

Shakespeare's Globe – the Journey towards a CRM Strategy

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Chapter 1. Discovery

Back in the depths of 2013 we began to think about how we could better understand the Globe's different groups of audiences, visitors and participants.

A distinctive point about the Globe's offer lies in it being founded around the interaction of performance, learning, research and tourism. It follows, therefore, that in order to experience the Globe brand at its peak 'customers' should be aware, at least, of the rest of the operation. Yet the way we communicated, facilitated and, to some extent, programmed activity often discouraged that possibility.

To use an analogy of Nina Simon's (Executive Director of Santa Cruz Museum of Art) about cultural organisations having doors (metaphorical and real) that audiences enter by: the Globe has a lot of doors. That could be something of an advantage. But it often felt that once you'd made your choice as to which door to go through you were locked in the first room you entered.

The Globe welcomes around 400,000 theatre-goers, between 320,000-350,000 visitors on guided tours, and over 100,000 students to our Education programmes (which includes work with 3-18 year olds, undergraduates, Globe MA and PhD postgrads, and public events for adults). Each of these is a significant group in its own right and illustrates that the Globe is not simply a theatre with 'added extras'.

Surveys of Exhibition & Tour visitors showed there is a split of around 66% international visitors and 33% domestic. Because we don't collect data on them as individual purchasers our engagement ends with them as soon as they leave site. We also know from surveys that there isn't a huge amount of cross-over with theatre audiences. What we didn't understand was why which limited the audience journeys we could build. We wanted to know how else we could continue our engagement with international visitors and whether our domestic visitors would be interested in engaging with our theatre seasons if we could get the information to them? Similarly, we had no understanding of whether teachers simply came out of professional enthusiasm/obligation or were patrons in their own right having their own experiences.

In short the Globe was not maximising engagement with its 'audiences' and we decided there were two things we needed to do to change this.

The first was that we needed to collect data better. This would involve looking at the procedures and systems we used. Before we got to that, though, it was evident that we needed to support any technical investment with an understanding of the behaviour and motivation our audiences and what we wanted to achieve. It is important to be armed with that understanding before beginning the procurement process for any tech or software.

Discovery

- Whole organisation – leadership led
- What do we already know, what do we need to know?
- What works and what doesn't?
- What are our goals and desired outcomes?

Having established these two objectives we spoke with a number of agencies about how they would approach these challenges; our brief focused very much on the issues we faced and outcomes we wanted. We commissioned Morris Hargreaves McIntyre, working in conjunction with HD Consulting, to take forward this work.

The key learning here, however, is not that you need to identify the right agencies to work with but that it is essential you identify your goals. If resources are limited you may decide to carry out the work in-house, but it is vital that you call on your knowledge and imagination to set your destination before you begin.

Chapter 2. Consultation

Whilst it can seem negative, identifying the problems that may prevent your plans from working at an early stage brings them out into the open. At the Globe we did this by setting up staff consultations led by HD Consulting. The external adjudicator meant that colleagues were less conscious about revealing the obstacles that prevented them from operating as efficiently as they might want to.

The result of these consultations was a highly constructive issues paper that dealt neutrally with perceived structural, procedural and resource problems; we were able to identify these as objectives and thus what began as issues became our achievements as we overcame them along the way.

The four key issues we identified for our project were:

Organisational silos

Many organisations will suffer from this, so it is important to identify not just that there are silos but what the impacts are of the silos. At the Globe we faced a situation where our key producing departments – Theatre, Education and Exhibition – operated as three almost separate businesses with their own visions and business goals.

The results of this were:

- ‘organic’ methodologies passed from employee to employee within teams as ‘the-way-it-is-done’
- different procedures achieving the same ends
- data held in inappropriate systems that suited the initial users but locked them away from further analysis by marketing or finance teams
- crumbling software that was kept because it did the job and replacing it would mean a knock on the department’s bottom line contributions.

This issue also exploded in a rather more overt way in October 2016 when it became evident that it was a root cause of the decision for Emma Rice to stand down as artistic director. This led us to undertake a wholesale rebrand alongside this project. Whilst initially a stress on time it also helped to define the objectives of the CRM work.

Consultation

- Sessions with staff at every level
- Build picture of internal and external CRM needs
- Enable data / system mapping
- Identify core CRM objectives
- Highlight internal change process required

No single database

The second obstacle was undoubtedly the most serious outcome of the first. With each team using its own software systems a patchwork of databases had developed that did not communicate with one another. This was not just bad for business, but led to bad customer service and CRM practice. It couldn't be acceptable that we were using technology reminiscent of 'The Wombles' to link our membership database with our ticketing system, or that we had no idea if schools that booked workshops were also booking for theatre shows, let alone whether the teachers making those bookings had another relationship with us as an audience-member in their own right. This had to be fixed in order to develop a coherent, effective CRM plan.

