



## Planning the Registration Flow for Corporate Meetings and Special Events **Guidebook for Happy Clients.**

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**Annual General Meeting** 12 [Add to my calendar](#)

Event	Annual General Meeting
	11 Jul 9:00 AM - 5:00 PM
	Location: Sheraton Center Boston
Registration type	Members -
Subtotal	\$
GST	\$
PST	\$
Total amount	\$

Enter registration information Mandatory fields

First name

Last name

Email

Meal choice

**Guest list**

No guest registration entered

## Planning the Registration Process for your Meetings & Events Guidebook for Happy Clients.

### Preparing the invitation list & mailings –

Integrated and online registration systems are an effective tool that in most cases will convert information from a database of prospective guests into Excel spreadsheets or other software for sending invitations, registration confirmations, and event reminders by email or other forms of electronic distribution. Digital invitations have been being used for corporate conferences, sales and marketing meetings and social galas for over 20 years (mid 90's). If you are sending hard copy invitations through regular mail for a large group, your service provider will likely work with a mail house that can handle it for you. Hard copy mailings require proper equipment and staff that can expeditiously handle printing labels or envelopes, collating materials to be enclosed, stuffing envelopes or folding mailers, and posting. Custom kits will require fulfillment services for organizing- stuffing, and distribution. Fulfillment services are priced by the project so depending on the demand of schedule, amount of kits and the level of setup be prepared to adjust your budgeting depending on attendance.

### Advance registration –

Advance registration is a necessity for most any type of meeting or event. The only exception would be if attendance is mandatory. Only then can you assume that everyone you invite will attend. But, if attendance is voluntary, it is best to plan conservatively because of attrition policies that will require payment for about 80% of the attendance you guarantee whether 80% show up or not. This applies to the food and beverage (F&B) order you place, the size of the event or function space you book, the sleeping rooms you reserve, and so on. You must plan realistically, and advance registration helps you do a better job of that. Historically, the number you can expect to voluntarily register in advance is 70% of the total you expect to attend which may be only 50% of the number you invite. That means you may be required to handle walk-in registrations for approximately 30% of the total you expect to attend.

### To encourage advance registration –

Many vendor groups will offer an incentive for advance registrations received up to a certain cutoff date. Incentives can be offered as give-aways to the first defined number of attendees that arrive or extra raffle tickets for prizes at a planned function or desired activity or early registration discounts. Registration materials that include mention of incentives must be prepared and ready as early as the Save-the-Date notice is to be distributed before the first marketing piece is initially released. This can be as early as six months prior to the event, earlier if your event is very large requiring a convention center or convention hotel. Although all the details may not yet be finalized such as speaker confirmations, any announcement should include key elements such as location, venue, date, theme and key topics, and the date that registration will open and an event deadline. If the event has been planned within 60 days or less from the arrival date, registration should be open and content ready to distribute with the first announcement.

### Advance registration tips –

Effective communication is vital if advance registration reaches a sold-out point. To avoid disappointed and disruptive guests who arrive on-site expecting to register, place a CLOSED banner on your website, publish a deadline to register or send notices through social media and email announcement to your entire invitation list. This will also work as a marketing tool by creating a buzz about the high demand for your event.

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### Mobile Apps –

Why not take your event or conference mobile?

- Reduce printing cost
- Share documents
- Increase sponsor revenue
- Collect feedback
- Engage attendees
- Add a whole lot more!

### Registration forms –

Registration forms can be simple if there is a single registration fee or action item for your meeting or event. Avoid any online registration set-up and registration forms to be completed and returned by fax or email attachment unless this is the backup plan as this is more complex if individualized form selections are required.

When outsourcing your registration services a sample registration form with defined fields should be provided to you as part of your project proposal.

### Registration confirmations –

Immediate automated confirmation of a registration will create a first and positive impression upon those registering for your program. If one must follow-up to ask for a confirmation, the perception will be one of doubt about on-site check-in procedures and whether the event itself will be handled efficiently or poorly. If the confirmation can also recap selections or include a receipt for fees paid, the first impression will be even more favorable.

### Name Tags | Badges –

There are numerous types of name badges and software applications for printing them. The type of event you are handling will determine the best choice. If the meeting or event is informal or outdoors, an adhesive tag may be appropriate and easier. But if a more professional badge is preferred coding may be attached to designate sponsors, VIPs, committee members, etc. If the event is large or high tech, a plastic card that can be swiped electronically is one choice or you may decide to leverage a fun, innovative application or technology approach. Printed name tags are preferred over handwritten, so the actual printing of

badges should be one of the last things to do prior to the event to accommodate last minute registrations or changes. Extra staff may be required if the number of attendees is more than 100. There will always be walk-ins and changes once on-site, so plan and rehearse the best way to accommodate them quickly and efficiently. An example, have a badge-change section set-up with forms ready to be filled-out by the individual requesting a change or correction and handed back to a staff member to type and print a new badge or manually hand-write one. The badge change form would also serve as documentation of the change for your recap records.

