Choosing a Ticketing System in 5 Easy Steps

1 *Determine needs and priorities*

Because of the wide range of ticketing solutions available, determining your organization's needs and priorities is the first step to choosing an appropriate software system. In the following pages, we have included a list of subject areas to consider as well as sample questions to ask. It is a good idea to seek input from every department you expect to use the system—not just ticket agents. The following is a list of common needs and priorities:

Specific Needs

- *Credit card processing*
- *Online sales*
- *Seat mapping/reserved ticketing*
- *General admission ticketing*
- *Subscriptions/season ticket capability*
- *Multi-user (multiple sellers can be logged in at once)*
- *At-home ticket printing for customers*
- *Security features (ticket forgery prevention)*
- *Barcodes/gate control*
- *Customer support/tech support for our staff*
- *Subscription sales/discount packages*
- *Group sales*
- *Automated sales reports*
- *Customizable sales reports*
- *Ability to print images or logo on ticket*
- *Ability to add a suggested donation*
- *Integrates with our existing customer relationship/donor management system*
- *Includes a membership management module*
- *Includes a customer relationship/donor management module*
- *Mobile integration*
- *Social media integration*
- *Demand-based pricing capability*

Organizational Priorities

- *Easy to use*
- *Easy to train staff*
- *Price*
- *Level of customization*
- *Specific functions and features*
- *Brand recognition*
- *Recommendation from colleague*
- *Customer service*
- *Integration with existing systems*
- *Required by a venue agreement*

2 *Identify vendors*

Your prioritized list of needs will help you begin to identify systems that are more likely to be a good fit your organization. You might start by looking at the systems commonly used by organizations in your budget category. A list of vendors included in this survey is also available on page 41. Visit their websites and research them to help you narrow your list to a few possibilities.

3 *Contact vendors*

Once you have narrowed your list to a few possible systems, begin to gather first-hand information from the service providers. In addition to asking some of the questions in the next two pages, you might do the following:

- Ask if there are any hands-on demonstrations that let you experience the system for yourself.
- Request a list of client references in your discipline and budget size, and ask those references about their experiences.
- Request a list of client websites to get an idea of the customer's experience of ticket purchasing and other transactions, such as donating online.

Areas to Consider	Sample questions to ask
Customer/Tech Support	• What type of support is available? (e.g. online, phone, etc) • Is there 24-hour support? If not, what options are available in the event of an after-hours emergency? • What is the average response time to support requests? • Is there a support fee? If so, how much does it cost, and what exactly does it cover?
Data Integration	• Can the system handle both online and internal sales? If not, does the vendor partner with another ticketing software vendor to provide complementary services? • What software does your organization currently use, and what capacity does the ticketing software have to integrate with your current software? • What is the time frame for migrating data from the current system to the new system? • What is the capacity to export data from the system, and in what format can it be exported? (e.g. Excel file, CSV, etc) • Does this system include integrated functions (i.e. donor management, class registration, etc.) that could replace any of your current software? • Does this system have a plug-in to sell tickets on a mobile device or smartphone? • Will this system have the capability to integrate e-mail delivery or social media data?
Data Security	• After a transaction, what data remains in the system, and for how long does it remain? • Are online transactions protected with a data encryption layer? • Is the data being stored with the vendor or with a third-party system like PayPal? • If the data is being stored with the vendor, do you have SAS 70 Compliance/European Safe Compliance?
Infrastructure	• Is the software hosted online, or will your organization need a server to host it? • Is the software compatible with your operating system? (i.e. Windows, MacOS, etc) • Does the system include credit card processing, or will your organization need your own credit card processing software/equipment? • Will the system require your organization to rent or purchase ticket-printing equipment? • If the system uses barcodes, will your organization need to rent or purchase barcode scanners?

Areas to Consider	Sample questions to ask
Price	• What is the set-up fee? • Is there an annual license or maintenance fee? • Are there any additional fees for your organization? (e.g. credit card processing fees, per-ticket fees, customer service etc.) • What fees are charged to the customer? How much control will your organization have over setting those fees?
Reports	• What transactional data do you want to be able to analyze? • What automated reports come with the system? • Can you create custom reports on the fly? • If the vendor will build custom reports for your organization, what is the customization rate and turnaround time? • How does the system track the source of the sale?
Specific Functions	• What specific functions are critical to each user of your ticketing system? (e.g. fast general admission sales, demand pricing, etc.) • What unique aspects of your organization will the system need to handle? (e.g. subscriptions for events in multiple venues, passes for multi-day events, etc) • What are your priorities for online sales? (e.g. at-home ticket printing, customer seat selection, online subscription renewal, etc.)
Staff Access	• How many user accounts do you need? (i.e. How many people should be able to log in to the system at the same time?) • How many user accounts come with the system? • Is it easy to add user accounts if your organization grows? How much do additional accounts cost? • Can you customize the information or functions that individual users are able to access? • What information can you draw from each user account? (e.g. daily sales activity, etc.) • If the software is web-based, can the staff access it from the browsers (and browser versions) currently installed on their computers?
User-Friendliness	• Are there hands-on demonstrations available online? • Are demos available once your data is in the new system in order to train new employees? • How much staff time can you expect to spend setting up events? Selling season tickets? Pulling reports? • How easy is this system for online customers to navigate? • For online purchases, is the system compatible with the last three versions of common Internet browsers (Internet Explorer, Firefox, Safari, Chrome, etc.)?

4 *Weighing Your Options and Making a Decision*

Revisit your list of priorities and, based on your findings from talking to vendors and organizations who use your system, rank your top choices. You might also seek input again at this point from people who will be using the system to see if your priorities are still in line with theirs.

Keep in mind that price is not always the best indicator of quality. Even if price is your organization's primary concern, it is still worth researching and evaluating other aspects of the system before making your final decision.

5 *Prepare for installation*

Changing a ticket system is a major organizational change, but it doesn't have to be difficult. Timelines for implementing the new system will vary from organization to organization, but here are some things to consider:

- How long will it take to transfer your data from the current system to the new system?
    - How many years of data do you want to migrate from your current system to the new system?
    - Will the data need to be "cleaned" or modified in any way before transferring it?
- How long will it take to install any software on staff computers?
- How much time will it take to create usernames for staff and adjust their profiles so that they have access to the proper data?
- How long will it take to fully train staff on business-critical functions?
- How close are you to the starting a new season and how long will it take to build a season with the new software?

From these questions, you can determine the best time in your season to install your new system, migrate any data from your current system, and start to train employees. Remember to inform your patrons of any new features that may interest them, like online subscription sales, choose-your-own-seat functions, or mobile integration.

Consortium Ticketing:
Questions to ask

Consortium ticketing refers to a system where an umbrella organization manages the system for a number of ticketing clients. Before you choose a ticketing system for a consortium or an organization that may be used in a consortium setting, consider, the following:

Can this system be utilized for consortium ticketing?

What would the structure look like for consortium ticketing? (e.g. sales and data from multiple ticketing clients live in one central database that may be partitioned for privacy purposes OR each ticketing client has their own unique account and the system has added functionality that allows a consortium coordinator to easily access each account)

Are basic changes of contact information (e.g. address updates) immediately available to all ticketing clients in the consortium?

What types of global reports are available to view activity across the consortium?