



Activation Workshop



Creating Efficient Reporting Criteria

● **Session Goal:** What You're Walking Away With Today



- Activate a four step process to **streamline your reporting**
- Evaluate how **Attributes and Tags** result in more efficient reporting and segmentation
- Brainstorm a plan for **optimized data collection**

Agenda

1

EXAMPLE
SCENARIO 1

2

EXAMPLE
SCENARIO 2

3

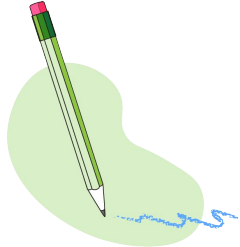
EXAMPLE
SCENARIO 3

4

BREAKOUT
GROUPS



Streamlined Reporting Process



DEFINE



MAP



FILTER



ACTION

1

2

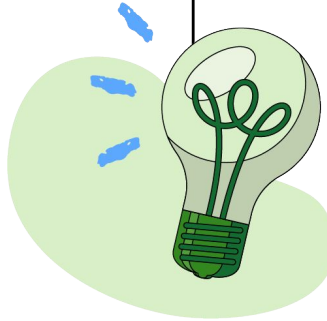
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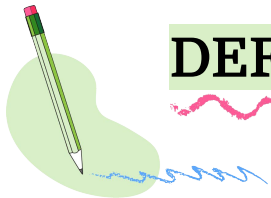
“

We are in need of new marketing strategies to further engage our high value patrons.



How can their booking behavior drive our approach?





DEFINE

**“I want to analyse the booking behaviour
of my high value patrons.”**



Books
Premium
tickets

Premium Tier
Member

Spent \$200+
on tickets in
the last 3
months

Uses Loyalty
Offers



MAP



Ticket Types



Books
Premium
tickets

Events	Subscriptions	Pricing	Seating	Customers	Other
Ticket Types	Price Bands	Price Lists	Ticket Donations	Ticket Com	
Ticket Types					
Web Types					
Name	Description	Active			
Adult		☒			
Child	12 & under	☒			
Senior	65+ with valid ID	☒			
Student	With valid ID	☒			
Premium	Best seats in house	☒			



MAP



Memberships



Premium
Tier Member

Events	Subscriptions	Pricing	Seating	Customers	Ot
Memberships	Ticket Subscriptions	Fixed Series			
Memberships					
Name		Description			
<u>Bronze Membership</u>		\$15 a month membership (every 4 weeks)			
<u>Gold Membership</u>		\$50 a month membership (every 4 weeks)			
<u>Premium Tier Membership</u>		Renews at \$500 per year.			
<u>Silver Membership</u>		\$25 a month membership (every 4 weeks)			



MAP



Auto Tags

Spent
\$200+ on
tickets in
the last 3
months

Events	Subscriptions	Pricing	Seating	Customers	Other
Tags	Questionnaire	Criteria Groups	Customer Groups	Relationships	
Tag Group					
Name		Customer Spending Patterns			
Description					
On web		☐			
Tags in group:					
Name		Description			
Spent \$200 on Tickets in the last 3 months					



MAP



Offers



Uses Loyalty
Offers

Events	Subscriptions	Pricing	Seating	Customers	Other
Funds	Merchandise	Offers	Promotion Codes	Priority Booking	
Offers Offer name: Edit Offer Priority Groups Active Between: mm/dd/yyyy Edit Offer Limit Groups Offer name & description <u>Education Discount: 10% Off</u> Customers with Educator Tag get 10% off their Order <u>Family Bundle</u> 2 Adult tickets, 1 child ticket <u>Silver or Gold Members, 10% off</u> Silver or Gold Members can get 10% off Tickets for Any Event <u>Summer Discount - 4 for 3 Adult</u> Buy any 4 Adult tickets for the price of 3					



FILTER

Guide to Standard Reports

WHAT'S NEW 2

Booking 4/8 ^ v x SIGN IN

Customer Analysis

Description: Analysis of active Customers.

Useful For: An overview of Customer behaviour and demographics of Individuals at your organisation.

Report Type: Customer

Items Reported On: Individuals

Standard Criteria Set: All Active Customers

Teams: Box Office, Marketing

Outputs: A summary of all active Individuals:

Last visit	Average spend per ticket	Average spend per order	Breakdown by postcode
Advance booking analysis	Database statistics		

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

Categories



FILTER

Criteria Sets

 	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

Uses Loyalty
Offers

Customer Behaviour Analysis Report

Tickets with

Returned ☐

and **Event Instances**

Date is Last month 
between 4/1/2026 and 4/30/2026

and **Instance included in metrics** ☒

and **Offer** includes Loyalty Program 2 for 1
Loyalty Members: Dance Pass
Muppet Royalty Loyalty
Special Loyalty Access 2026

“

An **Attribute** is a custom data field that allows you to store information that's specific to your organization.