### Registration packets –

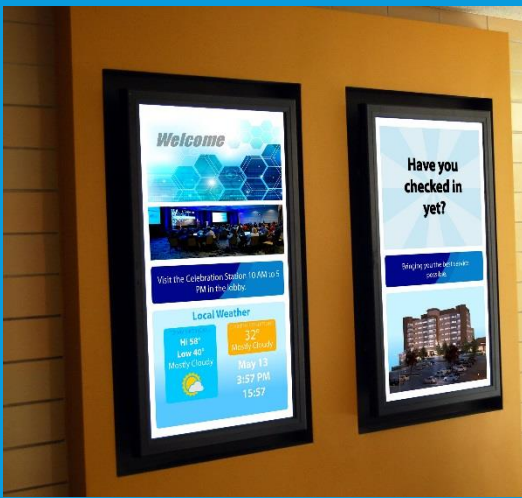
There will always be last-minute changes that would conflict with pre-distributed materials, so it is a better idea to have packets available at check-in instead of distributing in advance. Packets include such things as name badges and holders, lanyards, tickets for functions, a copy of the meeting or event program, promotional materials deemed appropriate, reminders about parking and shuttle policies, directions to off-site functions, and more ... or less.

### On-site registration -

Anyone working registration on-site wants to have pleasant and content attendees standing before them rather than those who feel disgruntled from waiting in a line. Doing appropriate research and pre-planning in great detail prior to on-site registration is going to make the difference in whether attendees have a happy experience to kick-off the event or an unpleasant one that dampens enthusiasm. You need to plan for expected attendance walk-ins who wish to register on-site. Unless attendance is mandatory, it is also safe to assume that a certain number of those registered will not show up (no-shows). So it will be important to analyze this carefully based on your event history and be prepared with adequate staffing and process procedures in place. Those registering on-site should be prepared to wait in line for processing or approval for attendance, but that doesn't mean they will like it. Perhaps someone can "work the line" by validating parking tickets or help them with registration forms while they wait or offer a cool refreshment. Be sure that the individuals selected to handle this portion of the registration function can remain cool and reassuring under pressure.



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## Registration Back-Up –

When you begin planning your on-site procedures, establish a back-up system very thoughtfully. The best way to do that is to imagine that the worst will happen, and prepare for it. Things to think about would be a power or equipment failure, lighting problems, stolen equipment, personnel no-shows due to emergencies or illness, and security breaches.

The most basic back-up is three separate print-outs listing all attendees, each sorted differently. One would be sorted alphabetically by last name of attendee, second would be sorted alphabetically by company first then attendee by last name, and third grouping. These three sorts will enable you to handle substitutions or last-minute changes quickly without long delays and to make reassignments as needed without error.

## Rule-of-Thumb –

If the size of your group is small, on-site registration can be handled manually almost as quickly as computerized. But it is more often the case that computers and printers are set up to accommodate name badges for those registering on-site as well as substitutions or corrections for those who pre-registered.

Written instructions and a pre-event orientation for all registration personnel will be critical, and an experienced supervisor should be present at all times on-site to troubleshoot and ensure success.

## On-site registration traffic flow –

If long lines are unavoidable, it will be helpful to assign one or two people to “work the line” assisting with the registration process or in directing guests to the appropriate line, offer refreshments, validate parking tickets or provide alternative check-in options. This extra bit of attention can turn a perceived negative into a positive situation and will help speed up the process. If the size of the group is 300 or less, name badges for those who pre-registered can be pre-assembled for pre-registered attendees to quickly pick-up. For larger crowds, registration packets or envelopes can be divided into zones so that the line can be separated with staff assigned to handle each zone. Check-in for speakers, exhibitors, sponsors, etc., can be set up at adjacent or nearby tables or counters with staff assigned to them specifically. Signage directing attendees to the appropriate zone and registration process can also be helpful.

## Registration contractors –

You may hire [Global Development](#) as your outside registration contractor to handle all aspects of your registration, both advance and on-site, or you may wish to leverage us for on-site services only. Impeccable communications must remain your priority from the date the contract is signed until registration is complete. The ultimate responsibility of a flawless registration will still rest with the event planner.

## Setting Goals –

Your goal in planning and setting up registration procedures for an upcoming meeting or event is to have happy people standing before you at the registration table once you are on-site and keeping them that way with a smooth, trouble-free check-in process. It takes thoughtful, friendly and competent people working on your team with you, and back-up procedures ready to overcome any unhappy surprises you might encounter when you are on-site. If your group is very small it will be simple for you to take registration requests yourself and insert them into an Excel workbook with different tabs for the various functions and responsibilities. But if your meeting or event is complex or if your group is large, strict guidelines will help you through registration procedures that will work best for you.