CRM, POS, OMG!

Navigating Data and Systems to Realize Your Institution's Fuller Potential

June 5, 2018

CompassRed | CHICAGO BOTANIC GARDEN | LONGWOOD GARDENS

Our Panel:

- Marnie Conley, Longwood Gardens
- Patrick Callahan, CompassRed
- Gwen VanderBurg, Chicago Botanic Garden
- Harriet Resnick, Chicago Botanic Garden
- Nick D’Addezio, Longwood Gardens

OVERVIEW

Patrick Callahan, ***Founder & CEO***
CompassRed

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Role of Data Within The Organization

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The Guardian

News Opinion Sport Culture Lifestyle More

Public Leaders Network

How tweeting about floods became a civic duty in Jakarta

Monsoon floods hit the Indonesian capital in 2015, sparking 100,000 Twitter conversations. Here's how those tweets were used in the rescue operation

Tomas Holderness and Etienne Turpin
Co-directors, PetaJakarta.org

Mon 25 Jan 2016 04.42 EST

< 374 1

▲ PetaJakarta.org is an online platform that transforms Twitter into an emergency data gathering and critical alert service during flooding in Jakarta. Photograph: Beawiharta/Reuters

Five major floods hit Indonesia's capital, Jakarta, in 2015, sparking more than 100,000 flood-related Twitter conversations in the city.

Jakarta, the world's second largest city, is regularly devastated by flooding during the annual monsoon. The global proliferation of smartphones has meant citizens increasingly take to social media networks to share information during emergency events like these.

most viewed in US

Liberals' worst nightmare: a second supreme court pick for Trump

Zidane steps down as Real Madrid head coach in shock announcement

The meaning of beige tights: they show what the Windsors will do to Meghan

Live Zinedine Zidane quits Real Madrid after winning third Champions League - as it happened

Trump holds prison reform summit with Kim Kardashian West

Role of Data Within The Organization

POPULAR SCIENCE

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TECHNOLOGY

Tracker Maps Reports Of Food Poisoning On Twitter

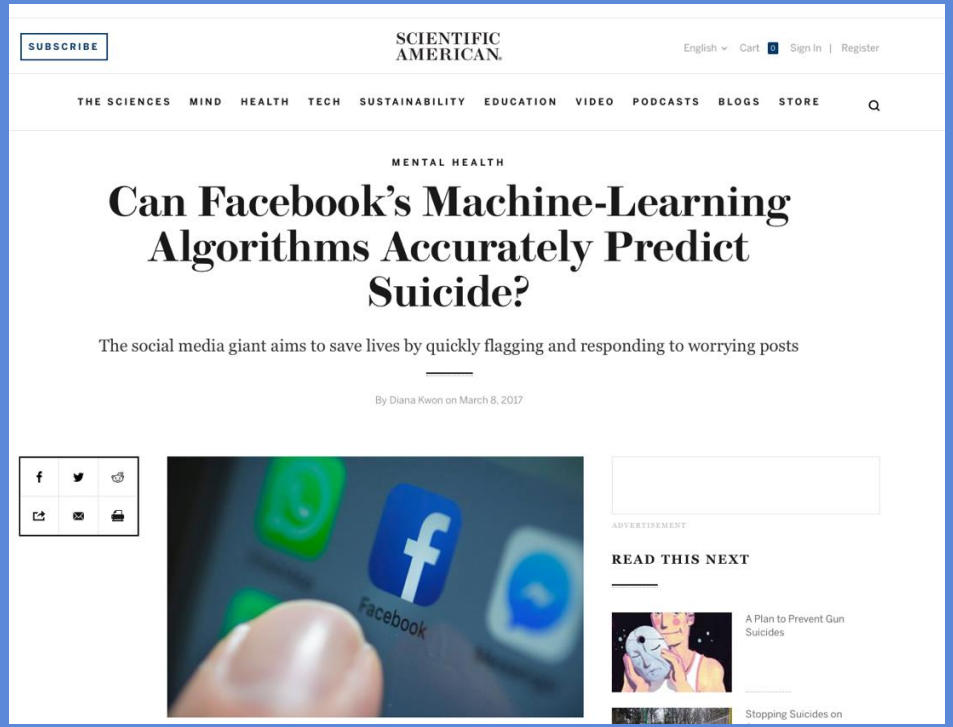
Mining tweets for illness-related complaints can tell us what restaurants to avoid when.

By Shaunacy Ferro *August 7, 2013*

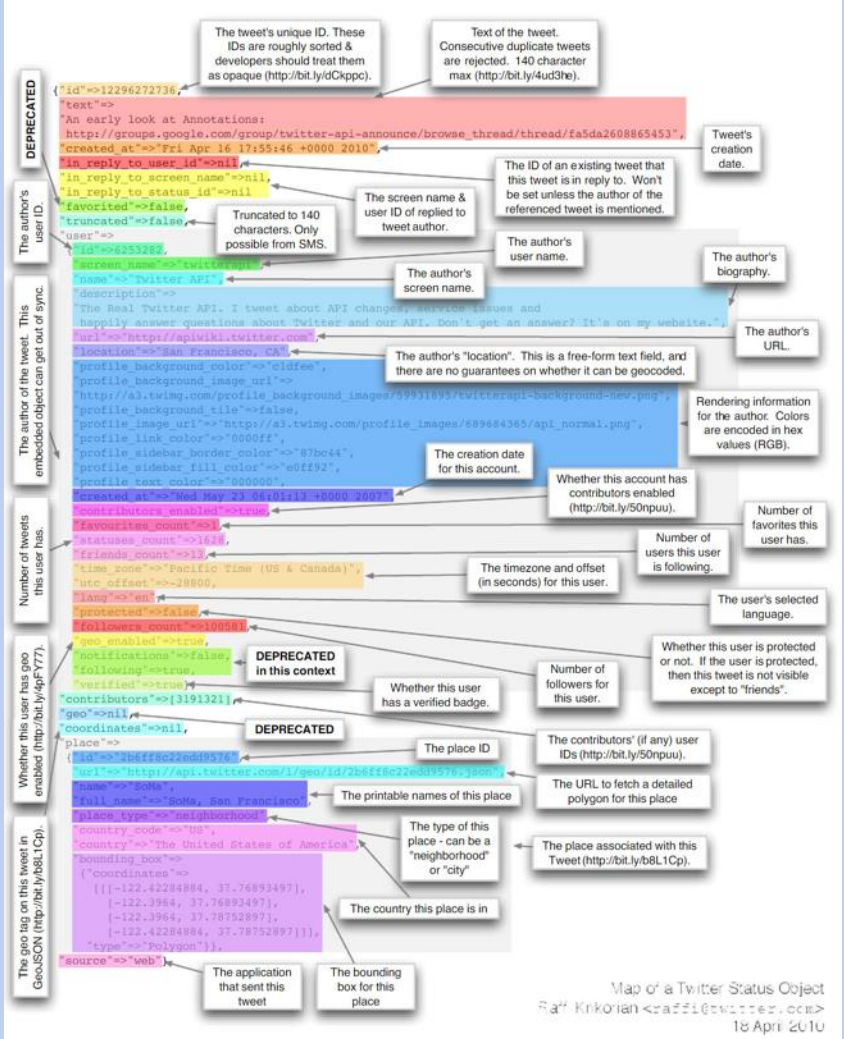
FOOD POISONING TRACKER
Sedilek et al.

