



Demystifying On-Line Registration Systems

By

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Introduction

Companies have been using on-line systems to register their attendees since the mid-1990s. The early systems were often custom built, did not process credit cards on-line, and required manual re-entry of data. Today's systems are now highly sophisticated, offering great degrees of flexibility, even targeting certain market segments such as education, religious groups, and sports. There are literally dozens of major players, with new products being released every day. Each system has its own strengths and weaknesses, but how do you determine which is the best one for them for you to use? The purpose of this whitepaper is to explore the concepts behind on-line registration systems, identify the important evaluation elements, and investigate ways to calculate the return on your on-line registration investment.

On-line Registration Concepts

Today's business environment is one that thrives on accessibility of information and ease of use. Organizations, even those that are traditionally old school and resistant to change, are quickly realizing that automating systems and processes is key to their survival. On-line registration is merely one of those components, and should be examined in the context of an overall eBusiness strategy, which encompasses customer relationship management, eCommerce, and electronic communication and collaboration, as well as other on-line considerations.

However, on-line registration is a process that is very easy to understand as an early candidate for automation, and is often a forbear for examining other systems to automate. Manual registration is extremely time consuming, requiring data entry, manual credit card processing and payment reconciliation, and a great degree of follow up. On-line registration removes each of those elements from the equation. For larger conferences and events, it is no longer an option to *not* utilize on-line registration.

For those of you reading this paper who have used on-line registration in the past, whether as a participant or as an event manager or coordinator, this is not news, and should rest assured that this is not the primary focus of this paper. Rather, it is to focus on the main concepts behind on-line registration, and to better understand the characteristics of good on-line systems.

Most registration systems are set up as *Software as a Service (SaaS)*. This means that they have a core system utilized by all of their clients. This works well for many – if not most – event registration needs. Generally speaking, you can accomplish most of what you’re looking to accomplish with your registration by using a SaaS-based provider. These systems tend to focus on smaller or simpler events, and are interested in generating volume. They are generally priced relatively low, as they have a single product that they can continue to fine tune and tweak to meet a broader base of clients. Your events usually share a server with many other events, and performance can suffer as server loads increase. In addition, if you require certain features that are outside of the core functionality, they can’t help you.

The second model is SaaS + Customization. There are relatively few of these. Just like the SaaS model, these providers have a core product that they continue to grow and develop, but they also are willing to adjust a particular instance for your specific needs. Their core products tend to meet a broader range of client needs, and can nearly always grow, expand, and scale with you. Their systems can either run on shared servers or those that are dedicated only to your events, so performance is seldom an issue. These providers tend to go after larger corporate events, which can have extremely complex registration requirements, which in turn need very specific software customization. The pricing of their products can range widely, but tend to be more expensive than the strict SaaS systems. In addition, customizing a system often results in a branching of a provider’s code base, which may preclude your organization’s instance from being able to receive updates to their main systems without having to pay additional fees.

Regardless of the service model, most registration systems are basically comprised of three separate components: The administrative interface, the registration form itself, and eCommerce. Each of these is discussed in detail below.

The Administrative Interface

The Administrative Interface, or “Admin” as it’s frequently called, is the interface through which your registration management staff handles day-to-day registration activities. Check reconciliation, customer support, substitutions, cancellations, badge printing, check-in, and all other registration operations are typically handled through this portion of the reg system. What you’re able to accomplish through a reg system’s administrative portal often dictates whether or not the system meets your needs.

Not all reg systems are created equally. Some early systems were created by software engineers around what they thought would be important to registration management staff. These systems often were sorely lacking in some of the core functionality that is required to perform registration operations. Now, software developers are smarter, and rely on subject matter experts to define the functionality of their systems. However, there are still some glaring weaknesses in certain packages that may either be holdovers from that previous time, or are misinterpretations of functional requirement. For example, in one on-line service provider, they offer “promotional code functionality”. One would presume that this meant the ability to provide conference fee discounts to those individuals using that particular code. In that respect, this function works as billed. However, the system is limited to *one and only one promotional code per event!* This means that if you wish to offer a 10% discount for one promotion and 15% for another, it simply can't be done using their software.

As you can see, it is necessary to ask questions of prospective providers, even if they seem minute or arbitrary. When dealing with a new provider with whom you are not familiar, it is often a case of “you don't know what you don't know,” so it is important to ask questions and take a detailed test drive before you sign on the dotted line. But we'll address that in more detail later.

