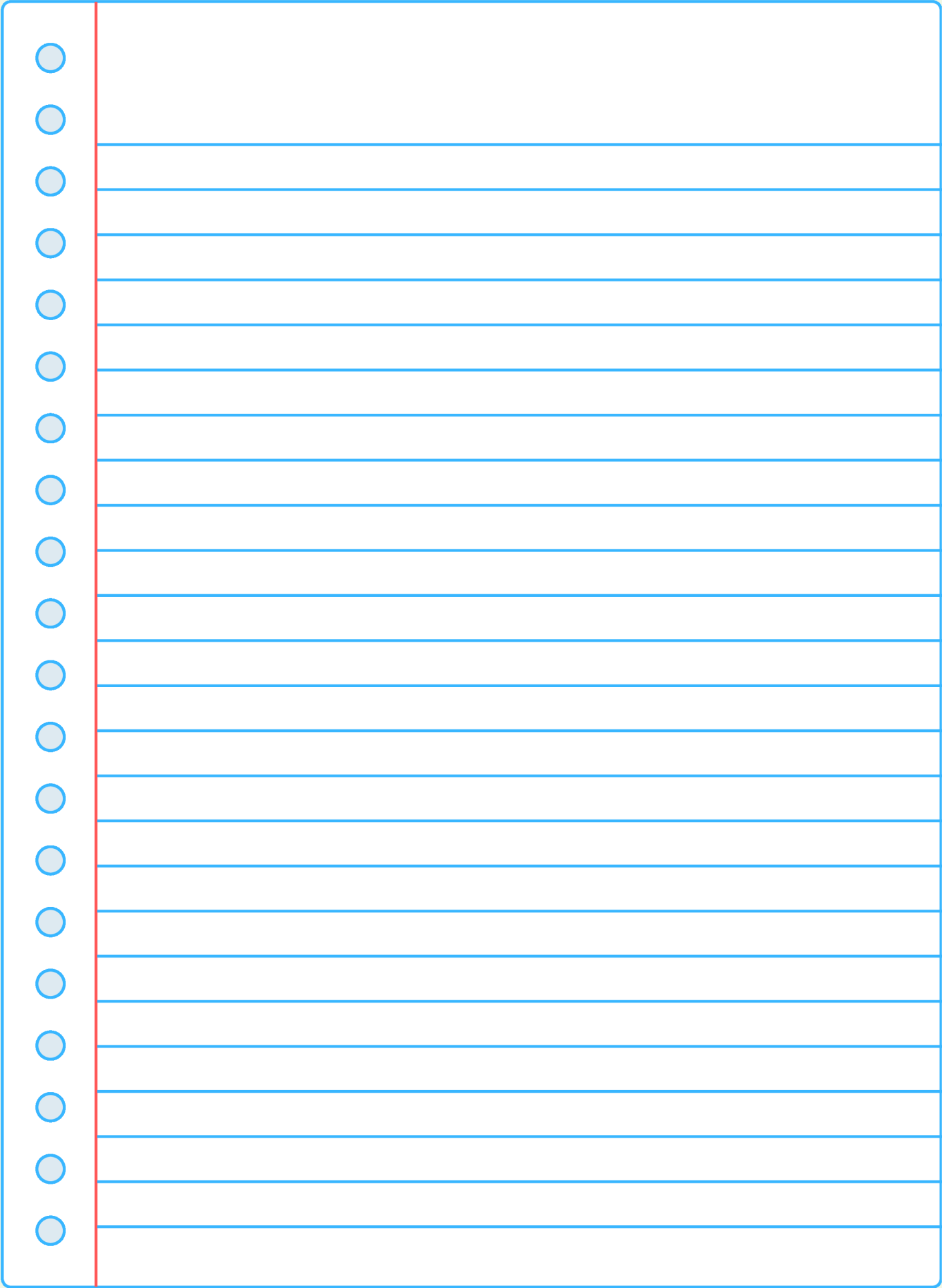**?** What's one question you've had that you wish you could ask other Spektrix users?

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? What's a tip or trick you'd want to share with other users?

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? What success story (big or small) could you share with the online community?