Twitter isn't as much a micro-blogging site anymore as it is a data pool. It can tell us what's happening during an emergency, how people are feeling about national news events, and even the difference between a geek and a nerd. Mined for the right

Role of Data Within The Organization



The 6,000 Characters You Don’t See


The tweet's unique ID. These IDs are roughly sorted & developers should treat them as opaque (http://bit.ly/dCkppc).
Text of the tweet. Consecutive duplicate tweets are rejected. 140 character max (http://bit.ly/4ud3he).
DEPRECATED
{"id"=>12296272736,
"text"=>
"An early look at Annotations:
http://groups.google.com/group/twitter-api-announce/browse_thread/thread/fa5da2608865453",
"created_at"=>"Fri Apr 16 17:55:46 +0000 2010",
Tweet's creation date.
"in_reply_to_user_id"=>nil,
The ID of an existing tweet that this tweet is in reply to. Won't be set unless the author of the referenced tweet is mentioned.
"in_reply_to_screen_name"=>nil,
"in_reply_to_status_id"=>nil
The screen name & user ID of replied to tweet author.
"favorited"=>false,
"truncated"=>false,
Truncated to 140 characters. Only possible from SMS.
The author's user ID.
"user"=>
{"id"=>6253282,
The author's user name.
"screen_name"=>"twitterapi",
The author's biography.
"name"=>"Twitter API",
The author's screen name.
The author of the tweet. This embedded object can get out of sync.
"description"=>
"The Real Twitter API. I tweet about API changes, service issues and
happily answer questions about Twitter and our API. Don't get an answer? It's on my website.",
The author's URL.
"url"=>"http://apiwiki.twitter.com",
"location"=>"San Francisco, CA",
The author's "location". This is a free-form text field, and there are no guarantees on whether it can be geocoded.
"profile_background_color"=>"c1dfee",
"profile_background_image_url"=>
"http://a3.twimg.com/profile_background_images/59931895/twitterapi-background-new.png",
Rendering information for the author. Colors are encoded in hex values (RGB).
"profile_background_tile"=>false,
"profile_image_url"=>"http://a3.twimg.com/profile_images/689684365/api_normal.png",
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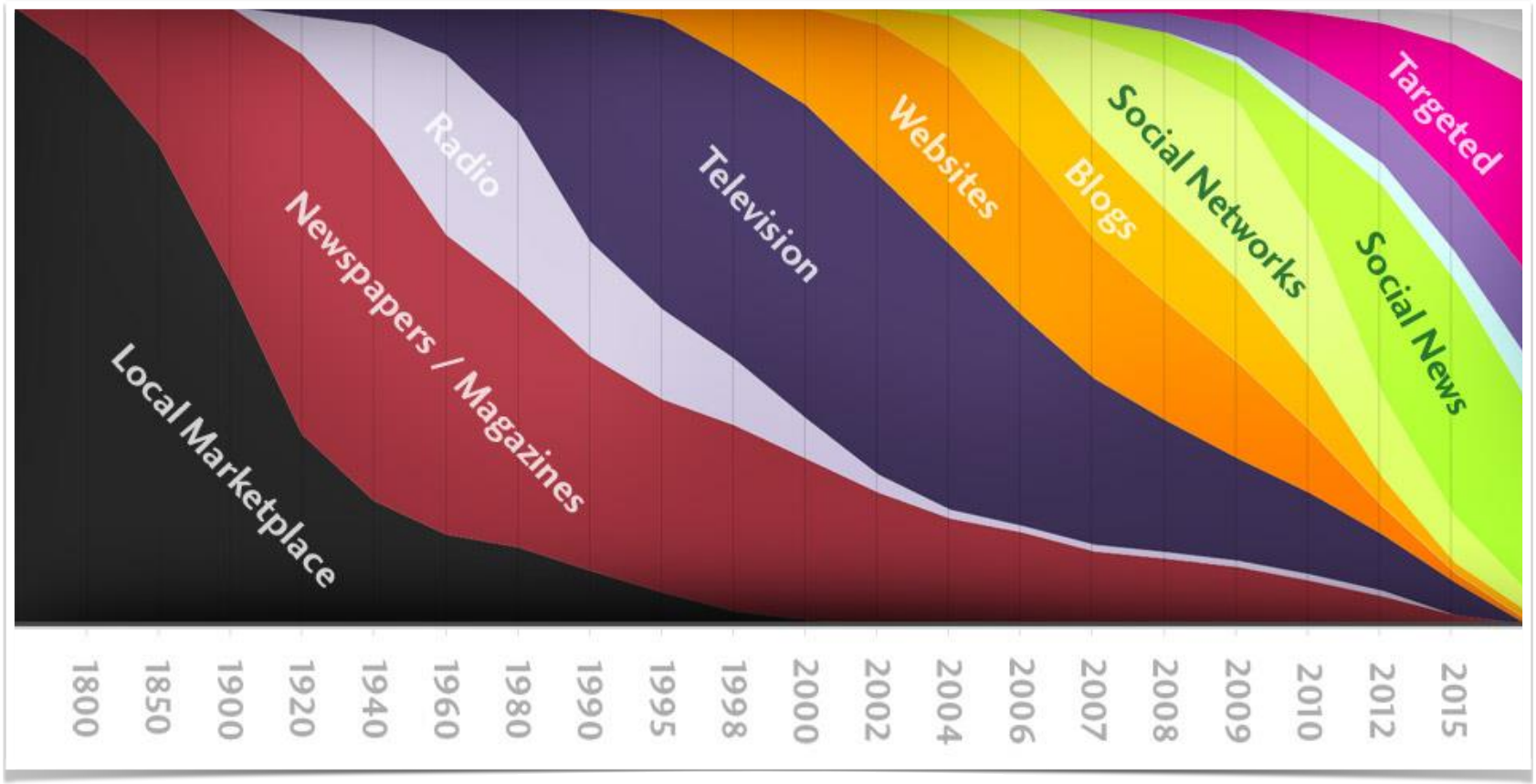
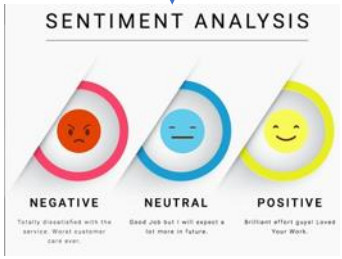
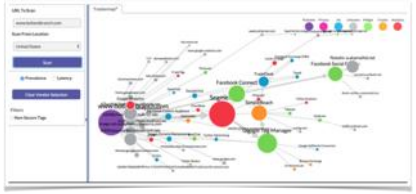
"profile_text_color"=>"000000",
The creation date for this account.
"created_at"=>"Wed May 23 06:01:13 +0000 2007",
Whether this account has contributors enabled (http://bit.ly/50npuu).
"contributors_enabled"=>true,
Number of favorites this user has.
"favourites_count"=>1,
Number of tweets this user has.
"statuses_count"=>1628,
Number of users this user is following.
"friends_count"=>13,
The timezone and offset (in seconds) for this user.
"time_zone"=>"Pacific Time (US & Canada)",
"utc_offset"=>-28800,
"lang"=>"en",
The user's selected language.
"protected"=>false,
"followers_count"=>100581,
Whether this user is protected or not. If the user is protected, then this tweet is not visible except to "friends".
Whether this user has geo enabled (http://bit.ly/4pFY77).
"geo_enabled"=>true,
"notifications"=>false,
DEPRECATED in this context
Number of followers for this user.
"following"=>true,
"verified"=>true}
Whether this user has a verified badge.
"contributors"=>[3191321],
"geo"=>nil,
"coordinates"=>nil,
DEPRECATED
The contributors' (if any) user IDs (http://bit.ly/50npuu).
"place"=>
{"id"=>"2b6ff8c22ed9576",
The place ID
"url"=>"http://api.twitter.com/1/geo/id/2b6ff8c22ed9576.json",
The URL to fetch a detailed polygon for this place
"name"=>"SoMa",
"full_name"=>"SoMa, San Francisco",
The printable names of this place
"place_type"=>"neighborhood",
The type of this place - can be a "neighborhood" or "city"
"country_code"=>"US",
"country"=>"The United States of America",
The place associated with this Tweet (http://bit.ly/b8L1Cp).
"bounding_box"=>
{"coordinates"=>
[[[-122.42284884, 37.76893497],
[-122.3964, 37.76893497],
[-122.3964, 37.78752897],
[-122.42284884, 37.78752897]]],
The country this place is in
"type"=>"Polygon"}},
The geo tag on this tweet in GeoJSON (http://bit.ly/b8L1Cp).
"source"=>"web"}
The application that sent this tweet
The bounding box for this place
Map of a Twitter Status Object
Raffi Krikorian <raffi@twitter.com>
16 April 2010