Within the administrative interface are all of the controls of the system, allowing you to fine tune your particular event and manage your attendees. Following are a list of features that are generally included in most registration systems. The extent to which a provider can perform these administrative functions determines their usability, flexibility, and overall quality.

Role Based Security. Obviously, you don't want just anyone rummaging around in your registration data. All registration system providers offer password protection for their admins, so only authorized users can enter the systems. Quality providers offer more than “one size fits all security” and offer different levels of access, depending on the role of the user. For example, your registration line staff on site probably don't need access to make changes to the registration fees. Role based security will provide that protection.

A client of ours once wished us to develop an admin role that had full access to reporting, but not to certain fields in a user's profile. While we were able to accommodate this request, we were curious and asked why they needed that. The response was, “We don't want our field marketing employees to log in and see phone numbers and email addresses, as they will generate their own marketing campaigns surrounding the event.” As you can see, the flexibility of a registration system's security has its advantages.

Event Configuration. Most registration systems allow authorized admins to make changes to how the event is configured, whether it's setting up an event from scratch, or modifying certain options, such as registration cutoff dates. Some registration systems allow you to generate full web sites using rich text editors, so that you only need to know how to operate a word processor such as Microsoft Word to format web pages, eliminating the need for an HTML developer.

Other systems allow you to create your own registration form questions and layouts, integrate form logic, allow for multiple entry points into an event, and a myriad of other options, tweaks, and fine-tuning adjustments.

In order to use the configuration options on any system, a significant amount of training can be involved. Some solution providers even have users groups to allow registration managers to compare notes with others to ask questions or address issues. Once you're fully up to speed with a package's features (as well as its limitations), however, it allows a great degree of flexibility in what you are able to produce for registration.

Payment Reconciliation. All registration systems nowadays provide on-line credit card processing, as it is the ticket to play in the industry. Better systems allow for multiple payment options on-line, such as providing options to pay by check, electronic check, wire transfer, purchase order, or even promotional codes. When a registrant is ready to register, you want them registered, so providing flexible payment options is paramount.

Good systems should allow for your registration staff to receive a check by mail and be able to apply it to the appropriate registration (or registrations, as the case may be). In addition, for auditing purposes, the system should support double-entry transactions, where refunds are applied as a separate transaction rather than producing a net amount in the original transaction. It should not be easy in the system to delete a charge and/or credit card payment, lest that introduce the possibility of fraud.

Day to Day Registration Management. When a customer calls you with an issue or concern, will you be able to help them right away, or will you need to call them back later when their issue has been resolved? Performing cancellations, substitutions, refunds, adding options, applying payments, and other functions should be easy to do within an effective admin interface.

One of the things most commonly overlooked is integrated badge printing. Some systems print badges of any configuration with aplomb, while some require certain templates, such as those provided by Avery. Some do not print badges at all, but instead rely on a data export and Microsoft Word mail merge. For those that do print badges, it is important to understand the

limitations of field selection and placement, as well as the ability to print 1D and 2D barcodes, RFID, or even magnetic stripe, credit card-type badges for lead retrieval.

Reporting. What use is the information you collect unless you can report on it? Back in the late 90's, there was a provider that offered a registration system that didn't have any reporting capabilities. To get information out, it required the purchase of a license of Crystal Reports and a 199 megabyte download of the Oracle Database drivers for Crystal. And even then, you had to generate your own reports. Needless to say, that provider is no longer in business in registration systems.

Luckily, the systems of today offer good – if not great – reporting capabilities. Some providers have a series of standard reports, but if you require something outside of the standard reports, they have to generate them for you, and often for an additional fee. The better providers have a series of standard reports, with ad hoc report generators that allow you to create, save, and share your own reports. Some even generate their own graphs. All reports should be exportable into XLS at the least, while some providers offer exports to CSV, PDF, or even XML.

And, let's not forget the full data export (FDE). FDEs are important if you wish to draw all of your information from the system for your own, external reporting, such as generating Microsoft Excel Pivot Table reports for multi-layered analysis of your registration data.

Training and Support. The training and support packages you are offered are important to the overall value of your registration service provider. For those that you configure yourself, training often represents a hidden cost, in that it is not always quoted at the outset of negotiations. Also, the hours and types of support you are offered can also have an impact upon the success of an event, as well as its budget. It is a good idea to know your training and support options before moving forward with a registration provider.

Registration Forms

The second major aspect of all registration systems is the forms themselves, as they represent the main interface for attendees when they register for your event. They truly represent your organization to that individual. Therefore, it is important that they look professional, are easy to use, and NEVER get in the way of a potential attendee in registering for your event.

