Fáilte Ireland
National Tourism Development Authority

How to buy a ticketing system

A guide for cultural organisations

by Beth Aplin with Belinda Adams for Theatre Forum

THEATRE FORUM IRELAND
The Voice of the Performing Arts

Contents

What are ticketing systems all about?

Introduction

Computer software in various guises has been used to sell tickets since the early 1980's. Computers are well-suited to managing and recording ticket sales and can dramatically improve the efficiency and capacity of your box office as well as transforming your organisation's marketing and customer care. You can:

- Sell tickets from multiple sales points at the same time
- Sell them quickly and securely (so no double bookings)
- Capture customers' details so you know who they are and what they buy
- Print tickets and other proofs of purchase easily and quickly
- Keep financial records more efficiently
- Offer your audiences easily accessible internet sales

Early systems ran on huge mainframe computers needing a room of their own. Now you can access software running at the supplier's offices via the internet. The cost of buying and maintaining a ticketing system has reduced enormously with options to suit every pocket and scale of operation.

There are several ways of buying a ticketing system:

- an all-up-front purchase of software licence (sometimes for a specific number of users, sometimes unlimited) with annual support & upgrade fees
- pay as you go where you pay a small fee for each ticket sold
- an agency model where you don't buy any software at all, but use another organisation's box office to sell your tickets.

If you choose to buy software, you can:

- load it onto a powerful computer located in your offices and maintain it yourself
- access software located on a computer set up and managed by the software supplier via a high speed internet connection (referred to as a 'hosted solution')

The ticketing software market is competitive and fast moving with suppliers constantly improving their software. So before you choose a system assess a range of options, comparing the current features with your specific requirements.

What a ticketing system should do

System Setup

Your ticketing system should allow you to set up all your events quickly and easily, enabling you to attach codes that group events together (for example all the events in a season).

It is essential that you can give each member of staff who will be using the system with a separate access code and password – and they keep these private. You should be able to give users different levels of access, so that, for example, casual Box office staff can sell tickets but not change prices.

If you sell numbered seats, you should be able to display a visual plan of where the seats are and print the seat number and any other information you need on your tickets.

In house ticketing

Selling tickets should be simple so you can train your staff quickly and easily. Your ticking system should sell tickets speedily and enable you to return, exchange and amend existing bookings. You should be able to hold back some seats from general sale for special purposes (house seats, press seats, wheelchair spaces, VIP seats etc) and then release them back on sale when you need to.

To speed up the time it takes to sell a ticket, you should be able to search for the specific performance a customer asks for.

There should also be an option to sell tickets very quickly just before a performance starts (known as door sales)

You must be able to associate the details of a specific customer to a booking both by searching for and selecting an existing customer record from your database or by registering the details of a new customer. You should be able to add the customer to specific mailing lists and stop the customer getting mail, as they prefer.

You should be able to sell tickets for the same event at different prices – full price, discount or concession price and complimentary or free tickets (known collectively as ticket types) and monitor who has bought each type. You should be able to add booking fees or charges and remove them at your discretion.

You must be able to take payment via a range of methods and have a facility for high speed, reliable, PCI compliant[1] credit/debit card sales.

Internet ticketing

You should be able to sell tickets via the internet and have cost effective facilities for credit/debit card payment (which may be processed differently from your card transactions sold directly through your Box office).

Some systems enable online customer to see which seats are still available for each performance and choose which they prefer. You should be able to choose which ticket types are available for internet sales so, for example you can prevent people getting complimentary tickets online.

Online customers should be required to enter their name and address details and have the option of joining your mailing list (a requirement of the Data Protection Acts is that they should opt-in rather than be forced to opt-out if they don't want to hear from you).

[1] The Payment Card Industry Data Security Standard ensures credit card data is held securely to prevent fraud.

Some systems enable customers to register their contact details and use them when they book again. This means box office staff have to spend less time cleaning the database as it reduces the number of duplicate customer records held on your system.

The system should automatically produce and send a confirmation email to the customer. You should be able to print out the tickets in a variety of ways e.g. allowing the customer to print them at home or to print them in the box office and hold them for collection (known as COBO).

Remote location ticketing

If you sell tickets for performances taking place in a different building to your box office, you may need a remote sales facility. Some systems have a specific module and with others you tap into your ticketing software via a temporary internet link.

Customer Records

You should be able to record customers' preferences, notes, queries and complaints and to attach tags, flags or codes to specific customers, for example board members, subscribers, teachers, group bookers or journalists. On your website, customers should be able to register to receive mailings without necessarily buying tickets at the same time.

You should be able to run a program to help you identify duplicate customer records and merge them together.

It should be possible to identify any customer record very quickly, see all key customer history easily and explore in more detail as required.

Donations

Your marketing and fundraising will be more effective if you understand the whole of each customer's relationship with your organisation including attendance at events, membership and donations.

You should be able to take a donation either on its own, or alongside a transaction involving tickets for a performance.

Some systems enable you to take donations via the internet sales module. The system should easily identify which customers have made a donation and help you to produce thank you letters and other correspondence.

Membership

If you have or are planning to have a membership scheme of some kind, you should be able to sell a membership either on its own, or alongside tickets for a performance. You should be able to set up membership campaigns as you wish and to see how many current members you have at any one time and whose membership has lapsed.

