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Increase Revenue and Retention with Integrated Museum Solutions

An Executive White Paper

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Executive Summary

Museums and science centers face unique challenges not shared by other tourist and leisure attractions like amusement parks, water parks and family entertainment centers. While museums often compete with these attractions for the same visitors, for-profit organizations don't have to have to raise money to support exhibit and collection development, education programs and other industry-specific expenses.

The success of a museum's mission depends on increasing the number of people who will visit and revisit the museum, become members, attend events and donate to fundraising campaigns.

Visitors are more likely to become ongoing supporters when they have positive experiences. Thus, museums are challenged to create the best possible visitor experience to create and sustain a favorable impression and ongoing support.

At the same time, individual departments within a museum are challenged to manage attendance, registrations, reservations and donations while continually updating offerings, campaigns and appeals based on up-to-date data. Additionally, financial officers and executive staff need comprehensive and flexible reporting and analytics capabilities to forecast, plan and allocate resources effectively.

Unfortunately, museums often assemble their online and back-office solutions from a range of different products that weren't designed to support their unique business environments. These solutions often include:

- Relying on paper-heavy manual processes for registrations and reservations, with minimal support for online or mobile-friendly sales.
- Ad hoc systems of different software for different needs, with separate programs for ticketing, memberships, registrations and reservations that operate in silos without sharing data.
- Using a program designed for a single purpose, such as ticketing, to handle purchases it wasn't designed for, like event registration, memberships and donations.

All of these approaches can result in unnecessary costs, incomplete or duplicate data, difficult financial reporting and an aggravated constituency who can't quickly and easily complete donations, ticket purchases and registrations in a single transaction.

Museums benefit from integrated online, onsite and mobile solutions that address both the needs of operating departments and the needs of the customer. Organizations that fail to improve the overall experience often lose more than revenue and engagement opportunities: their customers' frustration may send them to the websites and entry gates of other attractions.

Positive Experiences Begin Before Visitors Arrive

Historically, museums have focused on improving visitor experience with new and updated exhibits, innovative interpretation aids, improved pedestrian flow, increased accessibility and amenities and additional activities like guided tours, hands-on experiences and theater attractions.

However, the experience begins before the visitor even walks through your door, with easy online ticket sales and fast-moving ticketing and entry lines. Difficult-to-navigate web sites and slow-moving ticketing and admission lines can discourage potential visitors from attending and disappoint those who do. Common issues include:

- Long ticketing lines and lack of advance online purchasing options results in choosing another attraction.
- No transparency into program availability results in families registering children in programs where space is assured instead of mailing in a registration form and hoping for the best.
- Inability to purchase and deliver gift memberships online results in grandparents and other gift givers choosing a different, easier-to-purchase birthday or holiday present.

Impact of Technology on Mission and Operations

Nearly every museum is guided by a mission statement, typically to increase visitor and community knowledge, awareness, skills and actions related to the museum's major focus area(s). Each operating department within the museum is therefore expected to deliver their part of the mission, support other departments in delivering their part of the mission, or both.

A forward-looking and continually evolving technology strategy will empower each department to meet their mission-related goals. For example:

- The overall goal of the education department is not to make event registration and management easier. However, easy online registration and simplified administration frees the department staff to stop handling paperwork, returning phone calls and tracking down missing forms. As a result of an effective technology strategy, department staff can focus on delivering great educational programs that inform and delight the audience and make families want to return.
- The overall goal of the admissions department is not to deliver an excellent online, front-desk and mobile ticketing solution. A flexible, scalable ticketing and admission system to make lines move faster supports their mission by creating happier visitors who are more likely to return, donate and participate in programs.
- The overall goal of membership department is not to have an easy online membership process. Yet the membership mission is supported when it's easy to buy a membership or give one as a gift anytime and when member benefits can be easily and automatically applied to any purchase.

- For development departments, the benefits of online fundraising and donor management are well documented, and almost every nonprofit or mission-based organization accepts some kind of online donations. New and evolving technology solutions are available to help museums identify and leverage these opportunities, such as collecting donations inside the museum where visitors are receptive to requests for support, or presenting a donation request during every online and on- site purchase when the visitor is already prepared to make a payment.

Ad Hoc Technology Systems: A Common and Complicated Legacy

Many museums and science centers have adopted new technologies and infrastructure as they became available, resulting in a mix of current and outdated systems from a variety of vendors that struggle to support these organizations' diverse, constantly evolving needs.

