

Marketing Automation

Automated campaigns allow you to immediately communicate with your patrons in response to any Tessitura® transaction. Use the power of Tessitura List Manager lists to define who should (and shouldn't) receive your campaigns. Then set up WordFly to automatically send personalized welcome emails, performance reminders, membership confirmations, post-purchase emails, news alerts, and more. ■

All automated campaigns have three basic parts, no matter which type you are sending:

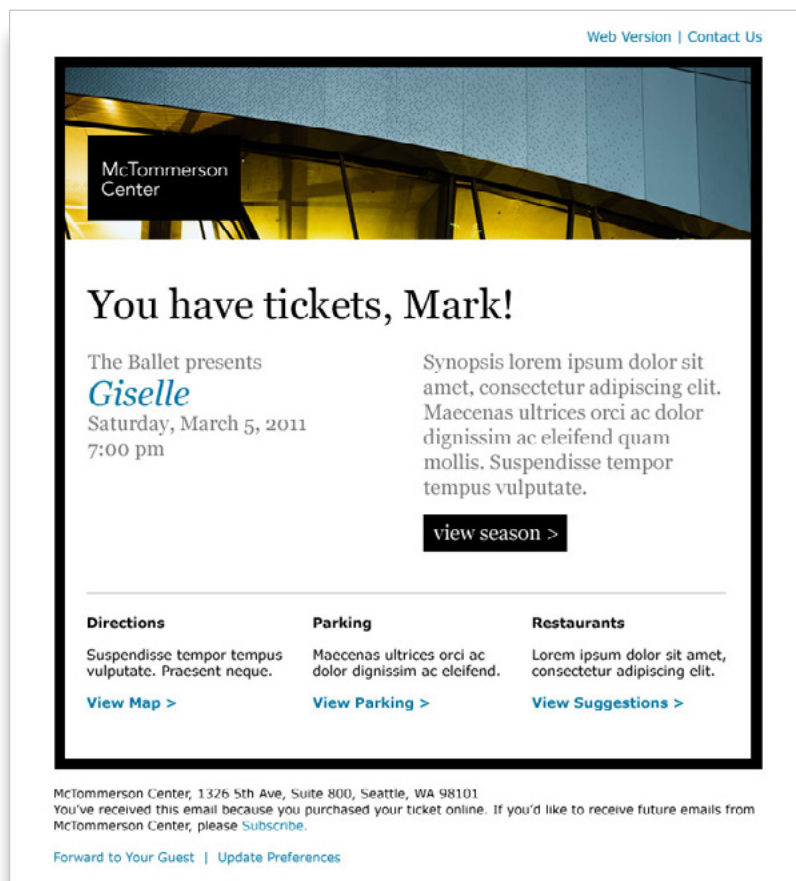
- Define your list in Tessitura
- Create your email design in WordFly
- Set up your campaign in WordFly

Performance Reminder example

In this guide, we'll illustrate these three parts by walking through the process of creating an automated performance reminder email.

Our example will cover how to dynamically display the performance name, performance date and time, a short synopsis, and the patron's first name.

We'll set up our example campaign to send a daily email to all patrons who have tickets three days from that day.



Performance Reminder example

#01 Define your list in Tessitura.

In Tessitura, you'll define who will receive the email by creating a **Dynamic List Manager List** with appropriate criteria. You'll also set up an **Output Set** to return the data you want to include in the email.

For performance reminders, you'll need criteria matching patrons with tickets to upcoming performances and additional criteria to further refine which patrons are matched. For example:

- Is the patron coming to the show?
- Have they opted-in to receive performance reminders?
- Do they have an email address?
- Have they already received a reminder for the same performance?

The List Manager tool in Tessitura allows you to define criteria for DateTime data (such as Ticket Performance Date) using a date that is relative to the date the List is run. For example, you can define criteria matching constituents with a ticket three days from today. **Prior to sending, a new list of recipients and data is pulled from Tessitura each time an automated email is sent according to your schedule.**

EXAMPLE: LIST MANAGER LIST CRITERIA

Our example uses two Dynamic List Manager Lists: **Performance Reminder** and **Performance Reminder Suppression**.

Performance Reminder is intended to find all patrons with tickets three days from now.

It defines the following criteria:

- Ticket Performance Date <= (relative date) DayRunDate +3
- Ticket Performance Date >= (relative date) RunDate
- Primary EAddress Flag also has Yes
- EAddress does not equal <> ""
- List is not [Select Performance Reminder Suppression List]

Performance Reminder Suppression is used by Performance Reminder to exclude patrons who have been promoted to the Performance Reminder Appeal and promoted in the last three days. It defines the following criteria:

- Promotion Appeal in [select the Performance Reminder Appeal]
- Promotion Date <= DayRunDate -3

EXAMPLE: OUTPUT SET

You'll also need to define an Output Set that contains any data needed to personalize the email in WordFly, such as performance date, performance name, production description, and patron name.