When you select a customer record, you should be able to tell immediately if that customer is a member, and if appropriate, give them access to priority booking or special offers.

The system should help you to renew members, ideally automatically through direct debit. Some systems enable you to sell and renew memberships via the internet sales module.

Merchandising

You should have the ability to sell things like programmes, car park tickets and t-shirts alongside tickets for performances. You are unlikely to get sophisticated stock control systems in software designed primarily to sell tickets, but you should be able to report upon sales figures.

Reporting

You should be able to produce all information necessary to cash up and reconcile sales each day, month and year. You should be able to report sales figures and produce all sales information necessary both for your own organisation's management reporting and to give to visiting companies and promoters. The reports may not look like the ones you are used to so identify what figures your colleagues actually use.

You should be able to report upon individual staff sales and be able to investigate past sales as necessary, for example if a credit card payment is charged back. You should be able to provide any information necessary to account for VAT and for your organisation's audit.

You should be able to produce a range of customer analysis reports looking at what they buy, when they buy it, how often they buy, how much they spend, what kind of tickets they buy, what kind of customer they are (members, teachers, donors etc) and where they live. You should be able to select a range of customers by any of these criteria and produce a mailing (or email) for them. Ideally, you should be able to monitor the success of particular mailings by identifying who you originally mailed and then seeing if any responded.

Support

The system supplier should have robust systems and processes that ensure they can provide the technical support and training your organisation needs to sustain its sales and marketing functions.

> No system will match all your requirements perfectly; it's all about finding the best possible match and a supplier that you want to work with.

Buying a system step by step

Software suppliers have two priorities:

- To persuade you to buy their system
- To help your organisation successfully install and run your system to meet the needs of your ticketing, marketing and accounts operations

> It is your organisation's responsibility to make sure you know what you want and that the system you choose performs these functions in the way you need.

This means that you need to follow a systematic process to get a clear idea of what is really important to you and what resources your organisation can invest in delivering your objectives. The project team needs to answer these questions:

- Why, exactly, do you want a new ticketing system?
- What do you need it to do?
- What staff time, money and physical space can you invest?
- What support do you have from senior management and your board? What are their priorities?
- What are the priorities of your other stakeholders?
- What systems are available within the resources you have available?
- What's your timescale?
- What kind of system supplier are you willing to work with? This is really about the level of risk your organisation can manage. Can you work with a small, rapidly developing but possibly under-resourced organisation or do you need an established and experienced organisation with mature software that is possibly more expensive.

There are four steps to the process: deciding what your organisation needs, drawing up a tender document, matching those needs to what suppliers have to offer and preparing for a successful installation of the new system.

Step One: decide what you need

Before you start:

- Involve all the relevant staff early on to ensure you do not miss any critical requirements
- Helping everyone to realise that each area of your organisation may have different priorities but that they are all inter-connected
- Identify the operations your organisation undertakes frequently or are particularly important so you can choose a system that does those things quickly and smoothly
- Ensure staff understand the inevitable pressures and stresses of moving to a new system and really want to make it work
- Manage your colleagues' expectations about what a new system will be able to improve, and what it will not
- Get everyone involved in testing potential new systems so they get excited about the opportunities it will bring your organisation

Put the project team together

Assemble the group of people from within your organisation who will make the project happen. This could be as few as two people but not more six as it is hard for a room full of people to focus and share information effectively. Your project team should represent the box office, marketing, accounts, front of house, IT and senior management functions of your organisation.

The team will be responsible for:

- Gathering the relevant information outlined in this document
- Writing the tender document
- Exploring the available systems
- Collaboratively making the decision
- Working through the installation and transition processes
- Supporting all staff during the settling in period

Appoint a System Manager

Identify a System Manager, if you don't already have one. This is not the most senior person on the project team but, typically, someone who will have significant day-to-day hands-on involvement with the system.

They should get the most in-depth training so they can take ongoing responsibility for the following:

- Being the primary point of contact with the system supplier
- Taking overall responsibility for decisions that affect more than one department
- Setting up new users on the system, with appropriate levels of access
- Planning and overseeing testing of upgrades and fixes
- Ensuring system problems are resolved.

Decide what functionality you need

Think about your operation in detail: it will help considerably during the installation of the system you eventually choose as well as enabling you to pinpoint essential functionality.

Explore your current operations and procedures; what currently frustrates you, what you rely on and what you would like to be able to do in the future.

> It is all too easy to get excited about new functions on offer that will solve little niggles but forget the everyday functions that you rely on but take for granted

Each of the following operational areas will have key requirements and so need to be involved throughout the process.