Form Layout and Design. The main difference in the appearance of forms is the ability to use your own look and feel to the registration form. The inexpensive systems often allow you to upload a logo or a header, but otherwise, you are beholden to what their generic systems look like. Good systems allow you to place your event shell around the header, footer, left and right sides, and even basic font changes within the forms. However, they cannot (or have severe limitations to) modify the overall form layout, such as where the form fields are placed. The

best systems allow for complete flexibility of design, so that it is completely transparent to the user that they may be leaving one web space for another.

Form Logic. It may often be desirable to change the questions a form asks based on how someone answers other questions on the form. For example, you may want to ask exhibitors different questions than you ask the general attendees. If the user selects an exhibitor audience type, the form automatically responds by presenting the questions that correspond with that type. The best form logic happens on the fly, where the questions are asked immediately when the appropriate selection is made. Other form logic requires that the user navigate to the next page in order to execute the logic. Some providers do not offer form logic at all.

Do-it-yourself form logic (such as in the SaaS model) can be functional, but very tricky to learn. If you are developing your own logic, it is strongly recommended that you fully test all permutations of that logic, lest embarrassing display results to your registrants occur.

Multiple Entry Points. Some systems allow for only a single point of entry per event. Some provide the option for multiple entry points, to either protect access to certain information, or as another solution to using form logic. In the exhibitor example above, you may wish to publish a separate URL for exhibitors than the general attendee. Rather than using form logic which may get very complicated, some systems allow you to create completely different forms that feed into the same registration database. It is important to note that some providers charge an additional fee per entry point.

Data Collection in a Self Service Environment. This is probably one of the greatest reasons why on-line registration is important. Using traditional mail-, phone-, or fax-in registrations, a data entry specialist is required to enter all of the data into the system. This process was fraught with errors as typos, poor handwriting, or unintelligible faxes wreaked havoc on accuracy. Attendees could become upset if their name was misspelled on their badge, and they have to suffer the inconvenience of a reprint.

Self-service data collection allows the users themselves to enter their own data. This not only relieves the burden of data entry, but if errors are made, the user has no one to blame but himself! Clearly, this does not abdicate responsibility of the registration service to check the data for obvious errors (“Does your name, sir, really have a silent ‘3’ in it?”), but the point of accuracy remains.

Demographic and extended data. In terms of the information gathered within a form, many systems allow for a wide range of question types (check box, radio button, multi-select, drop-down, text, text area, etc.) to be added. Whether it is to figure out what services your

customers are interested in, or to get industry specific intelligence on your attendees, the options for data collection are nearly limitless. Of course, you don't want your registration forms to be too long, lest you risk people giving up and not registering after all. It is important to note that some providers offer a certain number of questions at no charge, and will add others for a fee.

Ability to Generate Profiles. Some of the simpler registration systems allow for only "fire and forget" transactions. In other words, once the transaction is over, the user cannot log back in to review their registration, make changes, print their receipt, send their confirmation via email, or other functions. The more sophisticated systems allow for the user to create a profile, where they establish a user name and password that they can use to perform these functions. While this feature may not be desired for all events, it can be desirable to have the option to do this. Furthermore, creating profiles allows the user to use the same profile year after year, which generates an attendance history for that individual. All registration systems that also provide membership management contain this feature.

Handling Multiple Registrations. Another function of many registration systems is the ability to process multiple registrations. The simplest require you to close out your browser and re-open the registration form to complete secondary registrations. Good systems allow an attendee to create secondary registrations iteratively, by implementing a "Register another attendee" button at the end of the initial registration. The individual then walks through the registration process for each subsequent attendee. The most sophisticated systems allow for the user to create multiple registrations all at once just by entering in the information for each attendee on a single screen. This may also be a customization for some systems.

Many systems allow for discounts for multiple registrations, such as "buy three, get one free". Usually, in order for these discounts to be processed, all registrations need to happen at once (either iteratively or simultaneously). Otherwise, the registrant must call registration support to process the discount manually.

Event Options. Nearly all registration systems provide a mechanism for adding optional for-fee components to a registration, such as CD proceedings, pre-conference workshops, guests, and the like. The better systems allow the system to ask additional questions according to the option selected. For example, if a registrant wishes to attend golf, you may wish to ask if they want to rent clubs and shoes, or what their handicap is. Additional form intelligence would allow follow up questions such as men's or women's clubs, left or right handed clubs, and shoe size.

