# Rethinking Recruitment

Practical and inclusive ideas for attracting and hiring great people into customer and donor relationship management roles in the cultural sector.

### SPEKTRIX

## **Transform Your Talent Pool**

Rethinking Recruitment is a practical resource for anyone who recruits for roles using customer relationship management (CRM) tools in the cultural sector, usually in marketing, fundraising, ticketing and sales roles. Easy, quick-to-implement ideas will help you rethink job descriptions, questions and interview tasks to make them inclusive and inviting to a wider pool of candidates.

To help you find great people, we've drawn on expertise from our colleagues, partners and community. Throughout these pages, our team members share direct experience of recruiting and managing marketing, fundraising and sales teams using a variety of CRM systems. We also share perspectives and resources from clients, partners, and others in the cultural sector whose experience and ideas have influenced us along the way.

If you're looking at role requirements beyond CRM, the same principles can be applied whatever your priorities, think carefully about how you describe the characteristics you're looking for, test for vital skills, make space for transferable experience, and welcome new colleagues to your team.

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#### LOOKING WITH FRESH EYES: Lessons we've learned from rethinking recruitment at Spektrix

At Spektrix, we have been technology and business partners with arts and cultural organisations for over 14 years. Our CRM, ticketing, marketing and fundraising tools, along with our consultative approach, are rooted in the needs of the organisations we serve. We share their ambition, and that of the wider cultural sector to connect and deepen relationships with the widest possible range of audiences.

Our commitment to this work hasn't changed. However, like so many organisations in our sector and beyond, we've learned that we can be more effective in delivering on that commitment by being more inclusive and equitable as an employer, and by building a team that's as representative as possible of the diversity in our society. People from groups which have traditionally been marginalised are typically underrepresented in the cultural sector workforce - perhaps most significantly people who experience racism, those from lower socio-economic backgrounds and disabled people. Without the lived experiences and viewpoints that this diversity would bring, it can be no surprise that this underrepresentation flows through into our audiences.

This work is happening right across our business, but it's perhaps most visible in the way that we recruit new team members. We've made this a top priority in the last year and have transformed our recruitment process - recognising that the strongest teams benefit from diversity of thought, lived experience and sector knowledge. This review of our own approach has caused us to look at the wider jobs market with fresh eyes.For example, in the past, when organisations we work with asked for experience with our system as a job requirement, I saw that as a positive - an indicator that we are a valued partner in that organisation's success. Now, I wonder, is it a necessary requirement for every role? By including this requirement for a skill that can be quickly taught, I think the sector risks missing out on hiring great people with less obvious backgrounds. Similarly, could the prevalence of cloud based tools and video calling make it easier to recruit people who require flexible work hours or locations?

These questions led to more... If these are not necessary requirements, what are the core qualities needed to be a great cultural sector marketer, fundraiser or sales team member? Can changing the way we look at job requirements and recruitment practices help us find people with these qualities and give us a better chance of increasing the diversity of our teams?

Many useful guides exist with the aim of supporting more equitable and inclusive recruitment in the cultural sector (we've shared a few of our favourites on **page 17**). With this resource, we hope to augment some of the knowledge already out there by providing practical and specific advice centred around better recruitment of CRM-related roles. Based on our years of experience working with arts and cultural marketers, fundraisers and sales teams, and our own experience rethinking recruitment, we hope it will prompt others to rethink what really matters and support simple but meaningful changes to recruitment.



MICHAEL NABARRO michael.nabarro@spektrix.com he/him

Michael Nabarro is CEO and co-founder of Spektrix, based in London. He's passionate about the role that the arts and entertainment can play in making the world better, and while he initially worked as a theatrical lighting designer, he quickly realised that his calling was instead to support arts organisations by providing them with the tools and support needed to build strong relationships with their audiences and develop their revenue streams.



## Setting Criteria for Success

Simple changes to the language you use in job descriptions and interview questions can make your opportunities feel welcoming to a much wider range of candidates. Challenge yourself on each of your criteria, and consider whether they're truly essential or if they're describing knowledge which could be easily learned by somebody with the right aptitudes.

"To cultivate greater diversity and equity within organizations, we need to constantly interrogate our own assumed 'requirements' that are limiting or downright exclusionary. Where CRM is concerned, we must acknowledge that enterprise CRM technologies and strategies are quite evolved in other fields outside the arts. By investing in onboarding new hires to our specific platforms and business models, we invite their expertise and create belonging. And that's the point."