Box office

- Timescale - When in the year would it be difficult to move between systems? When would be ideal?
- Staff resources: Do you have part time or casual staff who could help during the training, testing and implementation phases?
- Access: Who needs to be able to use the system and what level of access do you wish to give them?
- Venues: In how many auditoria are you likely to present events? Do you have allocated seating or general admission? How many different seating configurations are you likely to use? How many seating plans will you therefore need and how complicated are they? Do you have venues with different prices depending upon where you sit? Do you need to hold back specific seats for VIPs, press, house seats etc?
- Show setup: How many shows do you issue tickets for in a year? Do you have specific seasons or festivals for which the shows need to be grouped together?
- Discounts: What type of discounted tickets do you sell? Do you have special offers which need to be put on sale quickly?
- Fees: Do you add booking fees? Are these charged per ticket or per transaction? Do you charge fees for handling returned/exchanged tickets? Do you charge fees for posting out tickets (is this different for phone/counter/internet sales)?
- Packages: Do you sell packages or subscriptions? Do these involve events in more than one venue? Do you allow people to part pay for a package, or pay by instalment? Do you rely on the system to automatically allocate subscribers the same seat for each performance?
- Memberships: Do you sell memberships or priority booking? Do you have different levels of membership? How do you need the system to help you handle membership renewals? Do memberships come up for renewal at set times or throughout the year? Do members get priority booking, special offers etc?
- Reporting requirements: What end-of-shift cashing up and banking reports do you need? What show return reports do you need? What audit reports do you need so you can check why takings don't initially balance? What reports do you need to handle a cancelled show? Do you need reports on the number and type of complimentary tickets issue and the returned tickets handled?
- Reports for customers: Do you need booking confirmation letters and/or emails? Do you need group booking acknowledgement letters?
- Methods of payment: How do you currently handle credit card payments (including in person and online transactions)? Do you need reports detailing credit card transactions? Do you issue invoices?

- Agency sales (when you act as an agent for other organisations): What reports do you need to supply? Do you need to add particular fees for those events? How do you need to be able to identify these events during the sales process? How do you manage which tickets you sell (and which are sold by the promoter)?
- Agency sales (when some of your tickets are sold by other organisations): What information do you need to give them? How do you manage which tickets they sell for you? What customer information (if any) do you need to get back?
- Off site ticket sales: Do you need to provide a remote door sales service? What payment methods do you need to deal with? Do these other spaces have a high speed internet connection?
- Ticket requirements: Do you need different ticket designs? What information do tickets need to include? Are you planning to change your ticket stock?
- Internet ticketing printing options: Do you want to be able to print out tickets sold via the internet and hold them at the Box office for collection? Would you like customers to be able to print out their tickets themselves at home like a Ryanair boarding pass? Would you like customers to be able to pick up their tickets from a kiosk in your foyer as at many cinemas?
- Internet sales seating options: If you have a venue where you sell specific seats rather than unallocated seating would you like customers to be able to choose their own seats or have the system pick the best available seats?
- Gift Vouchers: Do you sell/take gift vouchers? How do you need to record this income?
- Other sales: Do you sell merchandise, meal deals, drinks vouchers, car parking tickets etc?

Accounts

- Timescale: When in the year would it be very difficult to move between systems? When would be ideal?
- Accounts package: What accounts package do you use? What level of integration would you ideally like with the ticketing system?
- Daily reports: What information do you require on a daily basis to bank money taken? What other information do you require on a daily basis?
- Show reports: What information do you need to settle a show such as fees, credit card commission etc?
- End of year / period reports: What information do you need to help with year end? How do you handle show runs which straddle the end of year period?
- Audit reports: What audit information do you need to maintain/ monitor about system activity?
- Methods of payment: What information do you need about each method of payment? How do you handle charge backs? What information do you need to raise invoices for tickets?
- VAT: What information do you need to compile VAT returns?
- Gift Vouchers: What information do you need to monitor and manage the sale & redemption of Gift Vouchers?

Front of House

- Performance information: What information do you need in advance of a show starting? (e.g. number of wheelchair spaces being used, number and location of large groups, total number of tickets sold)
- Seating plan access: do you need to be able to view the seating plan directly?

Marketing

- Customer records - How do you want to divide ticket buyers into target groups in future? Do you need to categorise customers by type e.g. board members, journalists, school etc. What key customer information do you need to be highlighted when you and your colleagues in the box office look at customer records? What additional information would you like to add to customer records e.g. children's ages?
- Mailing lists: How many mailings lists do you currently run, how are they identified? Do you have separate online and offline mailing lists?
- Mail outs: How often do you produce mailings? Do you need to monitor who has been mailed and who has responded?
- Emailing: Do you use separate software to generate and manage emailing lists? How would you like this to work with your ticketing system?
- Analysis: What information about customer behaviour do you currently rely on? What would you like to be able to do in future?

- Monitoring sales: what information do you need about ticket buyers for events in a particular period? (i.e. postcode analysis, number of first time bookers, what other shows people have booked for)

IT

- System maintenance: What level of IT support do you have? Are you able to backup and keep secure copies of your system software and data?
- Type of system: Would you prefer an externally managed and run internet ticketing module (hosted solution)? Do you have fast, reliable broadband?
- Internet options: Would you like to sell merchandising, memberships, take ad hoc donations etc alongside tickets on your website?
- Hardware: do you have existing hardware such as servers and PCs that you would like to keep using?
- Ticket printers: Would you prefer to keep your current ticket printers or upgrade to newer printers?

Senior management

- Payment model: Do you need to choose a system which enables you to 'pay as you go' or do you have capital for up front purchase.
- Management reporting: What regular and periodic reporting would you like about sales, operations and audience behaviour?
- Depreciation: What period are you planning to depreciate the purchase over? How long is your payback period (3 years, 5 years, longer)?
- Risk assessment: What types of software supplier are you willing to consider? (i.e. a large, well-established company or a smaller, newer company)
- Links to other software: What other software would you like the system to integrate or work alongside (i.e. accounts software)?
- Overall business gains: What are the key business gains which you are hoping to be achieved by this purchase? What impact do these have upon relative importance of features? Are all staff aware of the underlying priorities?
- Legal requirements: Will suppliers have to meet any specific legal requirements?

