

**The Challenging Journey:
In Pursuit of the Holy CRM Grail**



**American Museum Membership Conference
Chicago
April 13, 2016**





Jacobson Consulting
Applications, Inc. (JCA)

Steve Jacobson,
President and CEO

Carnegie Museums of
Pittsburgh

Cari Maslow,
Senior Director,
Donor Relations and
Membership

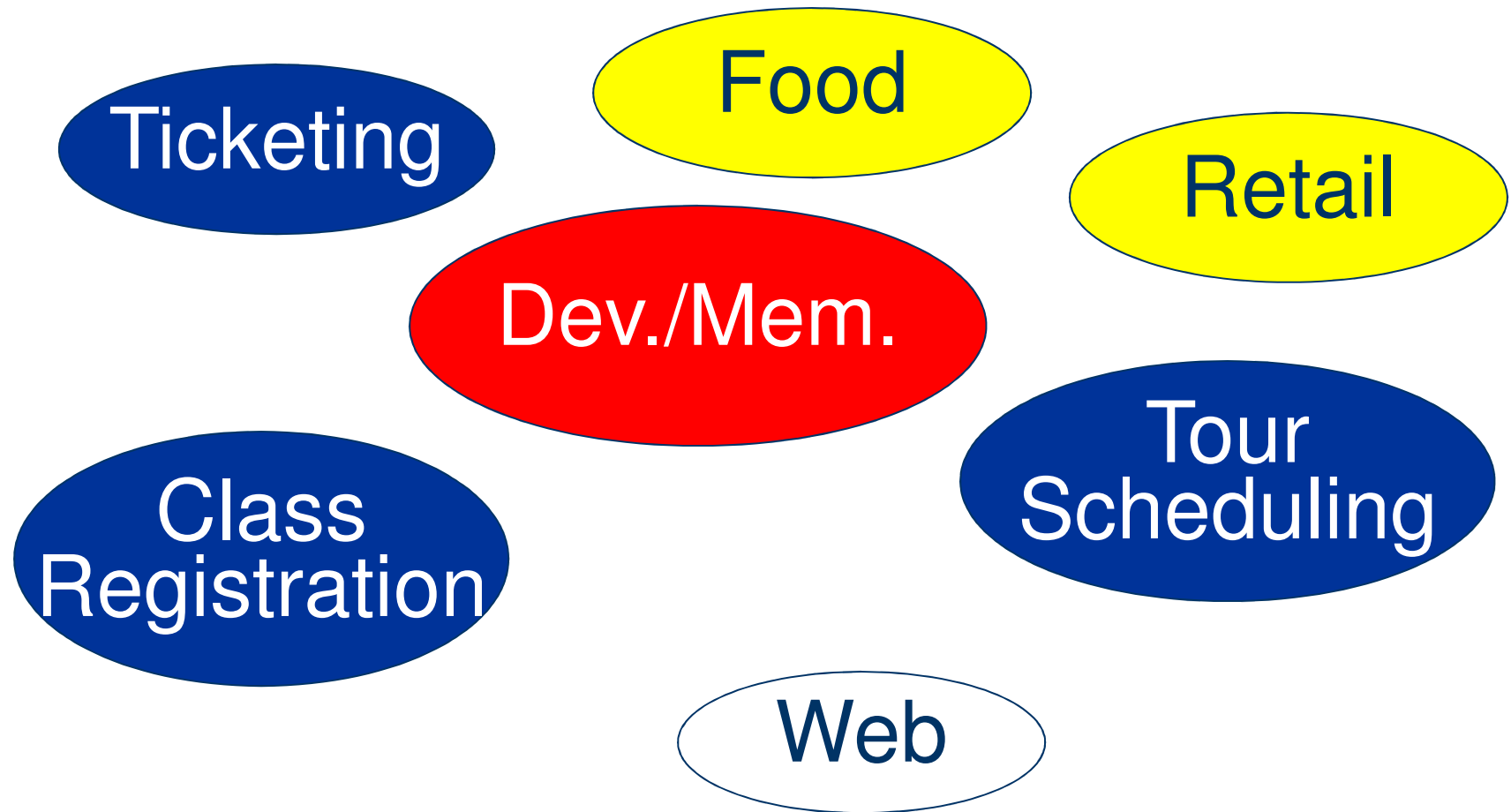
Royal Academy of Arts

Annie Wong,
Head of Friends

First – A Few Definitions

- CRM
 - Constituent Relationship Management
 - Software/processes to manage what you need to know about people & organizations
- Data Warehouse
 - A place where you merge data from different software for reporting and analysis
- Middleware
 - Software that glues together two larger pieces of software.

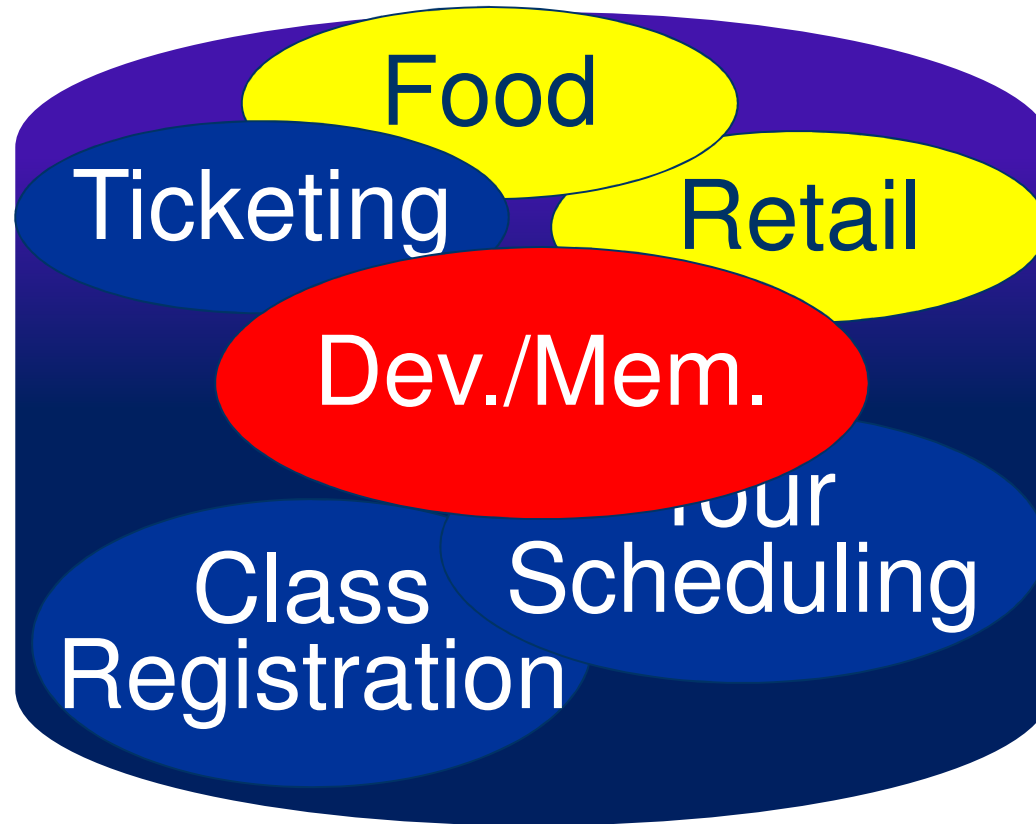
Silos of Data



Three Integration Strategies

- ① Unified system
- ② Integrated systems
- ③ Integrated (and unified) systems with a warehouse

Unified Systems



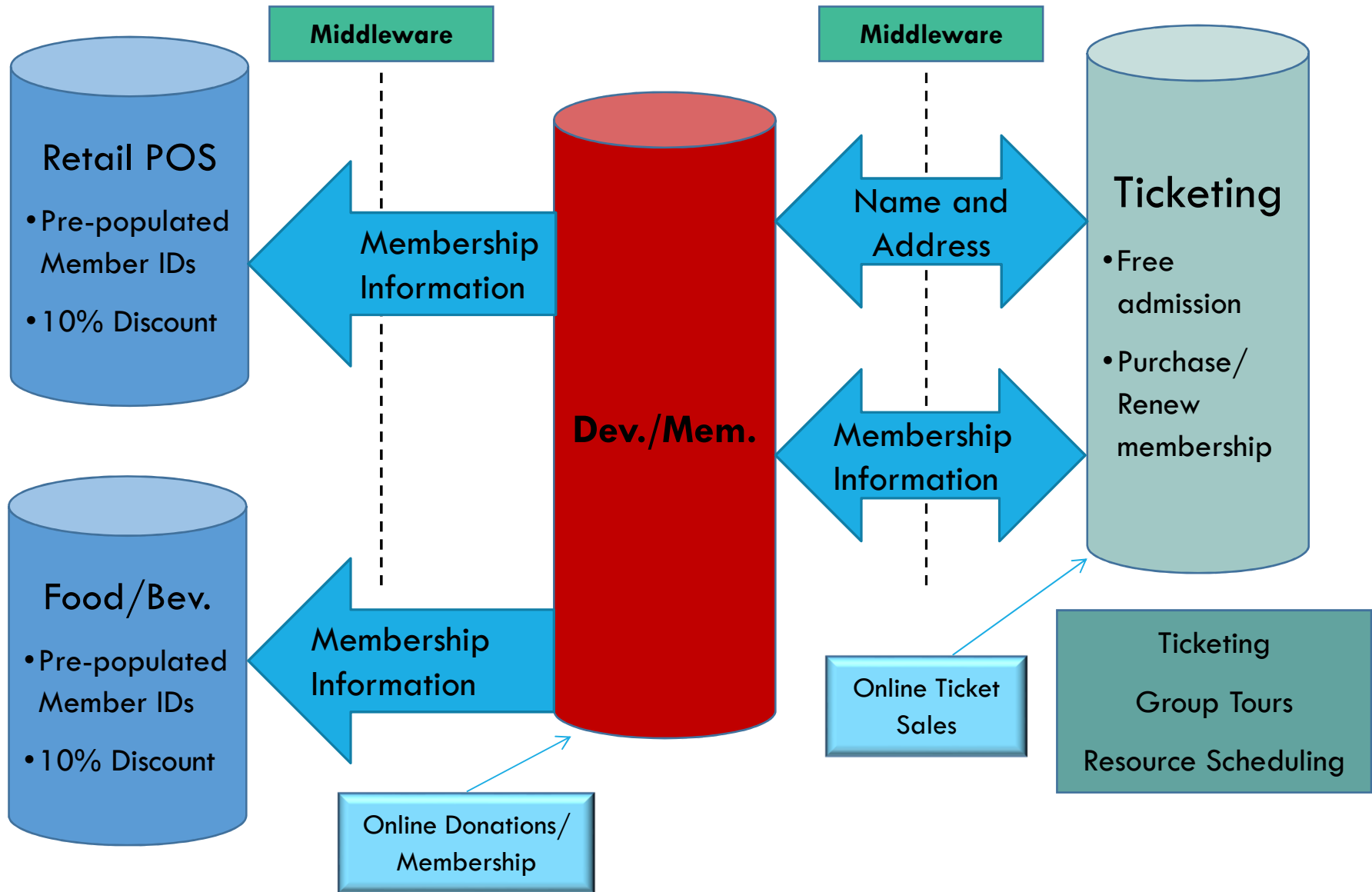
Unified Systems

- Pros
 - Common data in one system
 - One application and one set of tools to learn
 - Lower cost of ownership (maybe!)
- Cons
 - May sacrifice functionality for convenience
 - Can be an all or nothing proposition
 - Getting everyone on board

