



THEATRE COMMUNICATIONS GROUP, INC.

CENTERPIECE

FOCUS ON: TECHNOLOGY

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THE GOOD, THE BAD AND THE UGLY: A LOOK AT SOFTWARE IN THEATRE

BY MIKI ROBINSON

Introduction

"New technology is here to stay, and we must keep up with the times."

I couldn't have said it better myself. Now, in the middle of the first decade of the 21st century, technology is an integral part of how theatre companies do business. From box office to fundraising and from marketing to administration, it is vital that theatre companies stay in tune with technology and integrate it into their daily operations.

To this end, TCG put together the Software and Technology Survey (which by the way was distributed via email and taken online, saving TCG and respondents time and money). Many thanks to the 101 TCG member groups who completed the survey. This report is a comprehensive analysis of the data gathered and can help theatres like yours make decisions about new software.

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The Basics

Hardware and System Software

For the most part, the 101 respondents are using PC-based systems. When Macintosh systems are also used, their primary function is design work. This is not unexpected, considering that this is the way many small businesses work. What was troubling to see was the high number of theatres—both large and small

—that were working with multiple operating systems at the same time. What this may indicate is that many companies have taken a haphazard approach to technology growth within their organization (e.g., computers are replaced with new models when an additional one is needed or one breaks down without any thought given to how it will integrate with the rest of the system).

"The entire IT infrastructure of the organization is in the process of, or in need of, updating, due to significant growth over the last four years. Some planned improvements have been on hold due to a lack of funding. The current system is a hodgepodge of old and new."

Unfortunately, this can lead to computers that don't work well together, causing data to be double-entered or constantly reformatted to satisfy multiple users. In the long run, this wastes valuable time and prevents companies from doing their best work.

Technology Planning and You

For many of the companies surveyed, technology is an afterthought, or, worse yet, an albatross around their necks. Whether for lack of time or lack of money, many groups are not making the technological advances they need to increase their efficiency now and ultimately to survive.

"As the default computer wrangler, I think our budget for technology, of necessity, is too small to do a really thorough job. We 'make do' a lot."

"I am the accidental IT guy. We do not have a 'technology' budget or official job position."

"...The person in the office who knows the technology best gets stuck spending all of her time dealing with the printer that won't work, whether or not that's in her job description."

"Most of our workstations are pretty old, so we use older, less resource-intensive programs..."

Believe it or not, this is not the end of the world. A long-term, well-planned approach to technological growth can save time and money. Your first question is sure to be: how in the world do we do that? Thankfully, it doesn't have to be that difficult, but it does require a commitment to the process. The four steps below are from the [Technology Planning](#) section of the [TechSoup](#) website. Please visit them for more detailed information and assistance.

- **Assess your current resources.** What technology do you currently have? What staff knowledge and expertise? Who supports the technology you have?

- **Define your needs.** This is not about what cool new machines you want to buy. This is about what you want the technology to do for you.
- **Explore solutions.** This is where you have to do your homework. Use this report to help, and if you feel you don't have the technical expertise, find someone who does. (This might be a board member, a friend of the company or someone from a local not-for-profit that provides technology assistance.)
- **Write a plan.** This is the most important step. For a number of reasons, you need to document what you decided. First of all, this is the piece that can help you get funding. Second, having it in writing will keep you on track and remind everyone in the organization that you have all made a commitment to this.

Remember that you don't have to go it alone. There are many organizations around the country (like the [Fund for the City of New York](#) and [Technology for the Arts](#), run by the San Diego Performing Arts League) that offer assistance with planning and purchasing. Also, well thought out plans that show growth potential for an organization are often an excellent basis for grants from corporations and foundations. *Remember that companies sometimes keep these programs a bit under wraps, so doing your homework could help immensely.*

Though it can seem overwhelming, don't ever be dissuaded from moving your organization's technology forward because you're worried about the money. Take advantage of the resources that are available to you (you'll find some of them in an addendum at the end of this article). In the end, **smart** technology purchases are an investment that will pay off in the future.

Reading and Using This Report

"We do not know enough about what the potential could be."

