CRM, POS, OMG!
Navigating Data and Systems to Realize Your Institution’s Fuller Potential

June 5, 2018
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
Role of Data Within The Organization

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.

Toman Hohlerana and Erinne Turpin
Co-directors, Petakaja.org

Monsoon 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.

Public Leaders Network

most viewed in US

Liberals’ worst nightmare: a second supreme court pick for Trump
Zinedine Zidane steps down as Real Madrid head coach in shock announcement
The meaning of boho rights: 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

The Guardian
Tracker Maps Reports Of Food Poisoning On Twitter

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

By Shannon Ferro  August 7, 2013

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 pork and a need. Mined for the right
Can Facebook’s Machine-Learning Algorithms Accurately Predict Suicide?

The social media giant aims to save lives by quickly flagging and responding to worrying posts

By Danya Awen on March 8, 2017
The 6,000 Characters You Don’t See
How Did We Get Here?

News is no longer being reported by journalists, now it comes from everyone.
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
Internal faces can give context. A logo appears above a face such as America's Best Glasses in this picture. It communicates the person's wearing apparel. Similar help advertisers.

PRODUCTS
Users who post images of things like beer or wine equipment may be flagged for those elements. Ditto also seeks for common relationships and contextual contents. This is why you can see a penguin, which is a common element in all photos.

LOGOS
Ditto discounts thousands of logos, such as the United Blue Willow, a popular favorite. Any advertisement can appear on these logos.

CLOTHING
Ditto has learned classifying objects like pants or shirts in clothing.

SCENES
A scene is no big deal. In a photo, a man is looking at a mountain or a snow mountain can give advertisers ideas about where and how they can use their products.

HOW TO USE THE VISUAL WEB
Computers saw Jesus, graffiti, and selfies in this art, and critics were floored.
Where Is This Going?

American Public Gardens Association
2018 Cultivate Your Creative Nature
Who Are My Members?
Where Are They Now?
What Do They Like?
How Many Volunteers Are Here?
What is Our Current ____?

Who Will Be My Members?
Where Will They Be Next Week?
What Do Will They Like Next Year?
How Many Volunteers Will I Need?
What Will Be Our Current ____?
Hi, how can I help?

Make me a haircut appointment on Tuesday morning anytime between 10 and 12.
ai.

It’s Time to Lean Back Again
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.
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
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
The new system should connect us more to our donors, members and customers and ultimately generate more earned and raised revenue for the Garden.
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<th>Goals</th>
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<tr>
<td>Transactions</td>
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<td>Reporting &amp; Data</td>
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<td>Operations</td>
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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
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
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
• Chairman of the Board
• Board Committees
• 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 advanced and up-to-date skills
GARDEN CASE STUDY

Nick D’Addezio, Director, Marketing
Longwood Gardens
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
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
- Attendance Dashboard
- Scanned Admission
- Membership
- Hot Choc-O-Meter
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!

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