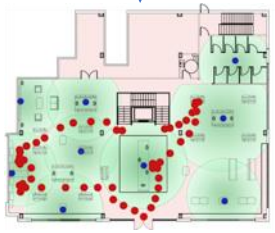
How Did We Get Here?



Where Are We Now?







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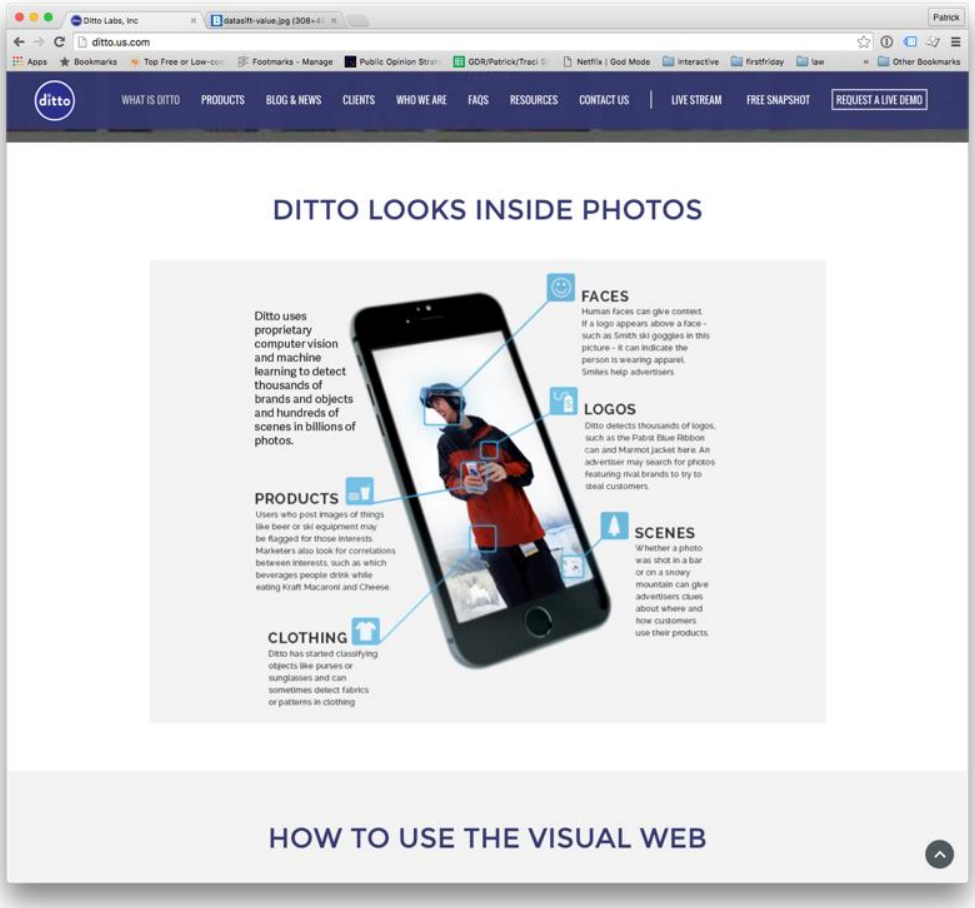
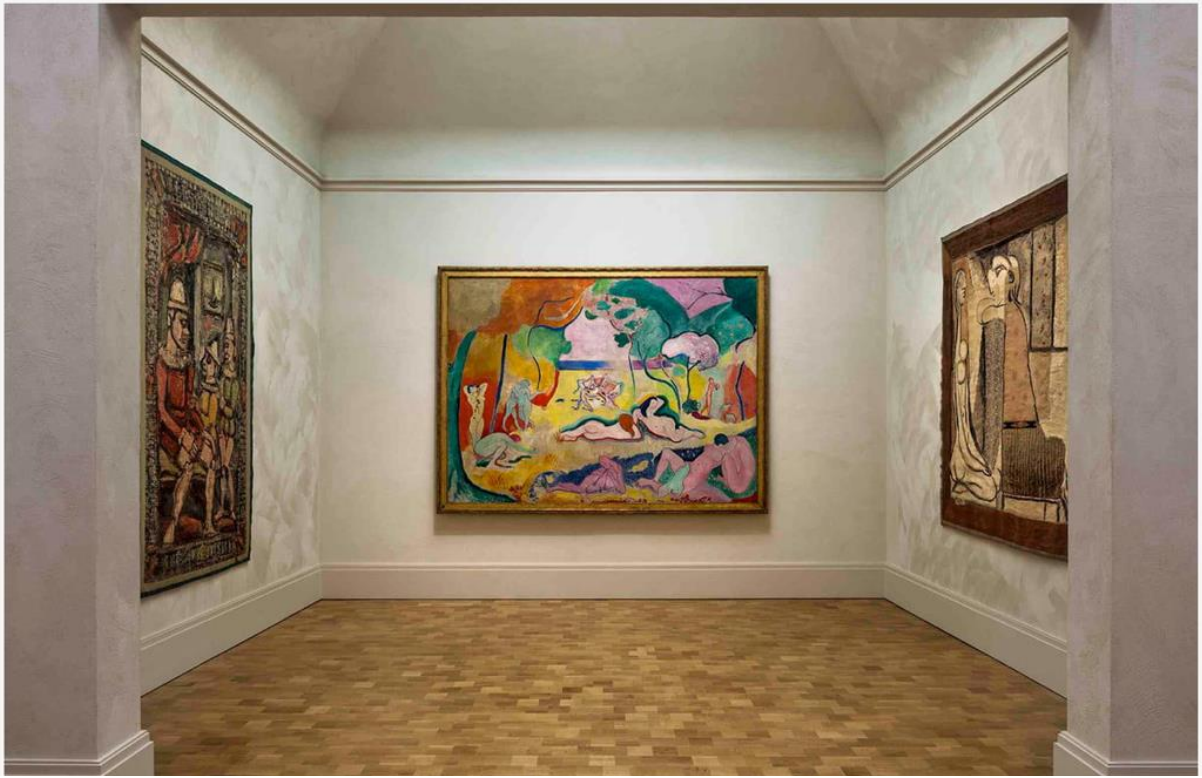
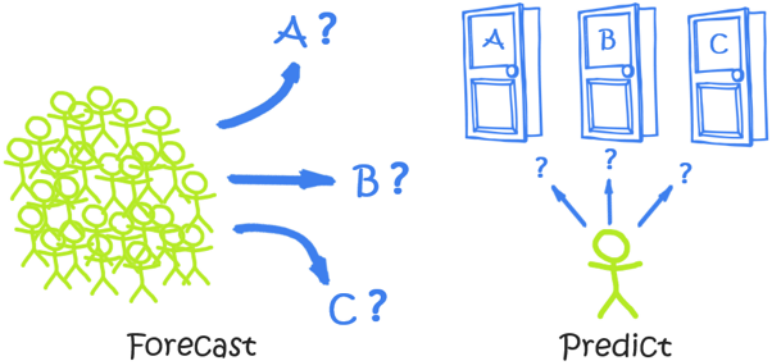

