NEW VIC

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INVITATION TO TENDER FOR CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM

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INTRODUCTION

The New Vic is a theatre-in-the-round located in Newcastle-under-Lyme, North Staffordshire. Each year we produce approximately 8 in-house productions and present a wide array of touring events, from one-night concerts to week-long shows. In addition to the work we present on stage, we run thriving community and education programmes, engaging with over 40,000 participants each year. The New Vic also leads Appetite, the Creative People and Places programme for Stoke-on-Trent and Newcastle-under-Lyme.

The majority of the theatre's programme takes place in our 600-seat auditorium. We stage each of our produced shows in-the-round, utilising the majority of seats within the space (pending show design). For one-night events, the seating configuration changes depending on the style of performance – for example, some touring concerts that visit our stage play directionally to an 'end-on' seating configuration. Sporadically, we stage events in our Studio space, which can hold up to 100 people. We also manage the ticket sales for Appetite, our CPP programme, which stages outdoor events in our region; and sell tickets on behalf of partner organisations including Stoke Literature Festival. We require a Customer Relationship Management system that has the ability to allow us to manage all operation of our business, while ensuring the reporting on sales can be clearly defined – i.e. sales for our Appetite programme need to be reported separately to the New Vic's main programme.

On average, the New Vic sells around 120,000 tickets annually, with around 40,000 tickets sold each year for our Christmas production. We also engage with over 40,000 participants each year through our participatory community and education programmes. Whilst much of this work is not ticketed per se, each department does monitor their audience engagements. Currently this information is collated outside of our Box Office system, however as this information is so vital to us, we would like to explore how a CRM system could help us manage this data securely in one place.

Currently, around 18% of tickets are sold online. We realise that this is much below the national average but are unsure whether this figure is due to the current online booking process, the charge required to book online, or the natural behaviour of our core audience (who may not want to book online, or may not know how to).

As a charity, our capacity to fundraise is an essential element of the New Vic, and it is important that our CRM system is able to support our fundraising efforts. In the last financial year, we raised nearly £100,000 of donations from individual givers. These donations are made up from those giving to us through our regular giving scheme (Patrons scheme) via direct debits and standing orders; CAF givers, and from one-off cash donations. As above, very few donations are made online compared to other charities, but we are unsure of the reasoning for this.

In summer 2020, the New Vic refurbished its auditorium – the biggest capital development project the theatre has undertaken since it was built. The newly refurbished space, including the redeveloped balcony area will offer audiences greater comfort and an improved experience. In order to ensure we use our space to its greatest capabilities, it is essential that our CRM system is able to help us maximise its potential – for example, helping us to increase revenue for popular shows by utilising our balcony space in the best way possible.

CUSTOMER RELATIONSHIP MANAGEMENT – PROJECT OVERVIEW

Our current Box Office system offers a reliable approach to selling tickets and reporting financial information. However, there is a strong emphasis on Customer Relationship Management within our organisation and our overarching audience development strategy focuses on developing a sense of community with our audiences, encouraging feedback and involvement and developing a deeper level of engagement between them and the theatre. We want to deliver outstanding customer care and develop communications that help us build long-term relationships with our customers.

We are looking to invest in a new CRM system to help us achieve our aims. In broad terms, we want our new CRM system to support us to:

- Develop a better understanding of our audiences with a range of intuitive reporting
- Develop a more strategic approach to communications with our audiences, offering a range of intuitive methods by which to segment different audience groups
- Maximise income through ticket sales, donations, season ticket deals, event-style incentives (i.e. Dinner and a Show package deals), merchandise sales and membership schemes
- Build and diversify our audiences by offering greater functionality with which to profile audiences on our system (i.e. First-time bookers, return-bookers, high-level attenders)
- Free up staff resources to focus on building audiences by automating reporting and some key marketing activity, i.e. emails
- Develop our ability to engage with our supporters through automated point of sale recommendations targeted to them, and donation asks based on their previous levels of giving
- Build new and diverse audiences by offering the ability to easily apply a range of discounting offers for strategically identified groups
- Continually expand our organisational development by keeping up-to-date with industry trends, developing the system and providing a network of peers we can learn from

SYSTEM FUNCTIONALITY

We require a number of important functionalities from a CRM system. Below we have outlined some of these requirements. This list is not exhaustive but includes some of the key things we would like to be able to have access to within a new system:

