

TICKETING & CRM SYSTEM FUNCTIONALITY CHECKER

Below is a list of recommended functionalities for a ticketing and CRM system.

This list is not designed to be exhaustive and should be considered in conjunction with your own business requirements

Event Management
Platform will sell tickets for general admission or unreserved events
Platform will sell tickets on a pre-determined seating plan
Patrons should be able to choose their own seats online or select best available seating
Platform will have the ability to sell multiple different admission types for each event such as Adult and Concession
Platform should have a comprehensive offers engine to accommodate several different ticket discounting methods
Platform should have event selling restrictions to accommodate functionality such as priority booking
Platform should allow for custom seating plans to be built and layouts modified per event
Platform will allow for custom seat assignments to be created to accommodate reservations and allocations to other ticket sellers
Platform will allow for custom pricing structures per event including custom charges or fees
Platform should allow for cross selling of other events during the booking journey to maximise sales
Platform should contain room booking facilities or integrate intuitively with recommended venue management system
Platform will accommodate sales from multiple channels including box office, phone and online simultaneously
Platform will have recommended box office operational hardware including chip & pin machines, printers and till draws
Platform will have functionality to produce a variety of ticket delivery methods including e ticket, postal and collection
Platform should have an integrated design tool to create your own custom event tickets
Platform will have integrated ticket scanning functionality with recommended hardware solutions
Inventory Management
Platform will have the ability to sell multi-tiered memberships online via one off or rolling payments
Platform will have the ability to take donations across several different campaigns and record gift aid declarations
Platform should have merchandise and e-Commerce selling capabilities
Platform should allow for stock control management of all merchandise items
Platform should allow for merchandise to be upsold during the booking journey with associated events
Record Management
Platform will allow the storing of patron records for both Individuals and Organisations

Platform will have the ability to create custom data fields and allow control in making fields mandatory or voluntary
Platform should have record relationship functionality to connect patrons together meaningfully
Platform should have tagging or categorisation functionality to group similar records together
Platform will show a full audit of interaction with the organisation by recording actions such as ticket or inventory purchases
Platform will have marketing consent functionality and provide a full audit of how consent has been captured in accordance with the GDPR
Platform will accommodate freedom of information and right to erasure requests in accordance with the GDPR
Platform should have a secure data transfer application to transport customer data to authorised 3rd parties
Platform should prevent duplicate records being input by creating a unique identifier such as email address
Platform should account for records to be merged on an individual basis
Platform will support the bulk import of new or edited customer data without creating duplicate patron records
Platform will allow for exporting of data in pre-designed formats or csv
Online Integration
Platform will have documented website integration types to produce seamless progression through the booking journey online
Platform should have some form of integrated content management system to reduce double entry for website content pages
Patrons should have access to their online account to update personal information, access booking history and change marketing preferences
Platform will take marketing sign ups online and import directly into the database
Platform must provide end-to-end payment authorisation process which is PCI compliant
Platform must have ability to offer a range of online payment methods including card holder wallets, direct debits, gift vouchers & PayPal
Reporting & Insight
Platform will contain a suite of standard reports which support the financial operation, venue/event management and analytical research required
Platform should allow for custom criteria and varying output methods in all reporting to allow for customisation
Platform will have an automated report scheduling tool based on a variety of dispatch methods
Platform will have a comprehensive segmentation tool which allows for granular integration of the database on a wide range of data fields
Platform should allow for bulk actions to be processed in accordance with reporting or segmentation results
Platform should have an integrated business intelligence tool or allow for it be intuitively exported to external data visualisation tools for analysis
Platform will integrate with analytics tools such as Google Analytics
Platform will integrate with insight tools such as Audience Finder
Communications
Platform will have a recommended integrated marketing platform which will report statistics to your patron records such as open rates and ROI
Platform will allow for campaign mailing lists to be created directly from subscribers located within your database

Platform should allow marketing automation workflows in correspondence with behavioural triggers such as first-time bookers or website visitors
Platform should send automated pre and post show emails in accordance with custom rules
System Requirements
Platform should be cloud based with data being hosted within the EU
Platform will have the ability to be accessed via a multiple device types including mobile or tablet
Platform will allow for multiple user 'Log ins' with the ability to lock access to certain areas of the system
Platform should provide several avenues to access technical support including email & phone
Platform should provide regular updates to the system to comply with continued industry requirements