Prioritise

Once you have reviewed each operational area, you will have a long shopping list of requirements. The project team now needs to prioritise them. Identify the 'must-haves' ensuring you include the essential functionality that your current system already provides as well as exciting, new features. Decide the relative importance of other issues that will affect your decision such as the type of supplier you would be willing to work with.

Consult externally

Find out about potential funders' priorities, criteria and constraints. You will need to tell system suppliers in your tender document if you can get funding for some services/software but not others.

Find out how key stakeholders weight priorities: what are they keen for you to be able to do, what is less important to them? Get them to endorse your selection criteria to make it harder for carefully made decisions to be questioned late in the day.

Ask similar organisations about their system and experience of the system supplier. Visit them to see their system in operation. The next section contains guidance on ensuring you get objective assessments.

Establish the selection criteria

Agree the selection criteria in advance to ensure there is consensus within the project team around your final decision. Get senior management, board and stakeholders to approve the selection criteria.

The criteria could include:

- The size and experience of the supplier
- The stability of the supplier's business model
- The supplier's ability to be flexible enough to meet your future needs

- How many other clients the supplier has and whether they are similar organisations to your own
- Feedback from these other clients
- Whether you want remotely hosted and managed options
- How the supplier responds to your tender document
- The functionality of the system
- The analysis and reporting functions of the system
- How the project team rates the supplier's demonstration of the system
- Technical support and training
- Value for money
- Whether you want a remotely hosted and managed option

Step Two: draw up a tender document

Break down the task into manageable chunks and assign different members of the Project Team to write different sections of the tender.

Areas to cover:

Your organisation

- Summarise your organisation's mission and objectives, its activities and context. Be concise.
- Explain how the ticketing system will fit into your organisation.
- What external issues will have a direct impact on your ticketing operation?
- Explain your operation: do you have a ticketing system already? What data needs to be converted from that system? How many staff do you have who need to know how the system works? How many tickets and performances do you sell tickets for each year? How many sales points do you have? Are there specific times of year when you need technical support out of standard office hours? Suppliers will use this information to calculate the price they will charge.
- Outline any significant ways in which your operation will expand or change in the near future.

Figure 1: Sample information about the organisation

Background

Mission and core objectives
We are a charity established in 1970 with the primary aim of promoting local and regional folk music through an annual Folk Festival. This festival has run every year since 1970. The charity employs four full time and four part time members of staff and has a large and active volunteer group. It receives funding from the district and county councils.

Core function
The Folk Festival runs for three weeks each May in one venue, the Town Hall. It attracts local, national and international performers and audiences.

Our website is a resource for folk musicians and audiences nationally and internationally including a comprehensive listing of musicians, venues, festivals and support organisations and a wide range of downloadable guides and briefings.

Recent changes
The Folk Festival has been growing year on year, and festival has just received an endowment to allow it to take over management of the building next door. We plan to expand the festival to both venues.

Ticketing operation

Current Operation
Tickets for the Festival go on sale in January to members and in February to the general public. The Sales/Marketing Manager sets up all the shows and a team of two part time staff and ten volunteers handle all bookings and sales. We have a website, but do not sell tickets online.

The Town Hall holds 300 seats, which are sold on a general admission basis (first come first seated). Two performances are held each day during festival, a total of 41 performances. On average 80% of the seats are sold. In addition, there are eight workshops per day at weekends, each with a maximum capacity of 20.

These are free to weekend pass holders who must reserve a place in advance, with the remaining places sold to the general public.

Future plans

The incorporation of the new venue will enable us to double the number of performances. It has 200 seats. We would like to sell reserved, allocated seating in both venues from next year and to sell tickets via the internet for the first time.

Your needs

- Set out your timeframe: when do you plan to start the transition process, when would you like to start selling tickets. Are there times of year when you cannot change systems?
- Legal requirements: What specific contractual requirements must your organisation meet?
- Describe your selection procedure: What information do potential system suppliers need to give you? What key elements will make up your selection criteria? Who should they contact if they have questions about the tender document?
- Set out your prioritised shopping list of functionality requirements.

Timescale

Let the system suppliers know how long you expect the selection process to take and what stages they will need to go through. (See Figure1 for a sample timescale)

> Work out how long you think you will comfortably need for each process – and then add a week or two. You won't make the right decision in a hurry.

Ensure you plan in staff availability so that all members of the project team can read the responses to tender, be present at all system demonstrations and go on at least some site visits.

> The project team will make their decision by comparing systems and you can't do this unless the same staff members are there for every system demonstration.

Figure 2: Sample timescale

Phase	**Timescale**	**Actions**
Respond to tender	20th July	Deadline to respond to all elements of the tender document
Initial assessment of tenders	Mid August	Review all tender documents and produce a shortlist.
System demonstrations	4th August – 12th September	Shortlisted suppliers deliver a full day demonstration. Suppliers may be called to an additional demonstration day
Decision	End September	Inform shortlisted suppliers of the decision
Start installation	Early November	Start training and planning data conversion
Go live	Mid December	Set up the coming season on the new system before booking opens in mid January (known as a 'quiet go live')

Selection criteria

Telling system suppliers the criteria you will use to assess their tender will enable them to give you all the information you need.