FINANCE
- Integration with **SAGE 50 Cloud accounts** - ideally to include automated data entry for 'real-time' reporting purposes
- Ability to export financial reports (i.e end of day reports) to excel
- Ability to report on donations in 'real-time'
- Ability to report on Gift Aid donations in 'real-time'
- Ability to easily manage any VAT reporting required – i.e. mixed supply packages (meal and a show) where one element is VATable, but other elements are not
- Ability to segment finances for different streams of our business – for example, our ticketing income and merchandise income go to different areas of our business
- Ability to segment finances at point of sale – i.e. splitting ticket income and donation income at point of sale, to the relevant financial stream

FUNDRAISING
- Ability to easily take point of sale (POS) donations both online and through Box Office
- Ability to track donations through reporting (in real-time)
- Ability to easily identify customer accounts of Patrons / Donors / Corporate Supporters / Key Funders
- Functionality to record relationships with Trust and Foundation/Corporate Donors, including donations given
- Functionality to identify potential donors (i.e high level attenders)
- Ability to automate 'thank you' messaging to one-off givers / low level donors at POS
- Ability to 'buy' and renew Patron membership online
- Functionality to activate automatic communications to customers where membership renewals are due
- Ability to link customer accounts together – for example, for joint membership requirements
- Easy to use functionality to set up top level campaigns with a number of appeals related to each campaign, and ability to run reports on each element of the overall campaign
- Ability to report on Gift Aid donations to accurately support Finance with claims
- Ability to add notes to customer files, to monitor all interactions (i.e. meetings with high value donors, or prospective business partners)

TICKETING AND SALES
- A flexible ticket design capability
- Ability to easily produce Print-at-Home (PAH)/E-Tickets
- Ability to sell Season Tickets online
- Ability to sell Package bookings online (i.e. 'Dinner and a Show')
- Ability to sell and redeem Gift Vouchers online
- Returning customer function online – ability to offer customer self-management, through own login and easy password retrieval
- Ability to easily manage duplicate accounts and merging
- Ability to easily offer regular discounts / special offers online
- Ability to offer accessible tickets for sale online (i.e. wheelchair spaces / audio description tickets etc)

- Address look-up functionality
- Ability to send automated confirmation of booking emails, tailored to purchases (for upsell)
- Functionality to enable automated POS prompts for upselling events / merchandise / add-ons – both online and offline
- Ability to sell non-ticketed merchandise both online and offline (i.e. Programmes)
- Easy to use event set-up, with availability of multiple seating plan set up and ability to see full auditorium plan on one-screen, both for inhouse team, and online for the customer
- Select-Your-Own-Seat functionality, including 'view-from-seat' option online
- Ability to easily update pricing, and ability to add/vary inside fees if required
- Ability to easily hold off seats for specific events/customers, i.e. Guest Nights
- Ability to easily amend and exchange customer ticket bookings
- Ability to manage large reservations: including reserving tickets, managing deposits and part-payments, balancing payments, invoicing where necessary
- Ability to gather additional information for customers within their records, e.g photo consent and emergency contacts for participatory workshops
- Ability to book workshops and manage regular participatory groups through the system
- Security functionality to allow sensitive information to be protected within a customer account for approved users only (i.e. Youth Theatre Participants details)
- Ability to provide ticketing solutions for third party clients, ensuring data can be segmented for external events – ideally with capability to sell tickets remotely

MARKETING & COMMUNICATIONS
- Full integration with Audience Agency Audience Finder Dashboard (a requirement of NPO ACE Funding)
- API functionality to aid seamless integration between CRM system and website
- Availability of Return on Investment (ROI) reporting functionality for campaign evaluation purposes
- Ability to easily build complicated lists and extractions of customers
- Ability to automatically add subscribers to email from online sign up into the database (with relevant GDPR settings)
- Integration with email marketing solution – with functionality to segment customers, automate emails, report on ROI and easily manage unsubscribers directly with the database
- Integration with digital analytic sites, specifically Google Analytics, with capability to also integrate other digital analytics to track campaign success (i.e. through social media)
- Ability to run a range of audience segmentations, including geographical area, recency, frequency etc
- Ability to track communications to customers within their account, to easily manage frequency of communications via departments including Marketing and Fundraising
- Ability to flag/tag customers to identify their relationship with the theatre, i.e. Board Members, Funders, Business Friends, Patrons, Members etc
- Ability to link accounts together to monitor communications with a number of people; i.e. Schools may book via more than one member of staff: useful to be able to track a number of personnel within the same school account

REPORTING
- Ability to easily run sales and movement reports – ideally that are chronological, can be automated and that can be exported in a number of formats including as PDFs and in Excel
- Ability to report sales against targets easily within system
- Ability to run reports on a variety of topics including, but not limited to:
    - Reservations
    - Part-Payments
    - Payment Types
    - Price Types
    - Operator Reports
    - Sales Audits
    - Frequency of attendance
    - Crossover analysis
    - Booking patterns
    - Gift Aid returns
    - Fundraising Campaigns and Appeals
- Ability to run reports based on comparison of past shows (ideally in visual and numerical formats, i.e. graphical)
- Ability to easily build reports specific to the organisation, for necessary reporting to stakeholders including Arts Council England