Ditto Labs, Inc
datasift-value.jpg (308×4
Patrick
ditto.us.com
Apps
Bookmarks
Top Free or Low-cos
Footmarks - Manage
Public Opinion Strat
GDR/Patrick/Traci S
Netflix | God Mode
interactive
firstfriday
law
Other Bookmarks
ditto
WHAT IS DITTO
PRODUCTS
BLOG & NEWS
CLIENTS
WHO WE ARE
FAQS
RESOURCES
CONTACT US
LIVE STREAM
FREE SNAPSHOT
REQUEST A LIVE DEMO
DITTO LOOKS INSIDE PHOTOS
Ditto uses proprietary computer vision and machine learning to detect thousands of brands and objects and hundreds of scenes in billions of photos.
FACES
Human faces can give context. If a logo appears above a face - such as Smith ski goggles in this picture - it can indicate the person is wearing apparel. Smiles help advertisers
LOGOS
Ditto detects thousands of logos, such as the Pabst Blue Ribbon can and Marmot jacket here. An advertiser may search for photos featuring rival brands to try to steal customers.
PRODUCTS
Users who post images of things like beer or ski equipment may be flagged for those interests. Marketers also look for correlations between interests, such as which beverages people drink while eating Kraft Macaroni and Cheese.
SCENES
Whether a photo was shot in a bar or on a snowy mountain can give advertisers clues about where and how customers use their products.
CLOTHING
Ditto has started classifying objects like purses or sunglasses and can sometimes detect fabrics or patterns in clothing
HOW TO USE THE VISUAL WEB

COMPUTING

Computers saw Jesus, graffiti, and selfies in this art, and critics were floored



Where Is This Going?



Where Is This Going?

Who Are My Members?		Who Will Be My Members?
Where Are They Now?		Where Will They Be Next Week?
What Do They Like?	=	What Do Will They Like Next Year?
How Many Volunteers Are Here?		How Many Volunteers Will I Need?
What is Our Current ____?		What Will Be Our Current ____?

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Hi, how can I help?
GOOGLE
PHONE CALL

ai.

It’s Time to Lean Back Again

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Can an Algorithm Tell When Kids Are in Danger?
Child protective agencies are haunted when they fail to save kids. Pittsburgh officials believe a new data analysis program is helping them make better judgment calls.

The New York Times Magazine

We help our clients use data in a better way

We combine cutting edge data science, industry expertise, and big data know-how to create insights that let our clients optimize today and predict tomorrow.

DEVELOPING A STRONGER CUSTOMER RELATIONSHIP

Presenters: Harriet Resnick, *Vice President, Visitor Experience and Business Development*
and Gwen VanderBurg, *Senior Director, Marketing*
Chicago Botanic Garden

