Facilitator

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Audience Strategies for the Arts, Inc.  
Variety of Clients & Markets - All Successful

- Arts Council of England
- East Texas Symphony Orchestra
- Houston Symphony Orchestra
- National Arts Centre of Canada
- Pittsburgh Symphony Orchestra
- Plano Symphony Orchestra
- Sydney Symphony Orchestra
- Symphony Nova Scotia
- Kay Meek Performing Arts Centre - Vancouver
Agenda

- Successful Strategies for Creating Loyal Audiences
  - 9:00 – 10:30
    - The Issue
    - Business Model
    - Organizational Alignment
    - The Experience
  - 10:30 – 10:45 Break
  - 10:45 – 12:30
    - Patron Progression – Relationships/Retention
    - Value Propositions
    - Highly Effective Campaign Strategies
Agenda

- 12:30 – 1:30 Break, Lunch Served
- 1:30 – 2:30 The Board and Staff – A House Divided?
  - Strategic Planning – The Elephant in the Room
  - Board/Staff Retreats – An Agenda
  - The Role of Board Committees
  - Fundraising Barriers
  - Board Support for Earned Income
- 2:30 – 2:45 Break
- 2:45 – 3:30 Q & A
- 3:30 – 4:00 Your Organization & Next Steps
The Issue
Brief History of Arts Marketing

Prior to 1960’s | Public Relations
--- | ---
1960 – 1980 | Danny Newman - Dynamic Subscription Campaigns
1980-2010 | Steady Decline in Subscriptions
2010 - | ?
Why There Must Be Change

- From 2000 to 2010, the percentage of orchestras reporting a deficit increased from 34.3% to 60%.

- In 2005, the average deficit among 20 larger American Orchestras was $937,293. In 2010, the average deficit was nearly $3.3 million!
Why There Must Be Change

- The top 10 American Orchestras lost 22% of their audience in the last 15 years – a decline of 450,000 tickets.

- The decline in ticket sales resulted in a cumulative loss of $200 million.
Why There Must Be Change
Oliver Wyman Study

- Between 2005 and 2015, total volume of subscription packages for 45 American Orchestras researched declined 24%, subscription revenue 15%

- Subscription sales declined by 2% per year over the last decade

- Research in the same time period indicates that people who subscribe to orchestras now spend on average half of their total arts and entertainment budget on the orchestra = more on an orchestra than all other arts combined
Why There Must Be Change
Oliver Wyman Study

- Between 2005 and 2015, overall ticket sales volume for orchestras (45 surveyed) declined at an annual rate of 2.8% - with a higher decline in the first five years and a slight increase in the last five years

- More recently, rising prices have increased overall concert revenue by 1.7% per year

- The primary reason for subscription lapse or not moving up from a single ticket relationship is PRICE – a close second reason is repertory
Why There Must Be Change
Oliver Wyman Study 2015

Pricing Trends

<table>
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<tr>
<th>TICKET TYPE</th>
<th>2005</th>
<th>2015</th>
<th>%</th>
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<tbody>
<tr>
<td>Subscription</td>
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<td>$38</td>
<td>31%</td>
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<tr>
<td>Single Ticket</td>
<td>$26</td>
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Wyman models suggest that most orchestras are within $1.00 of a price increase that will have considerably more negative impact than additional revenue.

Smaller budget orchestras ($500k-$7MM) are actually increasing revenue at 2.2% per year.
Patron Growth Initiative

- 9% of households provide 72% of revenue
- 64% of revenue comes from patrons over 65
- Most donors attend 10 years before making a gift
- 65% of patrons only attend once annually
- Most patrons have considerable respect for their orchestra, but respect doesn’t lead to revenue

Research and Analysis: Prescott & Associates
LOA
Marketing?

530,000 Orchestra Patrons Data Base from 9 US Markets
13,000 Households Surveyed

- Partnership (love, insider, family) 25%
- Compartmentalized Partnerships (admirer) 15%
- Acquaintanceships (casual, distant, business) 42%
- Negative (one-sided, love-hate, damaged) 16%
- No Response 2%

LOA 2012
Distinctive, definitive performances in excellent settings are not the secret sauce of solvency.
Long-Held Industry Beliefs

- Artistic excellence is enough and the key measure of success.

- Marketing is defined as “Promotions”.

- Better marketing is defined as “More Promotions”.

- Ticket Sales (audiences) are the responsibility of Marketing.
Industry Beliefs

- Subscription packages are defined by more or less events at higher or lower prices
- Customer service is defined as less commitment
- Marketing resources are limited
- Subscriptions are dead
Can commitment still play a fundamental role in audience engagement?

Clients who “Returned to Subscriptions:”

- Plano Symphony Sold Out 11 Consecutive Years 2016
- Dallas Symphony Sold Out 9 Consecutive Years 1998
- Pittsburgh Symphony Highest Subscription Sales in 25 Years - 2009
- National Arts Centre of Canada Record Subscription Sales – 2013
- Handel and Haydn Society of Boston – 192 Year Subscription Record – 2010
- Symphony Nova Scotia – 2016 – First Classical Concert Subscription Sell Out
Familiar Results?

- Inefficient annual relationships jeopardize our financial stability.

- Mass marketed transaction based systems continue to rely on increasing discounts, less commitment and more flexibility.

- More and more resources are placed in non-core activities to survive.
Another Inconvenient Truth

- People are not going to care no matter how well we do it or when we do it, if they know nothing about it.
What to Do?

What are the decisions and strategies that maximize audience growth and patron loyalty?
Key Question

What is Your Business Model?  
(What Business are You In?)
Distinguish Business Model from Mission

- Producing events is not our business – That is part of our mission

- Our business is the business of patron development
Fundamental Shift in Thinking

- **Traditional Thinking:**
  Economic engine is based on producing events, selling tickets and plugging the resulting deficit

- **Better Thinking:**
  Economic engine is based on development of patrons
  Frequency of interaction with the organization is the key to long-term engagement and patron support (Bravo Sage!)
What Changes?

