PATRON EXPERIENCE: MANAGING THE CROSSOVER ZONE
11:00 a.m. – 12:15 p.m.
This *organizational wheel* lays out the structure of the company in respect to the ‘patron-centric’ two department model. This structure relies on collaborative department teams rather than line-reports, and is intended to enhance Palm Beach Opera's work culture and empower employees.
The Tarnside Curve of Involvement

- Taking Personal Responsibility
- Ownership
- Commitment
- Engagement
- Interest
- Awareness

High

Giving

Low

IN Volvement

Low

High
EXAMPLES OF IMPLEMENTED INITIATIVES

• Institutional Advancement Meetings
• Overall Company Calendar
• Cross-departmental work:
  • Season Brochure
  • Monthly ‘Insider’ E-blasts for Donors/Subscribers
  • Marketing colleague on a fundraising visit; assign task to complete during visit
  • Development colleague assist on ad design for upcoming performance
EXAMPLES OF IA ENGAGEMENT WITH PATRON AROUND PERFORMANCES

• Team creates strategies, and implements ideas:
  • Personalized subscription/annual fund renewal packets
  • Regular notification of new to file, renewed, or lapsed patron from Box Office to IA Team.
  • Personalized letters/packets/e-blasts, based on activity: sub purchase, gift donation, single ticket purchase, etc.
  • Personalized or generic seat cards/visits for Subscribers, Donors, and Single Ticket Patrons
  • Pre-performance or intermission events for patrons and/or donors, based on activity: new to file, lapsed, renewed
  • Follow up e-blast surveys: demographics, stats, opinions
  • Follow up engagement based on history with company
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THE PATRON EXPERIENCE
GOAL
To create a thriving and collaborative team that pursues and supports the mission of Portland Opera.

By focusing on our patrons, we hope to enhance public engagement activities in fundraising, audience development, stewardship, and community impact initiatives.
PORTLAND OPERA ASSOCIATION / May 2017

DEVELOPMENT

DIRECTOR

Major Gifts Officer
Corporate & Institutional Giving Officer
Donor Relations Manager
Special Events Manager
Development Associate

MARKETING, SALES & COMMUNICATION

DIRECTOR

Opera Marketing & Digital Manager
Opera Marketing & Communications Coordinator

Associate Director of Marketing/Director of Broadway Marketing
Group & Corporate Sales Manager
Broadway Marketing Assistant

Associate Director of Ticketing
Assistant Box Office Manager
Box Office Supervisor
Box Office Ticketing Representative (x2)
Opera/Broadway Data Analyst & Group Sales Assistant

BOX OFFICE
PORTLAND OPERA ASSOCIATION / May 2017

OUTSOURCED
CONTRACT/PT/SEASONAL POSITIONS

- Graphic Design
- PR and Communications
- Front of House Manager
- Telemarketing
- Telefunding
- Overhire Ticketing Reps (x5)
PORTLAND OPERA ASSOCIATION / NOW

5 DEPARTMENTS UNDER 1 DIRECTOR

EXTERNAL AFFAIRS

DEVELOPMENT
MARKETING & AUDIENCE DEVELOPMENT
BROADWAY IN PORTLAND
PATRON SERVICES

All contract positions brought in-house
THEN  PATRON EXPERIENCE BEFORE MERGING DEPARTMENTS

SINGLE TICKET BUYER

STEP 1: Purchases tickets
STEP 2: Receives tickets
STEP 3: Receives “know before you go” e-mail before their specific performance
STEP 4: None

- No Staff or email interaction until time to buy another ticket or contribute.
- Incomplete patron data collection.
- Rush tickets — exact change, cash only.
PATRON EXPERIENCE BEFORE MERGING DEPARTMENTS

MULTIPLE TICKET BUYER

STEP 1: Purchases tickets
STEP 2: E-mail sent to MTB to purchase subscription
STEP 3: Receives tickets
STEP 4: Receives “know before you go” e-mail before their specific performance
STEP 5: None

• No Staff or email interaction until time to buy another ticket or contribute.
• Incomplete patron data collection.
• Rush tickets — exact change, cash only.
PATRON EXPERIENCE BEFORE MERGING DEPARTMENTS

SUBSCRIBER

STEP 1: Purchases subscription
STEP 2 (optional): Receives automated response of subscription purchase if made online.
STEP 3: Receives tickets
STEP 4: Receives “know before you go” e-mail before their specific performance
STEP 5: None

• No Staff or email interaction until time to buy another ticket or contribute.
• Incomplete patron data collection.
• Rush tickets — exact change, cash only.
PATRON EXPERIENCE AFTER MERGING DEPARTMENTS

SINGLE TICKET BUYER

STEP 1: Purchases tickets
STEP 2: Soloist acknowledgment letter with personal point of contact, audience resources, concierge and expectations
STEP 3: Receives “know before you go” e-mail before their specific performance
STEP 4: Receives e-mail with survey to share feedback after the performance

ONGOING:
• Wellness Calls/Solicitations
• Included the Single Ticket Buyer experience in season brochure
• Invitations to special events and other community activities
• Testing 1" time opera-goers drink ticket
MULTIPLE TICKET BUYER

STEP 1: Purchases tickets

STEP 2: Member acknowledgment letter with personal point of contact, audience resources, concierge and expectations

STEP 3: Receives e-mail “know before you go e-mail” before their specific performance

STEP 4: Receives e-mail with survey to share feedback after the performance

ONGOING:

• Wellness Calls/Solicitations
• Included the Membership experience in season brochure
• Invitations to special events and other community activities
SUBSCRIBER

STEP 1: Purchases subscription
STEP 2: Subscriber acknowledgment letter with personal point of contact, audience resources, concierge and expectations
STEP 3: Personalized thank you letter
STEP 4: Receives “know before you go” e-mail before their specific performance
STEP 5: Receives e-mail with survey to share feedback after the performance

ONGOING:
• Wellness Calls/Solicitations
• Invitations to special events and other community activities
• Enhanced subscriber benefits and cultivation
• Enhanced fulfillment packages
• Testing Subscriber loyalty program

NOW PATRON EXPERIENCE AFTER MERGING DEPARTMENTS
STEPS AFTER TICKET PURCHASE

- Patron acknowledged
- Confirmation of date/times
- Concierge information
- Surtitle/study guides
- Fashion
- “Know before you go” email
AT THE THEATER

• Box Office opens at noon — will call pickup
• Welcome to the theater
  • Concierge
  • Staff at all entry points
  • Red carpet
  • Photo ops
• Drinks in the theater
LEAVING THEATER/HOME

• Thank you for attending
• Survey
• Wellness calls/Donors
WHAT ARE SOME EXTERNAL AFFAIRS WINS?

• Magazine

• Season Brochure

• Separating Box Office
  • Broadway/Opera

• Concierge of Patron Services
EXTERNAL AFFAIRS: TEAM CHALLENGES
(we’ve been a team for six months)

• Marketing

• Data

• New Audiences

• Training

• Navigating change within other teams
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