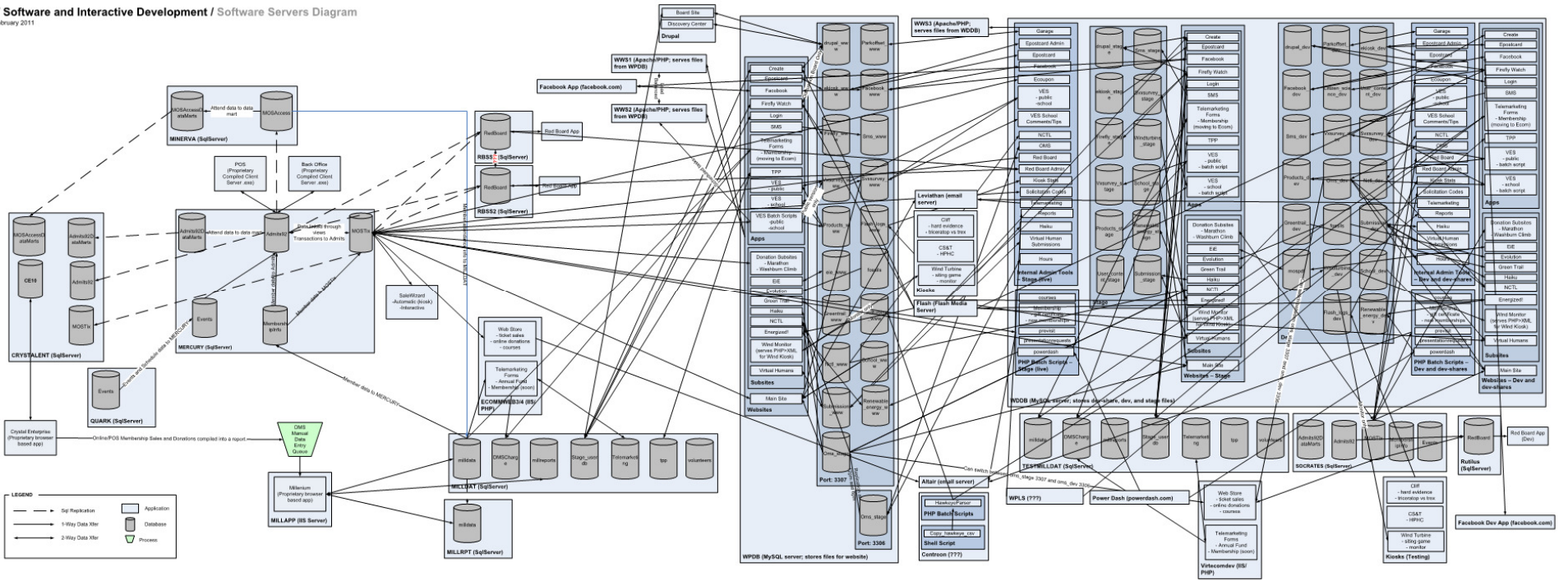
Integrated Systems



DATA INTEGRATION



// Software and Interactive Development / Software Servers Diagram
February 2011



...just because we can does not mean we should...

Integrated Systems

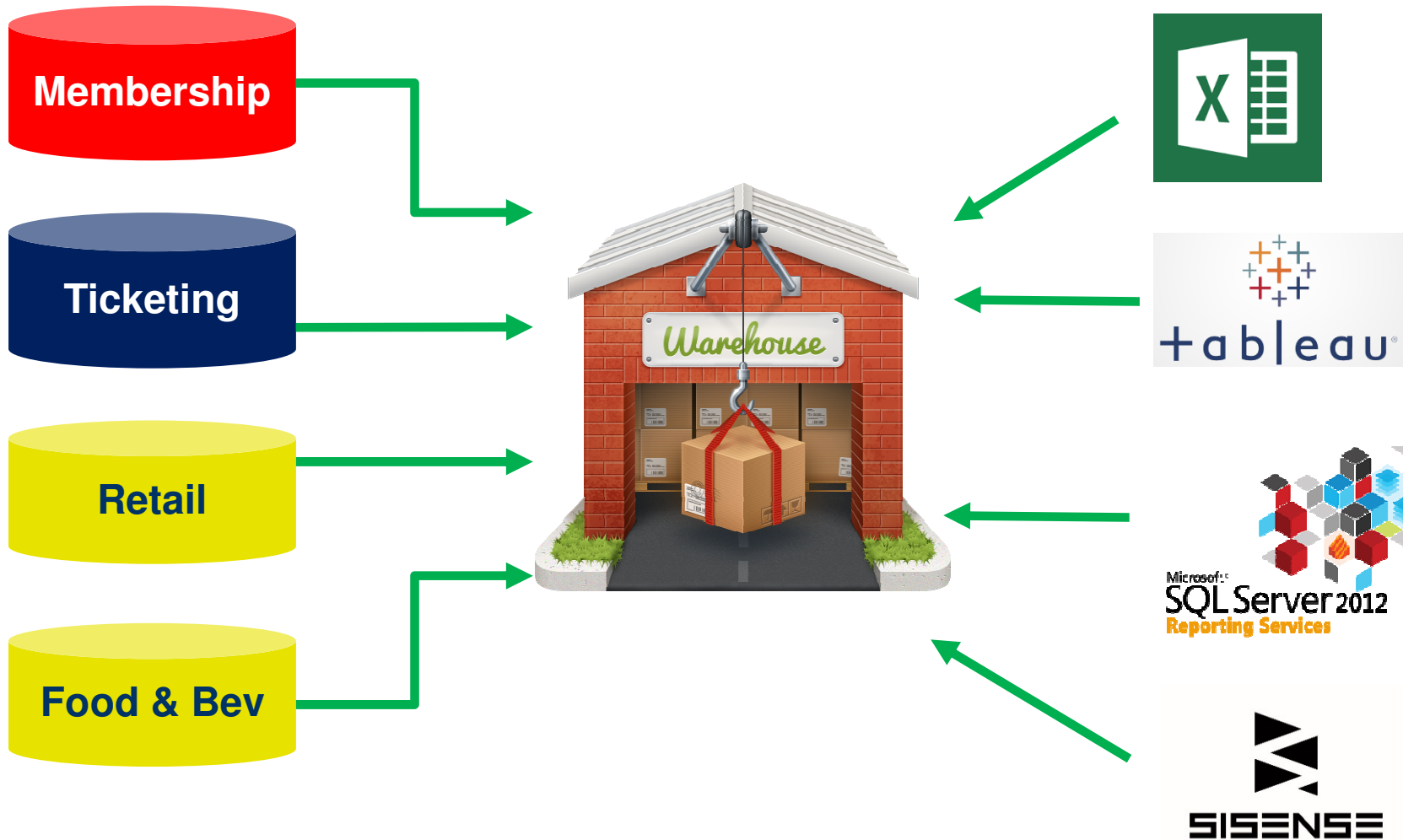
- Pros

- Best of breed approach keeps departments happy!
- Flexibility in establishing and maintaining business rules

- Cons

- Need to develop and maintain interface programs
- Data may not be exchanged in real time
- One or more systems may get cluttered

Data Warehouse



Tying It All Together

**It's Not All About
Technology...**

**It's Also About People,
Policies and Procedures**

Making Integration Work

- Policies
 - Institutional directive
 - Benefits and priorities defined
- People
 - Contributing to the greater good
- Procedures
 - Minimizing the pain
 - Automate when it makes sense
 - Clearly defined and documented

So, How Can This Benefit You?

- Enhanced guest service
 - Recognize high-level members everywhere
 - Renew and/or upgrade members everywhere
 - Change an address anywhere
 - Get a total 360 degree view of each guest
- Back-office efficiency
 - Eliminate duplicate data entry
 - Reduce errors and uncertainty
 - Reduce mailing and renewal costs

The End Result...



