AGENDA AT A GLANCE

Wednesday, August 22, 2018

8:30 - 9:00 AM	Registration & Breakfast	
9:00 - 10:00 AM	Welcome & Introductions *Forum*	
10:00 - 10:30 AM	Opening Keynote *Forum*	
10:30 - 11:00 AM	Roadmap Keynote *Forum*	
11:00 - 11:15 AM	Break	
11:15 AM - 12:00 PM	Thriving in the Digital Age: A Candid Conversation on the Future of Technology *Forum*	
12:00 - 1:30 PM	Lunch on your own	
1:30 - 2:40 PM	Breakout Sessions *Forum & Living Room Theatre*	Hands-On Training *Hub*
2:40 - 2:55 PM	Break	
2:55 - 4:05 PM	Breakout Sessions *Forum & Living Room Theatre*	Hands-On Training *Hub*
4:05 - 4:20 PM	Break	
4:20 - 5:00 PM	Breakout Sessions *Forum & Living Room Theatre*	Hands-On Training *Hub*

Thursday, August 23, 2018

8:30 - 9:30 AM	Breakfast	
9:30 - 10:40 AM	Breakout Sessions *Forum & Living Room Theatre*	Hands-On Training *Hub*
10:40 - 10:55 AM	Break	
10:55 AM - 12:30 PM	Breakout Sessions *Forum & Living Room Theatre*	Hands-On Training *Hub*
12:30 - 2:00 PM	Lunch on your own	
2:00 - 3:00 PM	Panel Discussions *Forum*	Hands-On Training *Hub*
	Product Development Forum *Living Room Theatre*	
3:00 - 3:15 PM	Break	
3:15 - 5:00 PM	Regional User Groups: Neighbors Beyond Your Borders *Forum*	
5:00 - 8:00 PM	Happy Hour & Hors d'Oeuvres *The Copacabana: 268 West 47th Street (at 8th Avenue)*	

Friday, August 24, 2018

8:30 - 9:30 AM	Breakfast	
9:30 - 10:40 AM	Breakout Sessions *Forum*	Hands-On Training *Hub*
	Product Development Forum *Living Room Theatre*	
10:40 - 10:55 AM	Break	
10:55 - 11:55 AM	Live Q&A *Forum*	
12:00 - 12:30 PM	Conference Wrap-Up *Forum*	

CONVENE

GLOSSARY AND GENERAL INFO

This year's Community Meeting has been designed to provide you with more opportunities than ever before to engage with your colleagues, PatronManager staff, and the product itself. Whether it's your first conference or your sixth, please see below for helpful information to prepare.

Keynote Sessions

These are all-attendee sessions featuring staff and guest speakers presenting on industry and product ideas and information.

Breakout Sessions

At the Community Meeting, we keep things moving — breakout sessions are generally 20 minutes each (with a few exceptions). There are two or three sessions happening at once, and each session is tagged to help guide you to the topics that best fit your skill level and interests.

Experience: Beginner | Experienced | All Levels

Professional Interest: Admin | Box Office | Fundraising | Marketing | Finance

Hands-On Training

The hands-on track has specific training topics based on the breakout session topics, so you can pick and choose the sessions that are right for you. Make sure to bring your computers into these sessions so you can follow along in your own PatronManager account.

Product Development Forum

New this year, we have two sessions dedicated to taking you behind the scenes of our product development process. Join us at these sessions to learn how we think up and create new features (ultimately delivering them to you), discuss possible items we may add to the roadmap in 2019, and even vote for the feature that matters most to you and your organization!

Online Agenda

The full agenda is available online and mobile accessible for you to plan out your sessions and keep track of what's going on (and when). Visit www.patronmanager.com/conference.

Wi-Fi Information

Wi-Fi is available throughout Convene:

- **Network:** ConveneConferenceCenters
- **Password:** meetings

Twitter

PatronManager will be tweeting throughout the conference. Follow us at @patronmanager and join in the conversation by using the hashtag #PMCM18.

