

VE:Forum

Choosing the right Ticketing / CRM System for your Visitor Attraction



indigo

BOP
Consulting

Foreword

Never has it been more important for visitor attractions to consider how the technology they use can support their businesses to deliver excellence. The days of the ticketing/CRM (Customer Relationship Management) system being the sole responsibility of the IT or box office team are over – our systems and the data they hold need to be powering the design and delivery of visitor experience throughout our organisations.

However, for so many organisations, the systems they have in place don't reflect this need. In the VE:Forum 2019 benchmarking study, 80% of Visitor Attractions surveyed had some form of paid-for entry, and 79% operated a membership or annual pass scheme. Yet over a third of respondents didn't have any form of CRM system for managing visitor relationships, and of those who did, less than half said they were happy with the system they had. A similar proportion had no suitable system to support their fundraising, and yet the majority of respondents were registered charities and needed to increase income from charitable giving.

For so many organisations it comes down to the confidence of those tasked with choosing the right system. Often those who bear this responsibility aren't ticketing or CRM specialists. They recognise the value and potential of these systems but are overwhelmed with trying to define the required functionality of the system, instead of focussing on the outputs they want to achieve.

The VE:Forum, in partnership with Indigo and BOP Consulting, has produced this guide, which we hope provides a framework for organisations to evaluate their existing system(s), or explore the possibility of investing in a new one. We are incredibly grateful to the numerous organisations and ticketing/CRM suppliers that offered the input and advice which shaped this guide.

Rachel Kuhn

Co-founder of the VE:Forum &
Senior Consultant with BOP Consulting

The Visitor Experience Forum Ticketing/CRM Systems Guide

This guide has been developed in response to some of the difficulties highlighted by VE:Forum members when tackling the issue of ticketing /CRM systems for Visitor Attractions. It is designed to act as a starting point for any visitor attraction looking to evaluate their existing system or explore the possibility of investing in a new one.

This guide draws on the experiences of a number of visitor attractions who have recently changed systems or considered changing systems. Alongside the attractions who participated in this project we also engaged with a number of ticketing/CRM providers working across the attractions industry. These following insights are the result of a survey and a series of interviews conducted in early 2019. We have then structured these into a methodology that we feel will best assist Visitor Attractions wanting to undertake this process.

‘Selecting a new Ticketing/CRM system is not a tick-box exercise that aims to list everything you want the system to do – if you do this you’ll just end up with the same system (and the same problems) that you already have’. Study Participant

Contents

Foreword	1
The Visitor Experience Forum Ticketing/CRM Systems Guide	2
The Big 3 Issues	4
The Ticketing/CRM Systems Guide Steps	6
Your Visitor Experience Vision	8
A Whole Organisation Approach	10
Market Scoping	12
Writing a Clear Specification	14
Procurement	16
Selection and Contracting	17
The Relationship With Your New Provider	18
To Sum up...	20
Acknowledgements & Thanks	21
About the VE:Forum	22
About Indigo	23
About BOP	24

The Big 3 Issues

When preparing this guide we consulted with over 30 organisations. Whilst each organisation required different things from their systems and had had very different experiences in the realms of ticketing and CRM there were three key issues that nearly all the organisations we spoke with were seeking to address:

1. Should we have multiple systems or a single one?

Even the very small organisations we spoke to could be operating up to five or six systems for different aspects of the customer experience: online booking, admissions, retail, membership, email communications and group bookings.

Many organisations in this position feel too overwhelmed to know where to start and often take the decision to ‘fix’ one system at a time, rather than look at the situation as a whole. This leaves them with the burden of managing multiple supplier relationships, whilst not having a single joined-up picture of their visitor relationships.

Our conversations have concluded that the question to ask isn’t ‘how many systems?’ but ‘how and why do we want to deliver an excellent visitor experience?’. Whether this is delivered by multiple systems, or one, is less important than having a clear and consistent approach across all interactions. (See page 8)

2. The relationship between the organisation and the ticketing/CRM supplier/provider

The way in which a visitor attraction relates to a ticketing/CRM provider is the key to success in selecting a suitable supplier, and in ensuring that the technological solution truly delivers the benefits the organisation expects it to.