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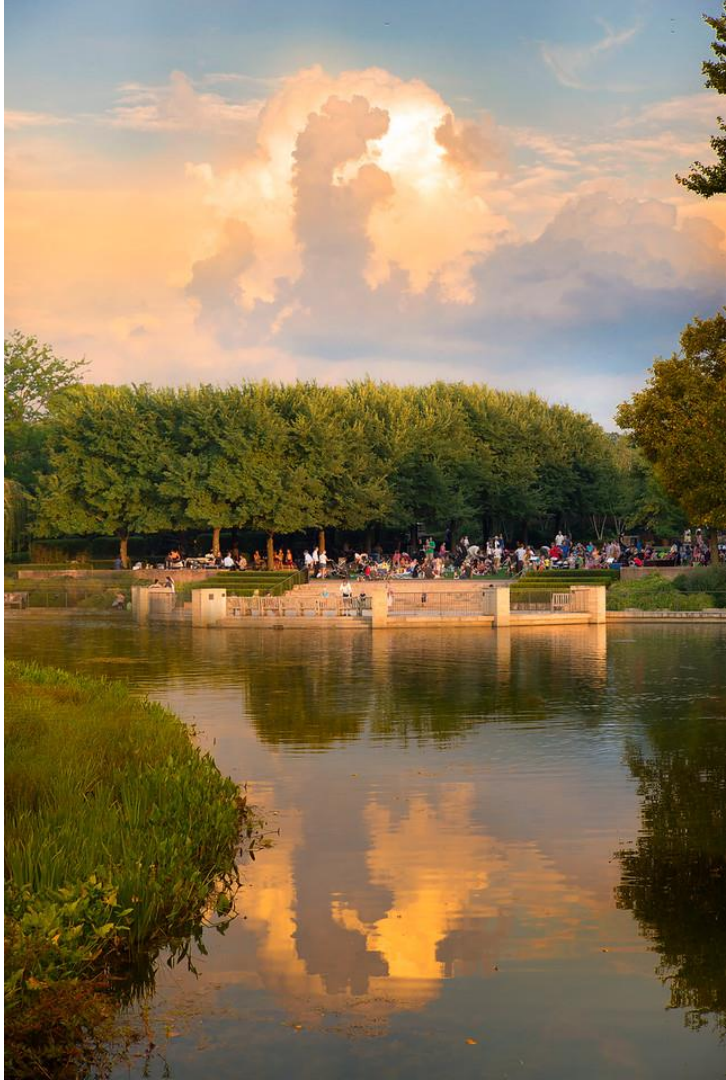
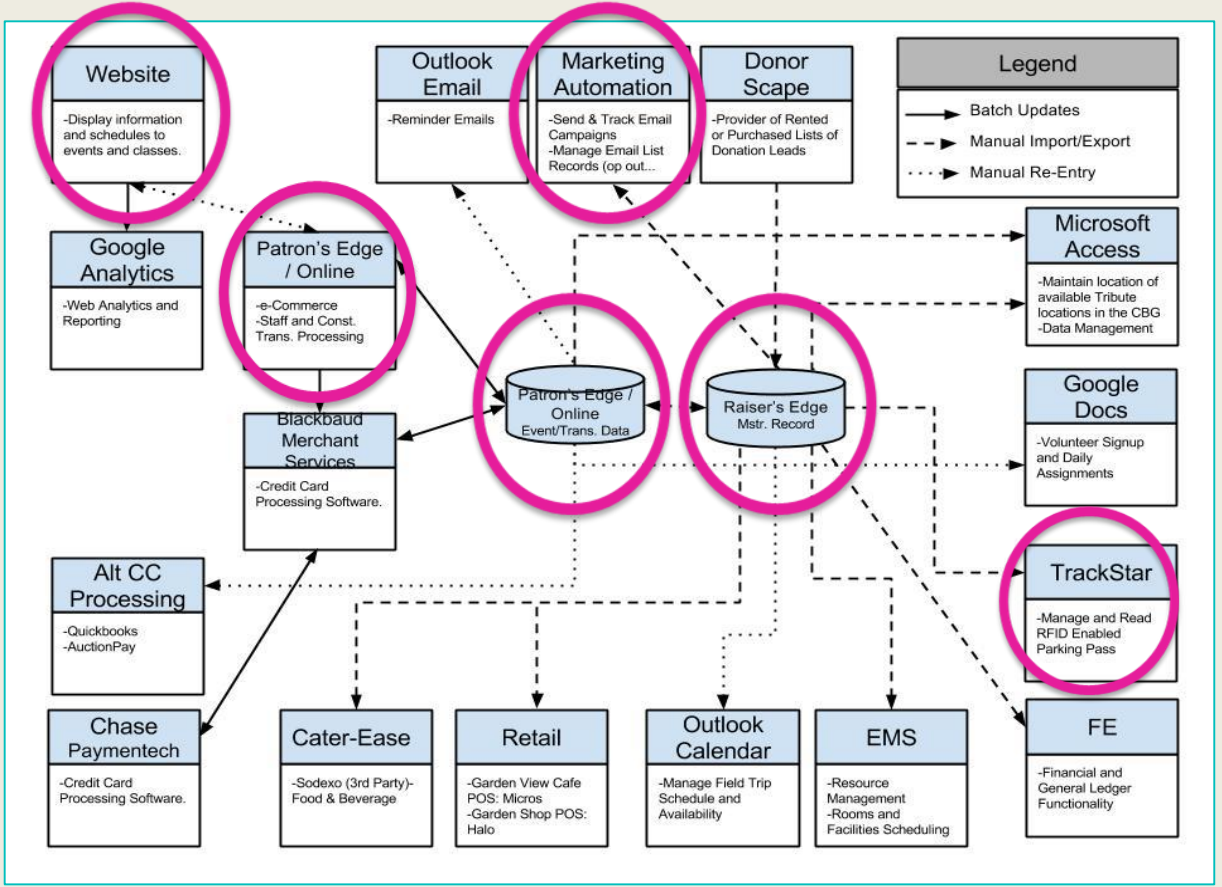
Why?

Challenges

- Ticketing system in use – support was going to sunset end of 2017
- Disjointed systems making 360 view of customer impossible
- Ticketing system in use was not responsive on mobile
- Marketing functionality was cumbersome, labor intensive, and not targeted
- Annual fund giving topped out at 5,000 donors with a member base of 51,000



View of Systems



What Was The Goal?

Transform Our Business

The new system should connect us more to our donors, members and customers and ultimately generate more earned and raised revenue for the Garden

What Does This Mean?

Goals

Transactions

Reporting & Data

Communications

Operations

How Did This Get Done?

Key Elements of Any Project: Leadership, Time and Money

Leadership:

- Appointed a Vice-President to be the project lead
- Cross-departmental Core Working Team
- Hired Consultant

How Did This Get Done?

Key Elements of Any Project: Leadership, Time and Money

Time:

- Prioritized time for Core Working Team within their departments to work on this – directive from CEO

How Did This Get Done?