#### TOM O'CONNOR

Tom O'Connor Consulting Group President (New York) he/him

Tom leads a consulting and executive search firm specialising in marketing, development and audience-related disciplines within the arts and culture space.



On the following pages, we suggest ideas for rephrasing criteria commonly used for entry to mid level roles. Inevitably, there'll be times when specific experience is needed, but very often the same skills can be demonstrated through comparable knowledge from different sectors, systems or communities.



### We are looking for somone who:

X Has experience of using Spektrix, or another ticketing system

Is computer literate and able to quickly learn to use new software

**WHY?** Anyone who's computer literate is likely to be able to learn to use new software quickly, with the appropriate training or support materials. Don't miss out on crucial people skills like management and customer service, for the sake of knowledge which can be easily learned.



**ASK how they learn:** Give me an example of where you've needed to quickly learn a new computer program, whether for a job, or as part of your studies, or in your personal life?

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**TEST** the ability to apply logic and respond to individual needs: Create a number of customer groups, from single bookers to larger parties, each with their own specific requirements. Ask candidates to seat those customers appropriately on a seating plan with limited space. Make sure their requirements are clear enough for someone without any knowledge of your policies, or of artform specifics, to apply - a wheelchair space or aisle seat should work, but a clear view of stage left may not be understood by everybody.



**TEST understanding of data and technical confidence:** Set a short task using specific Excel features, such as pivot tables. Let them know what you'll be testing in advance so that everyone has a chance to prepare.

 $\succ$  Is able to work under pressure and to tight deadlines

Has good time management and prioritisation skills

**WHY?** Whilst some people thrive on pressure, this language may put off people whose working style or external commitments don't allow for late nights or heightened tension. With the right time management skills, they may be able to meet deadlines in a way that works for them.



**ASK** how they manage time and people: Give me an example of a situation where you've had to manage a number of priorities in order to meet one or more deadlines?

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**TEST** their ability to manage time sensitive requests: Provide a list of tasks and ask them to order them from most to least important. Make sure you define any CRM-specific language, and provide space for candidates to explain their logic, so you're not relying on sector knowledge.



🔀 Has a demonstrable knowledge of and passion for the performing arts

Is interested in, or curious about, the performing arts

**WHY?** Not everyone's had the chance to develop their knowledge of the performing arts, and not every successful arts manager/administrator is passionate about their artform. The right candidate might be passionate about data, language or visual design, and eager to learn more about how they can apply these interests in the performing arts sector.



**ASK** what's drawn them to this role: What aspects of the work we do are you most curious about? How does that relate to your own interests or experience?

Degree level qualification (or equivalent experience)

Experience of working independently and leading teams or campaigns

**WHY?** Is a degree really necessary, or a useful measure of experience or knowledge? Even if you qualify it with 'equivalent experience', you can easily put off candidates who have taken other routes into work. Think about the experience you actually need, which could have come from a university or work context.



**ASK** for examples from any sector: Tell me about a time you've worked independently or led others to plan a piece of work, test its success and make improvements.



Experience of interacting with members of the public and engaging with their individual interests

**WHY?** At the core of most fundraising roles is the ability to capture people's attention and respond to their conversational leads. Someone may have made those human connections in any number of customer-facing, educational or care roles.



**ASK** how they interact with people: Give me an example of a conversation you've started with a member of the public. How did you learn what they were interested in and how did you adapt your conversation to their needs?

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**TEST communications skills:** Ask a colleague to role play a typical phone call from a patron, and test how helpfully and empathetically candidates respond.



Interest in and keen understanding of social media, CRM and the paid media landscape, as well as the traditional marketing mix

Experience of one or more marketing techniques, which may include print, email, social media and paid online campaigns, and how they help to build and engage potential audiences

**WHY?** Avoid jargon like 'CRM' or 'paid media landscape', which not everyone will have encountered before. Consider whether an entry level candidate is likely to bring the full breadth of experience, or if curiosity and willingness to engage with your communications is equally valuable.



**ASK** how they judge marketing success: Have you seen or received a memorable digital marketing campaign? Did you find it effective, and what made it work well (or not)?