Figure 3: Sample selection criteria

The company	The robustness of your business model and the extent to which we believe we could establish a good working relationship
Functionality	The extent to which the software meets our requirements
Future development	How well software development plans match our own future plans
Support	The extent to which technical and other support services meets our needs and the quality of your customer care
Cost	Value for money

Legal requirements

Describe any specific policies or procedures which your organisation requires any supplier to have in place. These may include:

- Health and Safety policy
- Equal Opportunities policy
- Issues arising from the Freedom of Information Act
- Escrow agreement: in which a third party holds a copy of the software code which all users can access in the event of the system supplier going into administration.
- Insurance
- Specific terms which must be included in any contract

How suppliers should respond to the tender

You will find it easier to compare tenders if you tell system suppliers exactly what you would like them to prepare for you. Consider asking them to provide the following:

How the system meets your needs

- A categorisation of each of your functionality requirements as currently provided, will be provided in future upgrades or will not be provided
- Contact details for reference sites: these are existing clients of the supplier who will be willing to talk to your project team and show you how the system works for them
- Hosting options, if applicable, for your internet ticket sales only or for a complete hosted solution.

A breakdown of all costs by:

- Software licence fees including whether the licence is for a fixed term or the lifetime of the system
- Support costs for the initial system set up and annual costs after that, listing the available support options
- Upgrade costs
- Internet ticketing costs including the initial set up and branding of internet ticketing web pages, any ongoing hosting costs, select-your-seat functionality and any other ongoing charges
- Credit card software including installation, setup, any software and hardware required and running costs
- Training including details of what this would cover. Your staff will need training to set up the system, sell tickets, send mailings, analyse data and run reports, undertake basic system management etc. You will probably need follow up training 2 or 3 months after you have gone live
- Data conversion, if you need to transfer data from your current system. Ask suppliers to specify what information can be converted and if there is a limit to the number of records that can be transferred
- System setup including any configuration of your system which has to be done by the supplier and the creation of seating plans and design templates for tickets
- Ticket printers and their configuration
- Initial consulting costs to explore your overall configuration requirements, before training starts

- Software modifications which are essential including any that are to be delivered after you go live
- Tailor-made reports which you require
- System hosting costs, where applicable
- Website hosting costs, where applicable
- Payment schedule including any pay as you go or upfront purchase options.

Technical specifications

- Details of all computers required to run the system e.g. a separate credit card server may be required
- Minimum and recommended specifications for PCs and servers running the system.

Support

- Details of technical support including what level of service is provided and when? Do they provide support outside office hours e.g. what happens if your system goes down at 7pm on Saturday evening?
- What is their policy on supporting features and reports created just for your organisation?
- Upgrade policy: how often are upgrades provided and what additional costs could arise from installing upgrades?

The company

- Company details including the full company title, registered office and current client list
- Details of the specific policies or procedures which your organisation requires any supplier to have in place
- A copy of the proposed contract to give you time to get legal advice before the final contract negotiation.

Timescale

- When is the company available during the system demonstration period you outlined in the timescale
- Will they be able to install the system by the dates proposed in the timescale? If not, what do they propose?

Communication

- Give suppliers the contact details of someone to call if they have any queries about the tender process.
- In what format would you like the responses: on paper or electronic, what digital format e.g. can you open documents created in Word 2007, how many copies, stapled or unbound?
- How should the tender be delivered?
- What is the deadline?

How <u>not</u> to draw up a tender document

Functionality requirements

An effective tender document sets out specific requirements, expressed in a way that enables an objective assessment of whether they have been met. It should specify what outcomes are required from each function, rather than dictate how those outcomes are achieved.

> Every system supplier claims that their system is 'easy to use'

Figure 4 shows a functionality shopping list that will make it more difficult for the organisation to choose the right system. The requirements are vague and subjective so the project team will need to make value judgements about whether each system meets them.

- What do 'easy to use' and 'quickly and easily' mean? How can a system supplier provide evidence for this in a document? It would be better to measure this objectively during the system demonstrations by timing specific operations and counting the key strokes needed.
- Specifying that schools tickets should be colour coded is dictating how the system should work, not what you need it to achieve.
- How can the system supplier tell if their system is compatible with your existing printers? Is this a deal breaker?

Figure 4: Example of ineffective functionality specification

Ticketing Maintenance

- Need to be able to release/change holds quickly and easily
- Need to be able to update show title field on tickets easily (i.e. if film certification changes)
- Is the system compatible with our printers?

Ticketing sales

- Need to be able to refund fees
- Held seats - need to be able to identify who released a seat and when
- Ability to add a prompt at the end of a transaction (reminders / up selling / fundraising etc)

Fundraising spec

- Ability to easily identify donors on ticketing history
- To be able to add website payments

FOH Report Management

- Colour coding of tickets to easily identify schools etc
- Show on screen the no. of tickets sold and the number left to sell

Figure 5 shows how you could rewrite the requirements to make your shopping list more effective. The items missed out will be best assessed during a demonstration.

Describe what you want to do, rather than second guess how systems might do it. Telling suppliers why you want particular functions just complicates matters. Say WHAT you want, not HOW or WHY you want it.

Figure 5: Example of an improved functionality specification

1. Ticketing Maintenance

1.1. Ability to hold seats back from general sale and to release these held seats after the show has gone on sale [Essential]. We would like to be able identify who has released held seats [Non-essential].

