



Subscribers are valuable and worth a lot of money to a museum. Your subscribers list should be treated with respect by segmenting it based your contact's interest and relationship to your museum. All records should be in a database system for customer relationship management, also commonly called a "CRM". A CRM system is the foundation for target marketing and the key to reporting on promotion results.

## CRM Field Templates

### Guestbook (First time visits)

Salutation: \_\_\_\_\_ First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_

Country: \_\_\_\_\_

Preferred Phone Number: \_\_\_\_\_

Email Address: \_\_\_\_\_

Opt In: News | Volunteer | Teacher | Parent | Student | Donation | Membership | Special Offers

Lead source (how did they hear about your museum?): \_\_\_\_\_

\_\_\_\_\_

### Members

Salutation: \_\_\_\_\_ First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_

Country: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Mobile Phone: \_\_\_\_\_ Business Phone: \_\_\_\_\_

Membership Level: \_\_\_\_\_

Membership Type: New | Renewal

Membership Expiration Date: \_\_\_\_\_

Activity: \_\_\_\_\_

Events: \_\_\_\_\_