[Learn more about Output Sets →](#)

A common issue with the default ticket history output set elements is multiple rows which means that these cannot be used for your email lists. Custom views are often used as a workaround. Tessitura's [Output Set Recipe Book](#) is helpful for this step.

You can use the custom view provided with this guide which returns helpful information such as performance name (perf_name), performance date (perf_dt), and production description (prod_desc).

1. Run the create view script in the impresario database.
[Get the script from Tessitura →](#)
2. In system tables, create a new output set group (TR_QUERY_ELEMENT_GROUP) and new output set elements (TR_QUERY_ELEMENT) that return the data you want from the custom view. The following sample shows how you will create the group and one of the elements (performance name = perf_name).
3. After you complete this step, you can build your output set with these new elements.

TR_QUERY_ELEMENT_GROUP

Column Name	Example Value
Description	Performance Reminder - custom
Data From	lvs_tkt_upcoming
Category	Ticketing

TR_QUERY_ELEMENT

Column Name	Example Value
Description	Performance Name - custom
Group Id	Choose the group created above
Data Select	!.perf_name
Single Row	Y

Update the **Data Select** for each new output set element:

performance name = **perf_name**, performance date = perf_dt, and production description = prod_desc

The experts at Tessitura are available to help with questions beyond what is provided in this guide.

- For troubleshooting, reach out to Tessitura Support
- For help with creating unique list criteria and output sets, reach out to Tessitura Consulting

#02 Create your email design in WordFly.

In WordFly, you'll define the **Email** that will be sent to the recipients who meet the criteria in the List Manager list defined in step #01. Data from the Output Set you created in step #01 can be imported into WordFly and inserted into the email using **Data Fields**.

WORDFLY DATA FIELDS

You'll need to set up data fields in WordFly, so we can correctly import your data into the WordFly database. Just like a subscriber list for a standard campaign, you'll need these when mapping the Tessitura data in your Output Set to the appropriate data fields in WordFly. For automated emails you'll also use these data fields to tell WordFly where to dynamically add content to areas on your email.

EMAIL DESIGN

An automated email can be HTML or Text. You can build it in WordFly or import your own code. Use the **Add Data Field** link to insert code for the dynamic content or hand-code the personalized content using the WordFly dynamic content methodology: `{{##datafieldname##}}`

[Learn more about Data Fields →](#)

PERSONALIZATION IDEAS

[Use default data fields, like first name, etc. →](#)

[Add dynamic images →](#)

[Link to dynamic URLs →](#)

[Use Conditions to show dynamic content →](#)

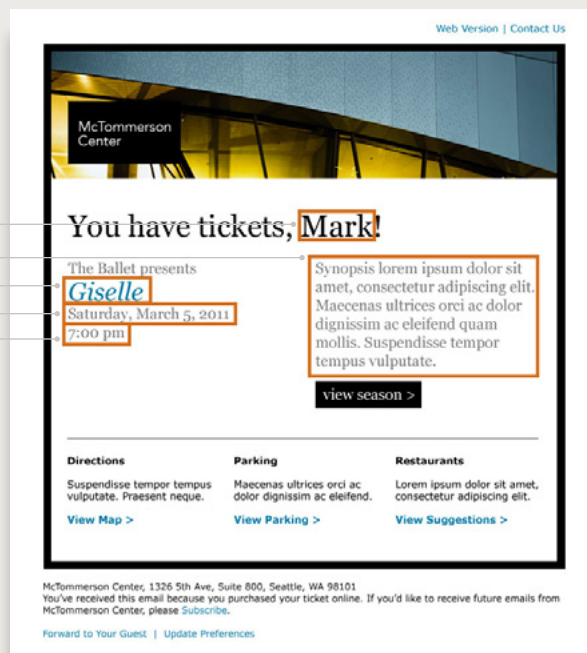
EXAMPLE: DATA FIELDS

For our example you'll need to create four new **Data Fields**.

- First Name (already created in WordFly)
- PerformanceDescription
- PerformanceName
- PerformanceDate
- PerformanceTime

For these new fields, select **List Data** as the field type. This tells WordFly that the data you are importing will change often. Once you've set up your data fields, you have the option to create Conditions. These allow you to add conditional statements to your data.

