Straightforward Management & Consulting

HALF-DAY DIAGNOSTIC CONSULT

For: ████████████

PEOPLE

████████████████████████(report recipient), ████████████████
██████(limited participation), Joseph Yoshitomi (consultant/facilitator)

CURRENT RESOURCE/INITIATIVE REVIEW

Marketing

1. Digital

    a. Internal Email

        i.   Full List (unsegmented)

        ii.   Weekly Sends

        iii.   Weekly Attendee Thank-You Messages (manually sent)

        *Current ESP: MailChimp with PatronManager and NationBuilder
        source databases.

    b. External Email/Promotion

        i.   Dedicated emails with TheaterMania (new) and LA Weekly
            (ongoing)

        ii.   Goldstar

    c. Social: Mostly Facebook

        i.   Modest (<$███) boosted Facebook posts and ads

        ii.   Regular organic posts

      d. Website/Search

         i.   Soon to launch Google Grant/Adwords initiative

         ii. No paid SEO efforts

2. Print

      a. Direct Mail

         i.   Internal and unsegmented list

      b. Local Alternative Publication (Name Redacted)

      c. In-House Program Distribution/Ads (Name Redacted)

      d. Local Paper of Record (recently ceased; Named Redacted)

      e. Hand-Flyers

Fundraising/Development

1. End-of-Year (EOY) Campaign (Direct Mail and Email)
   a. Reached $▇▇▇▇▇ revenue goal in 2016 with decreased assistance from associated major donor relative to prior year. Anecdotally, the most successful EOY campaign to date.
   b. Supported by temporary weekly newsletter "takeover" of marketing messaging with fundraising content during EOY campaign period.
2. Some Discussion of a "Spring Campaign"
3. Board-Level Discussion and Early Planning for XXth Anniversary Campaign
   a. May become annual "Fall Campaign"
   b. Aimed at high-level donors
4. Telefunding
   a. Ad-hoc, periodic, reluctant, and very light-touch "thank you" calls performed by company members.
5. Grant/Program Funding
   a. A very large source of revenue and rapidly growing education and ▇▇▇▇▇ projects.
   b. Not discussed in detail due to time constraints.

Administrative Infrastructure

1. Databases/Software
   a. Financial: QuickBooks
   b. Ticketing: ███████████
      i. Includes some fundraising functionality
      ii. Future in question: recently received change of service notice
   c. Fundraising & CRM: ████████████
   d. ESP: MailChimp
   e. Calendar: Google Calendar
      i. Inconsistently used across the organization
   f. Not discussed: Administrative Email Platform, Project Management Platform(s), CMS, Voice
2. Communication Culture
   a. Bi-Weekly Administrative Meetings
      i. Attended except when conflicting with urgent artistic matters
      ii. Follow "Talking Stick" rules under previously agreed upon agenda developed by ████████████
         1. Meeting called for multiple goals: some to share information, some for problem-solving, decision-making, team-building, etc.
3. Reporting
   a. ███████ pulls relevant financial reports for ██████ to review and visualize.
      i. Due to duplicated entries and other irregularities, reporting numbers frequently need appropriate filtering and visualizations (charts/graphs) to accurately report to board.
   b. Other information-sharing and update reporting not formalized into comprehensive documents: calendars, marketing/fundraising updates, etc.

NOTES

- **Gratitude to all attendees of this abbreviated consultation session.**
- **Considerations below are mostly native to staff;** Joseph points to a few resources or best practices but the ideas/initiatives seem already to have latent presence… perhaps these can be activated by this mini-consultation.

CONSIDERATIONS/FOR FURTHER REVIEW

Marketing

Digital Advertising: Take efforts to segment communications to internal database contacts. Broad "newsletter" communications might be retained for larger fundraising or other organization-wide efforts. Lists might be divided into: Loyals (attend multiple shows each year and/or donate), Casuals (attend one event every year or two), Prospects (in database, but no record of attending), and Family (company/board members, committee members, high-level donors or prospective donors). Develop products and a plan for engaging these audience cohorts:

1. **Prospects:** Receive regular content-inspired email communications with general updates on initiatives, events, etc.
2. **Casuals/Loyals:** Receive the above plus pre/post event or post-gift follow-ups relevant to the program to which they donated or event attended. Casuals might receive promotions or more explicit sales messages; Loyals might receive added benefits or "deeper" content.
3. **Family:** Might receive a personalized communication on top of those above.