FILTER

Customer Behaviour Analysis Report

Book with
Loyalty
Offers

Offer Attributes

Tickets with

Returned ☐

and **Event Instances**

Date is 
between 4/1/2026 and 4/30/2026

and **Instance included in metrics** ☒

and **Offer Attributes** Contains all of: Offer Type is exactly Loyalty Offer

Book with
Loyalty
Offers

Offer Attributes

Tickets with

Returned ☐

and Event Instances

Date is Last month
between 4/1/2026 and 4/30/2026

and Instance included in metrics ☒

and Offer Attributes Contains all of: Offer Type is exactly Loyalty Offer

or Tickets with

Returned ☐

and Event Instances

Date is Last month
between 4/1/2026 and 4/30/2026

and Instance included in metrics ☒

and Individual

Is Active ☒

contains all of

and Memberships is Premium Member

Hold an active
"Premium Tier"
membership

Memberships

SPEKTRIX



FILTER

Report Schedules

[Report Schedule Search](#) | [Edit Report Schedule](#)



Basic Details

Reports

Name: Monthly High Value Patron Analysis

Description: Outputs analysis for high value patrons last month

Active: ☒

Run on demand: ☐

Run as schedule: ☒

Run from: May 15, 2026

Run until:

Occurs: Monthly

Recur on the: First Day (any) of every 1 month(s)



ACTION

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	\$435.00	3.3%	20	3.5%
5-8 weeks before	\$0.00	0.0%	1	0.2%
3-4 weeks before	\$0.00	0.0%	15	2.6%
1-2 weeks before	\$175.00	1.3%	7	1.2%
5-7 days before	\$125.00	0.9%	9	1.6%
2-4 days before	\$857.00	6.5%	31	5.4%
The day before	\$630.00	4.8%	6	1.0%
On the day	\$1,360.00	10.3%	9	1.6%

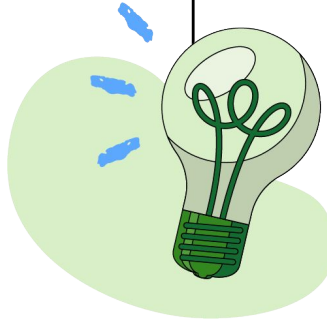
1

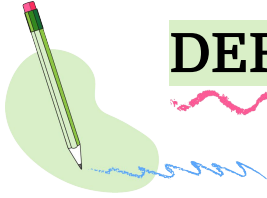
2

3

“

We want to increase sales by encouraging reattendance. Our target audience is people who are highly engaged with our emails.





DEFINE

How often do our customers who are highly engaged with our emails visit our venue?

Highly engaged
with our emails



Have
clicked a
link in last
30 days



MAP

+Auto Tag

Box Office Tag: Clicked a link in the last 30 days

Sent Mailings where

Receipt Date

is **Relative date range** ▼ between **days ago** ▼ and **today**



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



FILTER

Guide to Standard Reports

Visit

5/10



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	

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

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



ACTION

Reattendance Analysis Report

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



ACTION



1

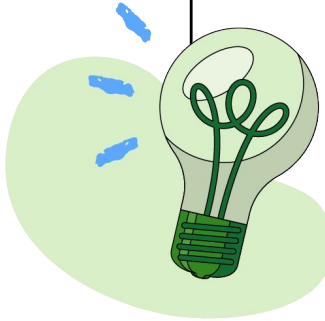
2

3

“

**We are planning for our new
Education fundraising campaign.**

**Who are our potential donors and
how could we tailor our ask to
maximize donation revenue?**





DEFINE

“

Which **potential donors** do we approach for our new Education fundraising campaign?



Donated \$100+
to any Fund **OR**
interested in
Education



MAP



+Auto Tag

Donors: Donor
over \$100

Events	Subscriptions	Pricing	Seating	Customers
Tags	Questionnaire	Criteria Groups	Customer Groups	F

Tag Group

Name	Donors
Description	Donated over \$100
On web	☐

Tags in group:

<i>Name</i>	<i>Description</i>
Donor over \$100	



MAP

Customers
interested in
Education

Opportunity Attribute

Add New Opportunity

Adding new opportunity for Nathaniel Archibald.