Lack of audience-focused targets.

It can be easy to mistake people that come through the door as the measure of how well the strategy is working. To make ourselves feel better we may sometimes turn £s into 'actual people'. It is likely, however, that we are still missing some key indicators about the experience we are providing our audiences, visitors or participants and the depth of the relationship we are building with them.

In particular, financial targets won't be telling us if the way we are working makes sense to, or is convenient for, the booker as a customer. Were the working methods our colleagues were using even convenient for them, or were they slaves to something that worked 15 years ago and had been maintained because it reassured 'management' that everything was working as it always had and therefore the money would keep coming in?

CRM is all about having a strategy around building your relationship with your customers. That is why it was always vital to see the tech as the tool to enable us to realise the relationships with our audiences. We needed to start thinking about our audiences more in this way rather than as a data point on a spreadsheet.

It also meant that rather than targets being set on an almost tactical level they need to be set on an organisational and strategic level.

Difficulties with functional cross-departmental working.

Ownership of targets at the Globe tended to sit within the 'producing' teams – Theatre, Education, and Exhibition – whilst other teams (marketing, digital, development, finance etc) were seen as services to deliver those targets. This approach led to a lack of provision of tools that would allow the non-'producing' teams to carry out their jobs. The marketing team struggled to access information for analysis and to inform their communications plan; it was a struggle to get digital content created and the Box Office was seen as a provider of ticketing for theatre shows, rather than as an organisation-wide facilitator ensuring that we developed good practice in sales, data gathering and storage.

Lack of cross organisational working was also an obstacle to more joined up CRM strategies that would enable us to communicate more engagingly about a broader range of activity. It may be important for an organisation that does not receive government funding to drive income, but an evolved audience journey was also critical to allowing 'audiences' to understand our aims as a charity.

One step was to acknowledge the need for an organisational lead on CRM with a clear remit to work across departments and participate in decision-making. In light of that, the role of Head of CRM & Brand emerged.

The positive factor that surfaced from these difficult discussions was the organisational understanding and agreement that a change in culture and approach was necessary.

Chapter 3. Objectivity

A new working practice we've introduced at the Globe is what we call the 'discovery phase'. This idea helpfully divides the framework of a project plan from the details of what will be done, reducing the reliance on a single person or small group to predict in advance all the steps that need to be taken. The downside can be that it doesn't always suit individuals who rely on that level of precision planning, as at the start of a project you will not know what you will be doing in six weeks or three months' time.

The compelling argument for discovery is that it can often uncover a 'truth' that unlocks the decision-making process. In this project we undertook two types of discovery; though different in intended outcome both were based on gathering data that would reduce reliance on subjective opinions.

The first led to one of our most exciting discoveries. Part of the audience insight work that Morris Hargreaves McIntyre produced was a segmentation using their Culture Segments system (www.mhminsights.com/culture-segments). This highlighted that we had three key segments we needed to think about. Two were segments we had anticipated would feature: Essence, a culturally confident information-consuming cohort; and, the community-minded Expression. The third segment was not one we'd foreseen: Stimulation, a group of early-adopters who seek unique experiences and have high design values. As we unpicked this discovery we realised it gave us the freedom to visualise our strategy and system selection using criteria beyond the functional. Whilst access to information and ease of booking would be key so too would be the platform's power to fuel imaginative experiences, bring people together and facilitate us in communicating our charitable cause more effectively.

We were able to hold this information in the background during the process of defining the criteria for system selection. To do this we used The Ticketing Institute's Functionality Builder tool. This enables you to rate 653 criteria and returns a ranking of systems. It eliminates personal preferences based on systems used in previous jobs and the influence of the culture sector rumour mill and trends.

Briefly, the process we followed at the Globe was:

- Round 1: 30+ systems scored by Functionality Builder; this produced a longlist of nine suppliers and facilitated a recommendation from HD Consulting as to which to take forward.
- Round 2: five suppliers were invited to submit written pitches which were assessed by a small internal steering group.

The importance of objectivity...

- Independent, neutral consultancy advice enables best decision for organisation
- Creating comprehensive functionality criteria ensures the right CRM system/s are matched to the organisation

- Round 3: three suppliers were invited to give full-day presentations to a large multi-departmental group who were able to give feedback before the steering group made a final decision.

One example of how this provided us with balanced decision-making was in who it put in play and who it ruled out. One product we were sceptical about when considered objectively turned out to be a definite front-runner. On the other hand, a company we had assumed would be near the top, and for which we had great admiration, was ruled out before the final stage; they have a brilliant product but it wasn't right for the Globe or the objectives we'd set ourselves.