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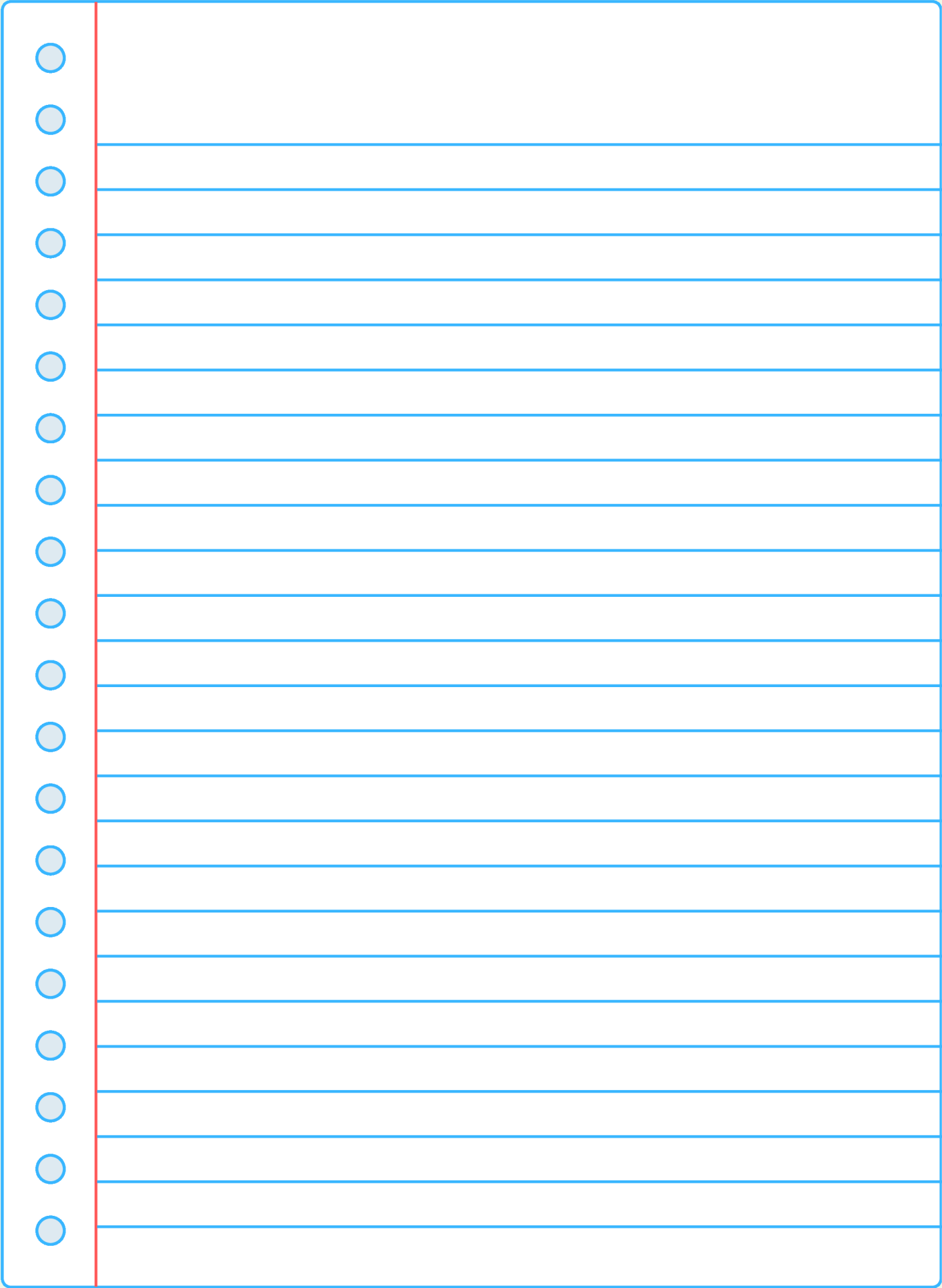
NOTES

NOTES

Scan this QR code to fill out our Hubs survey

Show us your completed survey and receive a deluxe Spektrix tote bag.