Increase efficacy in measuring paid, external digital efforts. Joseph to provide marketing report template to ▮▮▮▮▮▮ per request. To summarize:

1. **Paid dedicated "pay to play" email** would contain a unique discount code for each message. Tracking open and click through as well as conversion rate/ROI on these campaigns guides future advertising purchase decisions.
2. **Goldstar, TodayTix, Travelzoo and other "discount to play"** advertising opportunities are best measured in the context of revenue-per-seat; if

there would have been an empty seat, better to sell it at a penny than not at all. It is important this be done in an overall inventory management context. In general, comps are never a good idea to list, half-price/distressed inventory should be listed not much more than 14 days out, and allocations should be watched carefully. One might think of these as "aggregated group sales."

3. **Paid Social:** Use Facebook-provided metrics as guide. Try optimizing with a special landing page or pre-coded discount link to track sales. Continue to spend if ROI is positive.

4. **Organic Social:** Develop content marketing strategies for each campaign. Track response and optimize accordingly. Be sure to measure staff costs to optimize resources allocation based on return.

5. **Website/Search:** Do NOT use an agency at the start of Google Grant/Adwords initiative. Make that determination based on internally-managed optimization capabilities. For example, if ███ ██████████ is only using $2,000 (20%) of the allocated $10,000 monthly grant, and revenue from that traffic is determined to be $4,000/month, it may be worth hiring an agency to manage that grant up towards 80-90% of allocated grant funds. One might also consider light paid SEO efforts. This can be a rabbit hole (we didn't discuss in detail). Far more consultation may be prudent at a future date.

Print Advertising: "Print is dead." - Egon Spengler

Further print advertising is not recommended unless tied to specific revenue increases or large increases in advertising budgets. This can be casually calculated by estimating the total sales for period during which the print advertisement is live and subtracting coded or "expected" sales. Should print be further considered, the timing of it (layered with digital efforts) seems appropriate.

Hand flyers may continue to be of some real and perceived value.

Direct Mail: This continues to perform well for theaters across the country. But continue to measure efficacy. Consider a regular direct mail piece for every event and trading prospect/casual buyer mailing lists with other theaters. An easy and cost-effective way to do this is through ("BIG LIST"

ENTITY NAME REDACTED). Consider segmenting internal mailing lists as you did email lists too.

Fundraising/Development

Analyze 2016 EOY Campaign and Optimize for 2017

1. Schedule, Recipients, Content, Call-To-Action, Supplemental/Layered Campaign (Email Content), Etc.

Use Analysis to Determine Viability of Additional Campaigns

1. Who donated and why? Who did not donate and what messaging, donation level, etc. are appropriate for that cohort?
2. Can email content be duplicated/adapted for social channels?

Telefunding

1. This is an extraordinary resource and company-member based "portfolio management" need not be done through telephone alone (or at all).
   a. An entirely new revenue stream might be created through effort in this direction. The consultation lacked the appropriate time to delve into this matter further.

   *Launch points: study ███████████ telemarketing/telefunding efforts (Joseph can introduce to █████████████████████████████; analyze workflow of current phone volunteer hours resource/system/incentives; briefly examine outside company telemarketing/telefunding/potrfolio management systems to project possible cost and revenue estimates.

Administration/Infrastructure

Enroll staff and stakeholder in **shared organizational calendar**:

1. Production
2. Grant Program Deadlines and Fulfillment (Activities)
3. Marketing Deadlines & Non-Automated "Live" Ad Run Dates

4. Fundraising Deadlines, Events & Non-Automated "Live" Campaign Dates
    a. Consider including grant deadlines
5. Financial: Payroll, Board Reporting, Regular Audit
6. Staff Meetings

Organizational dashboard or regularly emailed/published report for the organization may gather disparate and otherwise less-networked individuals and programs.

Pareto Principle

"20% of invested input is responsible for 80% of the results obtained." In other words, you can make significant progress towards a goal putting in far less (but more focused) work than you think.

1. Goal: Increased Donations and Ticket Purchases (Generally)
    a. Tactic: Increased General Site Traffic
        i.   Tool: Launch and optimize Google Grant
        ii. Tool: Optimize Social Presence
            1. Lead Ads
            2. Repurposed Content Marketing
2. Goal: Increase Audience Attendance and Engagement
    a. Tactic: Communicate through segmented channels
        i.   Tool: Collect donations and ticket sales through one database: ███████████████████████ or Alternative
        ii. Tool: Pre/post show communications
            1. Automated emails
            2. Phone follow-up
            3. Lapsed/inactive content
        iii. Tool: On-Site engagement
            1. Joseph was pleased to see this already happening (greeting upon entry, email sign-up upon exit, etc.).
            2. There may be social/wifi and other mobile-device friendly leverage points here
3. Goal: Broadened and Deepened Donor Support
    a. Report continues… [redacted]