



Activation Workshop

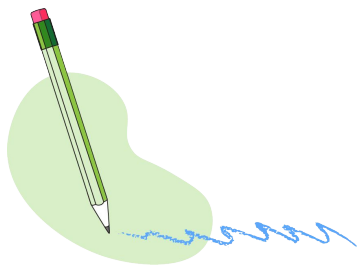
Streamlined Reporting





Creating Efficient Reporting Criteria

- Ensure the questions you ask of your data are fully defined
- Leverage Spektrix tools to build future proof logic
- Breakout Groups



DEFINE



MAP



FILTER



ACTION



“How far in advance do my school groups book?”

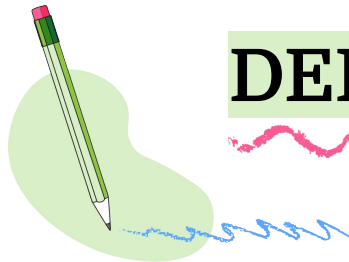


Customers
who book
school tickets

Education
Organisations

Customers
who use
school offers

Customers
who book for
schools
performances



DEFINE





MAP

A Guide to Standard Reports in Spektrix

advance booking

3/3

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v

X

Customer Behaviour Analysis

Description: Analysis of Customer behaviour e.g. period booked in advance, Offers used, group size.

Useful For: Understanding Customer behaviour for a particular Event(s).

Report Type: Analysis

Items Reported On: Tickets

Standard Criteria Set: By Instance Start Date; By Event; By Event Instance; By Transaction Date

Teams: Box Office, Marketing

Outputs: For all tickets booked, a summary of their purchasers' behaviours (includes visual representations):

Advance booking	Sales channel	Delivery method	Overall sales compared to other selected Events
Group size	How customers heard about the Event	Offers used	Promotion codes used

in this guide

How to Use this Article

Event Sales & Reservations

Ticket & Merchandise Sales Analysis

Customer Behaviour and Demographics

Accounting and Payments

Memberships

Campaigns, Opportunities, Pledges & Activities

Donations



FILTER

 	Customer behaviour analysis Analysis of customer behaviour e.g. period booked in advance, offers used, group size	Analysis	11/04/2024 14:36:50
	By Instance Start Date	 	
	By Event	 	
	By Event Instance	 	
	By Accounting Date	 	
			



FILTER

Customer Behaviour Analysis Report

Customers
who use
school offers

Tickets with

Returned ☐

and Event Instances

Date is 

between 01/04/2026 and 30/04/2026

and Instance included in metrics ☒

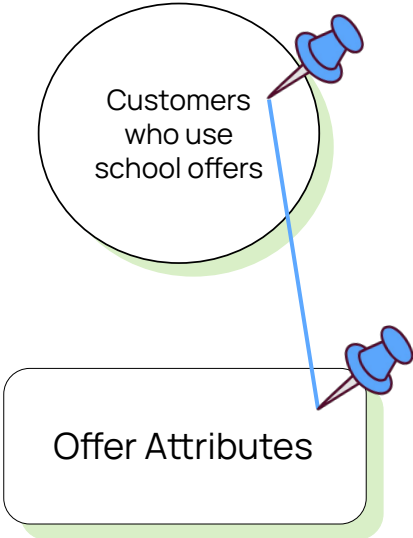
and Offer includes

- Primary School £3 Tickets
- Free Teacher Ticket
- High Schools 6 for 5
- The Very Hungry Caterpillar School Offer