All the ticketing/CRM providers we spoke to wanted to be seen as **partners**, not **suppliers**. Similarly, visitor attractions who were happiest with their system talked about a **relationship** with their ticketing/CRM provider and regular **dialogue**.

Conversely, organisations who felt the least happy with their system described a very reactive approach to the relationship with the supplier. (See page 18)

3. The system isn’t always the (only) answer

It was clear from the organisations we spoke to that simply changing one system that may not be working for an alternative one doesn’t necessarily solve the problem.

If the real problem hasn’t been defined clearly enough, or if the procurement and selection process is not conducted in an open and thorough way, it’s possible that the organisation will end up with system that does not suit its needs.

One study participant described what happened when their organisation changed systems: the new ticketing/CRM system did not subsequently meet all their needs, leaving them with far more issues than they were expecting before they changed it. They simply put in a system that one of the staff had successfully used in a previous organisation, without clearly defining their objectives nor scoping the market adequately. The system was not a good fit for the organisation, which now has to start the process again.

‘It’s too big for us and not made for visitor attractions... we didn’t do any research before we selected it’. Study Participant

Another study participant described a situation in which the organisation has extended the contract on their legacy system from year to year, even though they suspect it no longer meets their needs. For example, the system offers them no way of offering online bookings, nor email distribution – and they think this could be hampering their ability to attract new and repeat visitors. However, as they have not clearly mapped out what their requirements really are, they have no way of evaluating either their existing or a potential future system against these.

‘We really need to introduce online ticketing, but that includes a series of strategic considerations that go beyond the ticketing/CRM system... so until those are made there’s nothing we can do’.

Study Participant

The Ticketing/CRM Systems Guide Steps

We have laid out a process based on the advice and experiences of VE:Forum members, which we think offers the best opportunity for an organisation to secure a system to best help them deliver on the Visitor Experience.

1. Describe the organisation, what makes it unique and what it would like the visitor experience to deliver for both the visitor **and** the organisation.
2. Detail how each part of the organisation contributes to this vision, who is involved and which systems play a role. Identify the gaps between the vision and the current reality in order to identify the scope of and priorities for the project.
3. Scope out potential suppliers and providers who **may** be in a position to help the organisation address these priorities and have discussions and demos to understand the range of solutions on offer.
4. Write a clear and comprehensive specification document to outline your needs and requirements and invite responses from suitable suppliers.
5. Involve a wide range of visitor experience teams in assessing presentations and written submissions against the agreed priorities and desired outcomes.
6. Commit time and resource to maintaining the relationship to ensure the best outcome.



Your Visitor Experience Vision

It's crucial that you have a clear statement of what you are trying to achieve, so that your organisation is clear with itself about what it wants but is also willing to share this vision with a potential ticketing/CRM provider/partner.

System providers all told us that for them to provide the best solution for an organisation they 'need to have a clear understanding of what they want' and that 'you need to explain your business fully and be open and creative in your approach'.

Can you define, clearly and honestly:

- What the organisation is trying to achieve overall? (this is often described as a mission or a vision, but may not be).
- What is your vision for your future Visitor Experience? – complete the questions in the boxes below to map this out:

For the visitors

How does the organisation want to deliver the visitor experience?:

In advance (eg. Online booking etc)

On site (eg. Queue management, content engagement etc)

Post-visit

For the organisation

What does the organisation want to achieve in terms of:

Understanding more about its visitors? (eg. Data capture, research, reporting)

Driving income (eg. Retail, membership, donations)

Communicating more effectively with visitors pre and post visit?

- What are the challenges you are currently facing in achieving this vision? (These should include system **and** non-system related issues).
- This short narrative could be developed with the involvement of a wide range of staff, to ensure that it reflects the vision and needs of the whole visitor experience, and not just one part of it.

Advice from VE:Forum Members:

Think about who is best equipped to lead this process in terms of time and skills.

How will you ensure that all the people and teams that need to be involved will be?

Consider whether bringing in external input or help might add value or save time.

A Whole Organisation Approach

It's important to really understand which areas of the organisation are currently involved in delivering this Visitor Experience Vision – or could be in the future – and to involve them in this process from the outset.