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**TEST** the ideas they could bring to your organisation: Provide some simple information about an event and its target audience. Ask them to suggest 2-3 marketing approaches, why they could work, and how they might test that. Look for a creative, considered thought process - you can explain more about your own audience, budgets and approach later.

"In our Client Success team, people who joined us from arts organizations work alongside others whose experience comes from customer service roles, teaching and training, and tech companies. Their diverse experience bring different ideas and perspectives which benefit our team and our users, ensuring we're constantly exploring fresh approaches to delivering support, and staying in touch with the immediate needs of the sector. After the first week or two, it's almost impossible to distinguish experienced system users from those who had never seen Spektrix before."



#### VANESSA VELAZQUEZ

Spektrix Vice President, Client Success (North America) she/her

Vanessa is involved in recruiting and supporting members of the Client Success team in North America and ensuring that together, they can support Spektrix users with every aspect of their CRM needs.



# Set the Scene: Job Descriptions Matter

### Use this structure to review your existing job descriptions, or <u>download our</u> <u>template</u> to see how you might use it in practice.

At the heart of the recruitment journey is your job description. Honest and inviting, a good job description demonstrates what recruitment means to you, how you'll interview, assess and select candidates, and how you'll bring new colleagues on board. Before you begin, make sure that you've planned every step of the process, and equalise the relationship by sharing that plan with candidates from the start.

Actions to broaden your pool of candidates should help attract people whose professional experience, cultural background or personal identity differs from many of your current colleagues. That may mean accommodations are required to create an equitable starting point for every potential employee. Design a process that's transparent and equitable - which doesn't mean treating every candidate in exactly the same way, but giving every candidate the same opportunity to shine.

"By far the most impactful realisation I have had as we have focused on trying to improve diversity and representation at Substrakt is how inter-related everything is. The words you use, the places you advertise, the skills and experience you choose to prioritise, the way you talk about your benefits and your organisational culture, they all say something about who you are. And if we aren't prepared to change our thinking across this range of considerations then we are never going to be able to reach new or different people, and we will never see the change that we so desperately need to see."

#### ASH MANN

Managing Director, Substrakt (London) he/him



Write a job description that sticks to **truly necessary skills over 'nice to haves'**. Leaving out non-essential criteria can increase the number and diversity of candidates. People may be discouraged from applying if they can't meet every requirement, and it's often those from privileged backgrounds, or whose career paths are similar to those of existing team members, who have had the chance to acquire non-essential experience.

Check that every criterion relates to the **candidate's aptitudes**, and only calls on learned knowledge when something can't be easily taught. Provided new colleagues are already confident in using software or writing copy, it's easy to train them in your specific technology or tone of voice.

Show that you welcome a wide range of applicants, both in your implicit language and with explicit call outs. **Spell out acronyms and remove jargon**, so an applicant from outside the sector has the same knowledge as an internal candidate. Engage with campaigns like **#ShowTheSalary** and **#NonGradsWelcome** to understand how simple changes can have a profound impact on candidates' perception of your company and the role.

"At Spektrix, we know that there's no such thing as a 'perfect' candidate. Every individual brings unique lived and work experience and their own perspective, which rarely if ever maps exactly to a job description or set of criteria. That's why we want to hear from you if this role excites you (and you feel you could be a good match) even if you don't feel you meet 100% of the criteria."

Spektrix job description, 2021

#### INTRODUCTION

An at-a-glance guide to the role. Some candidates may not read past this point if the hours or location aren't manageable, so if you can offer flexibility, make that clear from the start. Be honest about your expectations, but **make sure there's a good reason for someone to be in the office every day** - with a cloud-based CRM platform, ticket sales, data processing and more can be easily managed from any quiet location with good internet access. **The more flexible you can be with hours and location, the wider your talent pool** - think about the needs of carers, disabled people, or people with voluntary or creative roles outside the workplace.

Always <u>show the salary</u>. Provide an annual or hourly rate of pay or range. You'll attract more applicants, won't waste time with applicants who are not a match, and avoid perpetuating pay gaps.



#### COMPANY AND ROLE DESCRIPTION

Sell your organisation to the candidate, and look for the elements that make you stand out. What are your priorities or values? How large is your team? What's distinctive about the work you do, your approach, or the people who make it happen? Follow this with an overview of the role, the immediate team, and the responsibilities or day to day activities involved. Describe in brief the attributes that would make someone successful in this role.