Generally, the visitor-facing technologies for museums fall into three categories:

- **The no-vendor/one-time-vendor solution**
- **The inflexible single-vendor solution**
- **The disconnected multiple-vendor solution**

The No-Vendor/One-Time-Only Vendor Solution

Some organizations simply don't (or can't) offer much for sale online. These organizations rely entirely on front-desk admission sales, and mail-in forms and checks for camps, classes, memberships, donations and special events. Others recognize the value of online registration and may deploy a one-time solution like EventBrite to support ticketing for popular events like holiday programs, exhibit openings and fundraising dinners.

The no-vendor/one-time-only vendor solution relies on staff time to manage the bulk of operations.

Administrators manually handle paperwork and phone calls for camp and class registrations, birthday party reservations and field trip bookings, and customers simply don't know if their camp session, party date or group visit time slot is available until they can reach someone on the phone.

Meanwhile, admission lines are long because tickets can't be bought online in advance. And, because membership requires completing paperwork, visitors to the web site can't spontaneously decide to purchase a membership, and engagement and revenue opportunities are lost.

This approach also creates a burden for financial and accounting staff. Because most registrations and reservations are mailed in, customers generally pay with checks. In the best circumstances, administrative time is spent processing checks for deposit and waiting for them to clear; at worst, staff must manually track missing payments and handle checks that are returned due to insufficient funds.

The Inflexible Single-Vendor Solution

Because ticketing and admissions management for large-scale attractions is a mature industry with proven options, many museums and science centers rely on ticketing solutions that were designed for amusement parks, water parks and family entertainment centers.

While these products are often excellent at supporting online and on-site ticketing, entry management and other front-of-house operations, they are not designed to handle museums' unique needs for managing memberships, donations, adoptions, camps and classes.

To an extent, ticketing systems can be modified to support other needs, but if the core tool is an online ticketing system, everything you offer must take the form of a ticket.

This inflexibility makes it difficult to support the needs of different departments, like requiring emergency forms be completed before submitting a camp registration, automatically applying member discounts to any purchase or enforcing attendee ratios like requiring one adult chaperone for every ten children on a field trip.

Other organizations choose to use donor management software as their primary system. While these systems offer excellent donor management features, their support for product sales, registrations and reservations is typically an afterthought or add-on that isn't flexible enough to support the many types of transactions of a thriving museum or science center.

The Disconnected Multiple-Vendor Solution

Perhaps the most common model for museums and science centers, this solution relies on different departments using separate applications from different vendors. For example, a typical museum might use any combination of these common tools:

- Ticketing system (e.g., Gateway Ticketing)
- Donor management system (e.g., Blackbaud products)
- Membership management software (e.g., Centaman)
- Registration for education programs including camps and classes (e.g., Active Network)
- Registration for special events (e.g., EventBrite)
- Manual reservations management in an offline calendar or spreadsheet for outreach programs, group visits and birthday party reservations
- Online merchandise sales (e.g., Convergence)
- Custom forms (e.g., Wufoo)
- On-site and off-site mobile sales (e.g., Square)

The benefit of the multiple-vendor solution is simple: the needs of every department are addressed with an appropriate tool. Unfortunately, using multiple systems that don't share real-time information presents significant drawbacks.

For example, because memberships and camp registration are managed in two different databases, members can't automatically receive their member discounts on camps and classes.

Or, if customers want to purchase both a membership and merchandise online, they must complete two different transactions.

This approach also creates a range of obstacles for staff who can't easily share data, and generally increases direct and indirect administrative costs. For example:

- Multiple solutions each incur startup, subscription, transaction and support fees.
- With multiple vendors, revenue is stored in multiple merchant accounts, all with different terms and conditions, and all of which may release funds on different schedules.
- Lack of integration means that staff in different departments must learn different systems, so there's no way to effectively transfer knowledge between departments.

Perhaps the most significant administrative drawback is the lack of a single data source for reporting and analytics. Without a single integrated database, staff must export data from different systems into a single tool, standardize the data and create their own analytics reports, a tedious procedure in which the data may already be outdated when the report is complete.

Lack of Integration Delivers Poor Experiences for Visitors and Staff

In addition to administrative issues, all of the above solutions share a critical drawback: poor visitor experience. Examples of how this impacts the business include:

- The member or customer has no unified online profile that remembers their preferences and purchases, displays meaningful offers and allows them to pay for admission, registrations, memberships or donations in a single transaction.
- Because members cannot automatically receive membership discounts or benefits (such as priority registration for special events, camps and programs), they must call during business office hours to register, complete a payment or arrange a refund for an item on which they should have received a discount.
- Families that want to register children for camp must print and mail emergency contacts, health forms and liability waivers to the education department, where staff must open the envelopes, process the information and make follow-up calls.
- A poor online experience is likely to drive off young adults who expect to learn about an event through social media, register immediately on their smartphone and share information with friends who may also decide to attend.

