

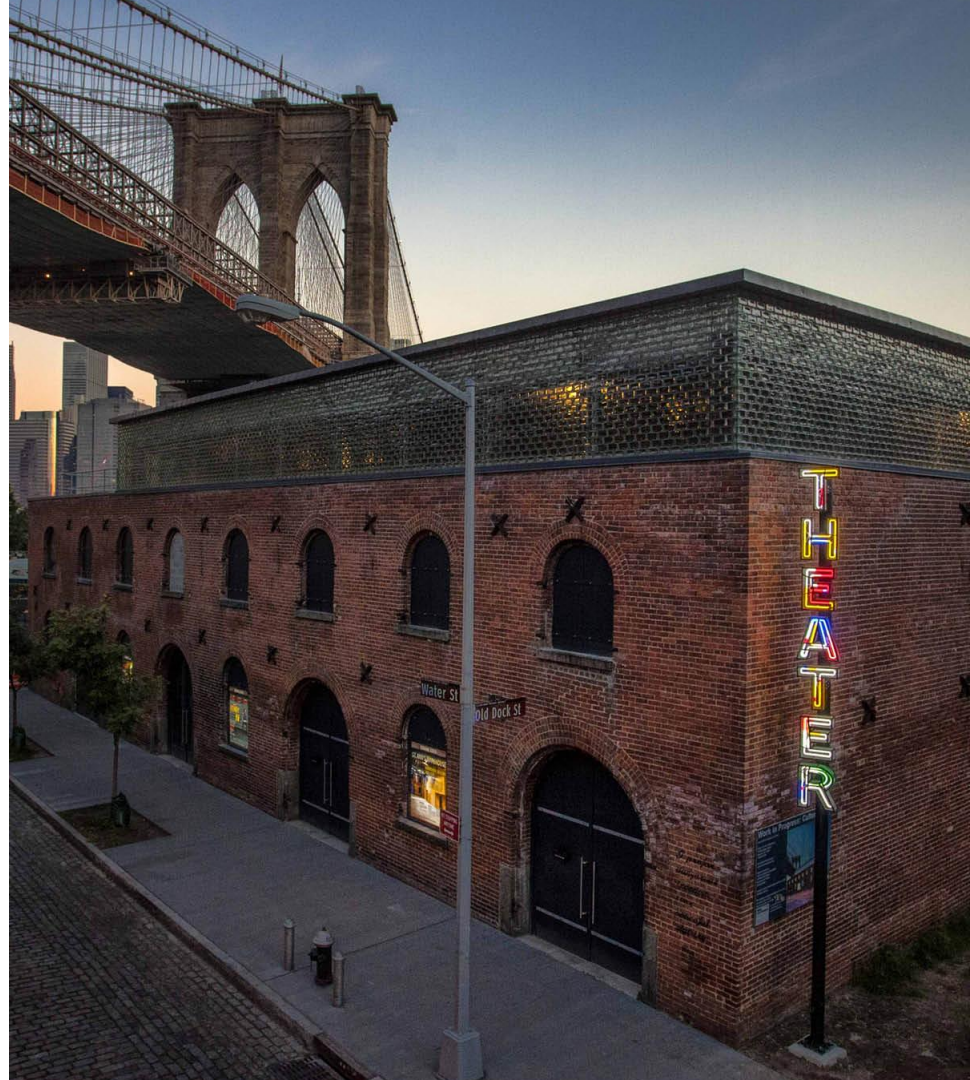


# Guest Speaker



**Lianna Portnoy**  
Managing Director

**ST. ANN'S  
WAREHOUSE**







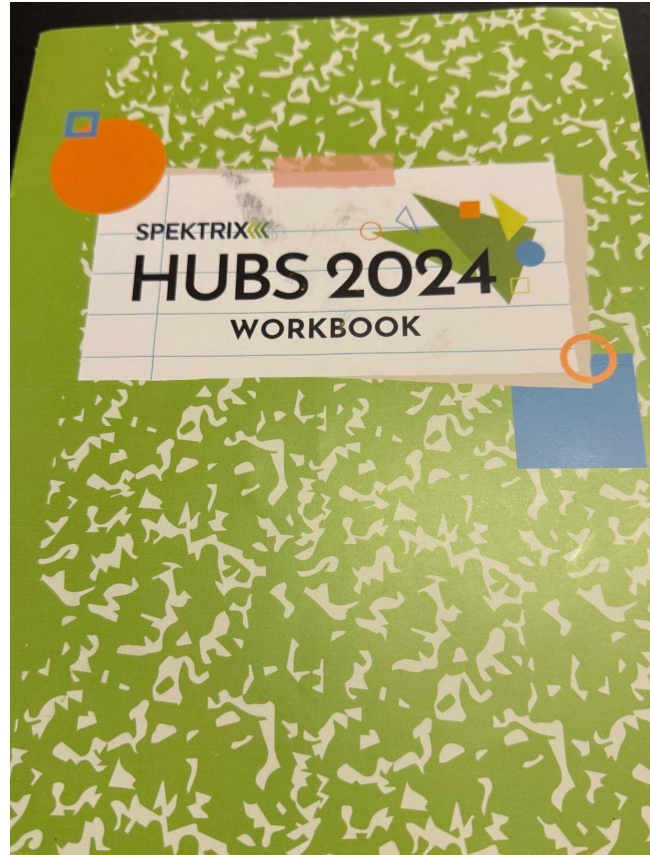
**Lianna Portnoy**

Managing Director

**ST. ANN'S WAREHOUSE**



# SPEKTRIX HUBS 2024 - The Opportunity





# SPEKTRIX HUBS 2024 - The Realization

**SPEKTRIX BINGO**  
See how much you're really getting out of your CRM

We check for duplicate customer records	We archive our events once they're reconciled	We keep our tags up to date, remove old ones, and organize them into tag groups
We monitor the number of customer records that have never booked and/or engaged	We use customer-facing tags on our website to collect extra information about our audience	We reuse our ticket types and price lists and try to keep the overall numbers in use to a minimum
We know what all our reports are for, when to run them, and that they are all in use	We know what all of our Event/Instance Attributes power and input the data consistently	We have a process to ensure customer records are well formatted, complete, and up to date

## Spektrix bingo

- We check for duplicate customer records
- We archive our events once they're reconciled
- We know what all our reports are for, when to run them, and that they are all in use

# SPEKTRIX HUBS 2024 - The Realization

## Audit your revenue streams

- We know who's most likely to book for which event, and we send them relevant information or incentives
- We have clear targets for customer loyalty, linked to specific segments of our audience
- We've prioritized our upsell asks, and we know which channels generate the most revenue.

**AUDIT YOUR REVENUE STREAMS**  
Find the untapped opportunities within your organization

Income Stream	✓	Score
<b>Ticket Income</b>		
<i>TRG dashboard</i> We know how our ticket income is performing against our own forecasts and sector-wide trends	✓	2.25 <i>social community</i>
We have <u>smart, measurable</u> goals for ticket income based on specific audience segments or performance genres	✓	
We know who's most likely to book for which event, and we send them relevant information or incentives	✓	
We know what success looks like to us	✓	
<b>Memberships &amp; Subscriptions</b>		
We know which memberships or subscriptions are selling well, which are standing still, and which are becoming less popular	✓	