GENERAL
- Unlimited number of users able to access the system
- Compatibility with various platforms, unrestricted to local PC use
- Full PCI DSS Compliance
- Full GDPR / PECCR compliance
- Ability for venue to own and control all data processed by CRM system
- Regular, secure back-ups of database
- Demonstrable consideration and regular investment of supplier into research and development of CRM software, to enable regular updates of system
- Access to ongoing support during office hours – via telephone and online – included within existing costs of system
- Ability to access out-of-hours support in the event of an emergency
- Support with training – during installation and ongoing – included within existing costs of system

TENDER REPONSE REQUIREMENTS

In response to this tender, we would like to invite you to demonstrate how your system would respond to the following situations. We would appreciate it if you made specific reference in your answers to the features of your system which would enable us to achieve these strategic aims:

1. How can your system support us to retain customers, turning them into more frequent attenders? How can we assess our customer retention rate?

2. We pride ourselves on offering customers exceptional customer care. How would your system enable us to engage with customers in an automated, structured way ahead of their visit to the theatre?

3. How would your system help us to report on ROI for a range of short to long-term strategic marketing and fundraising campaigns?

4. Outline how your system can help us to maximise efficiency with our financial processes - how can you help us streamline our end of day reconciliation procedure to make this a more automated process and eliminate potential for errors in our reporting?

5. How can your system help us to manage our Fundraising campaigns efficiently, reporting on successes effectively in 'real-time'?

6. We have busy education and outreach programmes at the theatre, running participatory programmes of work, many for young people under the age of 16. With multiple departments accessing and contributing to the gathering of data on individuals, how can your system best help us to accurately collect, store, present and securely protect customer data, offering access to the team members who require it?

7. In what ways can your system provide the best possible online booking experience for customers?

SUPPORTING INFORMATION

System Costings

As part of the tender submission, please provide:
- A full breakdown of annual costs for the system, including any initial implementation fees
- A breakdown of any ongoing support costs beyond implementation
- A breakdown of any costs for associated equipment (i.e. ticket scanners for e-tickets) as outlined below

Technology / Infrastructure

As part of the tender submission, please outline what infrastructure is required for the theatre to be able to successfully implement and run your system software.

Please include any details of infrastructure we may need to invest in to help futureproof our organisation.

As part of our development, we would like to offer customers the ability to have e-tickets, which we can scan at the theatre either by a print out, or on their phones. Within your submission, please provide details of a) whether this is possible and b) costings for additional equipment to run this service for the New Vic (i.e. ticket scanners etc)

Contractual Information

In addition to the above, as part of your tender submission, please provide us with:
- An outline of your standard contract document to consider
- An outline of your terms and conditions to consider

PROJECT TIMELINE

We would like to carry out the implementation of this project during the autumn, with a view to going live with a new CRM system in January.

Currently, the New Vic has no performances planned in January and therefore this would be an optimum time to install and go live with a new system. The timeline does mean that work will be required in December, across the festive period.

Our current, ideal timeline is:

Tender issued:	Thu 29 October
Tender submission deadline:	Fri 13 November
Shortlisting:	Mon 16 & Tue 17 November
Interviews/Presentations:	w/c 23 November
Supplier Appointed:	Mon 30 November
Contract agreed and signed:	By Fri 4 December
Project begins:	Mon 7 December
Implementation:	Between Mon 7 December – Mon 25 January (7 weeks)
Go Live:	Mon 1 February

Please let us know if this timeframe causes any concerns.

Evaluation Criteria

Proposals will be assessed on the basis of the following criteria:

Criteria	%
Understanding of our aims and demonstrated enthusiasm for the project	**10%**
Appropriateness of proposal	**30%**
Suitability of previous experience	**10%**
Value for money	**50%**

SUBMISSION DETAILS

Please return completed tender submissions to:

Emily Clarke
Head of Marketing and Communications
Email: **eclarke@newvictheatre.org.uk**

Alternatively, if you would prefer to send your tender via post, tenders should be addressed to:

Emily Clarke
Head of Marketing and Communications
New Vic Theatre
Etruria Road,
Newcastle-under-Lyme
ST5 0JG

No later than: **Friday 13 November.**

If you would like further information, or would like to have an initial discussion ahead of submitting a tender, please contact Emily Clarke on 01782 381353 or email eclarke@newvictheatre.org.uk