SSL Certificates. All registration systems provide built-in secure certificates. This allows for the transaction, whether a payment transaction or a login, to be secure. The only note about SSL certificates that bears mentioning is that if you don't wish to use the native URL of the provider, an additional SSL certificate must be purchased for the domain you wish to use for your registration. Not all providers allow the utilization of these vanity URLs.

eCommerce

Nearly all systems provide out-of-the-box eCommerce, where credit cards are processed online using the provider's processing account. It is important to note that using these systems may incur an additional per-transaction fee (usually a small percentage of each transaction). Using your own eCommerce provider may eliminate these additional fees.

In order to establish your own on-line payment gateway, you will first set up the destination bank account as an Internet bank account. This will allow your bank account to accept transactions from the Internet. If you wish to natively support currencies other than the US dollar, you'll need to make sure that your bank supports native transaction in the desired currency without requiring an exchange fee, and that they work with your merchant account provider.

The merchant account that allows you to process credit cards. There are multiple providers for this, such as Nova, First Data, Paymentech, and others. Then, you're ready to purchase your on-line credit card gateway.

The most common on-line credit card gateway is PayPal's Payflow Gateway, called Payflow Pro. Please note this is different than Payflow Link. Payflow Link will not work with most registration systems. At the time of this publication, Payflow Pro costs \$249 for setup, and \$59.95 a month for up to 1000 transactions per month. Other payment gateways supported by some providers include: Authorize.net, DataCash, Ogone, ePDQ, Plug n Pay, and QuikPay.

Your merchant account provider will supply the account numbers and IDs that are required to configure your on-line payment gateway. Your registration service provider may have experts to assist you with setting up your own account.

Requirements Analysis

Analyzing your requirements is the single most important factor in determining a provider and ensuring successful implementation. Using the previous year's registration form, if available, is beneficial for you to share with a potential provider, to determine whether their system meets your needs. However, it is also important to think about how your event may evolve in future years, so that you can be assured that your provider can grow and evolve with you. Unless you foresee your event changing significantly over time, it usually makes sense not to license a

system that isn't overkill for your needs. Otherwise, you're likely to pay for features and functions you'll never use.

Things to consider when evaluating registration systems:

- Will this event require the creation of a login and password?
- Can I use my own Payflow Gateway account?
- Do I need to set up my own Payflow Gateway account?
- Does this event require a complete web site in addition to the registration form?
- Does this event require a personal agenda builder? If so, how many sessions and time slots? When will these session titles be finalized?
- Do you require pre-event registration support?
- Do you require on-site registration support?
- Does each registrant see the same set of questions and options?
- How many guests are allowed per attendee?
- Are promotional codes required? If so, how many and what types?
- Does the registration system need to track housing?
- Does this event have for-fee options, such as workshops, guests, or evening events?
- Does this event require invitation distribution and response tracking?
- Does this event require separate registration workflows?
- Will I need to print badges directly from the system? Will the system support your desired badge?
- Do you require member vs. non-member rates? How will they be identified in the system?
- Do I need to consider lead retrieval?
- Does registration need to integrate with other systems, such as CRM?
- What is the pricing model of the desired provider? Do they take a percentage fee from each transaction? Do they offer volume discounts?
- Are there special cancellation or substitution rules for your event?
- Does the system need to be able to support registering multiple people simultaneously?
- Are there multiple registration discounts?
- Do you want to assign your staff to complete the configuration, or would you like someone else to handle it?
- Do you have time for training?
- Are there any special registration rules that need to be considered?
- What is your desired go live date?

- Plan on holding a discovery meeting with your desired vendor to drill down into the detail of each of these questions as needed

Think of these questions (and any others you might have) with your provider PRIOR TO CONDUCTING YOUR DEMO. This will help you make the most of your time during the demo. You may ask some or all of the questions relevant to you prior to or during the demo. After you've licensed with a provider, you should request a kickoff or discovery meeting in order to finalize the details of your requirements and nail down any customization estimates.

Site Design and Hosting Options

Some registration systems allow for the creation of complete web sites within their interface using rich text editors, so no HTML programming is required. However, these can often be limited to the extent of customization, so if you wish to exactly match a web site style guide, this can be difficult and require HTML expertise.

For more sophisticated events, the web site is often hosted separately, so there are no limitations with branding, design, or layout. As mentioned earlier, the better systems have no limitations when matching the actual registration form to the web site design. Certain providers may charge extra for developing and hosting your web site, or may not offer separate web site development and hosting at all, so it is important to determine in advance where your web site will live.