- All business decisions are focused on patron development
- Everybody is responsible for patron engagement
- Fanatical focus on relationships
Strategies for Successful Audience Engagement

- Distinguish Your Business Model from Your Mission
- Continuously Enhance Organizational Alignment
- Systematically Create Audience Engagement Resources
- Incorporate and Empower Artistic Leadership
- Develop Volunteer Resources for Earned Income
- Create & Execute a Patron Progression Path that Deepens Relationships
- Focus on Frequency of Patron Interaction
- Offer Compelling Value Propositions
Strategies for Successful Audience Engagement

- Focus fanatically on relationships
  - Put patrons at the core – artistic, marketing, development
  - Recognize and honor current relationships
  - Enhance audience engagement strategies to systematically include
    - appreciation
    - education
    - feedback
    - service
    - Loyalty (commitment)
Two Convenient Truths

- Resources are actually unlimited.

- Get out of the office. Solutions, resources and creativity are most often found outside of the office.
Organizational Alignment

The Fundamental for Success
Organizational Alignment

- All Business Decisions Focus on Patron Relationships

- Everybody Is Responsible for Patron Relationships
  - Board
  - Volunteers
  - Staff
  - Artists
  - Audience
  - Community
Think Tanks
Systematic Resource Generation

- Isolate & prioritize organizational needs and strategic issues
- Develop community based resources to address these needs and issues
- Create pool of professional expertise
Think Tank Mission

Continuously research and develop external resources through win – win collaborative partnerships with media, retail, service, technology, research, CRM and businesses based on organizational needs and issues.
Think Tank Participants

- Advertising Agency Staff
- Public Relations Agency Staff
- Local Retail/Service Marketing Directors
- Media Staff
- Direct Mail Specialists
- Customer Service & Retention Specialists
- Research Expertise
Think Tank Participants

- Tech Support
- Social Media
- Market Segment Representatives
- Board Members
- Volunteers
- Staff
- Artists
- Audience Members
Think Tank Logistics

- Identify a high profile chair
- Invite non-competing participants based on the organization’s resource needs & strategic issues agenda
- Set an agenda with a specific focus
- Briefly share organizational success
- Meet at a convenient time (Just Lunch?)
- Establish immediate next steps
Revenue Share Partnership

1) Establish Revenue Goal

2) Create Joint Marketing Strategy

3) Split Revenue Above Goal

4) Use Marketing Partner Share of Revenue Back Into Additional Advertising for Organization
Ron Chapman Newcomers Series - Endorsements

- AM Drive Offer to Special Audience
- Box Office Open Early Only for Ron’s Audience
- Chapman Concert Series
Brook Mayes Pianomax
Heartstrings Program

• In-Hall Piano Sale
• Silent Grand Piano Auction
  • Piano in Lobby
  • Played and Signed by Guest Artists
  • Formal Presentation to Highest Bidder at Concert
  • Musician’s Ensemble In-Home Performance
• At-Store Retention Events
Columbus Symphony – Leading Ladies

- Junior League Partnerships
- Five Concert Package Featuring Female Guest Artists
- Presentations/Lectures Prior to Concerts
- Marketed by Junior League
Additional Unique Partnerships

- The Rogers Group – KWS
- KDKA 100\textsuperscript{th} Anniversary - PSO
- Shirley Florist – “Good Neighbor Day” – SASO
- The Senators – Social Media – NAC
- The Fairmount - Retention – NAC
Aligning Artistic & Earned Revenue Goals

Collectively Creating Compelling Artistic Experiences
Artistic, Earned Income and Organizational Goals

Fundamental Tasks

Product On Stage

The Campaign to Market the Product

Customer Care

Financial Support
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Align Artistic and Revenue Goals to Create Compelling Experiences

- Eliminate “Classical” and “Pops” Distinctions
- Create Engaging Event Experiences
  - “Dueling Fiddles”
  - “Who Killed Mozart?”
  - “Are You Listening?” (Edwin on Beethoven)
  - “Choral/Orchestra Showcase”
  - “Intersections”
Merge Artistic and Revenue Goals to Create Compelling Experiences

- **Unique Experiences**
  - Multi-Media Presentations
  - Hack the Symphony - “Soundsync”
  - Mystery Pieces
  - Surprise & Delight
  - KWS by Request

- **Unique Collaborations**
  - Dallas Chamber Orchestra
  - NAC Casual Fridays

- **Unique Settings**
  - Metropolitan Opera High Definition Move Theater Telecasts
  - Amarillo – Symphony Underground
  - San Francisco After Hours
  - Dallas Opera – Texas Stadium
Volunteers

Unlimited Resource
One Organizations Volunteers for Audience Engagement

- New Season Announcement Committee
- Direct Mail Committee
- Student Subscription Committee
- Senior Citizen Committee
- Telemarketing Committee
- In-Hall Renewal/Acquisition Committee

150 Volunteers = Sold-Out Seasons
Audience Engagement
Volunteer Support

- Volunteers at the DSO
  - Retention Events
  - Subscriber Renewals
  - Subscriber Acquisition
- The PSO Ambassadors Program
- Think Tanks
- Marketing Committees
- Focus Groups
Artists

- Host Regular Audience Engagement Meetings with Resident Artists
- Create Renewal and New Acquisition Messages
- Help Host New Subscriber Retention Events
- Invite to “Think Tank” /Marketing Committees
- Assist with Unique Fund-Raising Events - DSO
- Personalize the Orchestra (KWS and PSO Spots)
- Create Unique Events – Deerfield Arts / PSO Soiree
Audience

- Influencers
- Focus Groups
- Specific Market Segment Initiatives
- Volunteer Resources
- Think Tank Members
- Marketing Committee Members
- Expertise
Organizational Alignment

NAC Example

- 3 Cross Functional Teams
  - Product
    - Repertory / Artists (Revenue Predictive Model)
  - Sales
    - Renewals / New Acquisition / Packages
  - CRM
    - Appreciation / Feedback / Education / Service
Patron Progression

Creating and Executing a Model
Patron Progression?