Key Elements of Any Project: Leadership, Time and Money

Money:

- Initial seed money to hire consultant to review business process and execute RFP

- Vendor selection, lead to overall project budget, Board approved additional funds

Make The Case

Financial Return

- Determine where and by how much *incremental* growth your business will see from this
- Project out long-term ROI and operating budget impacts each year
- Determine any staff costs/time savings
- Determine any additional staffing/change in existing staff roles needed due to new system

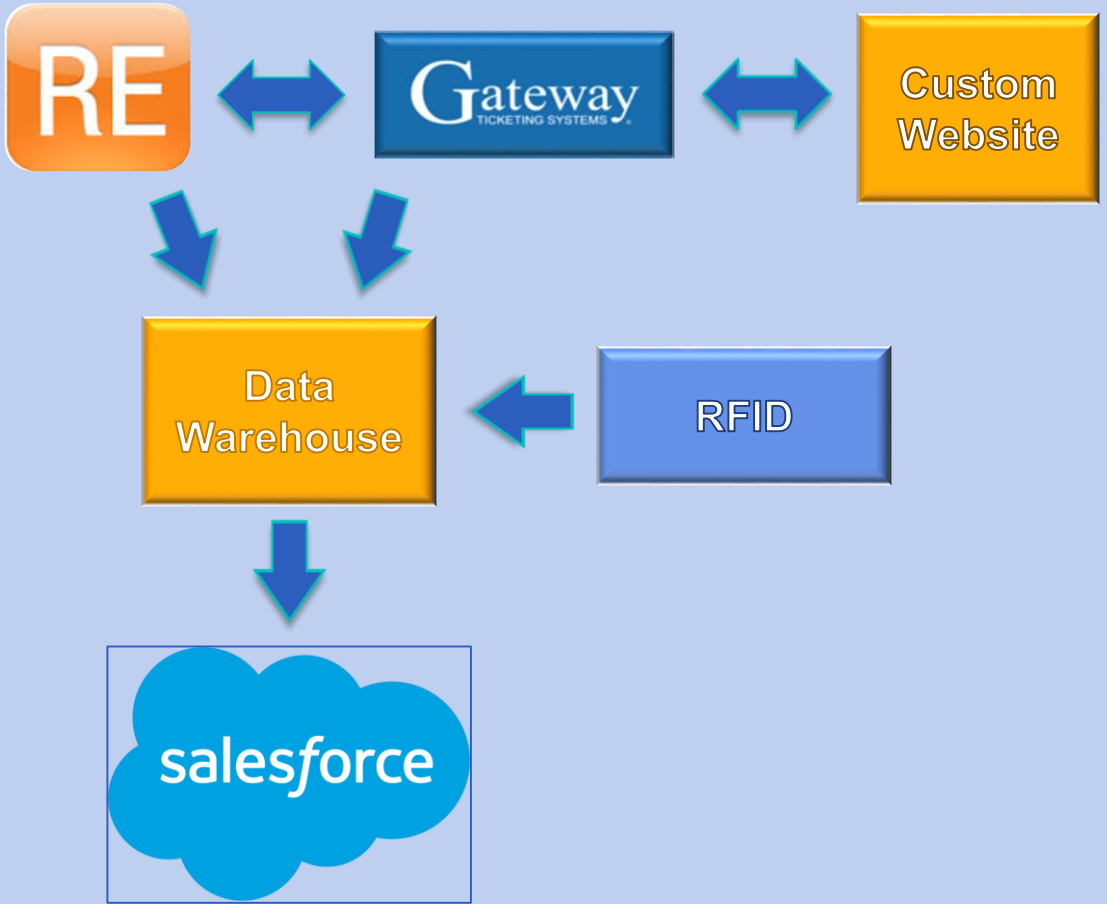
Engagement

- Business Process review sought input from many people, many departments
- Allowed for everyone to at least have input; final business requirements were decided by smaller group and sometimes just V.P. Project Lead

Leadership:

- CEO and CFO
- Board Committees
- Chairman of the Board
- Full Board

Our Solution



Challenges & Facts

- Bumps Along the Road
  - Managing vendors
- Time Line
  - Business Process Review and Vendor Selection – 4 months
  - Build & Implementation – Phased over 18 months
- Cost
  - Scalable for the size and scope of your organization and project
  - Ongoing annual costs of support and maintenance

Results & Opportunities

- Ecommerce sales significantly higher
- Audience segmentation now feasible – with data
- Marketing stronger and done more efficiently
- Personalized content now an option
- New staffing roles required

Results & Opportunities

- Modernizing our internal operations
- Maximizing staff efficiencies by maximizing new technology
- Develop new business processes
- Ability to let staff develop new, more advance and up-to-date skills

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GARDEN CASE STUDY

Nick D'Addezio, ***Director, Marketing***
Longwood Gardens

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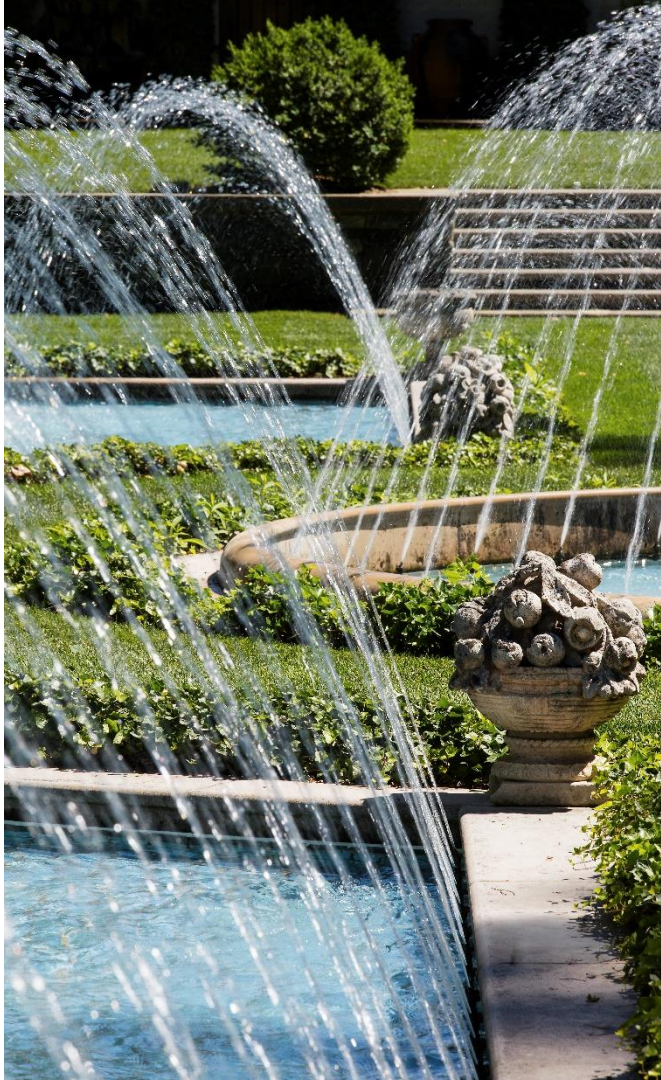
By The Numbers

1,530,000…	Annual Visitation
67,000…	Member Households
61,000…	Arts Attendees
45,000…	Students who Visit
2,431…	Alumni
800…	Volunteers
400…	Staff
50…	Guests from Every State
10…	Years Discussing Data and Systems
4…	Point of Sale Solutions