- Which teams are involved?
- Which areas/functions of the organisation does our vision for the visitor experience include? (see checklist).
- Which systems are currently used? (including non-ticketing/CRM systems).
- How well do these systems deliver **now** on the future vision expressed?
 - Where are the main gaps?
 - Is there any overlap in the needs to be addressed (across teams or systems)?
- What are the main areas you want to address through this project? Can you prioritise them into Essential and Desirable?
- Which systems will need reviewing and/or replacing as a result?

Advice from VE:Forum Members:

Use a checklist approach to focus conversation when you are trying to map your system requirements.

The checklist might include:

- CRM
- Income Generation
- Retail
- Fundraising
- Membership
- Catering
- Admissions
- Collections
- Learning and Education
- System hosting / IT
- Integrations between systems
- ...

Market Scoping

How to find out which systems you could be considering?

This is one of the main areas of concern for the organisations we spoke to. One challenge was knowing where to look for suitable suppliers. Another was around how and when it's appropriate to start having conversations with suppliers and how to manage communication during the procurement process once it has begun.

The starting point for most members was identifying organisations as similar as possible to them, and finding out which systems they used. However, others said that it was important to cast the net more widely, in order to fully test what's on offer, particularly if there are new suppliers into the market who don't have many existing clients yet. Some members had engaged the services of a consultant who knows the market well to help them shortcut this process.

The suppliers and VE:Forum members we spoke to all advocated having informal conversations with suppliers first, in order to fully understand what each provider can and cannot offer and to gauge costs and scale. They advised **against** using the procurement process itself to test and understand the market, as it typically had to involve more solution providers, multiple stages of shortlisting and often took much longer.

TOP TIP:

The VE:Forum can put you in touch with other members who have recently procured systems, have similar system requirements or who use a system you may be looking at. Get in touch!

Advice from VE:Forum Members:

Scoping the market

Look at organisations which are a similar **size** to you, even if what they do is slightly different.

Widen your search to include organisations and systems on the fringes of what you do.

Consider other models, such as outsourcing part of your ticketing operation if you don't have the capacity to do it all in-house – either to an agency or another Cultural Organisation.

Consider engaging external help such as a consultant who understands this market.

Writing a Clear Specification

The main advice from both suppliers and members was to ensure that the focus of the specification was on **outcomes** and not on **functionality**.

Any **outcome** would define what it is that the organisation wants to achieve – such as the challenges they are facing and the key priorities from the Visitor Experience Vision across the whole organisation. An outcome-based approach is likely to encourage suppliers to demonstrate how their approach, as well as the technical solution, can assist the organisation to drive change into the future.

Functionality would define exactly how the organisation requires the system to operate. A functionality-based approach would require a highly detailed specification, probably broken down by departmental area, detailing every possible technical feature that the organisation requires. It tends to focus on what features the organisation has in its current system, and is therefore typically limited by current working practices and knowledge. This approach is likely to result in the procurement of a very similar system to the incumbent, and not allow space for creativity and future-thinking.

‘It’s not a tick-box exercise that aims to list everything you want the system to do – if you do this you’ll just end up with the same system (and the same problems) that you already have.’

Study Participant

Advice from VE:Forum Members:

What should be included in an outcome-based Specification Document?

Brief background to organisation.

Key information such as size, visitor numbers, etc.

Overall vision of the organisation
Specific vision relating to the Visitor Experience (for visitors and the organisation).

How the organisation currently delivers the visitor experience, and what the challenges are.

The defined scope of this project (e.g. which systems are we looking to review) and any fixed elements or considerations (e.g. IT systems, hosting etc).

The desired outcomes of the project (prioritised).

Key instructions for the process (e.g. instructions for written submissions, deadline and interview dates).

Procurement

How you do this very much depends on what your organisation's 'rules' about procurement are. Some will require you to obtain at least three quotes, others to run a full OJEU¹ process. It's important to check what your organisation requires.

You may decide to have a number of aspects to your process. These may include:

- A short 'screening' questionnaire to eliminate any suppliers who do not meet your **essential** criteria. For example, if it is essential that suppliers have experience of working with visitor attractions, this could be included so that suppliers who do not are not wasting time preparing lengthy responses unnecessarily.
- Short written submissions in response to your specification document. You should give clear instructions about the format of this response, so that it's as easy as possible for you to compare suppliers as possible.