- How does your organization recognize a $100 donation?
- How does your organization recognize subscribers of 5 years or more? Ten years or more?
- What is the difference in the strategy to renew one year subscribers and subscribers of five years or more?
- How often do you ask a patron to donate? When do you start asking?
- What happens to a patron when he/she subscribes to your organization?
The Model is a CRM tool, with service defined as recognizing a current relationship with the organization and strategies to take the relationship to a higher level.
Importance of Patron Progression Model

A Patron Progression Model is a tool for turning ticket buyers into engaged patrons and investors.
Importance of Patron Progression Model

Tool that assists segmentation and customization regarding audience engagement strategies.

“One size does not fit all.”
Importance of Patron Progression Model

The Model focuses on total household revenue to the organization as opposed to earned and contributed income being separate revenue and business streams.
Importance of Patron Progression Model

Powerful tool in assessing future initiatives instead of simply repeating historical activities. Patron Progression is an important audience engagement strategic plan tool.
Importance of Patron Progression Model

Patron progression enhances audience engagement by enhancing strategies for

- appreciation
- education
- systematic feedback
- service and
- loyalty.
Importance of Patron Progression Model

“Organizations should consider moving away from a transactional mentality and migrate toward building closer relationships with customers.”

Oliver Wyman Study 2015/16
Creating/Upgrading a Model

- Identify initial segments (not more than six)
- List all current organizational strategies for each segment
- Determine desired strategies for each segment
- Prioritize the strategies and the segments
- Review segments and strategies regularly
Patron (Investor) Progression

Segment 1  Segment 2  Segment 3  Segment 4  Segment 5  Segment 6
The “Annuity” Building Process
Creating Definable, Sustainable, and Predictable Revenue

The League of American Orchestras
© St. Paul Chamber Orchestra, Pittsburgh Symphony Orchestra, LodeStar Associates
Suggested Initial Segments

- Segment 1: Non-Attendee
- Segment 2: Single Ticket(s) Buyer
- Segment 3: First Year Subscriber
- Segment 4: 2nd & 3rd Year Subscribers (Donors)
- Segment 5: 4 or 5 Year or More Subscribers (Donors)
- Segment 6: Major Donors
Segment 1 = Non-Attendee

As a rule, the primary strategy for a non-attendee is promotions.

Alternative

- Prospecting Campaign
- Referrals
- Bring a Friend
- Test Drive the Product
- Social Media Engagement
Segment 2 = Single Ticket Buyers

As a rule, the primary strategies for single ticket buyers includes numerous additional promotions, subscription telemarketing calls and requests for donations.

Alternatives/Additions

- Triggered e-mail acknowledgement/appreciation
- Short e-survey regarding initial impressions
- Missed you communication, if no purchase in given time
- “In the Know” organizational engagement messaging
- Surprise and Delight
Segment 3 = First Year Subscriber

Immediately acknowledge subscription orders in a meaningful way – e-mail, letter of appreciation, call, video thank you, invitation to an event

Helpful first-timer information – personalized newsletter format

Operation Welcome – phone calls, welcome party, including Music Director, musicians, Board members, volunteers and staff

Opening night welcome tables – information, seating, contest

Invitation to an initial Guild (volunteer) event of the season

Know Before You Go- e-program notes, Music Director audio notes, music examples on website, pre-concert lectures
Segment 3 = First Year Subscriber

Timely quick survey regarding initial experience

January new subscriber event prior to start of renewals

Invitation to select donor events

No individual giving request

Insights about the renewal process in advance of a first renewal experience

Personalized renewal notices that recognize the relationship
Segment 4 = 2\textsuperscript{nd} & 3\textsuperscript{rd} Year Subs

$50+$ minimum donation request on renewal notices

Education regarding the why for donations and donation requests from approximately $75$ to $125$ for third year subscribers

Not communicating all donation levels

Focused “Know Before You Go” strategy

Surprise and Delight – Seat Upgrade/Extra Concert

Unique Experience – Sit on-stage during a rehearsal

Renewal campaign that recognizes the relationship

Feedback/Surveys and Focus Groups
Segment 4 = 3\textsuperscript{rd} Year Subs

For 3\textsuperscript{rd} year subscribers, cultivation offering unique opportunities to engage based on 1\textsuperscript{st} and 2\textsuperscript{nd} year activity, including dinner with artists and staff, a possible event with the Artistic Director, sitting on-stage for a rehearsal, invitations to select donor events, etc.
Segment 5 = 4/5 Year Sub or More

Special acknowledgements
  Program book listing
  Lobby wall of honor
  Letter of appreciation
  Special acknowledgements during Patron Appreciation Month
  Annual Meeting
  Priority seating
  Priority for future events
  Special reception or event

Board cultivation for higher-end individual giving based on previous engagement, including attendance, individual giving history and volunteer activities to date
Segment 6 = Major Donors

Quarterly thank you letters (and statements)
Recognition in prominent local publication
Rotogravure recognition dinner
Coming season “Sneak Peek”
Post–concert artist receptions
Holiday messages of appreciation
Special events with the Artistic Director – Mimosas with the Maestro!
Opportunity to sit in the orchestra during a rehearsal
Staff dinner
The Board of Directors, Musicians and Staff

Invite You to Become a Virtuoso Society Member

For further information, please contact:

Douglas W. Kinzey
Director of Audience Engagement
Plano Symphony Orchestra
dkinzey@txstateuniv.com
office: 972-244-6083
mobile: 214-683-3714

Virtuoso Society Membership

Virtuoso Society Members make a commitment of support for five years at one of three levels:

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<tr>
<td>EMERALD</td>
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<td>DIAMOND</td>
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Support Passion Friends Fun

The Virtuoso Society

The Virtuoso Society

Plano Symphony Orchestra
5225 Tuscany Parkway, Suite 200
Plano, TX 75094
www.planosymphony.org
972-430-7263
The Virtuoso Society

A special group of passionate and committed supporters of the Plano Symphony Orchestra and its mission to inspire, educate, entertain and involve over 169,000 people in North Texas in the enjoyment of great music annually. This includes more than 40,000 youth.

VIRTUOSO SOCIETY MEMBER COMMENTS

“This is important support for great musical experiences, youth education and special friendships.”