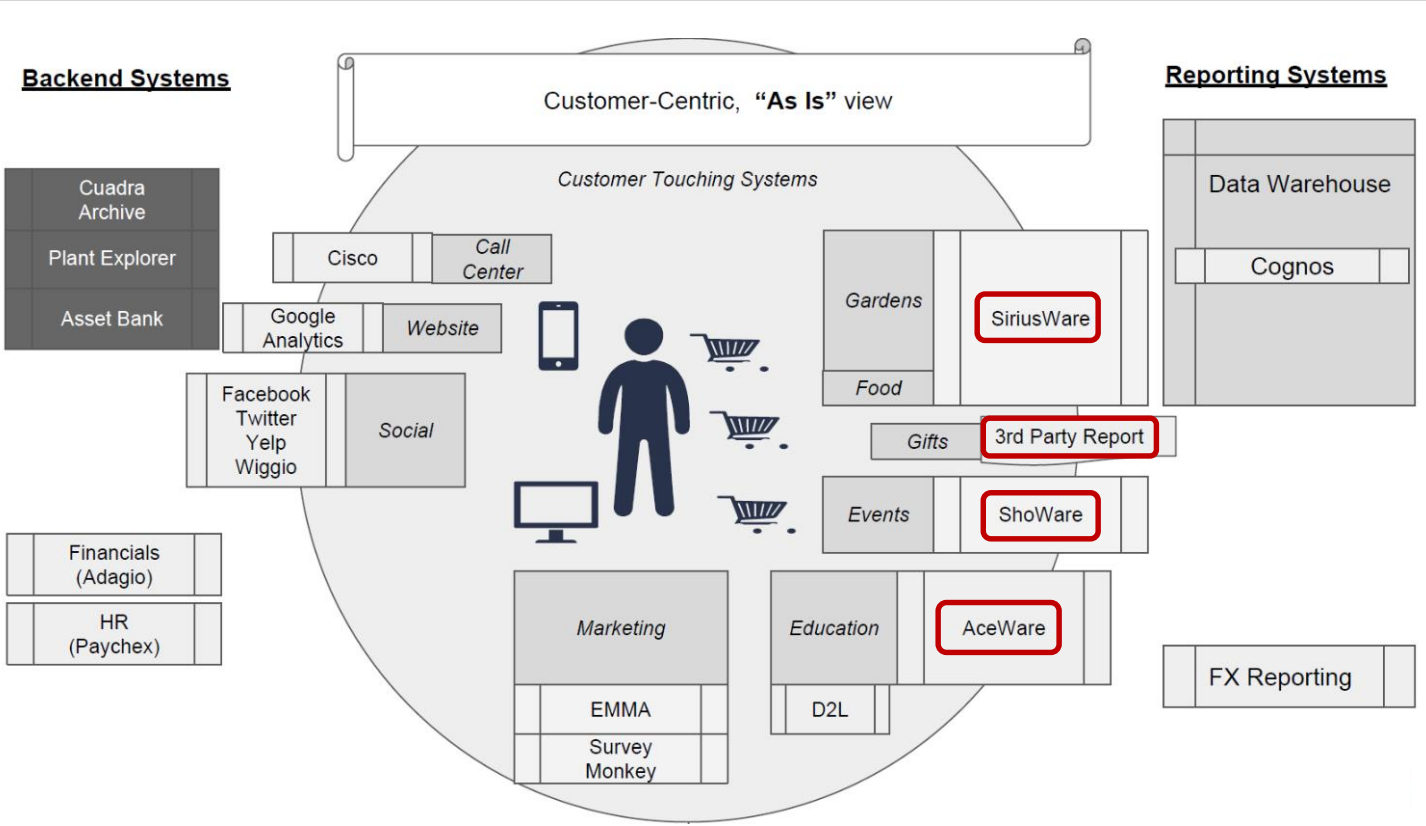
Why?

Challenges

- Lack of central location for constituent data
- Multiple systems with no integration
- Stalled business intelligence program/implementation



Current View of Systems



What Was The Goal?

Back to Basics

Follow Best Practices in Business Intelligence

- Evaluate BI platform, knowing our limitations
- Establish requirements and needs
- Assess our current POS and technology strategy

How?

- Workshop to uncover key areas for improvement and opportunities for success
- Cross-departmental 3-day workshop
- Review of all systems, reporting, needs, and limitations
- Focused on key areas that can lead to success

Recommendations

- Establish Data Governance Program
- Expand Data Warehouse and Data Visualization Tools for reporting and dashboard needs
- Implement a CRM solution

Our Vision for Data

“At Longwood Gardens, our data is culturized, automated, efficient and holistic. Business decisions are informed by specific, accessible data that drives the organization with a measurable impact.

The dialogue we have with our guests, our supporters and the Longwood Gardens community (both existing and prospective) is informed by a deeper understanding and leveraged to foster a better experience.”

Data Governance

- Technology and Data Steering Committee established
  - Ensure cross departmental awareness, collaboration, and prioritization for technology and data needs
- Data Governance work began:
  - Identify Data Owners and Data Stewards to establish clear responsibilities and ownership with a main focus on data security and accuracy
  - Identify technology priorities
  - Identify dashboard and reporting priorities
  - Develop policies and procedures, including security