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Visitation by Member Level

Sample Museum

Arrival Dates: 01/01/2005 thru 09/30/2005

<u>ID</u>	<u>Member Name</u>	<u>Membership</u>	<u>New/Renewal</u>	<u>Expiration</u>	<u># Visits</u>	<u># Tkts</u>
4003188	Mr. Paul Aaronson	Active	New	09/30/2005	4	8
4003143	Mrs. Olga Abad	Active	New	08/31/2005	1	2
4000978	Ms. Ann Abbas	Active	Renewal	12/31/2005	2	3
4002178	Mr. Robert Abbot	Active	Renewal	04/30/2006	18	19
4001890	Mr. Barry Abbott	Active	Renewal	03/31/2006	1	2
4003102	Ms. Susan Abe	Active	Renewal	07/31/2006	3	3
4002809	Ms. Stephanie Abler	Active	Renewal	02/28/2006	3	4
4001833	Ms. Maile Ackerman	Active	Renewal	04/30/2006	1	1
4003074	Mr. Evan Ackiron	Active	Renewal	10/31/2006	4	8
4001616	Ms. Guadalupe Acosta	Active	Renewal	02/28/2006	3	7
246	Ms. Cassandra Adams	Active	Renewal	06/30/2006	1	1
4003448	Mrs. Turi Adams	Active	New	06/30/2006	1	2
4001805	Ms. Mary Adamson	Active	Renewal	03/31/2006	2	3
4002974	Ms. Mary Adamson	Active	New	03/31/2005	4	4
4001765	Mr. Rahul Aggarwal	Active	Renewal	09/30/2006	3	5
4003398	Ms. Mathilde Agoustari	Active	New	05/31/2006	1	1



Attendance: 01/01/2005 thru 09/30/2005

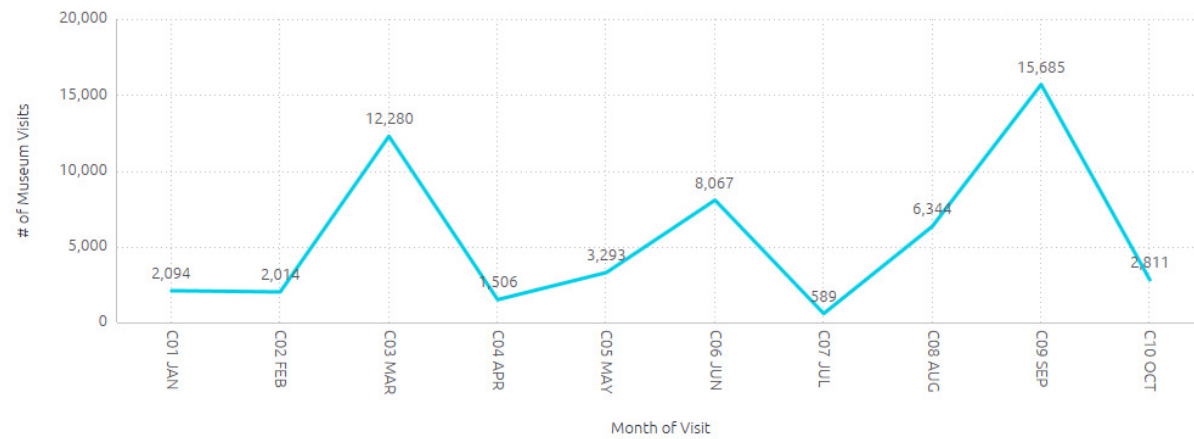
	<u>Unknown</u>	<u>9 AM</u>	<u>10 AM</u>	<u>11 AM</u>	<u>12 PM</u>	<u>1 PM</u>	<u>2 PM</u>	<u>3 PM</u>	<u>4 PM</u>	<u>5 PM</u>
Sunday	401	786	268	264	328	300	325	297	129	214
Monday	188	394	172	156	192	154	130	151	53	64
Tuesday	123	177	42	80	58	73	67	76	25	36
Wednesday	160	179	85	83	59	64	58	68	31	83
Thursday	119	201	63	90	38	104	71	81	45	34
Friday	194	322	119	128	133	142	136	121	245	337
Saturday	553	869	390	317	353	389	422	371	475	507
	1,738	2,928	1,139	1,118	1,161	1,226	1,209	1,165	1,003	1,275



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Applications, Inc.

Member Visitation Overview

Member Visitation YTD



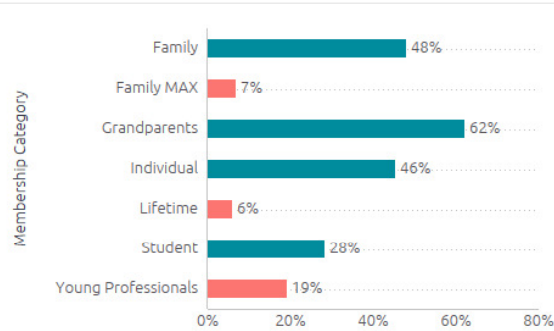
of Members with No Visits

MEMBERS WHO HAVEN'T VISITED

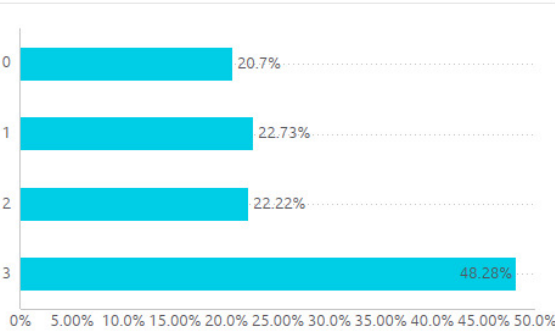
133

Renewal Rate Breakdown

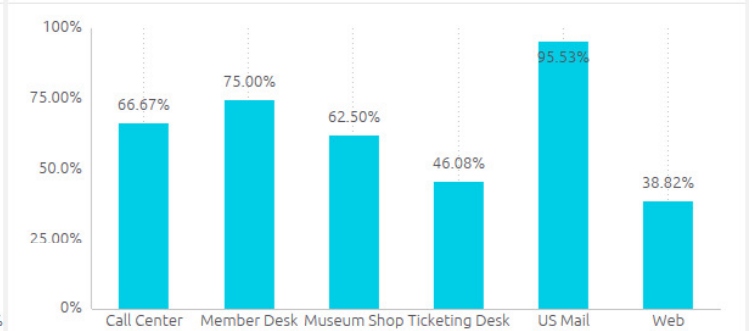
Current Renewal Rate by Category



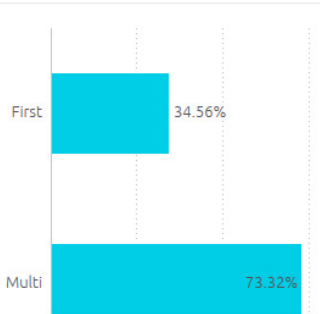
Current Renewal Rate by # of Visits



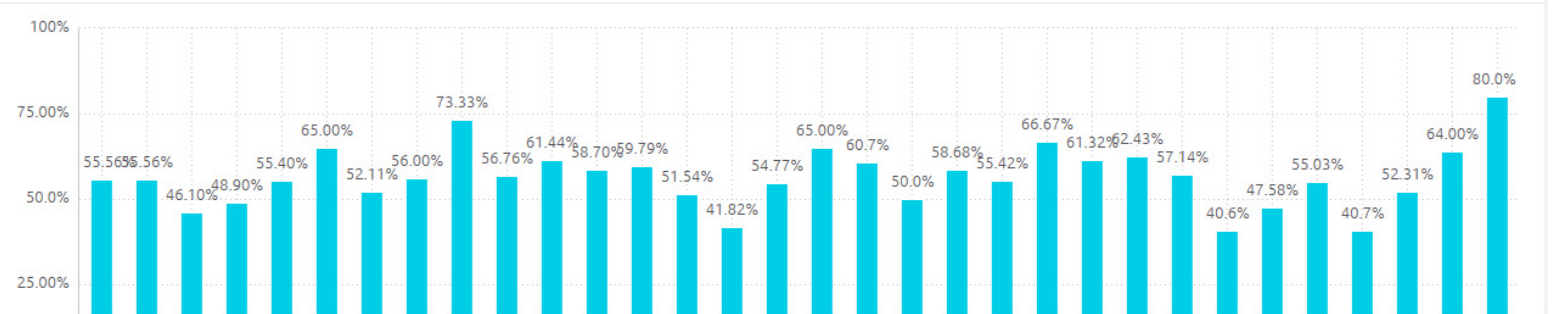
Current Renewal Rate by Purchase Location



Current Renewal Rate by...

