

Consumer Relationship Management Software Buyer's Guide

The pros and cons of the leading CRMs aimed at performing arts organizations.

THE OWOSSO COMMUNITY PLAYERS

May 18, 2016

Authored by: Hunter Charvat

Consumer Relationship Management Software Buyer's Guide

The pros and cons of the leading CRMs aimed at performing arts organizations.

Vendini

In short, Vendini is an easy to use and apparently cheap CRM which is utilized by many smaller performing arts theaters. This ultimately means that it is much more like a ticketing system than a full-fledged CRM, and as such it would not provide the high-level management features of the other options. I think that this makes Vendini a much less appealing option, and that it would have very little impact on sales, work-flow, marketing, and management.

The solution itself is not very beautiful, but it seems effective enough. I did not have any problems figuring out where to buy tickets or using the Vendini portal when testing out sites that are using Vendini. However, the way it integrated into the existing sites felt cluttered, and lacked the modern design methodology that I expect from modern tech-startups and market places in general. It was also quite jarring, and didn't feel as though I was still looking at the theater's brand. A major point of concern for me regarding the ticketing solution is that none of the sites I looked at took advantage of pushing additional donations or add-on sales at the time of check-out, leading me to believe this is either difficult, incurs additional fees, or simply does not work.

I also feel that Vendini is the least likely of the CRMs I researched to exist in five years, and that it is technically the least robust by far. Using the system without a complete switch to Apple devices (including mobile devices for all staff and office devices for the office staff) would be a complete waste of the systems potential, and is a major downfall considering the huge additional cost of this and little other tangible benefits it would give. The company also does not have any venture capital investment. Despite this being reportedly a conscience decision of the founder, I think this is another sign of the weakness of this organization, and will cause the service to suffer from technical and reliability problems moving forward.

Lastly, the site has almost no presence on social media. In my experience (and the advice of our partners at The Owosso Downtown Development Authority) this is a sign of a poorly run company, and one whose customer service is extremely poorly managed. I find that Twitter is an especially good predictor of a company's customer service experience, and Vendini's Twitter seems extremely inconsistent, going off and on in waves.

In conclusion, due to the switching costs, technical fears, longevity concerns, and low impact of Vendini I believe that we no longer need to consider it, and that doing a demo would not result in any tangible or experience benefit.

Links

1. Vendini PR and Marketing
 - a. <http://vendini.com/>
 - i. The solutions drop down menu contains the most valuable info
2. Vendini Twitter
 - a. <https://twitter.com/vendini>
3. Theaters who use Vendini
 - a. <http://siteline.vendini.com/site/downtowntheatre.com>
 - i. Uses a tool provided by Vendini
 - b. <http://www.sohotheatre.com/>
 - i. Integrates Vendini into the site
 - c. <http://www.thebarclay.org/>
 - i. Uses a portal to Vendini from their site

4. Some reviews from users
 - a. <http://www.capterra.com/ticketing-software/spotlight/20773/Vendini/Vendini>
5. Vendini Former Employees on their experience
 - a. <https://www.glassdoor.com/Reviews/Vendini-Reviews-E320598.htm>
6. Media Pieces
 - a. <http://www.forbes.com/sites/jesselawrence/2015/03/18/ticket-company-vendini-reaches-1-billion-in-gross-sales-and-is-still-growing/#57f0c6cd1fdf>

Choice Ticketing

Without having done a demo with any of these options, I am pretty confident that Choice Ticketing is the highest risk, highest reward option of any of the CRMs which I have researched. It appears to be as fully featured as Patron Management, but is almost certainly cheaper. However, despite the long history of the company, their technical services do not seem as reliable as Patron, and their development commitment seems to be much less than Patron's. There are also a lot of complaints from users and former employees of frivolous development of useless features, and not enough attention to reliability and debugging. These concerns are very important to me, but the solution does appear to work for many users. Of course, the pricing systems of these CRMs is kept very secret, so it is just speculation on my part that it will be cheaper than either Spektrix or Patron. This is an important question will need to ask all of the CRMs we demo, and I will include a list of proposed discussion points for those demos at the end of this report.

Choice Ticketing offers a solution for just about every aspect of running the theater. It seems to have robust box office features, allowing for easy integration of online, in-person, donation, and other sales data of every theater goer into a single profile. These profiles also include data on every interaction the theater has with them, from phone calls to emails to theater arrival. The system is also capable of applying specific attributes to certain patrons based on any criteria of at the will of the administrator. These robust profile capabilities should be positively invaluable for marketing, especially combined with Choice Ticketing's seemingly robust reporting and fundraising capabilities. Having Choice CRM would allow us to run any kind of fundraising campaign we like, and give us a way to easily analyze the effectiveness of that style versus others. I feel confident saying that this system would take over nearly all the theater's needs regarding consumer outreach, advertising, donation collection, ticket sales / tracking, volunteer tracking / management, reporting, and data collection.