DETAILED AGENDA

Wednesday, August 22, 2018

8:30 - 9:00 AM	**Registration & Breakfast**	
9:00 - 10:00 AM	**Welcome and Introductions**	Forum
10:00 - 10:30 AM	**Opening Keynote** Michelle Paul, *Managing Director, PatronManager*	Forum
10:30 - 11:00 AM	**Roadmap Keynote** Christa Avampato, *Director of Product Development, PatronManager*	Forum
11:00 - 11:15 AM	**Break**	
11:15 AM - 12:00 PM	**Thriving in the Digital Age: A Candid Conversation on the Future of Technology** Maureen Andersen, *President & CEO, INTIX*; Eugene Carr, *President, Patron Technology*; Hosted by Robert Friend, *VP, Business Development & Consulting, PatronManager*	Forum
12:00 - 1:30 PM	**Lunch on your own**	
1:30 - 1:50 PM	**Mind Meld with Peers Through PatronManager** All | Admin. | B.O. | Fund. | Mktg. | Finc. Hannah Ferguson, *Sales, Volunteer, & Access Coordinator, Northern Stage*	Forum A
	How to Survive Your First Year Using PatronManager Beg. | Admin. | B.O. | Fund. | Mktg. | Finc. Megan Witkovsky, *Patron Care Manager, Prima*	Forum B
	Partner Session: Worldwide Ticketcraft — Season Renewals 101 All | B.O. Erik Covitz, *VP of Market Development, Worldwide Ticketcraft*	Living Room Theatre
	Hands-On Training — Internal Documentation: Why You Need It and How to Start All | Admin. | B.O. | Fund. | Mktg. | Finc.	Hub 1
	Hands-On Training — Sandboxes: Get Your Hands-On Track Started Correctly All | Admin.	Hub 2
1:55 - 2:15 PM	**What to Do When Your PatronManager Is "A Bit of a Fixer-Upper" (Claire Randall Memorial Session)** Beg. | Admin. Ian Stewart, *Development Associate, Book-It Repertory Theatre*	Forum A
	PatronManager Means Time Management Beg. | B.O. | Fund. | Mktg. | Finc. David Kilpatrick, *Executive Director, Des Moines Community Playhouse*	Forum B
	Partner Session — Greencopper Mobile Technologies All | B.O. | Mktg. Gwenaël Le Bodic, *CEO, Greencopper*	Living Room Theatre

Wednesday, August 22, 2018 continued

1:55 - 2:15 PM	**Hands-On Training — Email Templates: Gussy 'em Up** All Admin. B.O. Fund. Mktg.	Hub 1
	Hands-On Training — Access Codes: Add-On Promotions and Private Sales Beg. B.O.	Hub 2
2:20 - 2:40 PM	**How to Make Hard Changes Easy** All Admin. B.O. Fund. Mktg. Finc. Adam Weems and Jessica Rowshandel, *Staff*	Forum A
	How We Lured Our Artistic Team into PatManLand All Admin. B.O. April Angilletta, *Communications Manager, The Choral Arts Society of Washington*	Forum B
	Magical Updates: Using DataLoader.io to Speed Up Your Workday All Admin. Jessica James Curtis, *Information Systems Specialist, Lyric Theatre of Oklahoma*; Allie Tabberer, *Staff*	Living Room Theatre
	Hands-On Training — User Management: Creating and Deactivating All Admin. B.O. Fund. Mktg. Finc.	Hub 1
	Hands-On Training — Discount Codes: Tutorial (and Unique Ideas) Beg. B.O.	Hub 2
2:40 - 2:55 PM	**Break**	
2:55 - 3:15 PM	**Make a Smooth Transition to Lightning Experience** All Admin. Allison Klein, *Staff*	Forum A
	Customizing Email Templates Beg. Admin. B.O. Fund. Mktg. Andrea Twiss, *Administrative Associate, Theatre in the Park*; Erin West, *Financial Director/Box Office Manager, Theatre in the Park*	Forum B
	Tracking Feedback to Create Audience-Centric Experiences All Admin. Mktg. Dustin Morris, *Staff*	Living Room Theatre
	Hands-On Training — Donation Forms: Customize with Hidden Fields (and More) Beg. Admin. Fund.	Hub 1
	Hands-On Training — Diagnostic Reporting: How Clean is Your Data? All Admin.	Hub 2
3:20 - 3:40 PM	**Better Living Through Automation** Exper. Admin. Adam Grosswirth, *Membership Director, National Alliance for Musical Theatre*; Rebekah Pearson, *Staff*	Forum A

