

On-Site Late Night –  
On the Couch with  
On-site Sales Experts



# Our panel:

- \* **Ambry Capistrano, Director of Membership,  
Monterey Bay Aquarium**
  - \* **Shelley Colvin, Institutional Giving Manager,  
Bechtler Museum of Modern Art**
  - \* **Blair Evans Steck, Dir. of Membership Acquisitions,  
The Trustees**
- Host: Karen Mariani, Manager of Onsite Sales,  
Membership Consultants**



# Monterey Bay Aquarium

- \* Attendance: 2 million visitors
- \* # of Members: 78,000 households
- \* Conversion rate: 2% YTD

Members receive a MBA tote bag & two additional months free membership (OSS only)



# Bechtler Museum of Modern Art

- \* Attendance: 41,600
- \* # of Members: 1,141
- \* Conversion rate: .91%

Members receive a tote and personal letter from museum president.

# The Trustees

- \* Attendance: 1.5 million visitors (115 properties)
- \* # of Members: 50,800
- \* Conversion: it's complicated... but 15% of annual membership revenue is from on-site sales

Members receive a guidebook and car decal



# The Questions

- \* What is On-site Sales / Why do it?
- \* How is On-site Sales viewed at your organization?
- \* Structure – On-site sales people report to whom?
- \* Staffing – hiring
- \* Training – messaging
- \* Incentives – for staff and for the member
- \* Conversion rates and tracking
- \* Challenges



# What is On-site Sales and why do it?

- \* Visitors are great prospects
- \* Personal
- \* Cost effective
- \* May be only opportunity to ask
- \* Builds awareness / serves as reminder
- \* Plants the seed



# Staffing

- \* Find the right people -
  - \* Paid staff
  - \* Volunteers
  - \* Other frontline team: museum store, café/restaurant
  - \* Contractors
- \* Criteria when hiring –
  - \* Outgoing - will approach visitors, initiate conversation
  - \* Enthusiastic; enjoys the contact
  - \* Enjoys competition
- \* Hourly rate or incentive-based





# Training

- \* Importance of regular trainings & up-to-date sales manuals / materials
- \* Train prior to each major event, campaign or exhibition
- \* Utilize role playing, quizzes and contests
- \* Training a variety of different audiences to work together
- \* Messaging – the pitch



# Staff Incentives

**Boosts morale, motivation, focus and healthy competition**

- \* Possible incentives:
  - \* Monetary or gift for each membership sold
  - \* Rewards for the most sold or largest single gift
- \* Group rewards for goals met – cash or prizes
  - \* Daily, weekly, monthly
  - \* Based on number sold or conversion rates
- \* Surprise incentives
- \* Team dynamics (individual incentive vs team)



# Visitor Incentives

- \* Immediate attention / express line
- \* Premiums – I want that shirt/tote/cap!
- \* Discounts – museum store, café, programs
- \* Advance notice, previews, events
- \* Tax deductibility
- \* Challenge / matching gift

**Key words: 'Today', 'Now', 'Free'**



# Measuring Conversion Rates

## Several ways to calculate conversion:

- \* All Members / All Visitors
- \* All Members / 'Convertible' visitors (all visitors less groups, students, children, current members, etc.)
- \* All Members / Households (total attendance divided by average party size)
- \* Members / Exhibition/festival/event ticket buyers
- \* **Example: 1,400 memberships sold / 35,000 visitors = 4%**

*2%-4% is a typical conversion rate goal*

**Choose the best method for your institution, then stick to it!**



# Other Metrics

## Sales per hour or sales per day

- \* Especially during 'blitz' situations
- \* Essential calculation when working with outsourced staff

## Average gift size

- \* On-site sale average gift is often less than other sources

## Renewal rates of 'on-site' members vs. other sources

- \* On-site members often renew at a lesser rates
- \* First-year members who joined on-site are the toughest to renew... be prepared with a plan!



# Consider outsourcing...

- \* Extra manpower during high traffic events
- \* Demonstrate / train your staff by example
- \* To start (or reinvigorate) a sales program
- \* To make the case for further investment
- \* Consider costs / ROI



# Challenges - Must Haves for Success

- \* Regular/ongoing training
- \* Solid sales team (with option to bring in professionals)
- \* Strong offer with immediate incentives
- \* Smooth and timely processing
- \* Goals & measurements
- \* Buy-in from the front line team, management, and other departments



Thank you for your time and attention.  
Please contact any of us if you have additional  
questions:

- \* Ambry Capistrano: [ACapistrano@mbayaq.org](mailto:ACapistrano@mbayaq.org)
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