TOP TIP: You may ask suppliers to provide a copy of their standard contract or terms and conditions at this stage so that you can ensure you fully understand it as part of your evaluation.

- A spreadsheet template for providing costs (split into one-off and annual costs) so that you are able to compare costs from different suppliers.
- In-person presentations by suppliers to demonstrate how their system meets your requirements. You may want to be prescriptive about how they present, but it is important to get a balance between making it easy to compare 'like for like' systems in a fair and logical way – and allowing space for both sides to ask questions and explore possibilities.

¹ www.OJEU.eu

Selection and Contracting

Assessing the written submissions and presentations:

- You might want to create a simple and top-level outcome-based scoring grid, where each system is scored out of 10 against the (prioritised) outcomes identified in the specification.
- Ideally this should be scored once on receipt of written submissions, and refined in the light of the presentations and demonstrations.
- The standard contract or terms and conditions should be included in this process to ensure that you are clear what is being offered.

'From the outset we involved every department as stakeholders in the project. Each team drew up their list of priorities, and then we worked together to create a specification for suppliers to respond to.

When each of the suppliers came to demonstrate the system, we were clear about the needs and priorities we wanted them to respond to. We were then able to score the suppliers consistently and ensure that our priorities were reflected in the presentations we received. It also helped to keep internal stakeholders focused through the process.

The fact that we had agreed the priorities in advance meant that it was easier when we had to accept trade-offs across the organisation.

We are really happy with the outcome.' Study Participant

Contracting

In many cases the suppliers will have their own contracts they wish you to sign. If you have included submission of these in the procurement process, then hopefully any questions should have been answered at that point.

Areas of particular focus should be:

- Ensuring you are clear about one-off and ongoing charges.
- Any third parties integrated with the system (eg. email suppliers, postcode look-up licenses) and who is responsible for the relationship with them and payment to them.
- Length of term and penalties for ending the contract.
- Access to the data once the contract ends and any charges imposed by the supplier.
- Agreed service levels and recourse should they not be met.

The Relationship With Your New Provider

All the ticketing/CRM providers we spoke to wanted to be seen as **partners**, not **suppliers**. What's more visitor attractions who were happiest with their system talked about a **relationship** with their ticketing/CRM provider, and regular **dialogue**. This relationship starts with the procurement and selection process, but the way this relationship is managed post-procurement is vital to how successfully the technology will be adopted to drive visitor-centred change in the organisation.

Advice from VE:Forum members

The table to the right summarises what system suppliers described to us as the difference between treating your ticketing/CRM provider as a supplier relationship vs. working in partnership:

TOP TIP:

To check out whether you feel 'at home' with the culture of your potential supplier:

- **Visit them at their own offices in advance of inviting them to tender.**
- **Ensure that you've met the Account Manager and anyone that would be involved in training your team as part of the selection process or before contracts are signed.**
- **During the lifetime of your contract with them – invite as many of their staff as possible to experience your organisation as visitors themselves.**

	Managing your ticketing/CRM provider as a SUPPLIER	Working in PARTNERSHIP
Procurement	Organisation uses procurement process to research the market.	Organisation scopes the market prior to procurement and understands broadly what each system can do.
Procurement	Organisation has a tech-heavy functional specification, with huge lists of requirements the system must meet.	Organisation has a short list of 'must haves' and a clear set of objectives or organisational challenges that they would like to explore with system or solution providers.
Problem-solving during contract	Organisation decides on a course of action (usually very specific) and tasks the system provider with making it happen on the system.	Organisation shares the problem with the supplier early-on and together they discuss how to address the challenge, and if/how the system might help them to do that.
Communication	Only contact them when there is a problem	Has a regular dialogue around business objectives.
Communication	Only contact them when there is a problem.	Supplier keeps clients informed of new features – planned and launched, and encourages trial and testing.
Staff time and commitment	No-one is actively and regularly working with the system, or when someone leaves it gets ignored.	The organisation has people allocated to using and improving the system. Various people are engaged across the organisation.
Culture and ethos	Differences between supplier culture and organisation culture.	Similar culture and working cultures in both parties.

To Sum up...

Choosing the right systems to support your engagement with visitors is not straightforward – but equally it's not rocket science either.