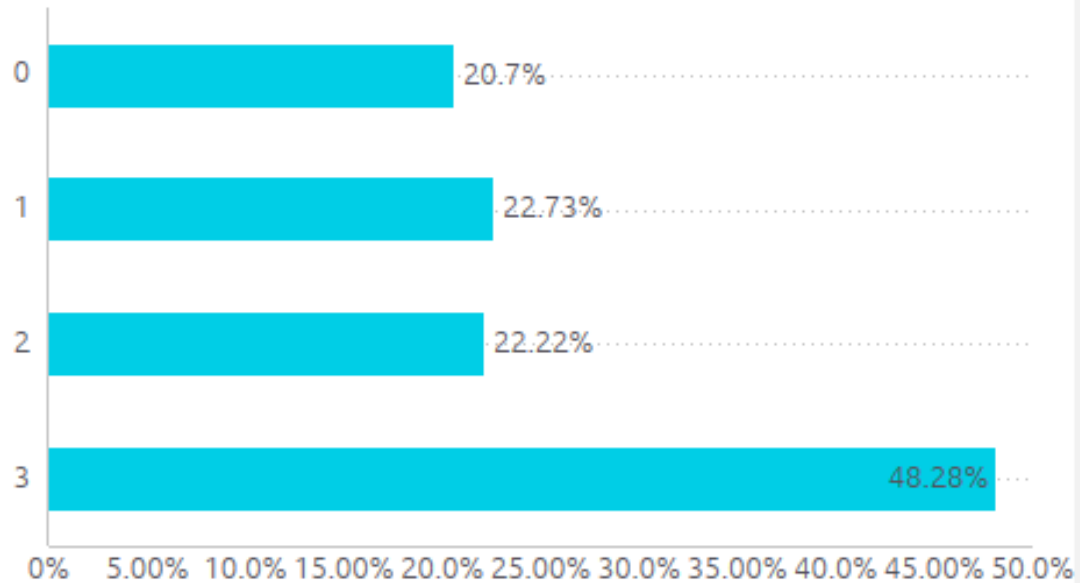


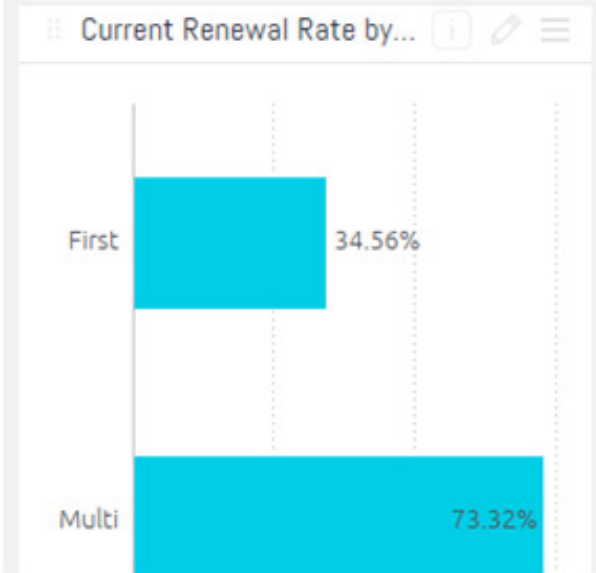
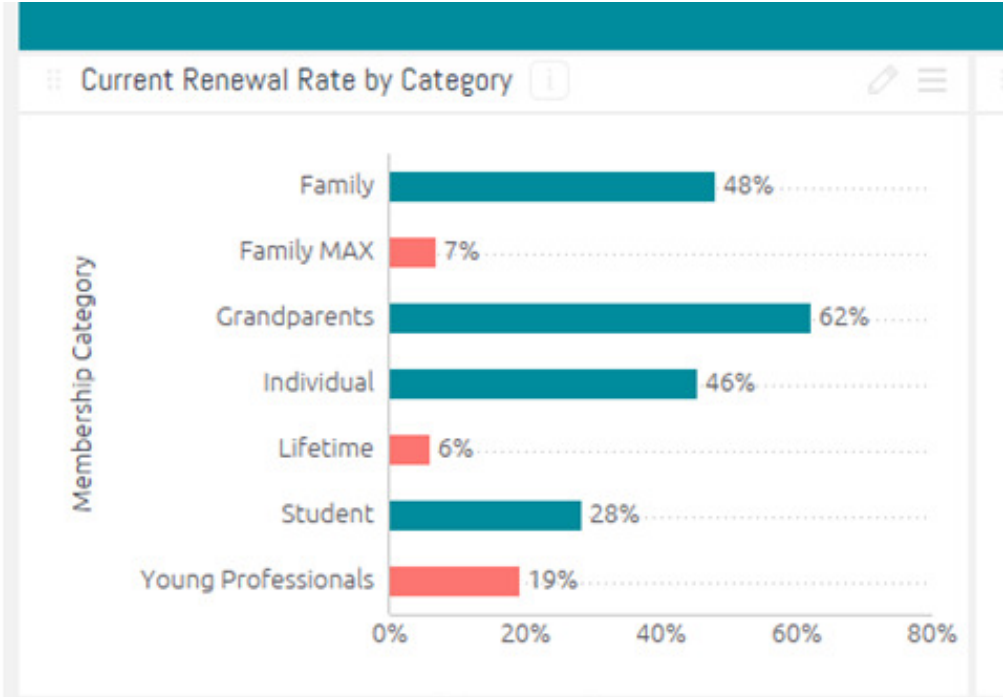
Current Renewal Rate by State



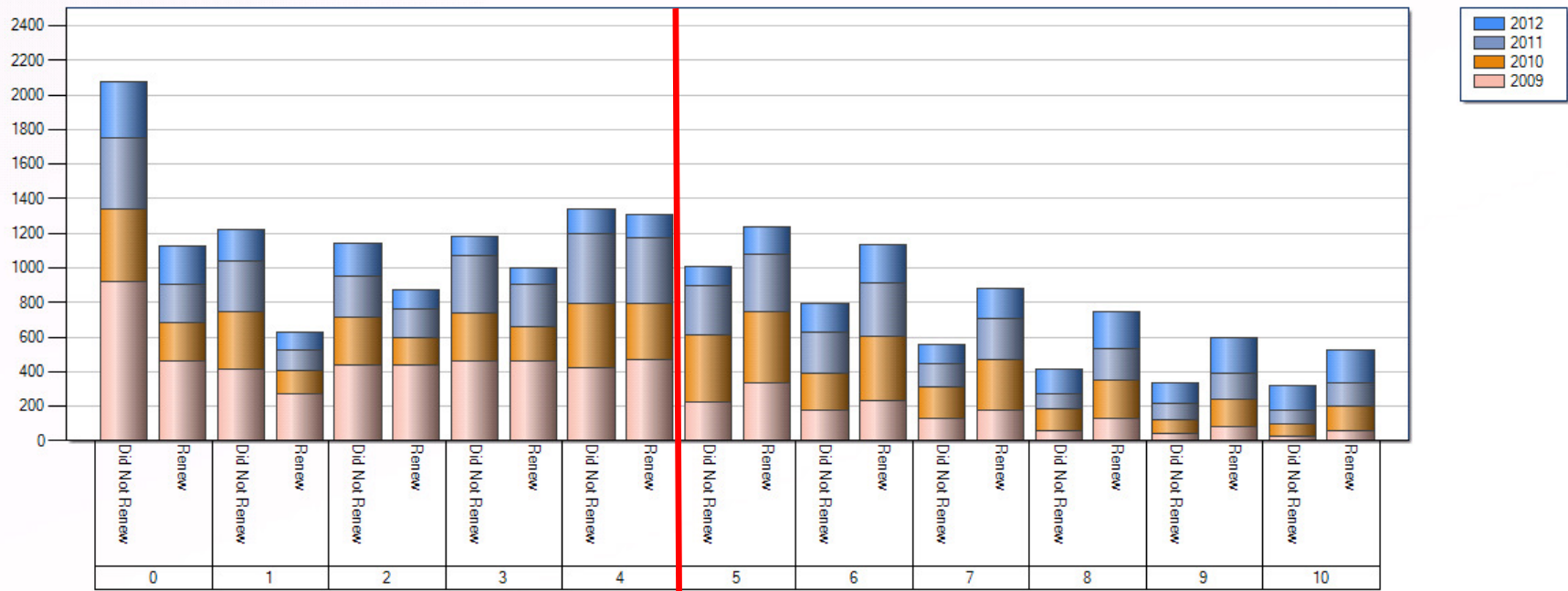
Renewal Rate Breakdown

Current Renewal Rate by # of Visits





Membership Renewal by Count of Events Attended and Expiration Year



Fairchild Tropical Botanic Garden

Ticketing system: TAM Retail

Membership system: Raiser's Edge

Integration: Member scan data is imported into RE Actions.

Analysis: Identify which groups/types of members are visiting and when.

Action: Target programming/events based on member visitation.

Asian Art Museum

Ticketing system: Siriusware

Membership system: Raiser's Edge

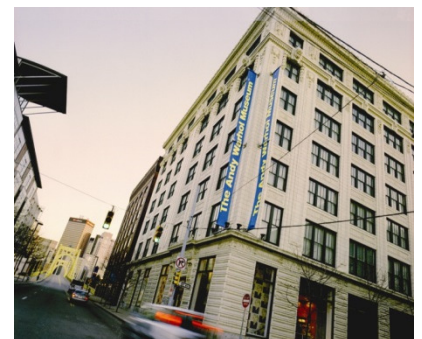
Integration: Member scan data is imported into RE Actions.

Analysis: Identify which members are attending an exhibition multiple times.

Action: Offer these members special access.

Carnegie Museums of Pittsburgh

- Founded in 1895
- 4 Distinct Museums
 - Carnegie Museum of Art
 - Carnegie Museum of Natural History
 - Carnegie Science Center
 - The Andy Warhol Museum
- Serve 1.3 million people annually
- More than 27,500 basic-level member households (\$250 or less)



Impact of the Structure on Data

- Decentralized/centralized organizational structure
 - Multiple opinions, directions & priorities
 - Long, time consuming process to gain consensus
 - No consequences for “going rogue”
- Loose framework of data control
 - Complete? Accurate?
 - Do we really know what it means?

The Data Challenge



- Multiple databases
- Controlled & configured by different components
- Importance of each data point looked at through single component's lens
 - Lost member & donor prospects
 - Fragmented information about current members & donors

The Future.....



Will it look like this

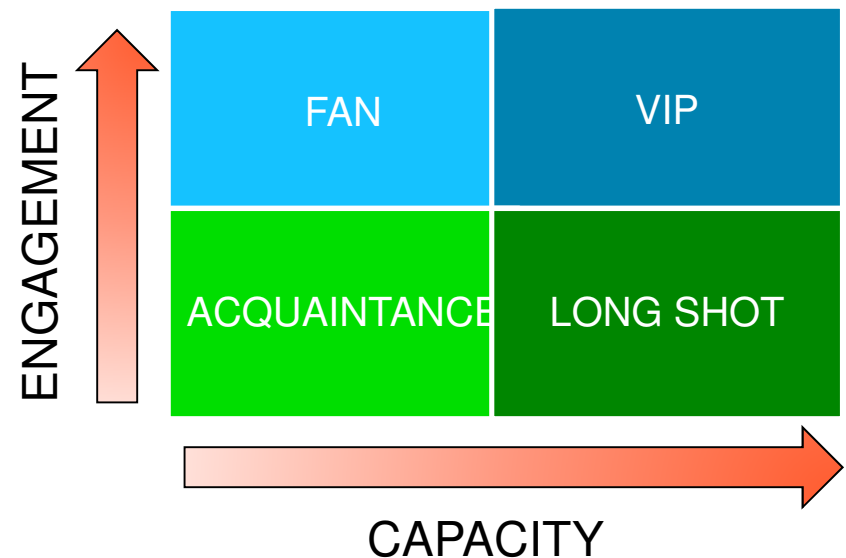
or more like Disney's
Magic Bands?

<http://www.wired.com/2015/03/disney-magicband>

**What will that
mean for our
data systems?**

Why it Matters?