We have clear targets for customer loyalty, linked to specific segments of our audience	✓	
We understand who is most likely to join a loyalty program	✓	
We know how we'll decide what to prioritize next	✓	
<b>Donations &amp; Secondary Spend</b>		
We know how many customers are donating or responding to upsells, online and at the box office	1/2	
We've prioritized our upsell asks, and we know which channels generate the most revenue	✓	
We target customers with relevant offers and asks, both online and at the box office	1/2	
We're measuring sales and donations, and adjusting our ask to optimize revenue	✓	

*targeted support related to programming*  
*box office commissions for upsells*  
*automated subscription offers*  
*call center*  
*new segments*  
*donate to education and randomly*  
*program levels*

# Returning to Work - Implementing Hubs at Home

Spektrix Hubs Action Items				
Spektrix topic	Next Steps	Point Person	Priority	Status
Keep tags up to date, remove old ones, and organize them into groups	Box Office/Devo/Marketing meeting to discuss/cull tags and make system moving forward Next step: Quarterly review of tags	Director of Marketing	Mid-level Priority	In Progress
Customer records that have never purchased and/or engaged	Next step: Create a customer list (Customers Never Booked) and create a new local segment within the list (Set the segment type to "Purchasing," and drag the "Date Transaction Confirmed" criteria into the Criteria Set. Instead of specifying a date range, you want to ensure that no transactions are found, so there will likely be options to select "is empty" or "has no value."	Box Office Manager Director of Marketing	Mid-level Priority	In Progress
We know what all our reports are for, when to run them, and that they are all in use	Next step: Each department will review and delete unnecessary and inactive reports We will establish naming conventions and include descriptions for newly built reports One-off reports should include ONE OFF in the title	Full Team	High Priority	Not Yet Started

# Returning to Work - Staying Connected to Spektrix!



## **Account Manager (Jess!)**

→ Monthly check-ins with full team

## **Development (Jake!)**

→ Sprints with team

## **System Efficiency Review (Elizabeth!)**

→ Monthly check-ins with full team



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