

Audience Analytics

Data Submission Guide – Current Participants

This material will guide you through the process of reviewing your current data in eMerge and organizing, preparing, and uploading your new or additional data.

1) Review your current data in eMerge:

- Are your lists segmented and named in a way that makes sense to you or other participants?
- Do you have at least 3 consecutive years of data in eMerge?
- Have you uploaded your suppression lists?
- Have you uploaded all of your data?
- Have you marked key lists as Do Not Trade?

2) Prepare your files to be added, and upload them using the Wizard!

- **Standard Accounts:** Data Submission Window begins August 1st and ends on August 31st. The next Data Submission Window will occur in January 2015.

For questions regarding any step of the Data Submission Process or eMerge, please contact Adam Scurto, your TRG representative. For questions regarding your account status of the Audience Analytics program, please contact Britney Hines at the Cultural Alliance.

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*For the quickest response and support, contact
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Audience Analytics is supported by the Pew Charitable Trusts

Step #1 - Take Inventory of your Lists / Segments

Think about the various types of lists (segments) you have within your organization, considering the past several seasons or memberships cycles and where they are housed. Consider your ticketing system, donor or fundraising system, education lists, staff or artist lists, volunteer lists, or any other data you collect. The more data you send, the greater your capacity to use the system to its full advantage.

Any data you provide can be hidden within eMerge so only your organization has access.

How much of my data should I submit to the Community Database?

We recommend that you treat the Community Database as your own online marketing tool and send ALL the data you have available on all patrons and their transactions from the last five years. The more data you put into the Community Database, the more control, marketing intelligence, and savings you will get out of it.

Why would I do that?

Only with complete data IN the Community Database can you expect maximum benefits OUT of it. The more data you have in; the more control that you have. (Note: This should also include people you “don’t” want to receive mail so that they can be removed from lists you trade for).

All of my data? Really?

Yes. Your data is safe and 100% in your control in the Community Database Program.

- Your data is housed in a separate secure server; there are no unauthorized users.
- You decide which segments of your data are hidden, so only you know they exist, and which are available for trade. However, remember, you must have at least one segment available for trade in order to participate in the program.
- Your permission is always required for any trade – yours is the last word on who uses your lists, what portions of data they may use, and when.

Do I have to?

No, but we do encourage it. By contributing more it will help you:

- Identify “super patrons” in your community – TRG’s national patron behavior research says that the more patrons buy, the more they keep buying.
- Use Community Database data intelligence to choose the most responsive lists for your offers.
- Easily include and access your “do not contact” lists
- Access demographic and geographic information to better target your mailings.



Audience Analytics is part of the Cultural Alliances’ Engage 2020 Initiative and is generously supported by the Pew Charitable Trusts.

Step #2 – Pull your data

Now that you have a sense of what data you have available, pull and compile it to send to TRG. A template and sample submission has been provided for your reference; if you require any deviation from this format, please contact TRG to determine the best way of doing so. Valid records are those that have at least ONE of these fields populated: Last Name, Full Name, Company, or Email. Records without one of these will not go into eMerge.

Please note that TRG can only accept ONE file (single tab in MS Excel, one text file, etc) per organization; that file can have as many segments or records as needed to fully represent the organization's patronage.

One of the most important parts of compiling your data is segmentation; segmentation is breaking up the large composite of your data into segments or lists. TRG uses three criteria, or fields to distinguish segmentation: **Buyer Type, Year, and Description**. These key fields also allow TRG to segment your data and provide us with how you would like to see your data in eMerge. Without these fields, we have no way of knowing proper segmentation.

****Note: TRG will only accept an upward limit of 400 segments in the initial upload file – any more than this will make eMerge very difficult to use.**

While you can code your data however you wish there are a few things to keep in mind:

Buyer Type

Buyer Type defines how the data is coded in eMerge. While there may not be a buyer type for every type in your ticketing or donor system, use the appendix to determine what buyer type is most appropriate for your use.

The suppression (omit, nixie, do not) buyer types are below. If a patron appears on even one list with one of these buyer types, they will be suppressed as defined below.

- SUP (suppression): removed from all trades, orders; MOST COMPREHENSIVE
- DNM (do not mail): removed from trades, mailing list created
- DNT (do not trade): removed from trades
- DNE (do not email): removed from email lists created
- DNC (do not call): available for you when creating a phone list

Example: If John Smith is a VIP of mine and I don't want to trade him with another organization and I also don't mail to my VIPs in the same way as I do my other names, I create a VIP list with John Smith on it. If John Smith is also a single ticket buyer for Cinderella and I give the Cinderella list to another organization, John will be removed from that list prior to the other organization receiving it.

Why is it important that I send my suppression (Do Not Mail, etc) segments?

It is impossible to know who not to mail if they are not in your database as a suppression list. You need that suppression list to exclude names from every trade you receive from another organization as well as every list you pull for your own direct marketing so you do not mail any of the households that have told you: Do Not Mail to me

Year

Year defines the year or season in which an event took place. If you have a split year season (09-10, 10-11), use the later year.

Example: 09-10 Subscribers would have the event year 2010.

Description

Description is your chance to detail what the list contains. Be clear in your descriptions so everyone on your staff as well as your trading partners understand what the list is. Additionally, TRG strongly recommends using a naming convention that allows visibility of the event year and buyer type within the description.

****Note: The event description must be less than 50 characters**

- Example: 09-10 SUB: Full Season – Classic
- 08-09 STB: Nutcracker
- 2006 DON: Annual Fund
- 2008 MEM: Family Membership

Additionally, you can incorporate things like venue or genre into your description so it is easily searchable.

Example:

- 09-10 SUB: 6-pack – Hubbard
- 10-11 STB: Tribute to Sondheim – Pops

Should I include Patron ID numbers in my data submission?

Some organizations employ patron ID numbers as an important part of their patron history files; other organizations do not. Please know that if you send patron IDs, they will be retained, but will NOT be used in the de-duplication of your mailing or email lists. They will simply be stored in the system for use by the submitting member organization.

Many of my patrons purchase more than one package or ticket from my organization. How do I represent their buying history accurately?

TRG views history by transaction, not by patron. This means that each record (row in Excel) is an individual transaction. Should a patron purchase more than once, please simply include multiple records (rows) to indicate this.

For example, if Jane Smith purchased a single ticket to Nutcracker and a single ticket to Giselle, she would have two records (two rows in excel). The distinguishing difference in these two transactions would be the buyer type, year, and description (STB / 2010 / 09-10 STB: Giselle); everything else in the record would be identical biographical information for Jane Smith.

Know that eMerge de-duplicates records at the order level (mailing list, email list, etc), so you have no fear of downloading a duplicate patron simply because you provided historical information. **Do not de-duplicate your data prior to sending to TRG.**

Step #4 – Upload your data using the Data Upload Wizard

TRG has provided a template for your use in preparing your data for upload. You must have all fields named EXACTLY as the template indicates. There can be no additional fields (columns) and all fields must be present.

- Files uploaded with the Wizard can be in the following formats: xls (Excel 2003), csv (Comma Separated Value) or txt (Text, tab delimited).
- All records must include at least one of the following to be valid: last name, company name, full name, or email. If NONE of these fields are populated, the record will not be loaded into eMerge.
- Your uploaded file will be used either to add one new list to eMerge or to replace ONE eMerge list segment).
- If you choose to replace a list in eMerge, all records currently in that list will be removed in favor of the new list.