“The Virtuoso Society is fun, energetic, important, and an extended family.”

“The Virtuoso Society is a great opportunity for important fundraising by creating an ‘insider’ group.”

“The Virtuoso Society helps to ensure that great music continues to positively impact health and education in our community.”

The Virtuoso Society Members Enjoy Special Benefits

Elegant Rotogravure Dinner
Receipts with guests artists following select subscription concerts
Mimosas with the Maestro - Sunday brunch in a private home with Hector Guzman
Opportunities to mix and mingle with Plano Symphony musicians
Priority seating
Contributing to the quality of life in North Texas
Making new and often life-long friends

Exclusives for Virtuoso Society Members

A Virtuoso Society Pin
Sneak Peek at the coming new season with Hector Guzman
Experience the excitement of sitting in the Orchestra on stage for a rehearsal event
Exclusive events with select guest artists
Optional Virtuoso Society Member wall plaque for home or office
Creating a Model

- Identify initial segments (not more than six)
- List all current organizational strategies for each segment
- Determine desired strategies for each segment
- Prioritize the strategies and the segments
- Review segments and strategies regularly
Campaigns & Value Propositions

Driving Commitment, Creating Relevant Packages, Successful Campaign Strategies
Successful Subscription Campaign Strategies

- Develop Value Propositions that Drive Commitment
- Create Market Specific Subscription Packages
- Make it Easy to Subscribe
- Don’t Make it Easy to Leave Your Organization
- Season Previews – Offer a Test Drive
- Use Focus Groups to Develop Relevant Message Strategies
- Use Direct Mail - Still Cool, But Maximize Primary Real Estate
- Expand Resources Systematically - Think Tanks
- Create Social Media Influencers (The NAC’s Young Audience Project)
Subscriptions are Dead?
But Who Killed Them?

- Subscription packages are traditionally based on only two criteria – the number of events in the package and the resulting discounted price.

- Traditional subscription campaigns continually shrink both the number of events and the price of the package for “buyer collapse”.


- Wyman Study indicates price and repertory are the two main reasons for lapsed subscribers.
Create Package Value Propositions

“Subscribing is Always Your Best Value”

➢ Create Packages that Drive Commitment

“Free Parking at Boston Symphony Hall”
Duluth Symphony
Value for Commitment

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Develop Package Value Propositions

“Subscribing is Always Your Best Value”

Create Market Segment Relevant Packages

- Executive Package (President’s Package)
- Student Package (Achievers Package)
- Singles Package (Classical Encounters)
- Tech Package (Designer Package – Choose from 10)
- Volunteer Package
- Young Professionals Package
Subscription Campaigns

Successful Strategies from the Road
Make Subscribing Really Easy

- No Money Down Event/Concert Offer
  - Mail Season Announcement/Order Form One Week Out From Event/Concert with No Money Down Offer
  - E-Mail Follow-Up Two Days Prior to the Event/Concert
  - No Money Down Offer at First Event(s) of the Campaign
  - Bring Order Form or Use Easy Order Form Program Insert
  - Stage Announcements and Projections About the Season
  - Help Stations in Lobby
  - Offer Good for Additional 48 Hours
Is it Too Easy for a Subscriber to Leave Your Organization?

- Pre-Campaign Letter – Anticipation
- First Renewal Notice - Snail Mail Easy Order – No Money Down
- Second Renewal Notice - Snail Mail (Brochure)
- Third Renewal Notice - E-Mail Early Bird Incentive Reminder
- Early Bird Incentive Deadline
- Fourth Renewal Notice - E-Mail – Second Incentive Deadline Reminder
- Second Incentive Deadline
- Fifth Notice “Whose That Sitting In Your Seats?” – Deadline Reminder
- Renewal Deadline
- Everybody Deserves a Little Grace – Grace Period Card Snail Mail
- Phone Calls
- Final Notice – E-Mail and Snail Mail = Grace Period Deadline
IT’S NOT TOO LATE!

GRACE PERIOD RENEWAL DEADLINE: MAY 22, 2014

RENEW YOUR 2014/15 SUBSCRIPTION TODAY!

Natalie MacMaster  Terry Tam & Lorraine Min  Tafelmusik  David Myles
Renewal Message

WHO'S THAT SITTING IN YOUR SEAT
Don't lose your seat - Renew by June 8, 2001 Deadline!
To renew today - Call (713) 224-7575
Segmented Renewal Campaign

- One size doesn’t fit all. A first-year renewal strategy should not be the same as a subscriber with five years or more tenure.

- KWS Renewal Segment Highlights (11 Segments Total)
  - First-Year Subscriber
  - CYO Subscribers
  - Subscriber Engaged by Special Deal
  - Preview Concert Subscribers
  - Subscribers with Previous Seating Issues

- Auto Renew

- Seat Leasing
Exposure – Not Just Promotions!
The Season Preview

- **Preview Events - Test Drive the Product**
  - Audience – Free Admission
  - By Invitation & Referrals
  - Marketing Partner for Acquiring New Audience/Sponsor
  - Special Event Offer – Extra 10% Off?
  - Works Best Within Two/Three Weeks of Opening Night
  - Overt Sales Event Highly Scripted
- **Unique Attributes**
  - Mix of Season Repertory
  - Patrons Can Text Questions
  - Cell Phone and Text Ordering
  - Audience Blogs and Facebook Follow-Up

- **Preview Event Runouts – A Smaller “Ensemble” Version**
Systematic Feedback

Focus Groups
Develop age relevant and market specific focus groups to create and test message/value strategies.