Wednesday, August 22, 2018 continued

3:20 - 3:40 PM	**The Three Most Important Questions Your Organization Should Be Asking** All Mktg. Kevin Patterson, *Staff*	Forum B
	Partner Session — Bluefin Payment Systems All Admin. B.O. Fund. Finc. Maryam Moniri, *Director Partner Management, Bluefin Payment Systems*; Alex Pagano, *Staff*	Living Room Theatre
	Hands-On Training — Event Building: Beginner Session Beg. B.O.	Hub 1
	Hands-On Training — Excel Wizardry: Get Your Data Ready for Imports and Updates All Admin.	Hub 2
3:45 - 4:05 PM	**It's Your Salesforce, You Can Cry (Or Customize) If You Want To** All Admin. Andrew Campbell, *Sales Operations Manager, The Second City*; Dawn Kusinski, *Director of Marketing and Communications, The Second City*; Zack Einstein, *Staff*	Forum A
	Marketing Money Doesn't Grow on Trees Exper. Admin. B.O. Mktg. April Angilletta, *Communications Manager, The Choral Arts Society of Washington*	Forum B
	Partner Session — WealthEngine Is Now Seamlessly Integrated All Fund. Dustin Kiernan, *Senior Director, Strategic Accounts, WealthEngine*; Justin Clark, *Account Executive, WealthEngine*	Living Room Theatre
	Hands-On Training — Reports: Enter the Matrix (format) All B.O. Fund. Mktg. Finc.	Hub 1
	Hands-On Training — Data Imports and Updates: Using Dataloader.io (DIY Data) All Admin.	Hub 2
4:05 - 4:20 PM	**Break**	
4:20 - 4:40 PM	**Partner Session — How an Existing PatronManager Customer Can Utilize FormAssembly to Easily Build and Better Capture Web Form Data** All Admin. B.O. Fund. Mktg. Jaret Manuel, *Director of Business Development, FormAssembly*; Caroline Renard, *Technology Interpreter for Arts Groups*	Living Room Theatre
4:20 - 5:00 PM	**Awesome Apps Roundup** All Admin. B.O. Fund. Mktg. Finc. Heather Gage, *Director of Education and Community Engagement, Reno Philharmonic*; Jessica James Curtis, *Information Systems Specialist, Lyric Theatre of Oklahoma*; Sarah Shoffner, *Customer Engagement Manager, Boston Gay Men's Chorus*; Regina Burgher, *Development Manager, The Choral Arts Society of Washington*; Allison Klein, *Staff*	Forum A

Wednesday, August 22, 2018 continued

4:20 - 5:00 PM	**Nerding Out on the Numbers: A Financial Reporting Deep Dive** Exper. Admin. B.O. Fund. Finc. Jude Shimer and Samantha Colbert, *Staff*	Forum B
	Hands-On Training — Custom Fields: How to Track Unique Data Exper. Admin. B.O. Fund. Mktg.	Hub 1
	Hands-On Training — Process Builder: Advanced Automation for Admins Exper. Admin.	Hub 2
4:40 - 5:00 PM	**Do Even More with PatronManager** All Admin. Danny Abosch, *Staff*	Living Room Theatre

Thursday, August 23, 2018

8:30 - 9:30 AM	**Breakfast**	
9:30 - 9:50 AM	**Keep It Simple: 5 Ways to Improve Efficiency in the Box Office** Beg. Admin. B.O. Evan Valle, *Box Office Manager, Orlando Shakespeare Theater*; Linnaia McKenzie, *Staff*	Forum A
	Save Time, Save Notes: Using Custom Fields to Share and Save Patron Knowledge All Admin. Fund. Jolene Patrou, *Development Manager, Bach Festival Society of Winter Park*	Forum B
	Partner Session (Mogli) — How to Use Text Messaging to Augment Your Ticket Sales and Donations All Admin. B.O. Fund. Mktg. Stevan Simich, *Founder and CEO, Mogli*; Rob Blatchley, *VP of Product, Mogli*	Living Room Theatre
	Hands-On Training — List Views: Learn 'em, Love 'em Beg. B.O. Fund. Mktg.	Hub 1
	Hands-On Training — Formulas: If This, Then That Exper. Admin.	Hub 2
9:55 - 10:15 AM	**Effective Ticket Design** All B.O. Kate Levine and Emma Smith, *Staff*	Forum A
	Don't Take Donations for GRANTed: Donor and Foundation Appreciation with PatMan Beg. Fund. Finc. Jill Michaelree and Emily van der Harten, *Staff*	Forum B
	Partner Session (Gameflow) — Help Your Patrons Help You: Gathering Data Throughout the Customer Journey All Mktg. Nick Keenan, *President, Gameflow Interactive;* Jeremy Douylliez, *Digital Marketing and PR Manager, American Shakespeare Center*	Living Room Theatre