When using sites who were implementing Choice Ticketing, I found them to be extremely under-whelming. This leads me to believe that most of the burden of providing a great LOOKING experience for our patrons would lie with us and not Choice. This is extremely unfortunate, as I feel that our current branding (especially online) would fail to meet the expectations of many modern internet consumers. In fact, I found the solutions being implemented by theaters on the system almost always used 2nd party platforms to sell their tickets (Not even particularly competent ones in my opinion.). This is extremely concerning, and I do not feel like this is something we should tolerate. It is absolutely something to ask the representative during a demo, and to see if there is a way to arrange a more seamless and elegant ticketing solution that does incur us fees beyond what we are paying for the CRM in the first place.

On the longevity / outlook of Choice Ticketing I have extremely mixed feelings. On the bright side, Choice was acquired by venture capital firm OEM Capital in November of 2015, and since that acquisition the feelings of both employees and users has been trending upwards. I believe this also improves my outlook for the company's technical future, and commitment to reliability and debugging. However, Choice still pales in these two areas compared to Patron management, and fails to create the image of a modern tech-company in any of their PR, marketing, or public image. Additionally, the company has by far the worst social media presence of any of the CRMs in this report, and there reports online claiming that Choice has sub-par customer service. This is a huge concern and red flag for me, as ease of use and reliability should be one of our top priorities in order to ensure a good experience for our customers, donors, and staff.

In conclusion, I believe we should schedule a demo of Choice Ticketing, and acquire more information about the product, cost, and company. However, I rank it 3rd out of the 4 CRMs in this report.

Links

1. Example Theaters
 - a. <http://www.imperialtheatre.com/showdetails.cfm>
 - b. <http://thebelasco.com/>
2. Choice PR / Marketing
 - a. <http://choiceticketing.com/what-we-offer/>
3. Some user complaints
 - a. <http://choice-ticketing.pissedconsumer.com/>
4. Twitter
 - a. <https://twitter.com/choiceticketing>
5. Employee reviews
 - a. <https://www.glassdoor.com/Reviews/Choice-Ticketing-Systems-Reviews-E320966.htm>

Spektrix

The put it plainly, I view Spektrix as the fresh 4.0 graduate looking to make their way into the industry with grit and wow. They are by far the youngest CRM which I researched, but their branding is extremely sleek and professional. The only CRM who came close was Patron, whose branding is much more professional, but not nearly as aesthetically pleasing as Spektrix's. They are expanding rapidly, and seem to be making quite a bit of noise in the performing arts CRM scene.

Spektrix has a (reportedly) different pricing model from the rest. According to some less than official source online, they charge by the module and then take 2-3% of sales. There is definitely a monthly minimum as well, so if 2-3% of sales does not meet that minimum we would be paying it anyway. Of course, as is par for the course with these, the pricing model is not clear at all from their site. This should be top priority when we go through with demos for these solutions. Some users reported that Spektrix is cheaper in the short term and more expensive in the long run than their competitors, with the breakeven time using being about 3 to 4 years, but I do not know the size of an organization that would see those kind of results. On the bright side, they only require a 1-year contract, which is very likely less than the other CRMs (though I cannot personally confirm this information at this time).

My biggest concerns with Spektrix are its volunteer management, difficulty of implementation, and the company's age. Because Spektrix uses extremely "processed by marketing" descriptions of their features and company, it is not clear to me that their volunteer management is very robust or even existing. This is something will have to bring up at a demo. Spektrix offers a sort of "library" in order for us to integrate their system into our existing online presence, but that comes back to same problem of current online presence being sub-par that I mentioned with Choice Ticketing. However, due to this company's size and vague wording, they could very well be more involved with the setup process than the others, so this is another concern to be brought up at a demo. Additionally, as a young company, there will almost certainly be some growing pains as the company expands. These could include bugs, unreliability, and changes to pricing / quality, poor management, or even company failure. Of course, these may never happen, and I do not have any evidence to suggest they are going towards any of these outcomes.

Otherwise, Spektrix seems to offer robust reporting, box office, and fundraising systems just like Choice and Patron. I would need to see how these are actually implemented and use them to make further judgments on this.

Spektrix has an extremely good social media presence, and every user review I could find had nothing but good things to say regarding Spektrix reliability and customer service performance. I believe that because they are using a newer system than any of the other CRMs that they do hold a slight edge in tech, though almost certainly less reliable than Patron. Spektrix is a British company, but they have opened an American office and I have not found any complaints related to their over-seas origin.

In conclusion, I find Spektrix to be a very interesting and appealing option. I absolutely think we should demo it and learn more about their services and pricing. I rank it 2nd in this report.