FILTER

Customer Behaviour Analysis Report



Run Customer behaviour analysis

School Bookings

Tickets with

Returned ☐

and Event Instances

Instance included in metrics ☒

and Start Date is Last month

between 01/04/2026 and 30/04/2026

and Offer Attributes Contains all of: School Offer is exactly 1

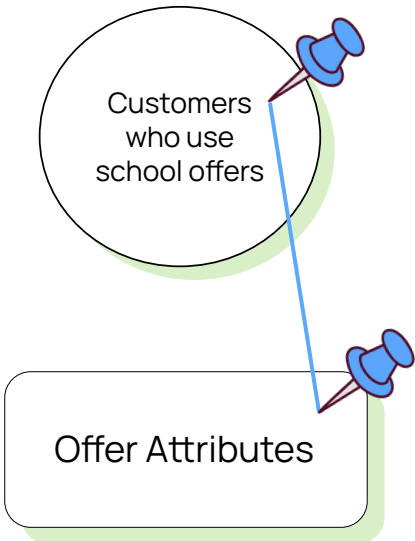
Total items: 0

Total discount: £0.00

School Offer: ☒



Customer Behaviour Analysis Report



Run Customer behaviour analysis

School Bookings

Tickets with

Event Instances

Instance included in metrics ☒

and Start Date is Last month
between 01/04/2026 and 30/04/2026

and Offer Attributes Contains all of: School Offer is exactly 1

or Tickets with

Returned ☐

and Event Instances

Instance included in metrics ☒

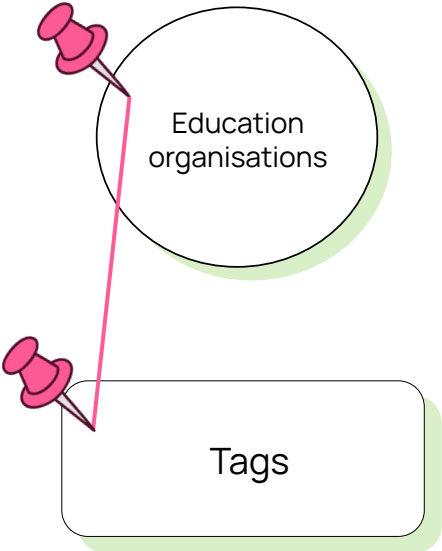
and Start Date is Last month
between 01/04/2026 and 30/04/2026

and Customer

Is Active ☒

contains all of

and Tags is Customer Type: School Booker



> Basic Details	Name: Monthly Schools Analysis
Reports	Description: Outputs analysis for school bookings last month
	Active: ☒
	Run on demand: ☐
	Run as schedule: ☒
	Run from: 04 May 2026
	Run until:
	Occurs: Monthly
	Rekurs on the: First Day (any) of every 1 month(s)
	Daily frequency: Runs before 08:00



FILTER

Customer Behaviour Analysis Report

How long did customers book in advance?

Period in Advance	Value	%ge of total value	Quantity	%ge of total quantity
More than 8 weeks before	£2,777.50	7.9%	177	6.3%
5-8 weeks before	£1,987.50	5.6%	159	5.7%
3-4 weeks before	£5,629.00	16.0%	429	15.3%
1-2 weeks before	£18,541.50	52.6%	1612	57.5%
5-7 days before	£4,542.00	12.9%	312	11.1%
2-4 days before	£1,753.00	5.0%	114	4.1%



ACTION





Examples

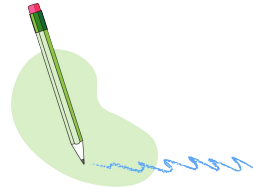
“

How often do our customers
who **recently engaged with
our emails** visit our venue?



Customers
who have
clicked a link in
last 30 days

DEFINE



 Add auto tag

Sent Mailings where

Receipt Date is Relative date range ▼ between 30 days ago ▼ and today ▼

☒ who have clicked a link within At least one ▼ of the mailings

MAP



SPEKTRIX 

Reattendance Analysis

Description: Information about reattendance of Customers for the specified Events.

Useful For: Getting an overview of Customer reattendance based on Tickets booked.