“We have collected 50 towels for the guest artist, if he is still alive at the end of the performance!”*

*Guest pianist performing 2 Liszt Piano Concertos on the same concert.
Focus Group Attendees

- 18 – 22 in Attendance
  - Current Subscribers
  - Lapsed Subscribers
  - Multi-Single Ticket Buyers
  - Non-Attendees

- Ages
  - $\frac{1}{2}$ 45 and Below
  - $\frac{1}{2}$ 55 and Above
Focus Group Agenda

• Welcome
• Refreshments
• Insights regarding organization’s audience successes
• Presentation of 4 – 6 message strategies
  • For ads, posters, radio spots, TV spots, social media
• Presentation of same message with different art
• Request to message two events upon hearing the description of each event
  (The above is accomplished by survey and not discussion.)
• Discussion and feedback
Focus Group Discussion

• Indicate the most preferred overall message
• Indicate the most compelling parts of the message
• Indicate the least compelling parts of the message
• Are there messages from different presentations that should be combine?
• What are the recommendations to improve the message?
• What actions would you take based on the preferred message strategy?
Focus Group Takeaways
(KWS Fledermaus Campaign)

• A prominent image as the focal point was important
• Traditional details (conductor, cast) were often overwhelming and not very relevant
• Participants wanted the image and messaging to convey emotion and the type of experience they were going to have
• Effective messaging was very different based on age
• Since several messages resulted, the campaign became layered with several distinct messages rather than a single message
• Results = Sold Out
DIE FLEDERMAUS
COMIC OPERA IN CONCERT

WICKEDLY FUNNY!
DECEPTIONS, INTRIGUE, PLOT TWISTS & GLORIOUS WALTZES

FEATURING MEMBERS OF THE WLU OPERA CHORUS AND OTHER SPECIAL GUESTS!

JAN 15 & 16
8 pm | Centre in The Square

ORDER TODAY! 519-745-4711 KWSYMPhONY.CA
Brochure Design

- More Traditional Audiences
  - Primary Real Estate
    - Covers
    - Inside Front Spread
  - Primary Real Estate Messages
    - Call to Action
    - Compelling Season Highlights
    - The Offer
    - How to Order
- Address Myths

- Less Traditional Audience Direct Mail
  - Life Style Relevant
KITCHENER WATERLOO SYMPHONY
2016/17 SEASON
8, 6 OR 4 CONCERT PACKAGES
THE BEST VALUE!

FEATURING
BEETHOVEN: SYMPHONY NO. 5
THAT THE BARRA MACNIELS
MAHLER: SYMPHONY NO. 1 "TITAN"
CHARLIE CHAPLIN'S MODERN TIMES
RAVEL: PIANO CONCERTO IN G MAJOR
MUSIC FROM THE MOVIES
TCHAIKOVSKY: SYMPHONY NO. 4
NAT KING COLE SONGBOOK

CELEBRATING EDWIN OUTWATER'S 10 YEARS!

SUBSCRIBERS SAVE UP TO 38% 
SUBSCRIBE TODAY!
COMPOSE YOUR OWN EXPERIENCE.

CREATE-YOUR-OWN CONCERT PACKAGE
STARTING AT $92

Buy your package by September 14th, 2015 to see "We Are the Champions" FREE!

For a limited time only, come experience great concerts with our Create-Your-Own package. Just buy four concerts of your choice and see the Rajan concert, "We Are The Champions", featuring hits of Queen for free.

NAC: CAN/CA/CHAMPIONS
SUBSCRIBE BY PHONE: (613) 997-7000 X620
OR IN PERSON AT THE BOX OFFICE

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COD: 0000
COMPONENT: Front Cover
LANGUAGE: ENG

DElocale: DT
DElocale: CR
DElocale: RO
DElocale: J
DElocale: AR
DElocale: DD
DElocale: DS

Approved: P1

Aug 25, 2013
KWS
KITCHENER-WATERLOO SYMPHONY
EDWIN OUTFATER | MUSIC DIRECTOR

2016-17 SEASON

SUBSCRIBE & SAVE UP TO 33%
CREATE YOUR OWN 8, 6 OR 4 CONCERT PACKAGE

FEATURING
BEETHOVEN: SYMPHONY NO. 5 | CHARLIE CHAPLIN’S MODERN TIMES
MAHLER: SYMPHONY NO. 1 “TITAN” | THE BARRA MACNEILL
RAVEL: PIANO CONCERTO IN G MAJOR | MUSIC FROM THE MOVIES
TCHAIKOVSKY: SYMPHONY NO. 4 | NAT KING COLE SONGBOOK

519-745-4711 888-745-4717 KWSYMPOHY.C
A TICKET PACKAGE IS ALWAYS YOUR BEST VALUE
• THE MOST SAVINGS
• THE BEST SEATS
• UNLIMITED FREE TICKET EXCHANGES

BEST VALUE SAVE UP TO 33%
CREATE YOUR OWN 8-CONCERT PACKAGE

GREAT VALUE SAVE UP TO 23%
CREATE YOUR OWN 6-CONCERT PACKAGE

GOOD VALUE SAVE UP TO 18%
CREATE YOUR OWN 4-CONCERT PACKAGE

2016|17 SEASON

All concerts are at Centre in the Square (Kitchener) unless otherwise noted.

SEPTEMBER 2016
SKATING'S GREATEST HITS
Fri Sept 23 & Sat Sept 24 at 8 pm
Relive the unforgettable figure skating routines hosted by Olympic medalist and
Canadian icon Kurt Browning with music by the KWS.

RACHMANINOFF &
TCHAIKOVSKY
Fri: Sept 30 & Sat Oct 1 at 7:30 pm
Natalia Penina plays Rachmaninoff’s most challenging and thrilling piano concerto,
Piano Concerto No. 3. This exciting program also features Tchaikovsky’s Symphony No. 4.

OCTOBER 2016
FAMILY: RHYTHM ROCKS!
Sat Oct 8 at 2:30 pm
Explore how rhythm makes music groove in this fun-filled, energetic and
interactive concert.

BAROQUE: HAYDN & RAVEL
Wed Oct 12 at 8 pm, Waterloo, First United Church
Fri Oct 7 at 7 pm, Guelph, HANDS!, Memorial United Church
Sat Oct 8 at 8 pm, Cambridge, Central Presbyterian Church
Two weeks full of humour and delight, another two colourful Baroque programs.

EDWIN'S FINAL BEETHOVEN
Fri Oct 28 & Sat Oct 29 at 8 pm
Music Director Edwin Outwater concludes his ten-year journey through all nine
Beethoven symphonies with Beethoven’s expansive and virtuosic Symphony No. 2.