Configuration vs. Customization

Most systems are user configurable, which means that an administrator can select from options within the framework and limitations of the system. However, there are only a handful of systems that allow for a customer to extend the functionality beyond what is available in the system. Customizations generally required increased development and project management fees, and will be estimated separately from licensing and setup fees. In addition, customizations usually extend the project timeline, so be prepared to plan your timeline accordingly.

Up Front and Hidden Costs

Pricing models vary based on the provider you're evaluating. Most providers charge some sort of per-transaction fee, whether it's a dollar value or a percent of the actual transaction. However, some charge a per-administrator fee and do not charge per transaction. Setup and professional services fees are common if the provider is configuring the system on your behalf. Some providers also charge a per-event fee. If your system requires customization, these will generally be quoted separately.

In addition to the costs a provider will quote you for use of their system, there may also be some hidden fees. These fees can include a percentage of credit card transactions; training fees; limits to the number of questions, promotional codes, sessions, or other aspects of the system; per administrator fees; and hosting fees. It is also advisable to inquire about any minimums that may exist for system usage.

How to Choose the Provider Right for You

So with all these details to think about, how can you be assured that a registration provider is right for you? Here is a partial checklist:

- Assess your current requirements vs. the capabilities of the system.
- Look at your future needs – can they grow with you, or will you be doing another assessment in the future?
- Is the provider flexible enough to meet your needs?
- Do they have performance metrics they can share with you (% uptime)?
- Do you (or will you in the future) require customizations?
- Don't buy more than you need.
- Does their service model meet what you're looking for?
- How is their pricing compared to the others?
- Look at their client list, ask for references.
- Conduct an on-line demo – see what you're buying before you commit.
- Do they require a long term agreement?
- Can they provide registration overflow services if needed to assist your staff?

Calculating Return on Investment

Utilizing on-line registration is an important investment. In addition to possibly increasing registration revenues as a result of making it easier for the individual to register, there are a number of areas in which cost can be reduced. These include:

- Staff time saved eliminating data entry
- Staff time saved running reports
- Increased advertising opportunities
- Reduce errors
- Reduce credit card disputes
- Address checking reduces credit card transaction fees
- Reduce print and postage by utilizing electronic communication
- Reduce travel agent fees by integrating travel
- Streamline registration processes

Outsourcing

As events grow in size and complexity, conversations eventually migrate towards outsourcing portions of the event to professional registration and event management companies to assist with handling all of the details inherent to sophisticated events. Those organizations without internal staff dedicated to event or registration management often impose these duties on staff members with additional responsibilities, and customer service may suffer.

There may be a benefit to outsourcing registration management services to assist with the transition to an on-line service provider. Registration Management companies may be able to recommend on-line registration systems that will meet your needs, rather than you having to conduct requirements analyses with multiple providers. To assist with the “internalize” vs. “outsource” decision, the following outsourcing benefits should be considered:

- Reduce operating costs: It costs much less to outsource than to hire all the subject matter experts needed to manage a conference.
- Scalability: Outsourcing to a firm allows one to take advantage of their internal resources and expertise needed to rapidly expand or contract depending on your needs.
- Access to Enhanced Capabilities: Take advantage of a specialist’s years of expertise and innovation towards addressing conference-related issues.
- Free resources for other uses: Redirect your internal resources toward core activities which more directly serve the customer.
- Improved focus: Allow your decision makers to focus on ends, rather than means
- Access to resources not available internally: Provide new vistas for problem solving and service enhancement, such as taking advantage of a third party’s call center capabilities.
- Experience immediate results: Outsourcing allows for immediate application of system enhancements and process improvements.
- Reduce Risk: Outsourcing allows you to share risks, minimizing exposure.
- More accurate ROI measurement: Using an outsourced provider allows you to calculate your return on investment with better precision.

Of course, outsourcing may not be for everyone, but registration management is discrete enough that it is often an organization’s first foray into outsourcing. Those firms which provide outsourced registration management services understand the sensitivity of outsourcing portions of a conference or event, and seek to develop synergies with existing staff to ensure mutual success.

Conclusion

As you can see, there are many details to be considered when choosing an on-line registration system. There are no shortage of products with varying degrees of functionality, flexibility, and sophistication. However, if you understand the processes and conduct thorough requirements analysis, you increase your chances of finding the system that is right for your organization, both for your current needs and for the future.

Should you have any questions about this course material, please feel free to contact the author, Jeff Rausch at jrausch@meetingexpectations.com.