As you read through this report and glean ideas for new technologies for your organization, keep a few key questions in mind:

- What parts of my organization could run more efficiently?
- How can new technology help with this?
- Will new technologies integrate with or replace what I currently have?
- What funding opportunities might be available for these new purchases?

The report focuses on four main areas: email and Internet marketing, ticketing, development/fundraising and accounting. For the purposes of this report, theatres are split into two categories: annual expenses of \$3 million and under (small) and annual expenses of over \$3 million (large). In several instances, certain software solutions are better for one category or the other in terms of

functionality and affordability. In each category, you will find the best-rated solutions and user comments about them, when available. In addition, at the end of each section, look for the "Honorable Mention" where you will find solutions that were very highly rated but only by one or two users (so the information may be biased). *Please note that all of the quotations incorporated into this report are from survey respondents.*

At the end of the report, you will also find an [addendum](#) with information on numerous technology resources that can help you with planning and purchasing. Also, keep in mind that all of this information comes from your fellow TCG members: don't be afraid to ask around (a lot) before you make any purchasing decisions.

Email and Your Presence on the Internet

In terms of Internet presence, respondents seem to be about split down the middle in terms of website design and maintenance. A little over half have their design work out-sourced, and about 65 percent do website maintenance in-house. Several companies mention that they get help from board members and other friends of the company for both design and maintenance, thereby taking some of the pressure for these tasks off of the theatre's administrative staff and saving some money.

The responses about email marketing show that there are just about as many solutions as there are theatre companies. (In fact, of 31 different email marketing providers/software packages given as answers, only two were used by more than two companies.) These solutions vary in cost, functionality, flexibility and amount of in-house maintenance required.

The most common solution mentioned (41 groups) was the use of [Microsoft Outlook](#) (and similar related products) to do all of the email marketing in-house. While in the short term it would appear that this is the most cost efficient, let's talk about some of the problems inherent in this sort of solution.

- **Spam:** Junk email is the bane of most everyone's existence. Most of us do anything we can to weed it out of our in boxes. Unfortunately many times customers, whether through an error or on purpose, report our companies as spammers to their email provider, or the provider identifies us because we send to multiple recipients. When you are operating all of your email marketing using Microsoft Outlook, you may very well not know that your emails are not getting through (e.g., if you are identified as a "spammer" by AOL, your mail will stop going through—not only your marketing emails, but customer correspondence as well—and you won't be notified).
- **Targeted mail:** With basic in-house systems you probably don't have the

ability to truly target your message. Do you know if your customers prefer matinees or evening? If they have children? If they only like musicals? With email marketing software you can capture this kind of information (and much more) about your customers and design your marketing campaigns to meet your customers' needs—which, of course, will lead to a higher return.

- **Customer service:** One of the most important customer service aspects of email marketing is "send the customer only what they want." Email receivers are very used to being able to remove themselves from someone's email list at the click of a button. Email marketing providers can automatically process this without staff ever having to touch it, and it happens quickly. With basic in-house systems, this usually has to be done by staff. *Please note that just because a customer asks to stop receiving your email doesn't mean that they are no longer interested in your productions. However, if you do not politely and quickly comply with their request, you most likely will lose a customer.*
- **Tracking:** Some of the more sophisticated software/providers have the ability to track some interesting things about your email marketing campaign. How many people actually opened it? How many forwarded it to a friend? How many clicked on the embedded link? How many bought tickets as a result? Information like this can help you get more people into your shows and save you valuable marketing dollars.
- **Staff time:** One of the biggest mistakes that companies make is only looking at the purchase price of a particular software solution/provider. What we sometimes forget to take into consideration is the amount of staff time required to accomplish a task. Many of the email marketing solutions out there can minimize the in-house staff time required to maintain the system, thereby freeing your staff for other crucial tasks.
- **Money:** Don't forget some solutions are free (or really cheap)! See [addendum](#).

Outside Email Software/Providers

The most used is [Patron Mail](#), which received very high ratings in terms of "Meets our needs" and "Is a good value" from a group of both large and small theatres.