1.2. Ability to add specific information on tickets and to be able to change this after the show has gone on sale [Essential].

1.3. We have three 100 dpi BOCA printers, are these compatible with your system?

2. Ticketing Sales

2.1. We add €1 booking fee to all transactions. Can your system add this automatically? Can it can be removed at the discretion of box office staff and can it be refunded if required? [Essential].

2.2. Automatic prompt at the end of transaction to encourage/ remind staff (e.g. about the sale of car park vouchers) [Non-essential].

3. Fundraising

3.1. Ability to take ad hoc donations during ticketing transactions both via internet sales and counter/phone sales. History of these donations stored against customer record [Essential].

4. Reporting requirements

4.1. Front of House report with general sales information and large group bookings identified [Essential]. How does your system help with this?

Number each item throughout the whole document. This is particularly important for key functionality requirements. This means you can ask for a specific response against each numbered point and nothing can slip through the net.

You could choose to include simple lists of clear, specific but relatively high level requirements in the tender document. You can then explore each requirement in detail during each system demonstration. You will need to ensure that the demonstration schedule allows enough time for this. Figure 6 is an example of a fairly high level list of required functionality for fundraising.

Figure 6: Example of a high level functionality specification

1. Fundraising

1.1. Track interactions with and gifts from donors, trusts and foundations [Essential]

1.2. Capacity to run a friends membership programme [Essential]

1.3. Ability to produce reminder/renewal letters automatically [Non-essential]

1.4. Online membership purchase [Essential]

1.5. Online membership renewal [Non-essential]

1.6. Ability to take and track donations online and via phone/in person transactions [Essential]

1.7. Ability to manage and monitor legacies [Non-essential].

Step Three: choose the right supplier

Introduction

Ticketing system suppliers have more experience selling systems than arts organisations have buying them. They are good at clinching deals. It is essential that the project team follows a systematic process of matching your needs to what suppliers have to offer. No system will suit all your requirements perfectly so the decision is frequently a trade off between:

- Cost
- Functionality: the things you *must* have and the things you would *like* to have
- How the team feels about the company
- The look and feel of the system
- Ongoing resources needed to run and maintain the system

If you spend enough time on steps one and two of the process outlined earlier, you will have a clear idea of what really matters to your organisation and can make the best possible decision.

How to approach suppliers

Ask as many organisations similar to yours as possible which ticketing system supplier they use and search the internet to compile a long list of potential suppliers.

Contact the system suppliers early on to check that you have the correct contact details and alert them that your invitation to tender will be coming so they can set aside time to complete it properly.

At this stage, send them a brief outline of your organisation, a summary of the number of tickets you sell each year, the date they can expect the tender document and the closing date for submissions.

System suppliers may offer to give you a demonstration of their system or send you sales information at this point, before seeing or responding to the tender document. Spend the time researching and compiling the best possible tender document and ensuring your colleagues understand and buy into the selection process, rather than looking at specific systems before you are ready to start the selection process.

System demonstrations

Careful assessment of the responses to your tender document is not enough. You must see the system working and scrutinise how it performs each of the functions you require. Even if the supplier confirms in their response to your tender that they can provide certain functionality, always explore it during the demonstration. Your idea of what is effective may be very different to the suppliers'. It is better to find that out during a demonstration than during the pre-installation training.

To get the best out of a demonstration, send the shortlisted suppliers a list of exactly what you would like to see and ensure that all members of the project team will be there to see it.

Figure 7 shows an example of an agenda for a system demonstration sent in advance to the system suppliers.

Comparing systems can feel like comparing apples and pears. Suppliers break down ticket purchase and management processes differently and use different terminology. If you are not clear, ask for an explanation.

Figure 7: Sample system demonstration timetable

10:15 - 11:00	**Customer records**	Looking up, adding new, Rapid Addressing, duplicate creation reduction, Data Protection, adding categories & flags, handling & monitoring customer complaints
11:00 - 12:00	**Selling tickets**	Selecting from a large list, Selling assigned seats, selling General Admission seats, hold codes, Door Sales, reservations, returns, reporting headline issues, options for fees
12:00 - 12:30	**Selling packages**	Package setup, sales, partial returns, full returns, adding additional information to a sale, producing reports
12:30 - 1:00	**Membership & Fundraising**	Managing donations, memberships, loyalty schemes, reporting
1:00 – 1:30	**LUNCH**	
1:30 - 2:30	**Internet options**	Sales, configuration, access, what can and cannot be sold, print at home, fees, merchandising sales, purchase path flexibility
2:30 - 3:00	**Group bookings, off site sales**	Look at setup, configuration, reporting, group booking reports and pricing, off site access, speed and ease of offsite sales
3:00 - 4:00	**Marketing & analysis**	Review ease of production of existing reports, consider ease of writing new reports, analysis options, Mailing List options (internet and standard), Incorporating email into standard marketing methods, campaign analysis
4:00 – 4:30	**Final questions**	Licensing, project management, data conversion - any other issues

Please note: you will be asked to demonstrate specific features mentioned in your tender document. Please be prepared to answer specific queries and demonstrate all features upon request.

Do not make any assumptions - if something is important to you, ask to see it in a demonstration. Ideally try it hands on for yourself.