At the end of this discovery process, we were able to feel confident about the foundations of our project (who our audiences were) and our choice of tools (the system selection).

Chapter 4. Learning to Inform Decisions

We realised early on that it would be important to ensure we had organisational understanding and (relatively) enthusiastic buy-in for the project. Whilst consultation had been wide in the initial stages what was required to go forward was a set of shared values, goals and benefits that everyone would be able to recognise as relevant to their roles. More mundanely, perhaps, it had to be clear this was not 'just' a project driven by Marketing or Box Office.

There were two cornerstones to this approach; putting together a cross-departmental project team and what came to be called a 'value proposition statement'.

It would have been entirely possible, even desirable, to have delivered the implementation of the new CRM system by a small project team. We decided to engage all the departments who would need to input in the long term at the outset. This was important for two reasons: (i) it gave a strong signal that everyone's contribution was important and would share in the benefits, and (ii) it meant that the advantages of bringing together databases and processes would (hopefully) become evident at an early stage.

A key characteristic of the project team was that membership was determined by who would be the key operators, rather than by seniority. We felt this was essential because often as senior managers we can be distracted by either the micro-detail of what we know already works to make our department tick or the strategic reasons behind a process change. And those responsible for delivering on the ground are often encumbered by a process that may not be the most efficient way to achieve the end. Largely this worked, with just two drawbacks: (i) managers needing to understand their teams' concerns were slow to respond leading to some tense discussions; and (ii) it was hard to persuade team members that they were empowered to make decisions.

The 'value proposition statement' was generated from a request by our CEO for a set of project principles. It is something that has since been incorporated into other projects. It was a two-sided Executive summary and set out how we would deliver the project, broadly

Using learning, evidence, data to inform decisions...

- All 'audiences' spoken to differently
- 360° view of data = joined up thinking
- Change to practice, systems, process, communication
- Potential to increase income & audiences, provide better service

what resources were needed, who would benefit from the project and how, and what value it would deliver to the Globe.

The 'value proposition statement' was created using a strategic management tool called the Business Model Canvas devised by the Swiss entrepreneur Alexander Osterwalder. A project is visualised in nine building blocks – around resources, customers (or possibly audiences in a cultural context), finances, and value – and identifies how inputs and outputs stack up against each other and what you may need to change or focus on to achieve your goals.

Through the 'value proposition statement' we ensured that a complex project was endorsed by the Executive team, allowing them to have oversight of the project and without having to refer every decision back to them. It also helped to explain the project to different departments, to talk easily about how there would be demonstrable progress that would give them the tools to do their jobs better and to reduce fear of change. It didn't mean, for example, there weren't difficult conversations about the time required from staff to deliver the project, but it did mean we had a common understanding of why the short-term pain was for long-term benefit.

The key point for me about the Business Model Canvas is that it focuses your attention on the value delivered (the 'value proposition') to your beneficiaries (audiences, visitors and staff) rather than the 'products'. The headline values we decided on were:

- A better understanding of our audiences
- Better audience and visitor experience
- Transforming the way we work
- Business gains

During system configuration, this allowed us to assess processes and where we needed to move away from replication of existing ones. If a current process made a customer journey cumbersome or created unnecessary travail for staff there was a clear justification for change. If a proposed change didn't achieve these goals then that required the new process to be reviewed.

On a higher level, at a point in the project where it was not possible to have key performance indicators (KPIs) as hard numbers the value proposition gave us a ready reference on project progress in order to help us make good decisions, use as a point of navigation if we felt lost, and to report back to the executive team and senior leadership.

Chapter 5. Means served the End

At the time of writing, our CRM journey is at the exciting point where all things are possible. We have delivered some early wins upon which we can build and set-up the foundations for future directions.

Our confidence from having a system that we know has been configured to deliver, means that in marketing/CRM terms we will be able to become much more sophisticated in engaging with our audiences and visitors in a deeper values and cause driven plan. We have a roadmap for our future work where projects and developments are set against the four objectives of the initial value proposition in order to give us:

- Better understanding of our audiences
- Improve audience and visitor experience
- Transform the way we work
- Business gains
- A less transactional approach
- One Globe brochure
- Align booking processes
- Analysis, segmentation, business intelligence

How the means (tech) has helped the end...

- Changing CRM system will mean significant organisational change
- Embracing it can bring positive change to culture, communication, process and practice

This article has been written with the intention of providing some pointers to powering up CRM within your organisation. It is projected through the lens of hindsight; all the points are ones that we have discovered during the journey and didn't, could not, have known in advance. You may not need to undertake this on the same scale as the Globe or with all the same elements, but it hopefully provides you with a framework that you can use to inform your own projects and to make a business case for change within your organisation.