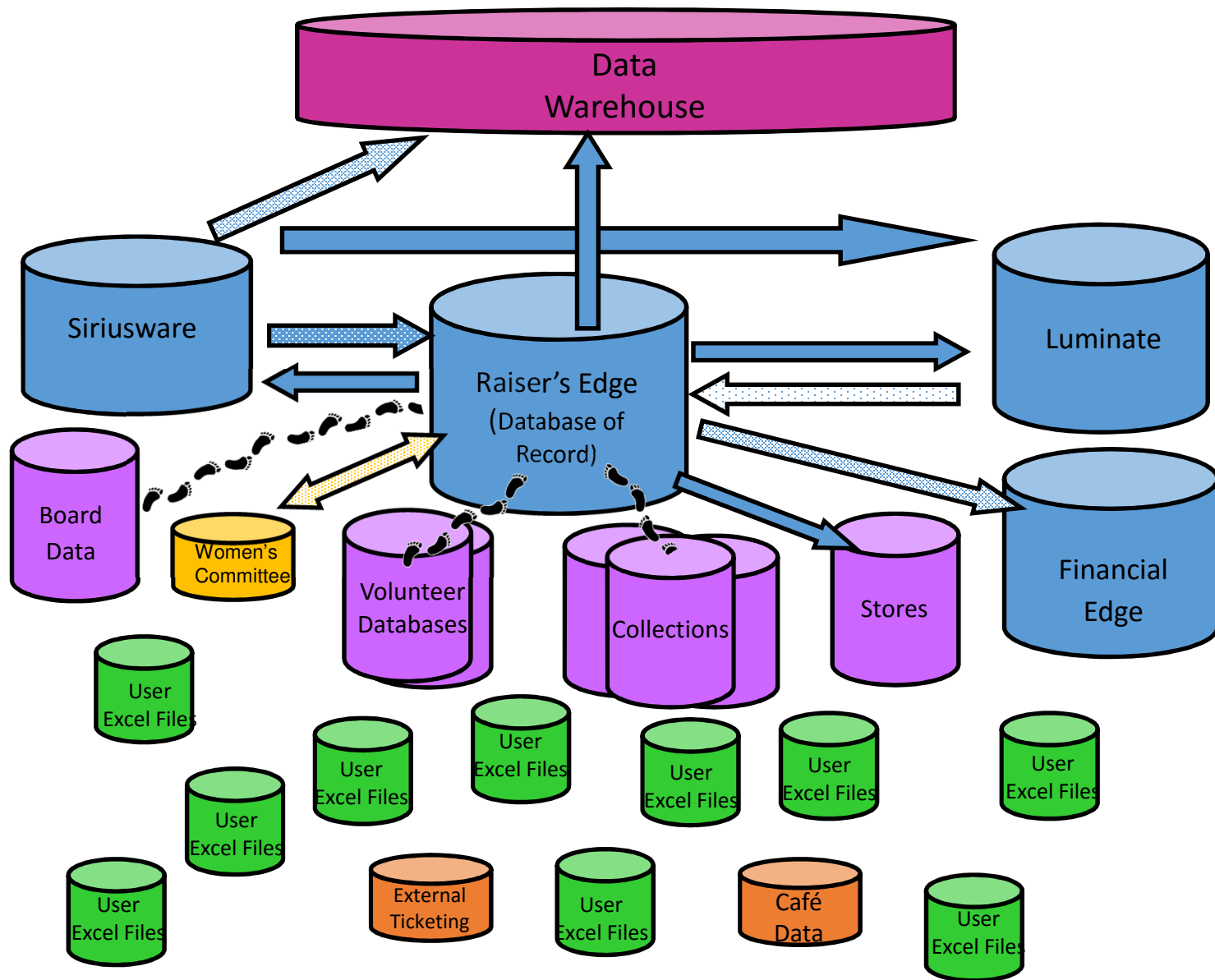
- Fairly straight forward to find capacity
- Difficult to determine engagement when data is siloed
- Without both data points we are selling our fundraising programs short



Engagement Comes in Many Forms

- In major gifts, we spend the time to profile each person
- Direct marketing relies on data driven mechanisms
- Need 360° view of constituents to be most effective





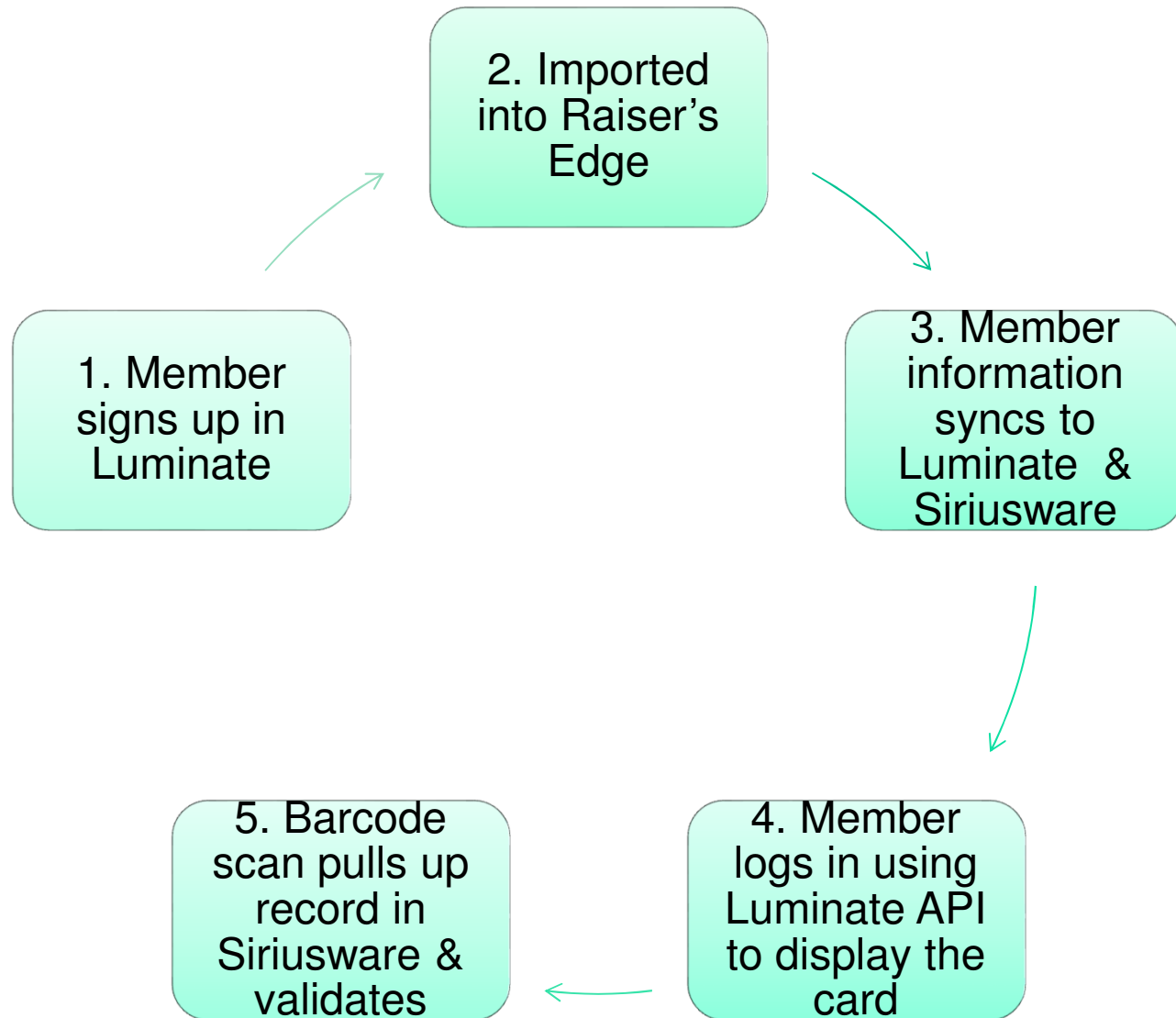
What would you do if you could....

- Identify new members who haven't visited
- Investigate which behaviors impact retention instead of guessing what they are
- Target renewal & upgrade emails based on actual member behavior
- Figure out why your on-site conversion rate is great one month and horrible the next

Renewal Strategy

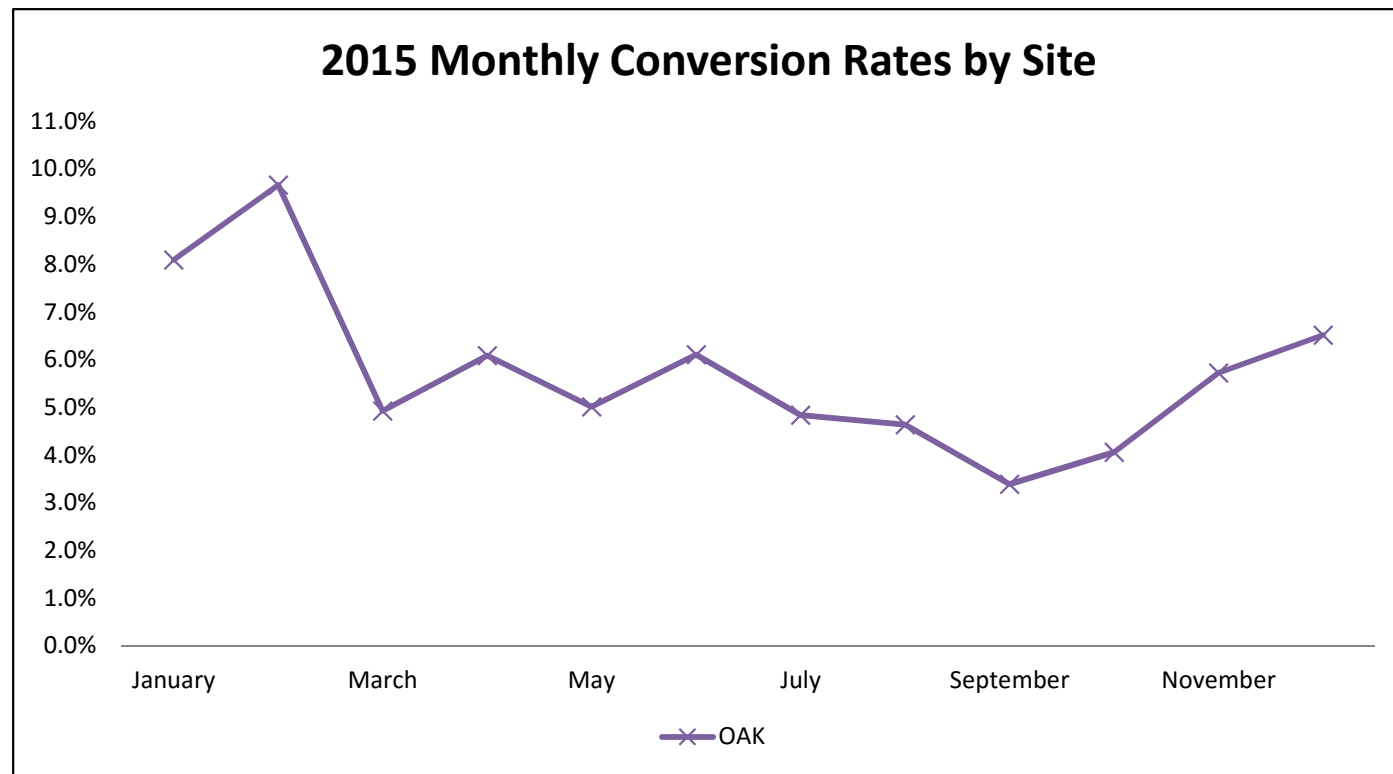
- Today: We can base the content of renewal emails on the site that of last visit
- This Year: Automatically email a list of new members who haven't visited so we can encourage visitation
- In the Future: Incorporate more behavior data to determine what's most likely to prompt renewal, encourage that action & use it in renewal messaging