Thursday, August 23, 2018 continued

9:55 - 10:15 AM	**Hands-On Training — Salesforce vs. PatronManager** Beg. Admin.	Hub 1
	Hands-On Training — Rollup Fields: Summarize Your Data All Admin.	Hub 2
10:20 - 10:40 AM	**An Audience of Students — Breaking Down the Intricacies of Group Sales** All Admin. B.O. Julia King, *Staff*	Forum A
	I Pledge to Thee ... to Enter Pledge Payments, and Here's Why Beg. Fund. Finc. Shasti Walsh, *Staff*	Forum B
	Bowl with Bumpers: 8 Data Validation Rules for Admins without Time to Spare Exper. Admin. Katie Campbell, *Staff*	Living Room Theatre
	Hands-On Training — Setup: Understanding Salesforce Under the Hood Beg. Admin.	Hub 1
	Hands-On Training — Emma Emails: Troubleshooting All Mktg.	Hub 2
10:40 - 10:55 AM	**Break**	
10:55 - 11:15 AM	**Hands-On Training — Campaigns: A Development Director's Best Friend** All Fund.	Hub 1
	Hands-On Training — Validation Rules & Dependent Fields: Increasing Accuracy of Data Entry Exper. Admin.	Hub 2
10:55 - 11:40 AM	**Reporting Basics** Beg. Admin. B.O. Fund. Mktg. Finc. Christina Johnson and Rebekah Pearson, *Staff*	Forum A
	Extend Functionality and Track More Data with Custom Objects Exper. Admin. Joe Gleason, *Assistant Executive Director, Capitol Center for the Arts*; David Bander, *Managing Director, Kirkland Performance Center*; Hannah Young, *Development Associate, ODC*	Forum B
11:20 - 11:40 AM	**Hands-On Training — Workflow: Intro to Automation** Exper. Admin. B.O. Fund.	Hub 1
	Hands-On Training — Auctions/Volunteers for Salesforce Exper. Admin.	Hub 2
11:45 AM - 12:05 PM	**Dashboards for Dummies** All B.O. Fund. Danny Bischoff, *Director of Customer Experience, The Second City*; Shasti Walsh, *Staff*	Forum A

Thursday, August 23, 2018 continued

11:45 AM - 12:05 PM	**Connecting with Your Patrons: Up Your Customer Service Game and Build Brand Loyalty** All B.O. Mktg. Sonja Baker, *Box Office and Patron Services Manager, Interlochen Center for the Arts*	Forum B
	Partner Session (Opus Affair) — List Segmentation All B.O. Fund. Mktg. Graham Wright, *Founder + CEO, Opus Affair*; Hailey Fuqua, *Director of Client Services, Opus Affair*	Living Room Theatre
	Hands-On Training — Custom Cart Text: Ideas and Best Practices Beg. B.O.	Hub 2
11:45 AM - 12:30 PM	**Hands-On Training — Moves Management: Target, Solicit, Succeed** Exper. Admin. Fund.	Hub 1
12:10 - 12:30 PM	**Data You Can Use — Using Reports to Make the Case** All B.O. Fund. Mktg. Finc. Zac Alfson, *Patron Engagement Manager, Bach Festival Society of Winter Park*	Forum A
	Making a Cultural Shift to Leveraging Institutional Memory and the Customer Journey All B.O. Fund. Mktg. Robert Friend, *Staff*	Forum B
	Setting Up Memberships in PatronManager Beg. Admin. B.O. Fund. Mktg. Andrew Baldwin, *Box Office Manager, Mile Square Theatre*; Christina Johnson, *Staff*	Living Room Theatre
	Hands-On Training — Dashboards: Vizualize Your Reports Beg. B.O. Fund. Mktg. Finc.	Hub 2
12:30 - 2:00 PM	**Lunch on your own**	
2:00 - 3:00 PM	**Panel — Crucial Conversations for Advanced Users and Admins** Exper. Admin. Ian Stewart, *Development Associate, Book-It Repertory Theatre*; Dan Martin, *Guest Service Supervisor, Musical Instrument Museum*; Dave Archuletta, *Chief Development Officer, New York Live Arts;* Moderated by Jordan Simmons, *Staff*	Forum A
	Panel — Beginners Can Crush It Too! Beg. Trevor Leaderbrand, *Marketing Director, The Peoples Improv Theater*; Roger-Paul Snell, *Ticket Sales Manager, Goodspeed Musicals*; Katie Wasserman, *Institutional Giving Manager, Goodspeed Musicals*; Ricki Marking-Camuto, *Box Office Manager, Repertory Theatre of St. Louis*; Moderated by Linnaia McKenzie, *Staff*	Forum B