NOVEMBER 2016
NAT KING COLE SONGBOOK
Fri Nov 4 at 8 pm
Sat Nov 5 at 2:30 & 8 pm
Join the KWS and Canadian vocalist Dena Sinkfield for a night featuring the music of
one of the most memorable voices in American music, Nat King Cole.

DEBUTS & BLOXOX
Fri Nov 25 & Sat Nov 26 at 8 pm
A program of French Jewels, from Ravel’s beloved Mother Goose to Debussy’s Preludes
to the Afternoon of a Faune.

ORDER YOUR TICKETS TODAY 519-745-4711 | 1-866-745-4717 | KWSYMPOHNYCA

FOR FULL CONCERT INFORMATION AND DESCRIPTIONS VISIT KWSYMPOHNYCA
Addressing Industry Myth

How do you get nearly 100 people to work for you for as little as $15...

or even six times for only $87?
Lifestyle Prospecting Message

Where's the music in your life?
Be Relevant
Simplicity / Curiosity / Relevance

Gershwin popped in to peel potatoes and discovered...
Relevant Messaging

She needs some time to relax... with Mozart.

He needs to get away from it all... with Manhattan Transfer.
They need a romantic night out... with Tchaikovsky.

Where is the music in your life?

It’s right here, in your hometown – the music of the Pacific Symphony Orchestra. Its power can do many things, fantastic, unexpected things, like wash away the daily grind, unwind your soul, take you away or reveal your passion.

Maybe you will lose yourself in a secret garden with Mozart. Maybe you will sail the high seas with Strauss. Or discover your wild side with Beethoven. You might fly a kite in the rain with country icon Randy Travis, or Bernadette Peters. Or walk with your love and Tchaikovsky.

But, once the music of the Pacific Symphony is in your life, it will become your haven, a place to relax, refresh and free your spirit, and you can do as you wish.

For as little as $14 per concert.

How about free tickets?

Respond by October 20, 2001, by mailing in the attached card, or by entering your information online at www.pacificsymphony.org, and receive a voucher good for two tickets to a concert.

*Offer subject to availability, limited to 2 tickets per household.
Social Media Sales and Engagement

- PSO Paid Facebook Advertising Examples Spring 2016
  - Time for Three Subscription Concert
    - Spent: $250
    - Duration: 18 Days
    - Target: City of Plano + 50 Miles, Age 18 – 65
    - Unique People Reached 27,034
    - Ads Liked 772
    - Ads Shared with Friends 48
    - New PSO Followers 97

- Results – Sold Out
Social Media Sales and Engagement

- PSO Paid Facebook Advertising Examples Spring 2016
  - Family Series Concert
    - Spent: $225
    - Duration: 10 Days
    - Target: City of Plano + 50 Miles, Parents with Kids age 3 - 12
  - Facebook Stats
    - Unique People Reached 8,875
    - Ads Liked 72
    - Ads Shared with Friends 16
  - Instagram Stats
    - Unique People Reached 3,639
    - Ad Likes 233
    - New PSO Followers 49

- Results – 80% Capacity
Social Media Sales and Engagement

- PSO Paid Facebook Advertising Examples Spring 2016
  - Best of Beethoven Subscription Concert
    - Spent: $79.70
    - Duration: 12 Days
    - Target: City of Plano + 50 Miles, Age 40-65 Like Music/Perf. Arts
  - Facebook Stats
    - Unique People Reached 4,719
    - Ads Liked 235
    - Ads Shared with Friends 37
  - Instagram Stats
    - Unique People Reached 2,633
    - Ad Likes 376
    - New PSO Followers 30

Results – Sold Out
PSO Facebook Examples 2016
Advertising Summary

- PSO Facebook Advertising – TF3/Beethoven/Family
  - Spent $554.44
  - People Reached No Duplicates = 46,900 (Ave. $.01 per)
  - Ad Likes 1,312
  - Shared with Friends = 101
  - New PSO Facebook Friends = 176
Social Media
Sales and Engagement

- **Sales**
  - PSO averages 5 e-mail messages per concert
    - Three weeks out
    - Tuesday 10:00 am best open click/read date and time
  - **E-Mail Strategy**
    - 1 = Traditional content information
    - 2 = Traditional content information with links – music/personalities
    - 3 = Focus on special characteristic about the event
    - 4 = Music Director audio notes
    - 5 = Note from the Director of Audience Engagement

- **NAC Influencers Social Media Campaign**
Social Media Sales and Engagement

Engagement

- Audience social media greetings to guests artists
- Audience social media photo competition that best describes their patron’s experience
- Single ticket availability wait list by E-mail
- Subscription and single ticket order confirmations
- “Notes from the Director of Audience Engagement”
- Thank You Videos for Donations
- Behind the Scenes – KWS dress rehearsal video
- Preview Concert In-House Subscription Orders
- “KWS by Request” and PSO “Mystery Piece” feedback
- London Symphony Music House and Music Blocks
- Deerfield Arts Festival On-Site Raffles by Text
- Sponsor Employee On-Line Ticket Discount Code
Social Media Sales and Engagement

• Importance of Mobil Devices
  • Prior to 9:00 AM – Majority on Mobil Devices
  • 9:00 AM – 4:00 PM – Majority on Computers
  • 4:00 PM – 9:00 AM – Majority on Mobil Devices
  • 2014 – More People on Phones and Tablets then Computers with 72% of Total Advertising Views on Mobil Devices

• Response Pages – Mobil Device Friendly

• People Expect Organizations to be Technologically Aware

• People are becoming “clickers” not “readers.”
Web Pages For Kids?