Mobile Member Card/Recurring Giving



Onsite Sales & Conversion Rate

- Difficult to impact without real-time information
- Hard to identify causes of fluctuation



Conversion Rate: $\text{New \& Rejoin Member Sales} / (\text{Paid Individual Admission} / 4)$

On-Demand Dashboard

Conversion Dashboard - Oakland

Last 7 Days

Conversion Rate

CONVERSION RATE
6.61%
Goal 7.00%

New Member Sales

MEMBER SALES
54
Gift Amount \$6,785

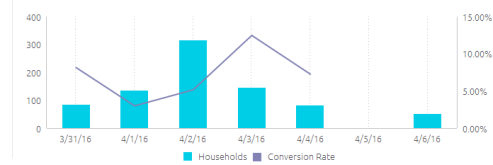
All Member Sales

MEMBER SALES
99
Gift Amount \$11,382

Daily Report

Date	POP Admissions	New Members	New Revenue	Conversion Rate
3/31/16	347	7	\$875	8.07%
4/1/16	541	4	\$450	2.96%
4/2/16	1,255	16	\$2,285	5.10%
4/3/16	583	18	\$2,150	12.35%
4/4/16	334	6	\$750	7.19%
4/5/16	0	0	0	0.00%
4/6/16	210	3	\$275	5.71%
Grand Total	3,270	54	\$6,785	6.90%

Daily Chart



Last Month's Performance

Conversion Rate

CONVERSION RATE
8.46%
Goal 7.00%

New Member Sales

MEMBER SALES
278
Gift Amount \$36,295

All Member Sales

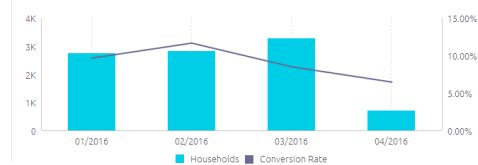
MEMBER SALES
457
Gift Amount \$55,075

YTD Performance

Monthly Report

Month	POP Admissions	New Members	New Revenue	Conversion Rate
01/2016	11,103	267	\$35,835	9.62%
02/2016	11,395	331	\$44,865	11.62%
03/2016	13,140	278	\$36,295	8.46%
04/2016	2,923	47	\$5,910	6.43%
Grand Total	38,561	923	\$122,905	9.03%

Monthly Chart



The Journey

- Adversity leads to innovation
- Acceptance of what you cannot change
- Iterations of improvement
- Given the speed of change, you will never be done



RA250
1768-2018



RA250

Royal Academy of Arts

Unlocking value from our loyal audiences

Annie Wong
Head of Loyalty & Partnerships Development



Overview

1. The Royal Academy of Arts
2. What does an integrated world look like?
3. Where is the RA now?
4. What is next?
5. What will the future look like at the RA?



Royal Academy of Arts



Living Artists. Leading Art.

Art is our lifeblood

We are a working academy led by artists

We are an independent charity

From its foundation in 1768 the Royal Academy of Arts has provided a voice for art and artists. We are an independent charity led by eminent artists and architects—the Royal Academicians—and we pursue our mission through exhibitions, education and debate.



Run by artists





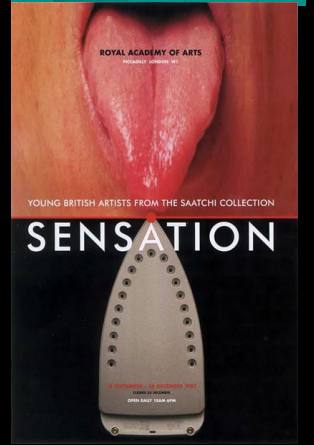
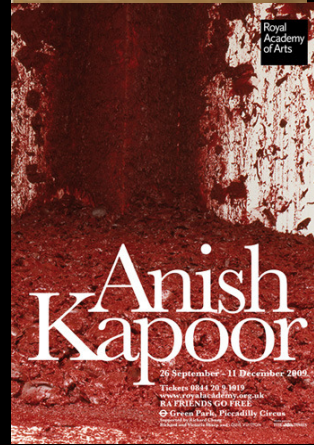
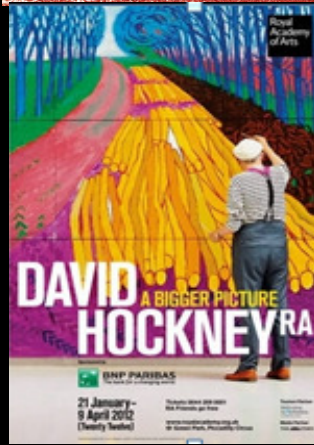
The heart of London's art scene



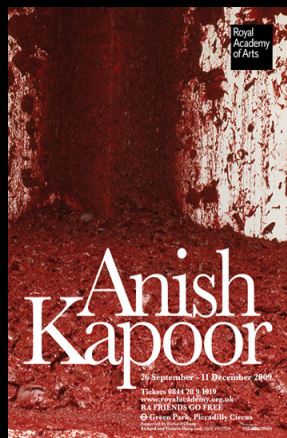
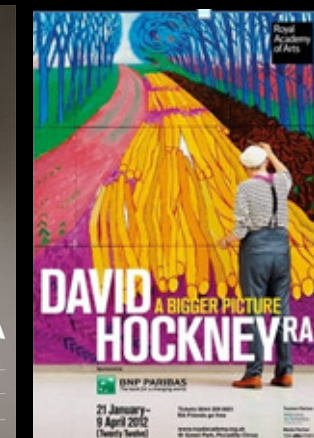
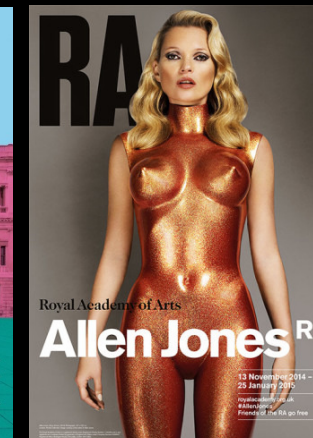
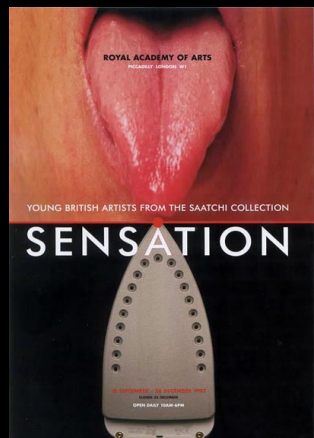


The UK's first art school





World class exhibitions





Mayfair, London

An Integrated world....

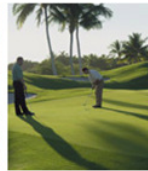
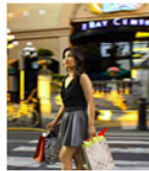


ENROLL IN FAIRMONT HOTELS & RESORTS EXCLUSIVE GUEST RECOGNITION PROGRAM...

Fairmont President's Club, a recognition program designed with your individual travel preferences, passions and interests in mind. We are committed in providing benefits and privileges that offer convenience and access to what you want when you travel.

WHICH OF THE FOLLOWING ARE YOU PASSIONATE ABOUT?

- Arts and Entertainment Family Travel Food & Drink Leadership & Philanthropy Shopping & Style Spa & Fitness Sports & Adventure



AIRLINE PARTNER PROGRAMS: (CLICK TO SELECT YOUR PREFERRED AIRLINE PROGRAMS)

MY PERSONAL STAY PREFERENCES: OPTIONAL (CLICK TO SELECT YOUR PERSONAL STAY PREFERENCES)

Smoking Preference

(Smoking rooms are not available at all properties)

- No Smoking Smoking

Bed

- No Preference One Bed Two Beds

Paper Preference

- No Newspaper Local National

Miscellaneous News Paper Preferences

Low-Fat, Low Carb & Vegetarian dishes are offered on all of our regular menus as part of Fairmont Lifestyle Cuisine

Please let us know if we can make your dining experience more pleasurable by advising us of any Fairmont Lifestyle Cuisine *Plus** preferences.

- Diabetes
 Heart Healthy/DASH(Dietary Approaches to Stop Hypertension)
 Vegan

Please let us know if we can make your stay more comfortable by advising us of any special requirements.

- Prefer room on low floor
 Prefer room near elevator
 Prefer foam pillow (please indicate allergy to feathers in Miscellaneous section provided)
 Hearing Impaired
 Visually Impaired
 Limited Mobility - Do not use Wheelchair
 Limited Mobility - Use Wheelchair

*Your health & safety is of utmost importance to us, if you have a food allergy, sensitivity or intolerance, we ask that you please speak directly to the Chef or Restaurant Manager prior to dining with us to ensure we take the proper precautions when preparing your meal.

Tailored and Detailed Global Preferences



Fairmont Fit Preferences

Fairmont Fit provides workout apparel and footwear, delivered directly to your room, for use in-room, in the gym or to enjoy in the great outdoors. A \$10 service fee per stay will apply for all Club level members and is complimentary for Premier and Platinum members.