#### CRITERIA

List only essential criteria, using the guidance on the previous pages. Include both hard and soft skills, but make sure you're looking for transferable attributes, not specific experience or knowledge which can easily be taught. Explain the relevance of each skill to help candidates understand more about the role.

#### **BENEFITS**

Outline your benefits and perks in brief. Think about different people's motivations for work, and address social, financial and lifestyle factors to help them choose your organisation. If you're providing the equipment people need to do their job - like a laptop for home working - this is an essential, rather than a benefit. Tell them what equipment or setup is available, but separate this out from the things that really benefit them.

"Flexibility is at the absolute heart of inclusivity. The more choices you give your team, the more you empower people to find solutions that are accessible for them. This might mean working remotely or adjusting hours to allow someone to work at a time and in a manner that will allow them to produce their best work. The key is not to assume what someone needs but to give them the freedom to meet their individual access requirements."



**PAUL HAWKINS** Attitude is Everything (London) he/him

Paul is head of a team looking at improving access to the music and live events industries for Deaf, disabled and/or neurodivergent professionals.



#### YOUR COMMITMENT TO INCLUSIVE RECRUITMENT

Some candidates may want to delve deeper into your working practices, to check how they fit with their individual needs or preferences, or to ensure you're practicing what you promote in your job descriptions. You may also have areas of your business, like hybrid working, that are evolving into firm policy right now.

Consider providing full or summary versions of your key policies on a site for candidates so they can look for more information if they need it, or invite them to ask questions of your HR team outside the selection process. If you're actively working towards better diversity, equity and inclusion in your organisation, tell people so. Include a clear statement telling candidates that you recognise and welcome different experiences, and what this means for your recruitment process.

**TEMPLATE**: Click <u>HERE</u> to view a template containing an example job description and accompanying guidance.

"The application pack created for my role was an invaluable resource and made the entire process incredibly accessible and straight-forward. It outlined the whole structure of the recruitment process with detailed in-depth explanations, whilst still being easy to follow and understand. I found this incredibly beneficial as the wording and phrases used within the document were inclusive, personable and encouraged people from different backgrounds to apply. This made a huge difference in how I approached my application and how easy it was for me to apply."

#### WARDA ABBASI

Resident Designer, Leeds Playhouse in partnership with tutti frutti, supported by the <u>Weston Jerwood Creative Bursaries Programme</u> she/her



# **Reimagine Every Step**

Before you publish your job description, consider how you can apply inclusive principles to promotion, assessment, interviewing and selection - as well as making your new colleague feel welcome in your organisation from their first day.

#### PROMOTING THE ROLE

There are great people working in the cultural sector. There are also **superb candidates in customer service, charity, technology and marketing roles** who could do wonders for your digital content, fundraising or analytics, bringing new perspectives and valuable insight. Those people might not know who you are - so create a recruitment pack that acts as a sales tool for your organisation, with welcoming, jargon-free language that invites great candidates in, and make sure that's replicated in job adverts and wider promotion.

Think carefully about what you actually need from your new recruit, and where you might find people using similar skills, to target your adverts effectively.

Make sure your promotional materials highlight your inclusive culture, but be **honest about setting expectations**. If every image in your recruitment pack shows a visibly diverse staff team, that's what a candidate should see when they walk through the door.

"Lots of Box Office roles are similar to customer service roles in that they involve interaction with the public, but with some additional technical responsibilities. So look for someone who is familiar and relatively proficient with any kind of computer system or software and has interacted with customers in any capacity. The experience doesn't have to be based in arts and culture."



#### JAMES WOOD

Spektrix Support Team Manager (UK & Ireland) he/him

As a hiring manager for the Support, Training and Consultancy team at Spektrix, James' focus is on recruiting people into CRM support roles. He draws on a background in customer service and freelance community arts work, with no previous experience working in a box office or cultural venue



#### ASSESSING SKILLS

Include a practical task in your recruitment process. **This provides concrete evidence of candidates' skills**, is less prone to bias than traditional interviewing, and allows less eloquent candidates to shine. An interview may be a valuable test of communication skills for a member of the front of house team, but a great data analyst may showcase their knowledge better in front of a computer screen than an interview panel.

