

Background & Purpose

- ❖ Two roundtables were conducted among Wallace and Trust arts grantees (11 organizations in total) in May, 2009 around the topic of “Psychographics and the Customer Experience.”
- ❖ As a result of the exercises and discussion during these sessions, a format has emerged as a model with which to conduct Learning Circle workshops among small Chicago arts organizations (i.e., <\$1 million).
- ❖ The purpose of these Learning Circles (LCs) will be to:
 - Help smaller arts organizations become better aware of and understand psychographics as a valuable strategic tool in developing and engaging audiences;
 - Guide participants in building their own audience profiles using psychographic characteristics, as well as other data and information;
 - Providing an opportunity for participants to organize and articulate their audience segment descriptions;
 - Help participants embrace the utility of psychographic profiling beyond just marketing and communications, for example, but as an effective way of crafting collaborations and improving the integration of information into their decision-making processes across internal functions (e.g., upper management, arts programming, education);
 - Provide additional methods and insights to identify topics for learning opportunities for the upcoming project year (i.e., 2009-2010) across the various AEE platforms (e.g., Open Forums, Roundtables, website, etc.).

Workshop Format

- ❖ Learning Circle workshops will be conducted over a consecutive 3-day period to ensure that at least 30-45 total organizations can be accommodated.
 - Participants will choose their own day on a first-come-first-served basis.
- ❖ Organizations will be encouraged to send no more than two (2) representatives each to a workshop.
 - It is recommended that there are a maximum of 20 individual participants per workshop to ensure that everyone has a fair opportunity to present and discuss their profiles.
- ❖ Each workshop will be conducted over a six (6) hour period on the given day.
- ❖ The workshops will be led and managed by two moderators to further ensure that all participants receive direct assistance and support throughout the sessions, as needed.
- ❖ The workshops will progress as follows:
 - Overview of the structure, goals and intended outcomes of the day's activities
 - A "tutorial" on psychographics, its definition, components and applications, followed by a brief Q&A
 - Profile board organization and building
 - Profile board presentation and discussion
 - Hierarchy of Needs/Pyramid exercise and discussion
 - Wrap-Up

The Overview & Tutorial

Overview/Introduction

- ❖ Why this topic is being covered in a Learning Circle
- ❖ Goals and Objectives
- ❖ Specific Outcomes (i.e. what participants will leave with and expectations once they return to their organizations)
- ❖ Agenda for the day

Psychographics Tutorial

- ❖ Participants awareness/understanding of what psychographics are
- ❖ The difference between demographics and psychographics (with examples)
- ❖ Sources of information to obtain psychographic data/insight
- ❖ How psychographics can be used (arts-relevance)
- ❖ Explanation of board and pyramid-building as techniques to organize, interpret and apply psychographic information

Building the Profile Boards

- ❖ Preparation of input and materials for psychographic profile-building
- ❖ Complete a worksheet that asks participants to define their Core/Target audience segment in four psychographic areas:
 - Lifestage
 - Lifestyle/Personality
 - Activities/Behavior
 - Beliefs/Values
- ❖ Build the actual Core/Target profile boards (as a 4-corner collage)
 - In addition to any magazines or other materials that participants were encouraged to bring, a large and varied number of magazines, newspapers, etc. will also be provided
 - Other board construction materials provided will include:
 - Large, colored poster boards
 - Scissors
 - Glue sticks

PROFILE BOARD STRUCTURE

| | |
|-------------------------|---------------------------|
| Lifestage | Lifestyle/ Personality |
| Activities/ Behavior | Beliefs/ Values |

Profile Board Presentations

- ❖ After the boards are completed, each organization will be asked to present and explain their profiles to the group, with discussion.
 - Based on the number of participants, we will be prepared to separate into two groups (breakouts), led by each moderator so everyone has ample time for discussion

- ❖ After the board presentations, the groups will come back together to briefly discuss areas where their profiles may be similar and how they could use that insight to (a) obtain additional learning or information; and/or (b) possible collaborations or partnerships.

Hierarchy of Needs Exercise (the “Peak” Pyramid)

- ❖ The group will then participate in the Hierarchy of Needs exercise where they translate their profiles into the perceived needs of their Core/Target audience across four (4) areas (relative to their own, individual arts organizations):
 - Basic needs/expectations (“Ok, I’ll go”)
 - Desires (“I had a great time”)
 - Transformation (“Its part of my life”)
 - The Experience

- ❖ The hierarchy exercise involves writing very brief, specific phrases on Post-Its that are color-coded to the three needs areas (outlined above).
 - Organizations will also put their initials on the Post-Its so they can retrieve and keep them once the workshop concludes.

- ❖ The ascension of the Core/Target audience toward Transformation will be briefly discussed to ensure participants understand and can distinguish the audiences’ needs from one level to the next
 - What makes the transformational stage so different and so important?
 - How does a Core/Target audience member develop from visitor (basic needs) to evangelist (transformation) for *my* organization?
 - Some of the Post-Its may be rearranged, especially as participants begin to understand the differences between levels.

Hierarchy of Needs Exercise (the "Peak" Pyramid)

- ❖ The last component of the hierarchy/pyramid exercise will be delineating the "Experience" that each organization believes it delivers, using the same technique as in the Hierarchy of Needs section
 - Again, they will be asked to use very specific, brief descriptive phrases
 - Phrases can include both tangible (e.g., flexible or customized membership packages, backstage events with artists/directors/writers, etc.) and intangible (e.g., "can't-get-anywhere-else programming") or emotional (e.g., "feel smart") deliverables

- ❖ Participants will discuss how the customer experience they deliver addresses their Core/Target audiences needs at each of the three levels
 - Moderators will direct participants to reorganize the Post-Its to reflect each needs level, that is, according to basic needs (bottom), desires (middle) and transformation (peak)

The Wrap-Up

- ❖ Moderators will collect the following feedback:
 - What did you learn that you didn't know before?
 - With who else in your organization will you share what you learned and how?
 - What else would you like to know based on what you learned today?
 - Tell me one new idea you thought of after doing the exercises.

- ❖ Remind that they will be receiving an online evaluation form and to fill it out as soon as they do.

- ❖ Thank and release the group