Fairmont Fit Apparel

- Each time you stay with us Only when requested - upon reservation Clear all Fairmont Fit selections
 Women's Sizes Men's Sizes

CLOTHING & SHOE SIZE FOR WOMEN.

CLOTHING & SHOE SIZE FOR MEN.

Shirt X-Small Small Medium Large X-Large Not required

Capri Pants X-Small Small Medium Large X-Large Not required

Shoe 5 5.5 6 6.5 7 7.5 8 8.5 9 9.5 10 10.5 11 12 Not required

▶ [Women's International Clothing Sizes](#)

▶ [Women's International Shoe Sizes](#)

Where is the RA now?

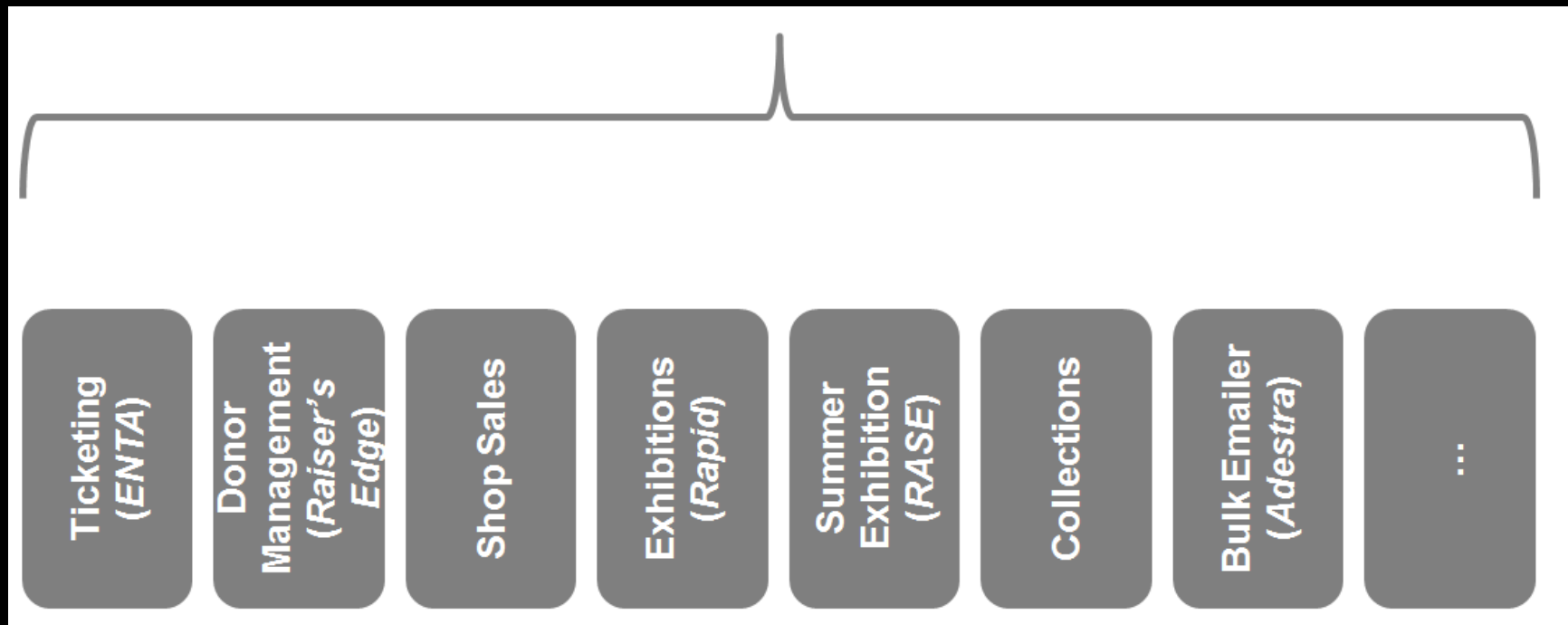
1. Focus to build customer loyalty and enhanced engagement and grow
 - a) a sustainable Friends base (100,000+)
 - b) incremental revenue to £12M+ from new and existing base (not including secondary spend)
2. Commitment to better understand our Friends to unlock value from our loyal audiences
3. Recently launched new Tech Foundation Initiative to join up databases, reporting to create ability for more robust analysis about loyal audiences



Royal Academy is at the infancy of its journey ...



Various silo systems sitting across different departments

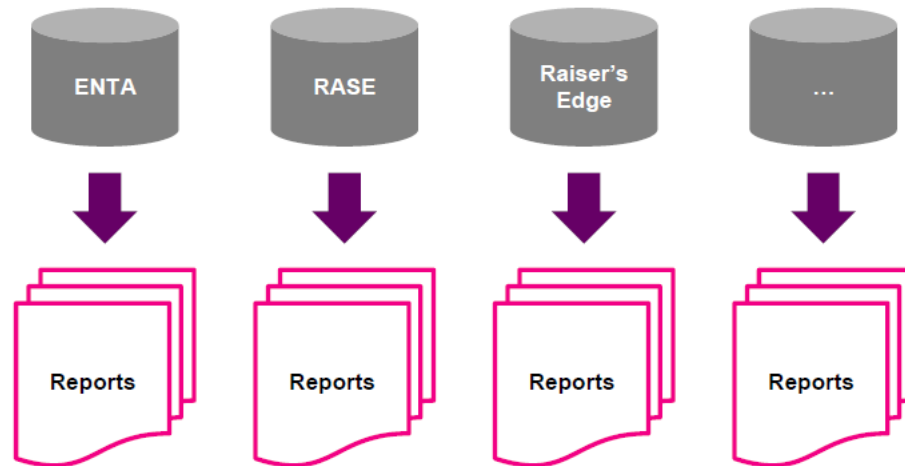


Fragmented Reporting

Our current BI Reporting takes individual 'flat' reports from separate systems that we analyse

What are the problems with the reports we currently run?

- Each report contains specific information about the data we wish to analysis.
- Reports are often extracted in different formats and stored in different places.
- Some reports are large and it is difficult to get the information breakdown we need to see quickly.
- We must be very specific about what information we want to run from our systems in order to get the right results.
- There is margin for error as reports are processed and reworked to manipulate the data to suit our purposes.



What is next for the Royal Academy?

- ✓ Know our Friends and build a lasting relationship (CRM)
- ✓ Shift organisational mind set to “one RA customer”
- ✓ Centralise systems previously run within departments
- ✓ Bring together data across all systems



Know our Friends (CRM)

“Once we understand our Friends motivations and behaviours we can use that insight to better engage, retain, and acquire more people similar to them...”

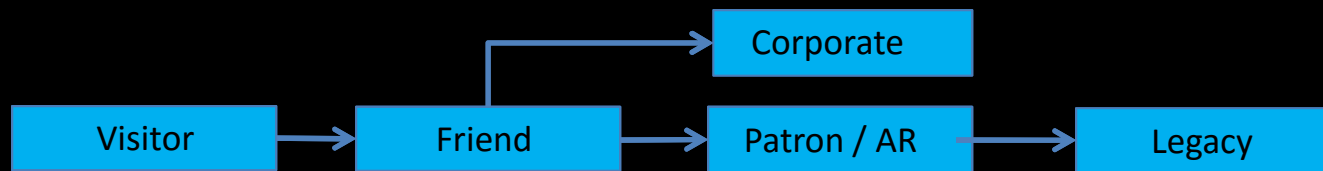
- **Identify** - what is **important** to each individual and **how they behave** – interests, motivations and behaviours
- **Recognise** - engage and retain member based on what is important/relevant to them, **acknowledges** to member that **we know** what is important to them
- **Reward** - based on actions/ behaviours and **what have they done** to help create value for RA



One RA customer view

Shift traditional way we think about customers and the income they generate; moving from transaction focused to integrated customer focused approach

- customer journey with the RA
- customer lifetime value
- comprehensive view of the value of the RA customer to the organisation (retail, events, courses & classes, food & beverage, art sales/summer exhibition)



Tech Foundation Initiative

An Integrated system

- ✓ Centralise and integrate systems previously run within departments to:
 - Better manage relationships with suppliers
 - Provide technical assistance required to get best out of systems
 - Ensure systems work for whole of the RA, not just one silo
- ✓ Bring together data across all systems
 - Give a 'single view of the RA customer'
 - Present a 'single view of the RA to the customer'
 - Centralise data reporting and tools for strategic decision-making
 - Data query tool