The lack of an integrated solution also makes it difficult for a forward-thinking museum to apply analytics and business intelligence to understand visitor demographics; identify trends and opportunities; and apply even basic principles of customer relationship management (CRM).

CRM helps museums and similar organizations manage donor, visitor, member and sponsor relationships by providing visibility and access to all available data and information about their activities and interactions.

Consider a science center that wants to increase membership sales to families who registered for camp last year. It's easy enough to export names and addresses of last year's camp families

from the registration system, but how will they easily identify which families are already members? How can they craft an offer for members who've visited more than three times in the past year, or reach out to families that booked birthday parties in the past six months to encourage return visits and donations? Because donation, registration, attendance and membership data are stored in different systems, it's difficult or impossible to develop insights about constituents that could result in greater personalization and engagement.

Ideally, staff could query a single data source that contains all customer information (including registrations, memberships, attendance and donation history) and provides flexible analytics tools to identify constituent patterns, craft meaningful offers and appeals and measure their success.

Integrated End-to-End Solutions Designed for Museums and Science Centers

Museums and science centers benefit most from a single integrated solution suite designed specifically to streamline customer interactions and meet the needs of every operating department.

With an integrated solution, a forward-thinking museum can **turn former friction points into a positive experience that delivers opportunities for greater engagement and revenue**.

For example, families with memberships can be offered priority registration for popular summer programs, and non-member families can see a message during registration showing how much money they could save if they purchased a membership. All registration materials can be completed and submitted online, saving time, paper and money for families and staff who don't have to process checks or track down missing forms and waivers.

For special events, organizations can create discount codes for registrants to share with their friends; pre-sell raffle or concessions tickets to shorten lines and minimize cash management at the event; collect donations and sign up new members at the event with an iPhone or iPad; and follow up with attendees afterwards with event photos, surveys and a discount offer for another event or visit.

Optimal integrated solutions for today's competitive environment will improve visitor experience and empower efficient operations with:

- A single customer login account that provides centralized access to everything the museum offers.
- Online, on-site and mobile sales and management for events and programs, ticketing, reservations, fundraising and membership management.
- Comprehensive reporting and analytics for all transactions.

For Visitors and Members

To deliver an excellent experience to visitors and members, the solution should include:

- A login account and integrated shopping cart so that customers can log on and check out once, even if they're purchasing items from different departments.
- Automatic application of member benefits and discounts even if a membership is purchased in the same transaction.
- Digital and print-at-home membership cards to ensure that members can always have their card available without worrying about loss or leaving the card at home.
- Multiple options for online and on-site payments.
- Print-at-home and/or mobile tickets to eliminate will-call lines.
- Capacity management and waitlists so registrants know whether space is available and can choose to join the waitlist.
- Up-to-date availability calendars and 24/7 booking for birthday parties, group visits, and field trips and experiences.

For Education and Outreach Staff

To serve the needs of a modern education and outreach staff, the solution should support:

- Managing registrations and registrant types for any kind of class, camp and program including payment schedules, billing reminders, automatic application of member benefits and discounts.
- Custom forms to collect liability waivers, health information, emergency contacts and other important information online.
- Allowing families to select options like before-care and after-care for camp programs or decoration and food packages for birthday parties, with costs automatically added to the registration or reservation fee.
- Automatic and scheduled communications including confirmation receipts, payment reminders, important information and updates.
- Quick on-site check-in to reduce lines at summer camps and other education programs.
- Support for updating registrations and collecting payments and donations on the fly at program sites.

For Development Staff

To fully support the needs of development staff, the solution should include:

- Management and tracking of multiple fundraising campaigns.
- Support for exhibit "adoptions" and buy-a-brick/plaque programs including automatically generating a personalized certificate.
- A mobile solution to quickly and easily accept donations anywhere.
- A complete donor/member/visitor profile that shows all relevant information including memberships, registrations, purchases, donations, demographics, interaction notes, etc.

- Creation of custom mailing lists based on querying membership, donation, registration and attendance data.
- The option to present a donation request during every online, on-site and mobile customer purchase.
- Integration with any existing donor management software as needed.