Thursday, August 23, 2018 continued

2:00 - 3:00 PM	**Product Development Forum — How an Idea Becomes a Feature: The Roadmap Planning Process at PatronManager** All Admin. B.O. Fund. Mktg. Finc. Christa Avampato, *Staff*	Living Room Theatre
	Hands-On Training — Reports: Mystery to Mastery All B.O. Fund. Mktg. Finc.	Hub 1
	Hands-On Training — Badges: Adding and Editing All Admin.	Hub 2
3:00 - 3:15 PM	**Break**	
3:15 - 5:00 PM	**Regional User Groups: Neighbors Beyond Your Borders** All Admin. B.O. Fund. Mktg. Finc. *PatronManager Staff*	Forum
5:00 - 8:00 PM	**Happy Hour & Hors d'Oeuvres** The Copacabana: 268 West 47th Street (at 8th Avenue)	

Friday, August 24, 2018

8:30 - 9:30 AM	**Breakfast**	
9:30 - 9:50 AM	**BYOBBBBP: Bring Your Own Brain and Build Better Business Practices** All B.O. Fund. Mktg. Finc. Elise Rebmann and Jill Michaelree, *Staff*	Forum B
	Hands-On Training — Lightning Sneak Peek: Show-and-Tell All B.O. Fund. Mktg. Finc.	Hub 2
9:30 - 10:15 AM	**Hands-On Training — Subscriptions: Building Packages** Beg. B.O.	Hub 1
9:30 - 10:40 AM	**CRI: Custom Report Investigation — How to Troubleshoot Your Report** Exper. Admin. B.O. Fund. Mktg. Finc. Mike Watson, *Operations Manager, Everyman Theatre*; Shasti Walsh, *Staff*	Forum A
	Product Development Forum — Be heard: Vote on 2019 PatronManager Roadmap Items All Admin. B.O. Fund. Mktg. Finc. Christa Avampato, *Staff*	Living Room Theatre
9:55 - 10:15 AM	**PM Hacks That Make Our Tiny Staff a Team of Nonprofit Wizards ... or Ninjas!** Exper. Admin. B.O. Fund. Mktg. Emily Hartka, *Co-Director, Charlottesville Ballet;* Emily Pozek, *Outreach Manager, Charlottesville Ballet*	Forum B
	Hands-On Training — Reports: What to Do When Your Report Appears to Be Wrong (Troubleshooting) All Admin. B.O. Fund. Mktg. Finc.	Hub 2

Friday, August 24, 2018 continued

10:20 - 10:40 AM	**What to Do When Things Seem Broken (Admin Troubleshooting)** All Admin. Jessica Rowshandel, *Staff*	Forum B
	Hands-On Training — Subscriptions: Renewal Process Beg. B.O.	Hub 1
	Hands-On Training — Take the Reporting Challenge! All B.O. Fund. Mktg. Finc.	Hub 2
10:40 - 10:55	**Break**	
10:55 - 11:55 AM	**Live Q&A** All Admin. B.O. Fund. Mktg. Finc. *PatronManager Staff*	Forum
12:00 - 12:30 PM	**Conference Wrap-Up** All Admin. B.O. Fund. Mktg. Finc. Christy Warren and Ellen Hindson, *Staff*	Forum