Links

1. PR and Marketing
 - a. <https://www.spektrix.com/us/features/>
2. Twitter
 - a. https://twitter.com/spektrix?ref_src=twsrc%5Egoogle%7Ctwcamp%5Eserp%7Ctwgr%5Eautho_r
3. Theaters
 - a. <http://www.royalcourttheatre.com/about-us/>
 - b. <https://themaclive.com/>
 - c. <https://www.stamfordartscentre.com/>
 - i. Recently migrated to spektrix
4. Some reviews from users
 - a. <http://www.capterra.com/ticketing-software/spotlight/89233/Spektrix/Spektrix>
5. Media Pieces
 - a. <http://theticketinginstitute.com/supplier-listing/spektrix/>
 - b. <http://www.artsprofessional.co.uk/magazine/281/article/making-everything-easy>

Patron Manager

In one sentence: If all the CRMs in this report are priced the same, then this is the clear choice. Patron management is the most robust, powerful, well-known, and professional CRM aimed at performance arts bar-none. Their technical systems and amazing, extremely reliable, and regularly developed. It is based on Salesforce, the most widely used CRM in the world, and basically builds all the functionality a theater would want from a CRM into it. It also has an extensive library of independently developed add-ons should there be features we aren't getting from them but absolutely need. This could be useful, but the feature list of Patron is so extensive I have a hard time believing that would be needed. Patron gathers the most data, reports it in the most ways, gives the most flexibility for patron and volunteer management, and is much more upfront with their path to implementation. It has a large community, meaning any issues we have can probably be solved with a google search and reading a forum post. They offer much more training than the others, everything from in-person, phone, webinars, and more. It is the only option to include an integrated work social media (it basically sounds like a Slack clone), which I think is really valuable, and that we should make a Slack if we do not end up going with Patron anyway. It supports Android and iOS for ticket check in, reducing our cost there compared to other solutions. Patron also claims to help with data migration, which could be HUGE pain in our necks off-set to them. The fundraising capabilities seem to more intelligently suggests changes to help us make more money.

A short, but important, note is that the sites I found using Patron took MUCH more advantage of the fundraising features than any of the other CRMs. This includes merchandise sales, time of sale add-on donations, and just about any other online feature that has been listed across all the CRMs. I also believe they are very involved in making sure our online sales image matches our existing image, and we are once again at the problem of our current image being lack-luster. I hope to ask if they would be involved with helping us with our re-brand and site development, as that could prove to be invaluable feedback.

Ass for cons, the only one I can possibly see is cost. Because it sounds so much better than the others, I have to imagine this is the most expensive solution. We will have to do a demo in order to know for sure.

In conclusion, this is absolutely my recommendation at the moment. If the demo goes well and the price is within our budget, I have no worries recommending we go with this solution over the others. Rank: 1st.

Links

1. PR and Marketing
 - a. <http://patrontechnology.com/>

2. Twitter
 - a. <https://twitter.com/patrontech>
3. Theaters
 - a. <http://labtheater.org/>
 - b. <http://www.pearltheatre.org/>
 - c. <http://www.fwopera.org/>
 - i. In the midst of migrating to Patron
4. Some reviews from users
 - a. <http://www.capterra.com/ticketing-software/spotlight/118188/PatronManager%20CRM/Patron%20Technology>
5. Media Pieces
 - a. <http://nycchildrenstheater.org/an-ode-to-patron-manager-by-julie-griffith/>

Research Methodology and Limitations

My research consisted mostly of reading each CRM's own site, reviews posted online by users and employees, financial reports, social media, and exploring their usage in the wild. I do not have access to use or see the use of any of these solutions, so my report is extremely limited by that. The only way forward is with demos, but those are obviously controlled environments in which we will be pitched the software, so I want to make extra sure that we demand to use the software ourselves before coming to a final decision.

CRM Demo Questions Draft 1

1. How do you price?
 - a. What are ALL the possible fees?
 - b. Do we get a special rate for being a non-profit?
 - c. Is the price negotiable? Try and negotiate anyway.
 - d. Is customer support included in the price?
 - e. Do we get access to ALL the features at that price?
 - f. Do we need to pay for multiple licenses?
 - i. Do all licenses need full rights and full charge?
 - g. Do we get refunded for downtime or losses caused by the system?
2. What are the start-up costs?
 - a. Extra equipment?
 - b. First time fees?
3. How long must the contract be?
 - a. Is that negotiable?
 - b. What is the penalty for backing out?
 - c. What rights do we have in that agreement?
 - i. What rights do they have in that agreement?
4. How involved are they in the set-up process?
 - a. Do they guarantee a working system, both in office, box office, and online?
 - b. If we re-brand do they help redesign online ticketing?
 - i. Does that cost more?
 - c. Do they help with data migration?

- i. What do we need to do to make it happen?
5. How long will the setup process be? When will it be ready?
 - a. What could go wrong?
 - b. Do they have an example timeline?
6. How does their system integrate with Quickbooks / accounting?
7. Is our size / revenue considered with the cost?
8. Does the CRM gather data from social media on our users?
 - a. How can we best use data?
9. Can we use it right now?
 - a. Mess with every feature, a detailed list should be made for each one.
 - b. Ask about the cost of every feature and possible fees for options.