- Web Pages – What’s in it for Kids?
  - PSO EncoreYouth
    - Kids
      - Explore Music: Melody, History, Orchestra, Form, Instruments
      - Meet the Musicians
      - Young Virtuosos
      - Current Contests
      - Upcoming Events
  - Parents
    - School Concert Education Program
    - Musicians School Appearances
    - Young Artist Competition
  - Teachers
    - Curriculum
    - Testing
  - Programs
    - School Concerts
    - Young Artist Competition
    - Family Symphony Sundays
    - Instrumental Petting Zoo
  - Contact Us
PSO Twitter
Engagement & Relevant

- Photos of Subscription and Family Concerts – The Experience
- Voting for the “Best of City = Plano” – Community Relevant
- “May the Force be With You!” – Coordinated with Star Wars Hype
- Rooting for local sports teams – Community Engagement
- Did you know the English Horn isn’t English? – Education Fun
- Checking out the Deerfield Festival (arts festival) – Related Events
- Thank you for the great success of 15/16- sold out! - Appreciation
- Patron anticipation of a concert – personalizing the experience
- Young Artist Competition Winners – where are they now?
Boards and Staff

A House Divided?
“I hear regularly from staff, impatient with Board members who won’t raise money when it is obvious there’s a budget shortfall, or frustrated with leadership who want to sell some product or put on an event without considering how much staff time and effort would be involved.”

Boards on Fire

Susan Howlett
Strategic Planning
The Elephant in the Room

- Plano Symphony Orchestra Status 15/16
  Sold Out Ten Consecutive Seasons
  Record 190,000 People Involved 15/16
  Operating Surplus
  No Line of Credit
  No Fire Sales

- Initial Strategic Planning Direction?

- Add Subscription Concerts! WRONG
The strategic planning elephant in the room is initially addressing program goals without addressing the investment or infrastructure that is required to make such programs possible.
Strategic Planning
Responsibilities

Board Responsibilities = Infrastructure & Finances

Staff Responsibilities = Programs & Program Goals
Strategic Planning
The Elephant in the Room

- Plano Symphony Orchestra 2000
  - 55% Capacity
  - 55% Subscriber Renewal Rate
  - Traditional Programming
  - No Distinct Branding – 6 Other Orchestras in Area

- Strategic Planning 2000 – “Business of People, not Music!”
  - Investment in Data System
  - Investment in Internal Design and Technology
  - Investment in Patron Services Staff
  - Major Change in Programming Philosophy - Branding
  - Fanatical Regarding Patron Relationship Strategies
  - Branded Youth Education Products – “Encore Youth”
First Impressions:
Three or Four Words that Come to Mind

Beautiful Music Classical Community Conductor Culture
Enjoyable Entertainment Evening
Excellent Exciting Fabulous Friendly Good
Music Great Music Guest Hector Guzman
Local Music Close Orchestra Outstanding Programs
Quality Symphonic Music Symphony Wish Wonderful Music
YOUR Plano Symphony Orchestra

INSPIRES

EDUCATES

ENTERTAINS

INVOLES

OVER 162,000 CHILDREN & ADULTS in North Texas annually with your support.

YOU MAKE THE DIFFERENCE
PLEASE GIVE GENEROUSLY

MAKE YOUR DONATION BY DEC 31
AND RECEIVE A TAX DEDUCTION AS ALLOWED BY LAW

DONATE NOW

THE PLANO SYMPHONY ORCHESTRA is a 501(C)(3) NON-PROFIT ORGANIZATION
PSO Product Line Analysis-Value Propositions
Youth Education and Development

Our Vision

- Identify current PSO services where opportunities exist to package, re-position communications and strategically market “value propositions” attractive to potential investors.

Our Assumptions

- Historical philanthropic messages will not be effective in attracting desired PSO contributed income.

- More success is anticipated if the PSO is positioned and aligned with company marketing goals—*partnering to deliver valued services, community image and customer prospect opportunities.*

Our Strategy

- Led by the PSO marketing and education committees working with staff, perform a PSO product line activity and economic analysis. Develop a set of value propositions aligned with perceived company sponsor goals.

- Working with the development committee, sharpen marketing messages, identify target companies for market testing and fine-tune our financial analysis with the goal of securing over $? investor annual income from title investor-partner and product investors.
### Encore Youth™ Umbrella Programs (product lines) and Sponsorship Examples

<table>
<thead>
<tr>
<th>School Concert Education Program - Send Me to the Symphony</th>
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<tbody>
<tr>
<td>- Musician visits, concert music and composer demonstrations</td>
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<tr>
<td>- Field trip concert</td>
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<td>- TEKS aligned curriculum tools</td>
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<tr>
<td>- Sponsored by Capital One?</td>
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<tr>
<th>Young Artist Competition</th>
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<tr>
<td>- Student competition in 3 age groups &amp; winners playing with PSO</td>
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<tr>
<td>- Sponsored by TOPAZ Labs?</td>
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<tr>
<th>Family Symphony Sundays</th>
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<tr>
<td>- Series of interactive and engaging concerts</td>
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<tr>
<td>- Experience focused on the entire family</td>
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<tr>
<td>- Sponsored by Atmos Energy?</td>
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<tr>
<th>Instrument Petting Zoo</th>
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<tr>
<td>- The Zoo gives children opportunity to see, hear and play different instruments</td>
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<tr>
<td>- Sponsored and made free of charge by 7-Eleven Stores Collin County?</td>
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<tr>
<th><a href="http://www.ensembleouth.org">www.ensembleouth.org</a></th>
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<tr>
<td>- A comprehensive and interactive online music education resource for children, schools, and families.</td>
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<tr>
<td>- In school and in home use</td>
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<tr>
<td>- Sponsored and Powered by HP?</td>
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Strategic Planning
PSO Strategic Plan Agenda

Control Our Destiny – Risk Analysis
Identify the Irresistible Idea (Investors)
Create the Orchestra the Community Deserves
Address a Long-Range Technology Plan
Maximize “Encore Youth”
Develop an Institutional Marketing Plan – PSO as a Valued Part of the Community
Create an Organizational Development Plan
Institutional Advertising Strategy
“The Best Kept Secret in Town?”