Taking time to really understand what both the visitor and the organisation need from a system, and being able to articulate that clearly are fundamental – as is choosing a supplier that aligns with your organisation's mission and culture.

Finally, utilising your networks is vital. There is a lot of support and goodwill from others working in the sector and our experience in writing this guide has shown that many are willing and keen to share their knowledge to help other organisations in the same boat.

Acknowledgements & Thanks

Producing this guide would not have been possible without the involvement of the numerous organisations who gave us their time to offer their experience and advice.

We would like to extend our thanks to everyone who participated in the 2019 VE: Benchmarking survey, our initial ticketing/CRM Hack event and to all those who participated in the 1:1 interviews. We'd like to particularly extend our thanks to:

Accesso
Bishopsgate Institute
Chelsea Physic Garden
Design Museum
Gateway Ticketing
Handel and Hendrix in London
Historic Royal Palaces
Imperial College London
JW3
Museum of London
Maidstone Museum
Southbank Centre
Spektrix
TATE
The Postal Museum
The Ticket Factory
Victoria & Albert Museum

And lastly we must thank Katy Raines of Indigo and Marta Moretto of BOP Consulting who have researched, written and compiled this guide on behalf of the Visitor Experience Forum. Both organisations are great supporters of the sector and generously gave their time on a pro-bono basis.

About the VE:Forum

Founded in 2014, the VE:Forum was set up to facilitate networking events for those involved in the creation of visitor, guest or customer experience.

Today the VE:Forum has over 450 members – professionals working in museums, galleries and visitor attractions across the UK and Ireland. We hold regular events including Meet-Ups, Hacks and an annual seminar and awards scheme. All of our events are free to attend and there are no costs or fees associated with membership. We are entirely run by volunteers. We also have over 100 associate members – organisations and individuals who support our sector who are invited to a select number of our events.

To find out more about the VE:Forum check out our website (www.vedf.weebly.com).

About Indigo

Indigo provides smart, sensible and practical marketing and fundraising consultancy to organisations working in the cultural sector, in the UK and Europe. Their clients include concert halls, museums, theatre, arts centres, orchestras and dance companies.

Indigo's work includes:

- **Marketing and Fundraising Consultancy:** Improving marketing practice to drive more effective audience or donor engagement.
- **Ticketing and CRM system procurement:** Assessing the needs of an organisation and identifying suitable systems to fit.
- **Insight:** Helping organisations to better understand their audiences, visitors and donors through data analysis or research.
- **Evaluation:** Designing effective programmes to evaluate or evidence the impact of cultural engagement.

Indigo's Partners and Associates have all worked in a senior Marketing and Fundraising role in UK Cultural organisations, and not only have a vast combined knowledge of the sector but also a passion for the arts – an overriding desire to help organisations thrive.

Katy Raines, Co-founder and Partner at Indigo, is a leading speaker, trainer and consultant on CRM and Ticketing systems, and as such has written this guide for the VE:Forum on a pro-bono basis. For more information about Indigo and its work, please contact: katy.raines@indigo-ltd.com.

About BOP

BOP is an international consultancy with a 20-year track record of work in the cultural and creative economy. Their clients range from government bodies to leading arts and cultural organisations, property developers to international agencies.

Every year BOP work on a wide range of projects including;

- Working with organisations, **developing exciting concepts** for new and enhanced cultural buildings, **testing their feasibility**, supporting the development of their **visitor experience** and assisting them with **business planning**.
- Working with local authorities, city leaders, and developers to map and plan for dynamic cultural places and projects across scales.
- Delivering **original research and robust evaluations** that help their clients improve what they do, plan new programmes, test policies and make the case for their work.
- Delivering sector wide **benchmarking** and tracking and reporting on **trends** in museums, galleries and visitor attractions.

BOP's rigorous and effective research translates into guidance and recommendations that help arts and cultural organisations deliver better projects or programmes. Since their formation they have worked on over one thousand assignments and have played a central role in the UK in promoting culture and creative industries within broader economic, social and educational agendas.

BOP are proud partners with the VE:Forum. BOP provide regular pro-bono support to the Forum and have undertaken the research for this guide on a pro-bono basis.

If you'd like to hear more about BOP's work and how they might support your organisation please get in touch with **Rachel Kuhn** – Rachel@bop.co.uk