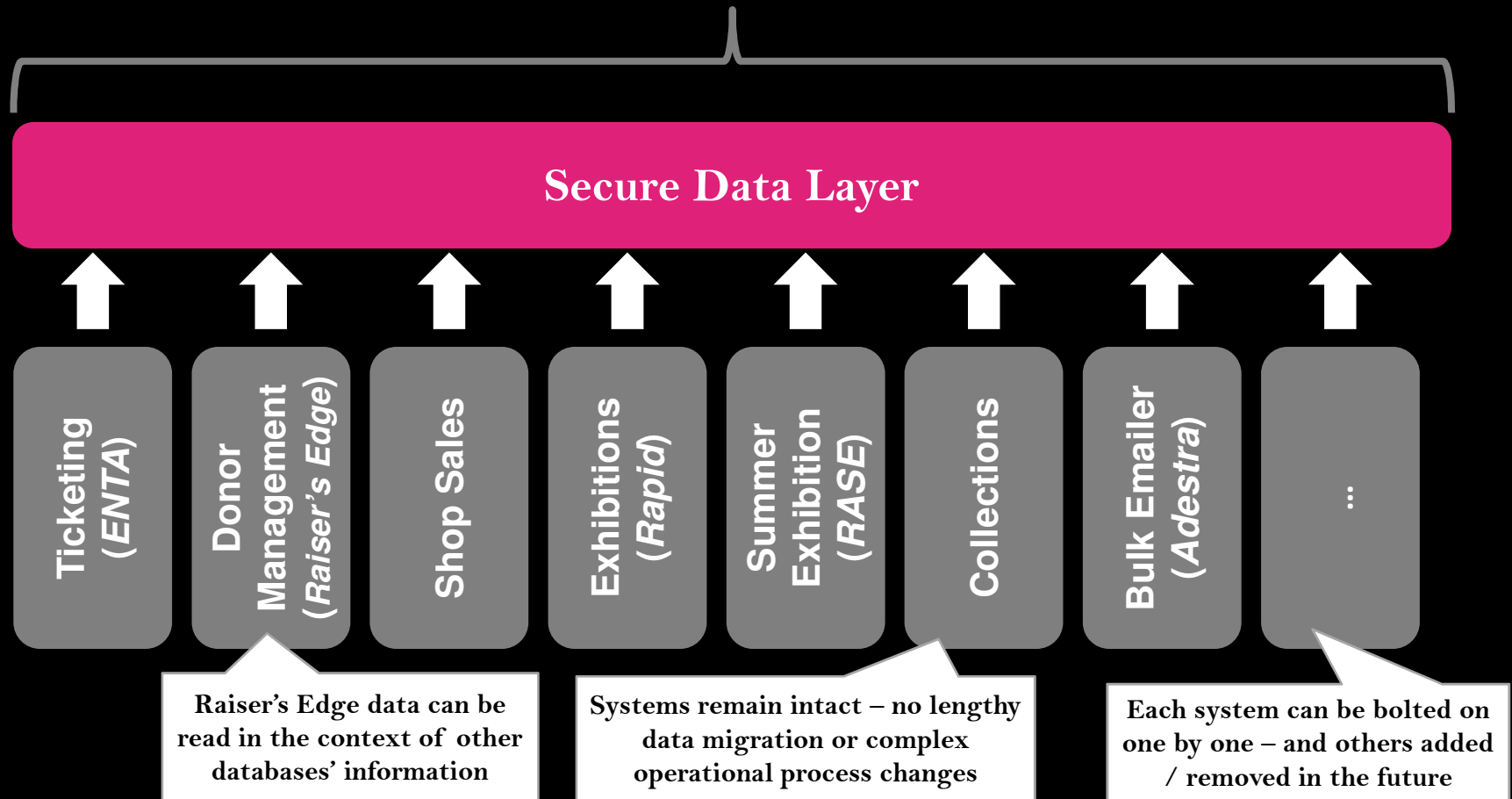
Bringing data together into a single place, along with the tools to manage it, is a catalyst for simplicity and knowledge



One RA 'secure data layer'

Bring data held in all systems together

Pulling together visiting, donor, shopping, art buying behaviours and more to get a **'single view of the RA customer'** that is truly comprehensive; enabling simple and central data reporting



RA



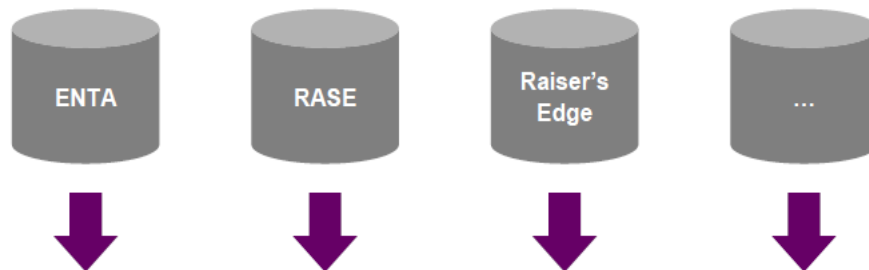
Redeveloping the Royal Academy

RA250: Plans for our anniversary in 2018

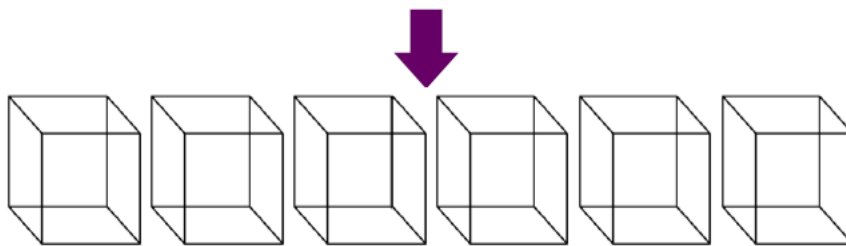
What does the future look like at the RA?

What will reporting look like in the future?

We have built a centralised data warehouse that allows 'Multidimensional' reporting



We now have one data layer that is holding all of our key customer data in one place

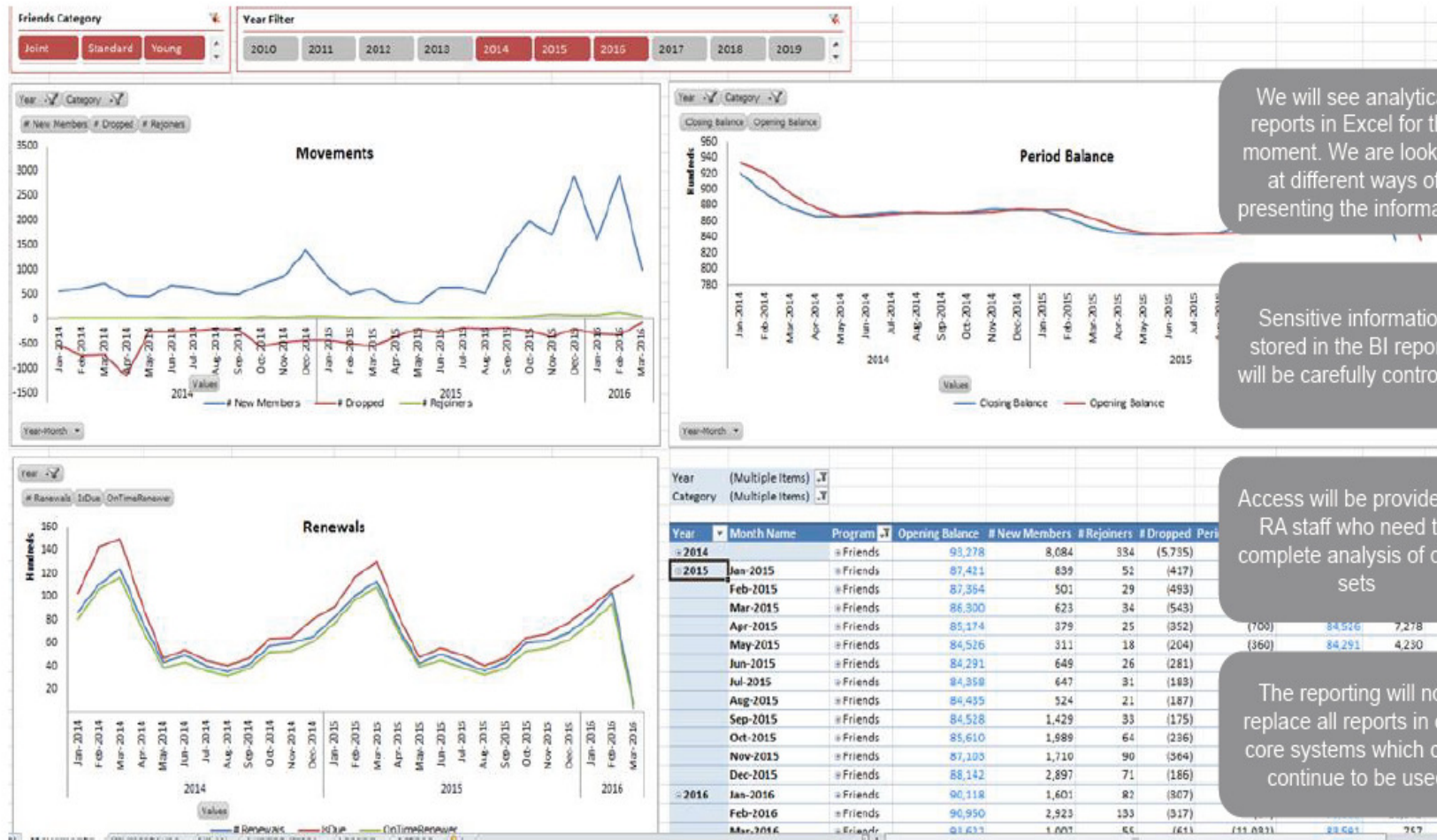


This means that individual reports for each system are now compiled together in reporting suites or 'cubes'

How does reporting now work?

- We are able to pull key data from multiple areas and multiple systems to analyse the figures they provide us with in one place.
- We can plug in multiple databases and tailor reporting to our requirements.
- The data we extract will be accurate and requires less manipulation, processing and clean up.

The BI reporting tool is a way to build up 'cubes' of data we can use to recognise trends in areas and across areas



We will see analytical reports in Excel for the moment. We are looking at different ways of presenting the information

Sensitive information stored in the BI reports will be carefully controlled

Access will be provided to RA staff who need to complete analysis of data sets

The reporting will not replace all reports in our core systems which can continue to be used

Data Query Tool (DQT)

What can the data query tool do for us?

Example Query in the Data
Extraction Module

Customers who visited [XXX] exhibition 10,000 10,000

AND

Customers who are a Friend of the Academy 90,000 7000

AND... [see nested 'OR' query below]

Who pre-booked their ticket for [XXXX] 500 500

OR

Have been a Friend for more than [5]
years 10,000 10,250

*Can be saved
for later use /
adjustment*

*1. Mutually
exclusive
total, i.e. all
unique
customers*

*2. Queries can
be layered, one
on top of the
other*

*3. Parameters of the clause can
be changed to any value you
wish*

What are the benefits?

For each area, we will find that reporting across data sets will give us a number of benefits

**Multi Dimensional
KPI Analysis**

*No siloed reporting, due
to the presence of an
overall view*



**Quick and Accurate
results**

*Reducing the processing
time on reports*



**A Centralised
reporting suite**

*Providing a 'single
version of the truth' as
we are able to report on
information in a
consistent state*

RA250 - An Integrated Site



Integrated data, communications and physical site
Celebrating 250 years



Thank You

RA Friends
of the Royal
Academy

Questions?

Jacobson Consulting
Applications, Inc.

Steve Jacobson,
President and CEO

Carnegie Museums of
Pittsburgh

Cari Maslow,
Senior Director,
Donor Relations and
Membership

Royal Academy of Arts

Annie Wong,
Head of Friends