For Membership Staff

To enhance the capabilities of membership staff, the solution should include:

- Creation of custom mailing lists based on querying current and lapsed membership, donation, registration and attendance data.
- Custom discounts and incentives to retain existing members, attract new members and increase overall participation.
- Automatic application of member benefits to every purchase, even if the membership is being purchased in the same transaction.
- The option to deliver print-at-home and mobile membership cards that can be used immediately and eliminate printing costs, postage and paper waste.

For Admissions and On-Site Sales Staff

To serve the needs of visitor-facing staff that interact with customers, the solution should include:

- An easy-to-use point-of-sale (POS) for ticketing and admissions that is integrated with the online ticketing system to provide a consolidated source of attendance data.
- A mobile point-of-sale (mPOS) for admissions linebusting, membership, registrations and add-on sales both inside and outside the museum.
- Group tickets and individual tickets.
- Timed tickets to control capacity at popular exhibits and events. (High-traffic museums might also consider a dynamic ticket pricing solution.)
- A range of ticket and receipt printing and delivery options.
- Easy-to-deploy entry scanners that support scanning tickets from the admissions booth, print-at-home tickets and tickets displayed on mobile devices.

For Executive and Administrative Staff

To efficiently serve executives, administrators and IT staff, the solution should include:

- Integrated management and sales so that everything the organization offers—whether it's a membership, an admission ticket, a camp registration, a birthday party reservation, an IMAX ticket, a donation and a T-shirt—is handled by the same system.
- Comprehensive reporting and analytics to develop a deep understanding of every aspect of customer revenue and attendance.
- A product roadmap that predicts and addresses museums' and science centers' unique needs to aid future-proofing and planning.

For Financial Staff

To meet the needs of financial staff, the solution should offer:

- Comprehensive financial reporting and revenue tracking.
- Choice of merchant account providers.
- Low transaction fees.

For IT Staff

To support the complex and evolving needs of IT staff while improving the end-user experience and increasing efficiency, the solution should include:

- Best-in-class availability and performance to ensure seamless customer experience for even the most popular events (such as special exhibits, holiday programs and popular summer camps).
- Cloud-based software-as-a-service (SAAS) to reduce the cost of deployment, administration and support.
- Industry-standard peripherals including cash drawers, ticket and receipt printers, secure credit card readers and more.
- Outstanding training, documentation and customer support.

Conclusion

With so many other attractions competing for the same visitors, museums must strive to deliver a unique and satisfying customer experience that promotes loyalty and support. Such a customer experience begins outside the museum: on the web site or in the ticketing and admission lines at the front desk.

Museums will benefit from technologies that create a simple and streamlined path to purchasing tickets, registering for events, booking tours and parties, becoming members and supporting the museum with donations.

However, museums that choose multiple solutions to meet the needs of different departments without considering integration cannot benefit from the management and planning efficiencies of modern CRM.

Forward-thinking museums will benefit from technology strategies that rely on a single, integrated system to provide an excellent on-site and off-site customer experience; streamlines the daily operations of every department; and delivers comprehensive reporting and analytics across all departments to stakeholders throughout the organization.

About Doubleknot with Sales Station POS Cash Register and Mobile Sales

Hundreds of organizations rely on Doubleknot's fully integrated online, on-site and mobile management of events, programs, memberships, ticketing and admissions, facility reservations and fundraising for their daily operations.

Doubleknot believes that the software you use to manage your museum should be adaptable to match your exact needs and support your mission.

You can configure anything once and make it automatically available for sale everywhere: online, at admissions, at the gift shop and through mobile sales anywhere on or off your site.

Doubleknot's modular solutions include:

- Event registration and program management
- Reservations and facilities management
- Ticketing and admissions
- Online donations and fundraising
- Membership management
- Integrated POS cash register and mobile sales to support ticketing, product sales, registrations, reservations, donations and memberships anywhere in and out of the museum

All Doubleknot solutions leverage these fully integrated features:

- Custom registration and purchase forms that support upsell and add-ons
- Mobile registration, ticketing and check-in
- Discounts and promotions
- Automatic application of member benefits
- Integrated donation request at every checkout
- Reporting and analytics
- Online, on-site and mobile merchandise sales
- Communications and email marketing
- Custom documents including membership cards, name badges, certificates and more

To protect existing investments, Doubleknot delivers off-the-shelf integration with Blackbaud's The Raiser's Edge and Galaxy Ticketing Systems eGalaxy. In addition, Doubleknot's open API enables custom integration with any back-office system.

Learn more about Doubleknot's integrated solutions for museums:

Contact David Ellis (DEllis@doubleknot.com)
Call (615) 645-4838 or visit **museums.doubleknot.com**