

## **1. Project Title**

Enhancing Customer Experience and Business Efficiency at The Lawrence Hall of Science

## **2. Submitter's name, title, and contact information**

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## **3. Project Summary**

The Lawrence Hall of Science converts its existing systems to a new Customer Relationship Management (CRM) system, paving the way for others on campus to follow this path for effective resource utilization and financial sustainability.

## **4. Project Narrative**

The Lawrence Hall of Science (The Lawrence) is UC Berkeley's public science center. Founded in 1968, The Lawrence's mission is to provide innovative and effective science learning experiences for all, especially those who traditionally lack access. The Lawrence provides direct experiences to learners of all ages, supports educator professional development, promotes capacity-building in in- and out-of-school education systems, and produces instructional materials that are rooted in what is known about how people most effectively learn. Research underlies everything The Lawrence does, and they evaluate all of their programs as well as produce original research on science, technology, engineering, and math (STEM) learning. About 12 million people in over 20 countries use learning resources produced by The Lawrence each year.

The Lawrence's direct experiences take place both at its science museum and in the broader Northern California community. Onsite, the Lawrence operates a store and cafe, and offers memberships to the museum. It is a popular field trip destination for Bay Area schools, with about 150,000 visits annually. Like most other nonprofit institutions, it also brings in a significant part of its annual revenue through contributed income from donors and foundations. However, until 2020, all of these contact points--from donors, visitors, customers, and other stakeholders--were not being effectively captured in a single customer relationship management (CRM) system. Instead, there were several disparate systems ranging from boutique software (including the University's donor management system) to single Excel spreadsheets stored on shared drives. Over time, this created a variety of problems. Staff from different collaborative departments (such as Development and Membership) were sometimes unaware of each system, and in other cases, aware of but unable to access them. Customers who registered their children for summer camps could not be directly added to The Lawrence's mailing list. Many customers received individual communications from The Lawrence's different departments, leading to inefficient marketing and many missed revenue opportunities.

Beginning in 2017, the recently-appointed Director of The Lawrence set finding a central CRM solution as a key priority. After a year-long search for a software solution, the leadership team decided to utilize Tessitura, which is widely used by many other cultural organizations. Tessitura combines a CRM database with a point-of-sale system and web mailing platform for seamless customer tracking and communication. A key driver of this decision was the fact that Tessitura is already utilized by Cal Performances on the UC Berkeley campus. This meant that The Lawrence and Cal Performances could save on implementation and maintenance resources by entering into an agreement deemed by Tessitura as a consortium. This consortium is also open to other cultural entities on campus, and saves them large costs because they will not have to evaluate and from-the-ground-up implement a new system. Groups including the Berkeley Art Museum, Hearst Museum of Anthropology, and UC Botanical Gardens have all expressed interest in joining the consortium when resources are available to do so. This has the potential to save significant resources on campus and enable these organizations to more effectively serve the public.

The implementation of Tessitura is currently underway. It is led by a cross-functional working group with staff from Development, Sales, Visitor Service, and Finance, as well as our Systems Administrator. The implementation is happening in phases, starting with summer camp sales in March 2020 (which was moved up by a year due to UC unexpectedly pulling support for the existing registration system, B2H) and will continue over the next year. With the SARS-CoV-2 pandemic and subsequent closure of the science center, the team has had to adjust its plans on the fly to better meet the needs of customers. Success will be measured by comparing sales and frequency of contact to the pre-Tessitura configuration of disparate systems. The team anticipates that this will have manifold impacts including:

- On customers: Customers will experience the seamless experience that they have come to expect in this era of data collected by companies. The system will allow new features that customers have long wanted, such as online ticket sales.
- On staff: Teams will be able to work together in more effective ways, and the project team anticipates that morale will be improved. Job duties can be performed more efficiently and effectively.
- On business: The system will enable staff to better market products and raise funds. Although the initial investment is significant, the team anticipates a tradeoff of increased efficiency that will lead to greater financial sustainability for The Lawrence and more cost savings for the University as a whole.