Then you're ready to build your email. We recommend starting with fake placeholder content, then once you like how it looks, replace it with the WordFly data field code by clicking the Add Data Field link.



Areas that aren't outlined denote static content.

#03 Set up your automated campaign in WordFly.

Now it's time to pull everything together in WordFly. These five steps will sound familiar if you've sent standard campaigns.

1. SETTINGS

Go to Email → Create a Campaign. Select **Triggered** from the Campaign Type dropdown. Define the basics, such as the subject line and from name.

2. EMAIL

Choose **Use Existing Email** and browse to the email created in step #02.

3. RECIPIENTS

Define who will receive the campaign.

- Select the appropriate List Manager list.
- Select the predefined Output Set that contains the dynamic data you are using in your email.
- Identify settings for how the list will get promoted. The Appeal attribute is required if you want to track your emails in WordFly (highly encouraged). Media Type and Source Group are also required.
- Map your Tessitura data to data fields in the WordFly database. Don't forget to create the data fields in **Subscribers → Data Fields** before you get to this step.
- Click **Continue** to save your selections.
- Your list will show 0 subscribers. This is expected.

4. TESTING

Send test emails and use **Subscriber Preview** to preview emails with real data from Tessitura.

5. ACTIVATION

Schedule when and how often the campaign will be sent.

ACTIVATION OPTIONS

WordFly gives you a lot of flexibility for scheduling your automated campaigns. You'll want to invest time in planning your calendar to avoid overemailing your patrons.

Mailing Frequency

How often do you want the campaign to be sent?

- Once a day
- Once a week
- Once a month
- One time only

Select Start Date + Time

When do you want to send the first automated email?

- Now
- In the future

Select End Date + Time

When do you want this campaign to end?

- Never
- In the future

Sending Limits

How often do you want to send this email to an individual? These activation settings serve as a safety net. Use your Tessitura criteria to fine-tune your list in advance.

- One time only
- No more than once a day
- No more than once a week
- No more than once a month
- Every time they meet the requirements

[Learn more about creating and testing your campaign →](#)

EXAMPLE: ACTIVATION

For our example we would send once a day to everyone with tickets to a performance three days in the future.

- **Mailing Frequency** Once a day
- **Select Start Date + Time** January 1, 2022 9:00 AM
- **Select End Date + Time** February 15, 2022 9:00 AM
- **Sending Limits** Every time they meet the requirements

FAQs and additional notes

Are responses sent back to Tessitura?

Yes. Email responses from automated campaigns are tracked back to constituent records in Tessitura just as they are with standard campaigns.

Are sources generated with each list import?

Yes. Every time an automated campaign runs, WordFly regenerates your list in Tessitura. This will generate new source codes, but only for the patrons who still meet the List Manager criteria. If a patron continues to meet the list criteria every time the campaign runs, they will have new source codes created and will be imported into WordFly.

Can I exclude certain subscribers?

Yes. WordFly looks at the campaign's Activation settings to determine how often a subscriber should receive the campaign. Based on this setting, WordFly can exclude subscribers even though they met the list criteria and were imported. For example, if you selected **One Time Only** in WordFly and a subscriber met the list criteria every time the campaign ran, WordFly would only send the campaign to them once. However, they would have a source code for each time the campaign ran. For this reason, we highly recommend fine-tuning your list criteria to only pull the addresses that should be sent to.

Can I update my email design while the campaign is running?

Yes. Every time the automated campaign sends, it will send the latest version of the email design. This allows you to make adjustments to your email while the campaign is activated. To edit the email for an active campaign, go to **Email → Emails**.

Can I pause a campaign to make edits to the settings, etc.?

Yes. To pause an automated campaign, go to the **Activation** step for your campaign and click **Pause**.

[More FAQs →](#)

Ideas for automated campaigns

Automated campaigns can be driven by any data in Tessitura. The possibilities for campaigns are limitless. Here are a few ideas to spark your brainstorming.

WELCOME EMAILS

- [Welcome email →](#)
- [New Member/Subscriber email →](#)

PERFORMANCE + EVENT REMINDERS

- [Pre-performance reminder](#)
- [Schools performance reminder](#)
- [Post-performance email →](#)

NOTIFICATIONS + REMINDERS

- [Abandoned cart →](#)
- [Membership renewal reminder →](#)
- [Subscription installment payment reminder](#)
- [Unpaid balances and deposits for groups](#)
- [Expiring ticket vouchers or gift certificates](#)
- [Expiring credit card](#)

SPECIAL OFFERS + THANK YOUS

- [Update your interests](#)
- [Thank you for supporting our organization](#)
- [Drink ticket offers for groups](#)
- [Birthday emails](#)