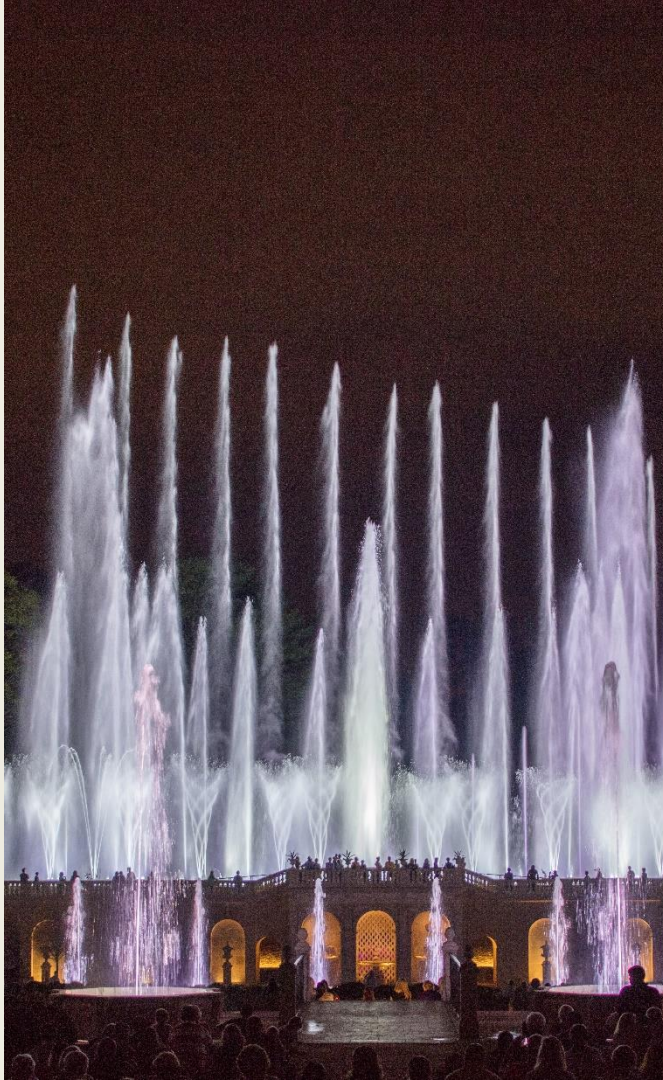
Streamline Sales Channels

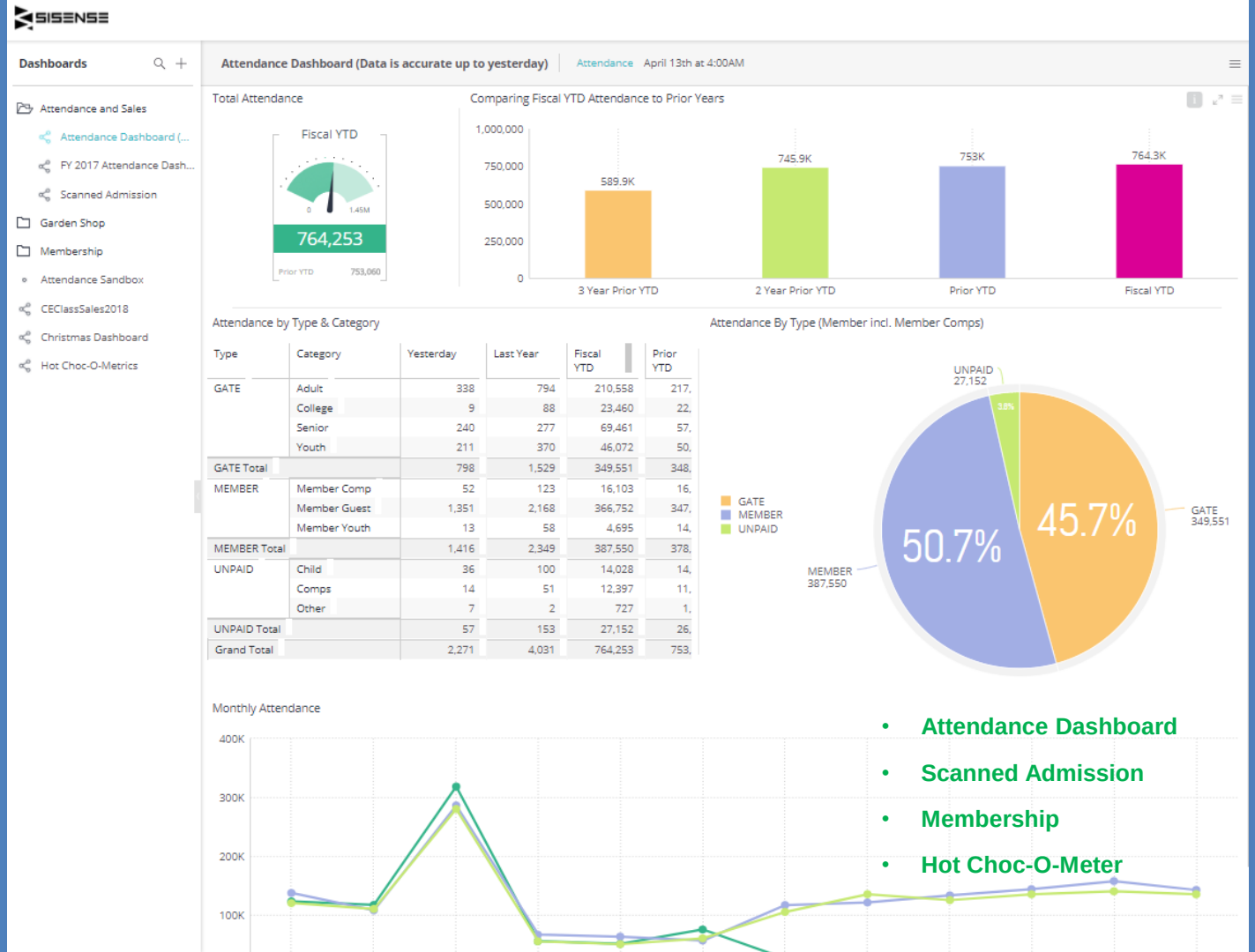
- Utilize Siriusware as main POS
  - Transition Continuing Education
- Where not possible, populate guest number in both systems
- Build additional feeds to the Datawarehouse for other data, including surveys and GardenShop data

Implement Data Visualization Tool

- Put the data in the hands of everyone in the organization
- Present Dashboards while allowing users to manipulate their own data
- Easy to implement tool with a simple user interface and competitive pricing

SISENSE





Type	Category	Yesterday	Last Year	Fiscal YTD	Prior YTD
GATE	Adult	338	794	210,558	217,
	College	9	88	23,460	22,
	Senior	240	277	69,461	57,
	Youth	211	370	46,072	50,
GATE Total		798	1,529	349,551	348,
MEMBER	Member Comp	52	123	16,103	16,
	Member Guest	1,351	2,168	366,752	347,
	Member Youth	13	58	4,695	14,
MEMBER Total		1,416	2,349	387,550	378,
UNPAID	Child	36	100	14,028	14,
	Comps	14	51	12,397	11,
	Other	7	2	727	1,
UNPAID Total		57	153	27,152	26,
Grand Total		2,271	4,031	764,253	753,

People Management with CRM

- 360 degree view of our constituents including non-transactional relationships
  - Demographic/psychographic data and impact reporting
- Increased efficiencies and more targeted marketing
  - Email marketing integrated to the POS
  - Increased demographic and psychographic information to better segment and prospect…getting the right message to the right person
  - Better reporting on campaign effectiveness
- Potential for higher levels of Membership and earned revenue

Our Solution

blackbaud™

power your passion

Raiser's Edge NXT™

Target Analytics®

a division of Blackbaud, Inc.

Attentive.ly

accesso SIRIUSWARE

emma®

Results

- Clear direction for priorities around BI and technology
- Cross-departmental collaboration
- Increased accountability and identified ownership
- More reliance on data for decision making

Results-Expected

- Increased efficiencies
- More targeted segmentation with higher opens, clickthrough rates, and conversions
- Increased ticket and Membership sales, and increased revenue

CRM, POS, OMG!

Navigating Data and Systems to Realize Your Institution's Fuller Potential

June 5, 2018

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