Campaign: FY26 > Learning and Development

Description:

Owner: John Taws

Current Stage: Research

Expected Close Date: mm/dd/yyyy

Target Amount: \$

Asked Amount: \$

Likelihood Of Success: ☒ Default for this stage (15%)
☐ Custom: %

Closed: ☐

Expression of Interest:

- Education
- Diverse Voices Programming
- Restoration
- Gala

Save Cancel



FILTER

Customers
who donated
\$100+ to any
Fund

OR

Customers
interested in
Education

Reports Mailings **Customer Lists** Report Schedules Customer List Schedules

Customer Lists Segment Explorer

Customer Lists | Potential Education Donors

Customer List Builder

Pre-filter Main filter Output

Choose an action: ▾

Name Potential Education Donors

Description

Audit trail

Drag segments to determine criteria:

☐ Not Donor over \$100 AND

OR

☐ Not Interest In Education AND

OR

drop criteria here

Segment Explorer

- Customer
 - Active Customers
 - YES to Email
 - YES to Postal Mail
- Fundraising

Local Segments

- Donor over \$100
- Interest In Education



FILTER

Crossover Analysis: Run through Report

Reports Mailings **Customer Lists** Report Schedules Customer List Schedules

Customer Lists Segment Explorer

Customer Lists | **Potential Education Donors**

Customer List Builder

Pre-filter Main filter Output

Segment Explorer

- Customer
 - Active Customers
 - YES to Email
 - YES to Postal Mail

Name Description

Audit trail

Drag segments to

☐ Not Donor

Choose an action:

- Choose an action:
- Output as CSV
- Output as unformatted Excel file
- Run through report**
- Use in standard mailing
- Apply or remove tag
- Apply or remove contact preference
- Attach attribute
- Bulk create opportunities
- Bulk create invitations



FILTER

Select a Report and Criteria Set

All reports

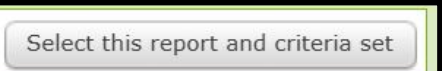
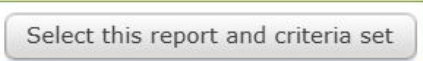
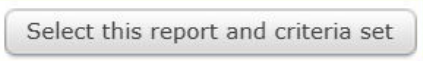
All reports : Search Results

donor giving

Shortcuts

 [Credit Reports](#)

 [Devo](#)

	Report name & details	Report type	Date last run
 	Donor Giving History A list of donors w/ a breakdown of their total, average, latest, and largest gift information	Analysis	5/27/2026 12:22:34 PM
	Lifetime Donations (Use with Customer List) 	 Select this report and criteria set	
	Lifetime Donations - By Tag 	 Select this report and criteria set	
	By Accounting Date	 Select this report and criteria set	
	Donor Giving History - By Household		5/27/2026



ACTION

Donor Giving History

Transaction dates between 10/30/2020 and 1/9/2026 | Account

Customer ID	Title	First Name	Last Name	Total Giving	Number of Gifts	Years Giving	Average Gift	Latest Gift Amount
I-RM22-25RH	Mr.	Robert	Adkins	\$150.00	1	1	\$150.00	\$150.00
I-BX22-25RJ	Ms.	Teresa	Agostini	\$175.00	1	1	\$175.00	\$175.00
I-ZL22-25JW	Dr.	Melissa	Alexander	\$25.00	1	1	\$25.00	\$25.00
I-HK22-29PL	Ms.	Angela	Allen	\$260.00	1	1	\$260.00	\$260.00
I-K222-2G6M	Mrs.	Anna	Allen	\$50.00	1	1	\$50.00	\$50.00
I-QZ22-2HK4	Mr.	Anthony	Allen	\$600.00	3	1	\$150.00	\$200.00
I-ST22-25NG	Mr.	David	Allen	\$25.00	1	1	\$25.00	\$25.00
I-KS22-25PM	Mr.	Timothy	Allen	\$75.00	1	1	\$75.00	\$75.00
I-WV22-25Y2	Mr.	Kenneth	Alvarez	\$75.00	1	1	\$75.00	\$75.00
I-WM22-25YT	Ms.	Iola	Ambrose	\$50.00	1	1	\$50.00	\$50.00
I-HQ22-25MY	Mr.	Wilfred	Anderson	\$150.00	1	1	\$150.00	\$150.00
I-5C22-25K4	Ms.	Tonya	Arroyo	\$500.00	1	1	\$500.00	\$500.00
I-FM22-25LB	Mr.	Charles	Artis	\$25.00	1	1	\$25.00	\$25.00
I-2622-25JY	Mrs.	Catrina	Arzola	\$15.00	1	1	\$15.00	\$15.00