Report Type: Analysis

Items Reported On: Tickets

Standard Criteria Set: By Instance Start Date; By Event; By Event Instance; By Transaction Date

Teams: Box Office, Marketing

Outputs: Based on Tickets booked, an analysis of Ticket purchasers' attendance history:

Number of visits	Total customers visited	Total visits	Total tickets
Average group size	Total Customers by number of visits	Total Tickets by number of visits	

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Ticket & Merchandise Sales
Analysis

**Customer Behaviour and
Demographics**

Accounting and Payments

Memberships

Campaigns, Opportunities,
Pledges & Activities

Donations

Categories

FILTER



Run Reattendance analysis

by Tag

Tickets with

Returned ☐

and **Event Instances**

Instance included in metrics ☒

and **Start Date** is 
between 01/01/2026 and 31/12/2026

and **Customer**

Is Active ☒



and **Tags**  **Box Office Tags: Clicked a link in last 30 days** 

FILTER



Visit analysis for named customers:

Number of Visits	Total Customers	%ge of Total Customers	Total Visits	%ge of Total Visits	Total Tickets	%ge of Total Tickets	Avg. Group Size
1	3820	67.02%	3820	37.75%	17883	60.73%	4.68
2	884	15.51%	1768	17.47%	4468	15.17%	2.53
3	402	7.05%	1206	11.92%	1844	6.26%	1.53
4	233	4.09%	932	9.21%	1483	5.04%	1.59
5	132	2.32%	660	6.52%	1061	3.60%	1.61
6	75	1.32%	450	4.45%	637	2.16%	1.42
7	49	0.86%	343	3.39%	450	1.53%	1.31
8	44	0.77%	352	3.48%	534	1.81%	1.52
9	33	0.58%	297	2.94%	452	1.53%	1.52
10 +	28	0.49%	290	2.87%	636	2.16%	2.19
	5700	100%	10118	100%	29448	100%	2.91

ACTION



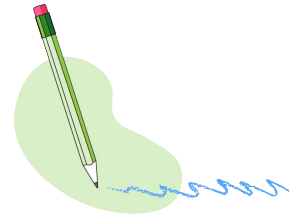
“

Which **potential donors** do we approach for our new Learning and Development fundraising campaign?



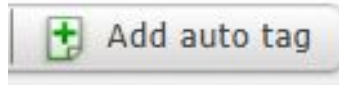
Customers who have donated to a Fund **or** Expressed Interest

DEFINE





Customers who have donated to a Learning and Development Fund



Donations with

Returned ☐

and **Fund Attributes** Contains all of: Grouping is exactly Learning and Development

MAP





Customers who expressed interest in Learning and Development

MAP



Edit Opportunity

Editing opportunity for Nicole Bierton.

Campaign: FY20262027 > Learning and Development

Description: Learning and Dev

Owner: OllieF

Current Stage: Research

Expected Close Date:

Target Amount: £

Asked Amount: £

Likelihood Of Success: ☒ Default for this stage (5%)
☐ Custom: %

Closed: ☐

Principal Prospect: ☐

Expression of Interest: Learning and Development

Learning and Development

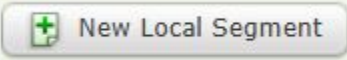
Restoration

Programming and Production

Gala

Save Cancel

Customer List Builder

New Local Segment

☐ Not Donated to L&D Funds

OR

☐ Not Expression of Interest



Customers with

Is Active ☒

contains all of

and Tags is Development Tags: Donated to Education/L&D Fund

Opportunities with

Opportunity Attributes Contains all of:

Expression of Interest is exactly Learning and Development

FILTER

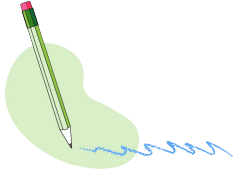


>	Basic Details	Name:	Potential Education Donors			
	Customer Lists	Description:	Outputs all potential educational donors to cultivate			
		Action:	Deliver Customer List ▾			
		Active:	☒			
		Run on demand:	☐			
		Run as schedule:	☒			
		Run from:	14 May 2026			
		Run until:				
		Occurs:	Weekly			
		Rekurs every:	1 week(s) on			
			☒ Monday	☐ Wednesday	☐ Friday	☐ Saturday
			☐ Tuesday	☐ Thursday		☐ Sunday
		Daily frequency:	Runs before 08:00			

ACTION



Breakout Groups



DEFINE



MAP



FILTER

-  Discuss what your customer profile means at your organisation
-  What data would you need to reference in Spektrix?
-  Which functionality could you use to map your definition to Spektrix?