Honorable Mention

Eight companies received a perfect rating:

- [Auto Response Plus](#)
"This is the most powerful mass emailing solution I've found in four years of looking—it's awesome."
- [Constant Contact](#)
"Love it! Easy to learn."
- [Exact Target](#)
- [Group Mail Pro](#)

- [POP! Multimedia](#)
"POP! Multimedia integrates with our CRM, ticketing and donor software."
- [Touchpoint](#)
- [Worldcast](#)
Please note that this software is free for not-for-profits.

Several other solutions received very high marks:

- [Cooler Email](#)
 - [Loyal Customer Club](#)
 - [Majordomo](#)
 - [Novell Groupwise](#)
 - [Vertical Response](#)
"Much more affordable (if not as robust) as Patron Mail. A good match for our current needs."
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Ticketing Software

Of 101 respondents, 29 have no in-house computerized ticketing system and 5 have systems custom designed for them. The other 67 companies listed 18 different software packages, 10 of which were used by only one or two respondents.

- By far, the best-rated system was [Tessitura](#). With very high marks in all three categories ("Easy to learn and use," "Meets the needs of our organization," and "Is a good value"), Tessitura comes highly recommended from the respondents that use it. It is important to note here that Tessitura is aimed at larger organizations. All the respondents had annual expenses of over \$4 million.

"This is by far the most advanced ticketing system we have seen."

"This is the best and only product we've found that truly integrates ticketing with donor management."

For smaller organizations, two packages stood out:

- [Theatre Manager](#)
"Theatre Manager attempts to integrate box office, marketing and development into one database, but it has uneven results among the modules."

"[Theatre Manager is] rich in features but hard to use. Developer continues to add features and improve the product."

- [WinTix](#)

"I've been using WinTix for over five years, and learned to use it in less than two days on my own. It's a straightforward program that allows you to use multiple venues and flexible seating charts, which is helpful for a black box with moveable seating. Season tickets can present a problem if you're not using a flex ticket..."

"Excellent value. Quite stable. Wish we had better features for capturing multiple sale patrons to target for season ticket campaigns, etc."

Both received high marks from smaller organizations (the largest with annual expenses of \$3.8 million; the smallest with expenses under \$250,000). Theatre Manager scored slightly higher in "Meets the needs of our organization," and WinTix was better in the "Easy to learn and use" category. Both received very high marks for value.

Honorable Mention

- [tix.com](#) (perfect rating)
- [Cambridge Software](#)
- [Martech Folio](#)

"The customer service is incredible and they are always willing to provide assistance."

- [Maxtix](#)
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Development/Fundraising Software

Of 101 groups, 21 have no fundraising software, 28 have custom-designed systems (mostly in [Filemaker Pro](#) or [Microsoft Access](#); for a [comparison](#) of Filemaker Pro and Microsoft Access for nonprofit use, visit the [TechSoup](#) website) and the remaining 52 listed 21 different software solutions.

Overall, fewer organizations are happy with their fundraising software than they are with their ticketing. Even the ratings on the custom-designed systems were middle of the road.

- Once again, the highest-rated software was [Tessitura](#). However, its marks here were lower than those it received for ticketing.

"This has the power and functionality of Raiser's Edge, while being completely integrated with ticketing."

"Reporting on Tessitura is not that robust."

- The other software that rated fairly well was [Raiser's Edge](#).

"Software is almost too robust. Too much focus on 'new features' and not enough focus on core product."

"The fundraising software is well liked by the development department. The problem, as with the other critical applications, is a lack of integration."

For smaller organizations, [DonorPerfect](#) and [Theatre Manager](#) are the highest rated software packages. They received virtually the same rating for "Meets our needs" and "Easy to learn." DonorPerfect, however, scored much higher for "Is a good value."

Honorable Mention

- [Meadowbase](#) (perfect rating)
"Great free program—highly recommended."
- [Fundraiser Professional](#)

A Special Note on Integration

In a perfect world, ticketing and fundraising software would work together seamlessly so that we could have all the information about our patrons in one place. With the software packages we currently have available to us, this is not always possible. However, two pieces of software mentioned above seem to be good attempts at this: Tessitura, for large organizations, and Theatre Manager, for small.