Make sure you know which criteria you're testing for at every stage. Detach your task from specific systems, and **test for the ability to apply knowledge, understand concepts or interpret data**. Can a box office cashier read a seating plan, and offer advice on the best seats available? What does a fundraiser suggest you do to increase donations online? Can a head of marketing use data to determine a pricing strategy for your upcoming events?

"If using 'ticketing' data, make sure all key terms are explained to prevent bias against people from non-arts backgrounds. For phone skills, asking them to walk you through a basic task entirely verbally can show how well they communicate detail."



#### **ELLIE ENGQUIST**

Spektrix Senior Customer Support Manager & Fundraising Team Manager (North America) she/her

Ellie joined the Spektrix team without job experience working at a tech company; the practical interview task allowed her to show her skills even when she couldn't describe them.

#### INTERVIEWING

It's the job of interviewers to **help candidates perform at their best**, not catch them out. How to do this differs for each person, but it's important to ask questions that welcome examples from education, personal experience, volunteering or other sectors - working with candidates to discover the experience that could help them excel in your role.

Create **diverse interview panels** to bring different perspectives, perhaps inviting colleagues in other departments or in partner organisations to represent a broader range of ideas, demographics or experiences. Enable candidates to request changes to the format, timing or location of interviews to help them manage disabilities or caring responsibilities.



Provide space for candidates to find out if your organisation and the role are right for them. Great candidates might be in high demand, and this is another opportunity to excite them about your organisation and the opportunities you can give them.

"I regularly find that a question has to be asked two or three times to get the best answer. And it's not usually because a candidate is weak. It's because they can't read my mind and know exactly what's going to hit the mark for what's needed. It's critical to keep probing till you're confident you've got the best example that the candidate is able to provide, and to help them with finding that."

MICHAEL NABARRO Spektrix CEO & co-founder he/him

#### SELECTION

Before every stage of the process, **agree which criteria you're testing**, how you'll score them, and what constitutes a pass or fail.

Use our **<u>Recruitment Questions and Scoring</u>** spreadsheet to map questions or assessment prompts to every stage, and identify what you're looking for or what would cause you concern.

If candidates have reached the interview stage but aren't offered a role, **take time to offer them honest feedback** that could genuinely help them go further next time. Invite them to share their own feedback with you in return, so your recruitment process can continually improve and evolve.

Pass	5	Showed evidence of a high level of capability and no substantial negative evidence
1 055	4	Showed clear evidence of capability and little negative evidence
Consider	3	Showed more positive evidence of capability than negative evidence
	2	Showed insufficient evidence of capability
Fail	1	Showed sufficient negative evidence to be judged lacking in the capability

Scoring criteria used for recent Spektrix interviews and skills assessments



#### ONBOARDING

**Familiarise new colleagues with your artform** by encouraging them to shadow customer-facing teams and attend events. Ask nearby venues to swap staff tickets occasionally, or provide a small budget for your team to buy tickets, compare experiences and reflect on what worked well, from the event promotion and purchase to their visit on the day.

"We recruit software engineers for their technical abilities and teamwork skills, not their knowledge of the cultural sector. This does mean we need to give them training about the sector, taking many forms from deep dives by experts we have in the business to setting up a mock box office in our London kitchen. When added to the daily exposure to the needs of users, this quickly covers the knowledge gap and gives us the ability to hire the best people while bringing diverse ideas and experience from other industries to our product. "

#### **ROBIN DODDS**

Spektrix Engineering Management Lead (London) he/him

Robin brings five years' experience of ensuring the Spektrix engineering team is as good as it can be, both hiring the right people and getting them the training they require to grow.

**Check what training's available online or from your partners and suppliers.** If someone hasn't used your CRM or other systems before, online resources and even in-person training may be free or included in your contract. Guide new starters to the most useful content and help them apply those ideas to your organisation.

Help new starters to **navigate your organisation**, understanding not just the practical tools but the culture of your team - how you manage hybrid working, breaks and social events, how to understand the work of other departments. Avoid 'unwritten rules' creeping in, which can undermine inclusive policies or set expectations for attendance, long hours or flexibility which not everybody can achieve.



### **Resource Guide**

This resource does not stand alone. We are grateful for the many experts from across the sector who have shared guidance or support for organisations and individuals who are driving more inclusive recruitment. Here, we've gathered some of the insights we've found most valuable, and which we'd recommend to anybody seeking to expand their knowledge in this area.