**Products**
- Concerts
- Encore Youth
- Healing Notes
- Community

**Audience**
- Patrons
- Education
- Medical
- Chamber
  - Parents
  - Kids
  - Senior Care
  - City Hall
  - Economic Development

Goal = Sustainable income stream beyond performances.
Board/Staff Retreats

- Annual Retreat
- Mid to Late August
- Saturday Morning Half Day
- Responsibility of Strategic Planning, Board and Staff

- Attendees
  - Board Members
  - Volunteers
  - Select Musicians
  - Staff
  - Invited Guests
Board/Staff Retreat Agenda

8:00  Breakfast Served
8:20  Welcome/Magical Mission Moments
9:00  Our Orchestra
9:20  Artistic Insights
9:30  Musicians Performance & Discussion
9:50  Strategic Plan Priorities (Committee Reports)
10:50 Break
11:00 Main Topic for Discussion or Breakout Sessions/Reports
12:45 Closing Remarks
Staff Versus Board Committees

- Finance Committee – Bean Counters = Focus on Expenses?
  - Short on Budget Resulting Agenda?
    - Budget Earned Revenue to the Walls?
    - Raise Ticket Prices?
    - Cut Artistic Budget?
    - Cut Marketing Budget?
    - Cut Staff?
    - Cut Concerts?

- Marketing Committee – Value Propositions = Earnings
  - Create Value Propositions – Concerts/Subscription Packages/Experience
  - $XX Investment = $XX Revenue (Revenue Predictive Model)
  - Create Value for Investors
    - Encore Youth
    - Multi-Season Programming
    - Soundsync
    - The Big Idea

- Development Committee – Fund-Raising? % of Budget?
Strategic Planning
In Challenging Times

Michael Kaiser’s 10 Rules for the Turnaround

1) Someone Must Lead – Not Diffused Leadership
2) Leader Must Lead – There Must be a Plan
3) You Cannot Save Your Way to Financial Health
4) Focus on Today and Tomorrow
5) Extend Program Planning Creating Investors
6) Develop Institutional Marketing Plan
7) There Should Be Only One Spokesman
8) Focus on the Larger Donors
9) Boards Must Allow Restructuring
10) Follow the Above Rules
Board Fundraising Barriers
Boards on Fire/Susan Howlett

- Expectations are Unclear – Suggested Documents
  - Role of the Board
  - Board Member Expectations
  - Customized Letter of Agreement
  - Individual Performance Review

- The Purpose and Rational for Funding is Cloudy
  - How is our work distinct from other groups
  - Develop/explain the why of the organization’s strategy
  - Help Board members educate themselves about the organization, community, industry, issues
Board Fundraising Barriers
Boards on Fire/Susan Howlett

- Board Members Don’t Own the Budget
  - What patterns indicate physical health or red flags?
  - How does the budget reflect mission, goals, core values?

- Trustees Aren’t Engaged in Governance
  - Typical meetings offer little responsibility to lead or be in creative conversation in the “generative mode”
    - Fiduciary Mode – Budgets, Contracts, Legal
    - Strategy Mode – Program Goals and Relative Outcomes
    - Generative Mode – Outside the Box, Vision, Leadership

- The Mission is Muddy – Board Members Can’t State It
Board Fundraising Barriers
Boards on Fire/Susan Howlett

- Goals Aren’t Driving Behavior
  - Goals don’t coincide with organizational vision
  - Targets have no bearing on the Board’s work
  - Goals are so general no one can measure them
  - Base Annual performance evaluations for both Board and staff on their progress toward meaningful goals

- Outcomes are Vague
  - What difference does something make
The Fundraising Strategy is Ill-Defined
- A budget shortfall often causes frustrated leaders to want to sell more products
- The issue is often a lack of a coherent development plan

The Board Isn’t Being Used Optimally
- Fill Gala tables? Attend Ball?

Board Members Haven’t See Good Models

Board Members Haven’t Been Trained to Be Good Ambassadors
Development and Community Engagement Process

<table>
<thead>
<tr>
<th>Prospects</th>
<th>Assignment</th>
<th>Relationship Cultivation</th>
<th>Data</th>
<th>Analysis</th>
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**Activity**
- **Goals**
- **Direction**
- **Assign**

- **PSO Events**
- **PSO Concerts**
- **Personal Meetings**
- **Personal Commitments**

- **Data**
- **Reports**
- **Analysis**
- **Updates**

**STAGE**
Plano Symphony Orchestra Contributed Revenue Dashboard as of May 9, 2016

**Corporate/Foundation**
- Goal: 10 Gifts
- Number of Gifts: 1
- Total: $125,000 Budget
- Amount to Reach Budget: $123,380
- Foundations: $59,000
- Corporate Gifts: $26,308
- Matching Gifts: $12,203

**Virtuoso Society**
- Goal: 81 Gifts
- Number of Gifts: 74
- Total: $113,000 Budget
- Amount to Reach Budget: $111,550
- Virtuoso Gifts: $12,000

**Individual Gifts**
- Goal: 390 Gifts
- Number of Gifts: 253
- Total: $65,000 Budget
- Amount to Reach Budget: $63,183
- Individual Gifts: $63,183
- Angel Fund: $9,837
- Memorial Giving: $3,990

**Encore Youth**
- Goal: 8 Gifts
- Number of Gifts: 3
- Total: $111,000 Potential
- Amount to Reach Potential: $111,482
- Title Sponsor: $40,000
- Program Sponsors: $5,518
- Other Support: $5,518

*Paid and Pledged PSO Confidential Information. Not to be Forwarded or Distributed*
Governance & Earned Income

- Subscribe to and attend performances
- Participate in a minimum of one audience development project annually
- Devote select Board meetings to audience engagement issues and Board involvement
- Serve on a Think Tank as qualified
- Answer the question, “How do we (Board) organize ourselves to enhance earned income?”
“I Did Not Bring You Here To Tell Us How to Get to 60% Capacity.’

DSO Primary Strategies
- Investment in Service Infrastructure
- Resource Development Think Tank
- Fanatical Focus on Relationships
- Product Education: Know Before You Go
- Market Segment Specific Subscription Packages
  Drove Commitment

Results = 5,100 to 31,000 Subscribers
  Sold-Out Nine Consecutive Seasons
Your Organization

- Audience Engagement Priorities and Opportunities
- Organizational Alignment/Strategic Planning Priorities
- The Irresistible Idea
- Next Immediate Steps
Thank You!
Audience Strategies for the Arts, Inc.

You don’t need anyone’s permission to be successful!