

BUILDING BLOCK

Creating Customer-Friendly Policies

THIS SECTION WILL COVER

- What it means to have customer-friendly policies
- Covid-specific needs for flexible purchasing options
- Steps for updating your refund and exchange policy

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WHAT ARE CUSTOMER-FRIENDLY POLICIES AND WHY ARE THEY IMPORTANT?

The way that arts organizations communicate about their refund policies, exchange options and any add-on fees are all integral parts of building a relationship with your audience. These policies are present at key moments: the exciting first ticket purchase and the beginning of your relationship, or the stressful last-minute cancellation that could be the end of it. To build lasting audience connections, it is critical to make those policies as clear and customer-friendly as possible, extending the positive experience you offer in your organization into patrons' online experience.



How to build or review customer-friendly return and exchange policies

Build in flexibility:

- Offer credit or exchanges, free of charge and available up to the start of the event, for anyone who is unable to attend for any reason.
- If you are constrained from doing this by agreements with presenters or producers, now may be the time to revisit these. If you're able to collaborate with presenters to find a new way of sharing the risk of canceled tickets, everyone can benefit from increased consumer confidence.
- Process refunds and exchanges on the phone or by email. Human touchpoints allow you to support patrons who reach out to you and reduce the chance of people taking advantage of your flexibility.
- Empower your sales team to use their discretion to support customers' inquiries on a case-by-case basis.
- If appropriate for your business model, invite full or partial donations in place of ticket refunds or credits. Let patrons know they can support you by converting their ticket purchase into a donation and that any amount helps.
- Make no-fee e-tickets the default delivery method. E-tickets limit box office lines, enable contact-free scanning and allow you to reissue tickets easily if event details change. Encourage contact-free methods whenever possible, but keep will-call or mailed tickets available as an option for those who cannot access the technology for print-at-home or e-tickets.
- Choose clear and accessible language for your policy. Go over your terms and find opportunities to rephrase any language that could cause confusion for your audience.
- If you use add-on fees, make sure your refund and exchange policies related to fees are as transparent as possible. If you have not previously communicated whether a fee is refundable, consider doing so now. Evaluate how to communicate in any situations where fees are waived, e.g. as a member benefit.

Share it internally:

- Make sure your whole customer-facing team understands the policy and how it will be implemented.
- Upskill your patron services team to ask for donations, exchanges or account credits over refunds. Key to this is that they understand the specific financial challenges your organization is facing and that they have the language to make the ask confidently. Use the [Asking for Donations Worksheet](#) to help you with this.

Share it externally:

- Put your policy front and center as part of your communications plan. Make it easy to find on your website and when people are buying tickets by creating a FAQ page clearly linked from checkout.
- Use different media or formats to highlight key messages and reassure patrons at every point of the purchasing process.

After Covid-19 closures in 2020,

60%

of people using the Spektrix Ticket Converter Tool returned at least some of the value of canceled tickets to the organization as credit or donations.*

Organizations that train front-line staff on asking for donations see up to a

5x

increase in phone or in-person donation rates.**

*Stats taken from Spektrix blog, '[Retaining arts income during Covid using the Ticket Converter Tool](#)'

**Stats taken from the [2019 Spektrix Insights Report](#)





Creating customer-friendly policies: additional resources



Use our [Asking for Donations Worksheet](#) to help upskill your patron services team to ask for donations, exchanges or account credits over refunds.

Spektrix Users: Click this icon to view a pop-up list of Support Center articles to help you implement this advice in your system.