#### CAMPAIGNS, PEOPLE AND PERSPECTIVES

#### All Rise Initiative, Tom O'Connor Consulting Group

Diversifying the arts marketing workforce through career coaching and mentor matching for early- and mid-career arts marketing professionals.

#### Black Opera Alliance

"The mission of the Black Opera Alliance is to empower Black classical artists and administrators by exposing systems of racial inequity and under-representation of the African diaspora in all facets of the industry and challenging institutions to implement drastic reform."

#### Inc Arts

"Inc Arts champions the creative, contractual and economic rights of the UK's African, Asian, Caribbean and ethnically diverse arts sector workforce. We work to make inclusive change in the arts and cultural sector. Our vision is to create a thriving cultural community that allows everyone to do their best work."

#### <u>#NonGraduatesWelcome</u>

#NonGraduatesWelcome encourages every charity to remove the requirement for an unspecified degree-level qualification from fundraising job descriptions. In its place, charities are encouraged to be clearer with applicants about the skills, knowledge and experience they will be judged on, empowering applicants to decide how best to demonstrate their suitability for the role.

#### <u>#ShowTheSalary</u>

Show The Salary was born out of frustration at the lack of action being taken to address pay gaps and inequity in the charity sector. At the heart of their campaign is a commitment to fairness and equity, and to the people with lived experience of the impact of salary secrecy.

#### We See You White American Theater

"In reaction to civil unrest in our country, we - Black, Indigenous and People of Color (BIPOC) theatremakers—formed a collective of multi-generational, multi-disciplinary, early career, emerging and established artists, theater managers, executives, students, administrators, dramaturges and producers, to address the scope and pervasiveness of anti-Blackness and racism in the American theater."



#### PUBLICATIONS AND RESOURCES

#### Accessible Employment Guide, Attitude is Everything, 2021

Comprehensive guide to improving accessibility to the music and live events industries for D/deaf and disabled professionals.

#### Equitable Recruitment and Hiring Guide, League of Resident Theatres

Suggestions for a more equitable employment process with special attention to the recruitment of uderrepresented candidates for leadership positions, primarily people of color and women.

**Finding the Keys: Antiracist approaches to radical recruitment in the arts**, artEquity A workshop experience designed to give you real life recruitment and hiring solutions that can be applied across industries.

#### How We Find New Team Members, Cog Design, 2021

A summary of how an inclusive recruitment process works, which is shared alongside application packs when advertising roles. It covers advertising, anonymous assessment and interview process among other things.

#### Inclusive Recruiting in the Arts, Advisory Board for the Arts

Resources to get you started on making your hiring process more inclusive, from defining the position all the way through the interview process.

#### Inclusive Recruitment Guide, UK Theatre, 2021

Write a better job pack, remove bias from your selection processes, andreach a wider talent pool with your job ads.

#### Recruitment and Workforce Development Toolkit, Arts Council England

Best practice downloadable resources, templates and guidance, such as: advertising a job and job descriptions, reasonable adjustments and Access to Work, managing employee and workplace stress, conducting board skills audits and more

### Socio-Economic Diversity and Inclusion in the Arts: A toolkit for employers, Jerwood Arts, 2019

Learning and case studies informed by practice and research, relevant to all arts and cultural organisations and individuals interested in taking action to advance socio-economic diversity and social equality.

#### Tech in Culture EDI Alliance

For tech companies serving the cultural sector, signposting, sharing and discussing useful, insightful and effective information, programmes, work, and ideas across the range of considerations and questions that EDI encompasses.



# **About Spektrix**

#### **ABOUT SPEKTRIX**

Spektrix combines a powerful CRM platform with the expertise to help cultural organisations make the most of it. Trusted by over 500 cultural organisations across the UK, Ireland, US and Canada, our technological expertise and profound sector understanding help ticketing, marketing and fundraising professionals build audience relationships that last and grow. In 2021 we've renewed our commitment to positive change within and beyond the cultural sector, and we're finding practical ways to improve diversity, equity and inclusion in our own work and that of the organisations we work with. As a newly certified **B Corporation**, we've joined a global network of purpose-driven businesses prioritising the needs of their communities, staff teams, suppliers and the environment

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