Accounting Software

Accounting software is an important way for companies—both large and small—to track their activity and thereby maximize their resources. It is vital that all companies have a thorough understanding of their financial situation. The software packages listed below can help with that.

From the 101 respondents, nine software solutions were used by at least three groups.

- The highest rated (with seven users) is [MYOB](#) (Mind Your Own Books).

"Meets our needs but does not allow for some of the sorts we would like to be able to do, and has some problems exporting Excel documents."

"We are limited with choices [for Macintosh]—I basically like the system, but there are some limitations."

- The next highest rated overall (with 35 users—nearly 35 percent of the total respondents) is [QuickBooks](#).

"We are customizing the chart of accounts in QuickBooks and experimenting with reports to get what we need. Great software."

In a side-by-side comparison, MYOB was rated higher in "Easy to learn and use" and "Is a good value," but QuickBooks fared better in "Meets the needs of our organization." Both sets of software are used almost exclusively by small organizations.

- For large organizations, the only solution that stood out was [BlackBaud](#). The company has various packages available to meet different needs. Blackbaud received high marks for "Meets our needs" but scored much lower in "Is a good value."

"Older version is okay. Newer version gets strong marks."

Honorable Mention

- [ACCPAC](#)
- [Best Business](#)
- [Traverse](#)

"Can do payroll and A/P well. There are minor holes in the logic of the payroll module that make it difficult to correct mistakes."

Summary

As you can see, technology solutions are as varied as the companies we run. Solutions are available for any size theatre and nearly any price range. But no system is perfect for everyone. It is vital that, before you make a new acquisition, you do your homework. Check out the Internet site for the software (links for each solution are incorporated above, when available); establish a list of "must haves" and "would like to haves" and discuss them in detail with a sales representative from the company, and, perhaps most importantly, talk to someone else who uses the software. In most cases, the sales representative can give you contact information for a referral. If not, email [TCG](#) and they will try to match you with another member group.

The most important thing to remember is: plan, plan, plan. Any new technology solution is an investment, and you will save yourself time and aggravation if you choose the right one the first time. Good luck!

ADDENDUM

Good Stuff Cheap (and Sometimes Free)!

As promised, here is information on how to acquire software cheap as well as

resources that will help in your planning.

The best website and resource (by far) is [TechSoup](#) and their associated website [TechSoup Stock](#) (formerly Discountech). TechSoup Stock has an astounding assortment of software at deeply discounted rates for qualified not-for-profits (Microsoft Office for \$20 and QuickBooks Pro for \$30!). In addition, TechSoup offers a wealth of information, including community chat rooms (see this [conversation](#) about accounting software), newsletters and links to other resource sites. See also TechSoup Stock's PDF [catalog](#) and TechSoup's [Other Resources](#) section.

In the Other Resources section of TechSoup, you'll find great information about software and hardware not available on their site. There are also several pages of descriptions and links about available freeware, including two that were mentioned in the survey above:

- [Meadowbase](#)
- [Worldcast](#)

Another resource worth checking is [Ebase 2.0](#), the database software created by TechRocks, a nonprofit organization, for other nonprofits to manage community relationships with members, donors, volunteers, activists and clients. Ebase runs off of a runtime version Filemaker Pro (if you wish to customize Ebase or run it on a server, you will need the full version of Filemaker Pro, which comes prepackaged in an administrator's package for \$149) and seeks to be an alternative to Donor Perfect and Raiser's Edge. Ebase software (includes the runtime version of Filemaker Pro) and manuals are distributed free of charge; fees, however, are charged to access online support resources.

In many cases, you can also go directly to the software maker for discounts. Here are a few of the biggest names:

- [Adobe](#)
- [Real Networks](#)
- [Symantec](#)
- Quark
Not available online, but call (800) 676-4575 and ask for special sales.
- [Macromedia](#)

Also, don't forget that there may be resources available in your community. If you have a local chapter of [Business Volunteers for the Arts](#), you may be able to make arrangements for custom-designed software solutions or get help with your tech planning. Also, don't forget to check with your board members and see what they can do to help.

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