What to assess during the demonstration

During the demonstration you should check against your functionality requirements: what have you seen, what are you happy with and what you would like to see more of?

Guidelines

- How well has the supplier prepared for the demonstration? You can tell a great deal about the supplier by how much thought and effort they have put into what they show you. A supplier who has prepared in advance, researched your organisation and has matched their product to your needs is showing you how much they value your business.
- List specific key functionality that you would like to see demonstrated. Be specific and through. Give the supplier specific details so that they can show you exactly what you need to see (see Figure 8 for an example)
- How well do the people presenting the demonstration know the system? You are trying to gain confidence in the system as your business will depend upon it. Does the sales person inspire that confidence? Can they answer your questions? Does everything work smoothly? Do you believe what they are telling you?
- Always make sure that you see all the things which are fundamental to your business. In particular, explore things which you do frequently or that take a lot of time. Check these things off against your requirements list.
- Does the salesperson show you what you want to see? Be aware that they may want to show you system features that excite them but are not important to you. Be firm so they do not take up too much valuable time and the demonstration can cover your priorities.

Figure 8: Sample specification for the demonstration of a specific function

Selling packages

We would like to see you:

- Set up five performances that will be part of a package and create the package
- Sell two tickets for that package to a new customer
- Refund one of those tickets for that package
- Review all the sales and reporting history for the customer and the package

Don't make a decision if the project team feels they don't have all the answers. If a specific aspect was not covered in enough detail during the demonstration or in the response to tender, arrange an additional demonstration to see it again.

What to ask other customers

It is strongly recommended that you research your shortlisted suppliers by visiting organisations similar to yours that use the systems. Look at the list of reference clients you asked suppliers to include in their response to the tender document. These clients will have a good relationship with the system supplier and may be getting some assistance or recognition from the supplier in return for acting as a reference. You may want to ask for details.

Choose one or two other users, who are not reference clients and contact them for their thoughts. Assign members of the project team to make site visits to explore the operation and set up of the system. If possible, several members of the selection team should make each visit.

You will be able to tell a great deal about the supplier from the attitude of the organisation to your visit:

- Are they pleased to show you around?
- Are they enthusiastic about the system and what it can do?
- Are they eager to talk about the company?
- Are they keen to answer all your questions or do they avoid talking about certain aspects?
- Do the staff seem comfortable using the system?
- Are the staff talking positively about the system?
- Does everything work while you are there?
- Do ticket buyers seem to get what they ask for without a fuss?

For best results, prepare questions to ask the box office manager and their staff as the opinions of the people who use the system on a daily basis are hugely important. Figure 9 gives an example.

What to look out for

Management issues

Weigh up the pros and cons of larger, more established companies against small, newer companies. There are benefits to both: tried and tested software and a large client list of organisations similar to yours will mean less risk but a newer company with developing software and far fewer existing clients may be more flexible and responsive to your particular needs.

You may wish to pay for a specialist agency to run credit checks on your shortlisted companies or wait until you have a preferred supplier.

If you agree that you need specific reports or additional functionality, document this in specific detail and make sure that anything critical is incorporated into the contract with an agree delivery timetable.

Start enquiries with your preferred credit card solution supplier as soon as possible.

It always seems to take a long time and can feel as nerve racking as buying a house. Elect someone from the project team to manage this process and get a weekly update on progress.

Figure 9: Sample extract from a site visit questionnaire

Questions for the Box office/Sales Manager

1. How easy is it to sell the tickets (or whatever job they need to do)?
2. Is the system sophisticated enough to meet their needs?
3. How easy is it to train new staff?
4. How do the staff feel about using the system? If possible ask the front-line staff as well as the manager
5. How do reports work in practice? Can they get what they need?
6. Is the support from the system supplier efficient and effective when they report minor matters?
7. What is the support like if they have major problems?
8. What is the organisation's overall view of support?
9. How responsive is the supplier to developing the software?
10. Do they feel as if the product is improving and progressing - and in a sensible and robust way?
11. Do they talk to other users of the product? Is this arranged officially or unofficially?
12. How well did the supplier prepare them for the installation?
13. What do they know now, that they wish they had known before?
14. Would they recommend that you purchase from this supplier?

Costs

Work out the cost of the system over your chosen depreciation period. A per ticket fee may be expensive over 5 years.

Be realistic about whether you need out of hours support. Some organisations need a high level of support at specific times of the year and you may be able to arrange a bespoke package.

Check out exactly what the implications of custom reports, functionality and configuration are when you get an upgrade. You do not want to be faced with a large bill when installing a 'free' upgrade.

Check that enough training is included to enable you to use the system to its full potential. It may help to have the trainer come back a few months after you go live to refresh your memory and show you more complex features.

Step Four: prepare for a successful installation

Once the decision is made and agreed you need to prepare for the transition between systems to minimise disruption.

After the decision:

- Make everyone clear about why you have chosen the system, and what trade-offs you have had to make
- Negotiate the contracts including any bespoke functionality which you need within a specific timeframe
- Get a written guarantee that any customisations and modifications will be taken into account in future standard upgrades. You don't want to have to pay each time to get them to work
- Start any credit card setup procedures as soon as possible – this can delay installation
- Work on internet ticketing integration with your website developer
- Prepare your organisation and gather necessary detailed information
- Start your installation, training and configuration
- Test and check including a detailed check of any data conversion
- Go live – ideally internet sales should go live a few weeks after phone and counter sales, to allow a settling down time.
- Plan follow up training a few months later

Planning is the key to a successful installation

System administration

A lot of detailed information is needed to set up your new ticketing system. The project team will have already collected a lot of this information when they were compiling the tender.

Figure 10: Sample pre-installation information checklist

Pre-installation information needed from the box office

- A list of all the spaces for which you sell tickets and an indication as to whether they have assigned numbered seating or unreserved seating (general admissions)
- A seating plan for each configuration of each space with rows and sections clearly marked. Also mark up all restricted view seats, standing room, wheelchair spaces, any sections with unreserved seating etc
- General admissions: give details of the maximum capacity for each space
- Seating information to print on tickets e.g. where customers have to enter through specific doors/gates to access certain seats.
- Examples of previous and current season brochures, pamphlets or events listings
- A list of all available concessions with details of any group discounts, special offers, voucher schemes etc
- Descriptions of any membership or friends schemes including whether they are sold through the box/ticket office or not and whether they are included in the ticket price or sold as a separate item
- A list of all payment methods including details of how you handle credit card bookings.
- Details of any ticket agents including commission rates, booking, collection and invoicing procedures
- Details and examples of any invoices or confirmation letters for ticket sales
- Details of any off-site ticket sales e.g. by amateur groups, promoters, members etc.
- Details of how you currently handle reservations, returns and exchanges

- Details of any subscription schemes or packages including examples of subscription renewal forms, acknowledgment letters etc.
- Samples of reports you currently use e.g. cashing up sheets, end of day return, show returns etc
- Details of the number of partially sold shows including estimates of the number of ticket sales and reservations which you will need to transfer
- Examples of all types of tickets and vouchers.

Installation schedule

Make sure that you have enough time set aside for you and your colleagues to learn, practice and gain confidence in the new software. Don't rush the installation. Try to schedule it for a quiet period in your box office calendar, not, for example, for the week before your Christmas show goes on sale.

When you are planning your installation with your system supplier, take into account the following:

- What is the date of the first performance you will sell on the new system?
- How busy do you expect to be during the installation process and immediately after going live?
- When will you need to do your first mailing?
- When do you want to go live with Internet Sales? It is worth considering leaving a gap of two weeks after counter and telephone sales go live on the new system
- How will you work with promoters and producers during the change over and start up period?

Together, draw up an installation schedule to include:

Infrastructure

- Hardware purchase and installation if required. There may be a lead time on ordering equipment. Take into account the time needed for your organisation to process purchase orders and make payment etc.
- If you are replacing all the Box office equipment, it may be worth considering the layout of the Box office. Do you gain or lose space? Will staff and customers benefit from a rethink?

Internet connectivity

- Physical connectivity – broadband set up
- Online ticketing website design – deciding on the look and feel of the website, finding a designer, if necessary and then testing the site.

Training

- The number of people required to learn the system
- The availability of these people – have they booked holidays?
- The location of the training – it is highly recommended that you have the training in a separate room to the box office, so that everyone can focus on learning the new system without interruption. This may involve providing box office cover from either other areas of the organisation or using casual staff.

Credit card setup and testing

- Contacting banks and service provider and getting set up as a merchant
- Installing processing devices i.e. chip and pin
- Testing of different cards to ensure connectivity and accurate handling

Data conversion

As part of the tendering and contractual processes, you will have agreed with the system supplier what data will be converted. As a general guide it can include:

- Customer details including mailing lists and data protection codes
- Past purchase history although this is unusual as it entails coding up all past events

Take time to make sure that the data has been converted correctly. It is difficult to correct a mistake once you are up and running.

Shows currently on sale

Transferring partially sold events can be done in three ways:

- Use a hold code to exclude from sale on the new system the seats already sold on the old system. This is quick but will mean that financial reports will need to be run on both systems
- Sell the tickets on the new system to a generic customer called 'Old System' using a dummy payment type. This will mean that the financial side will be correct but the seating history will be wrong
- Sell the tickets to the correct person using a dummy payment type. This can be time consuming and labour intensive but the reports and seating history will all be correct on the new system.

Stationery

Allow time for the ordering, design, printing and delivery of any new stationery:

- You may want to change your ticket stock because you have new printers or have the opportunity to rebrand your tickets. Get a list of appropriate specialist ticket stock suppliers from the system supplier. Prices and quality vary so ask for quotes and samples. The number of tickets that you order will affect the price.
- If you have limited space, ask the printer if they can store the tickets for you. Provide them with any graphics to be pre-printed onto the ticket stock, the wording of terms and conditions and artwork for any advertising.
- When you have decided on the size and format of your tickets, you may have to order new window envelopes for posting them out.
- If your ticket size has changed, you may need new with compliments slips or ticket wallets.

Making and testing custom modifications

- Your system supplier may have included custom modifications to the software as part of the sales process. If these play an important role in your operation, make sure that there is time in the schedule for testing and modification before you go live.
- Making sure you have all the key reports that you need, or know exactly when you will get them.

If possible, keep a copy of the old system running on a standalone machine so that you can check if any problems occur.

ENDS

For more information contact:
Theatre Forum, 15 Bachelors Walk, Dublin 1,
email theatrefrum@ireland.com tel 01 8746582