THE ULTIMATE EVENT REGISTRATION GUIDE

GETTING PEOPLE REGISTERING FOR YOUR EVENTS

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INTRODUCTION

Looking for an event management software can be overwhelming. All the options sound great, there are lists and lists of features, and you aren't sure which you should value and prioritize. Not only that, each software option have different pricing structures that make calculating the actual cost of each system and comparing them a little difficult.

At the very least, your software choices should include the following abilities:

Registration on YOUR Website

Embed the process into your existing event website, so you aren't sending attendees, vendors and speakers to a 3rd party site.

Flexible pricing.

Whether this is month to month pricing vs. an annual contract commitment or paying per administrator using the system vs. paying per attendee, the pricing structure should make sense for the type of events you are running (once a year or several per year, etc).

Excellent Customer Support

The customer service and tech support you need for yourself and your attendees. A software solution should be an extension of your own office, not impossible to reach and troubleshoot inevitable issues that come up.

Easy to use!

This may sound like a no brainer, but take advantage software company's offer for a free demo and work with the system to see if it works with your process seamlessly and doesn't create problems, confusion or headaches for both you and your attendees. This includes offering group registration, which is a huge time saver for many attendees registering as groups and makes the process from registering to paying to attending super simple!

Create intelligent forms!

Be sure you can create any kind of form you need to gather all the information you require. The software should allow each attendee to move through the process in a unique way, customized to their selections. The software should allow many different options to select from (different sessions, meals, etc) that create an easy to understand flow for the attendee and that easily calculates all the possible selections.

Integrate and automate payments!

Just with intelligent form creation, you want whatever combination of activities the attendee selects to total up quickly with options to pay in several ways: in multiple currencies, with payment plans, and in the case of group registration - to pay for the entire group, or one attendee at a time. The point is to make it easy for the attendee to pay right then and there, understanding what they owe and with many options to choose from on how and when to make their payments.

Automated invoicing and email communication.

Automating this basic task saves you a ton of time! If someone makes a payment, the system should be triggered to send out a personalized email with the payment details and balance due. When forms are incomplete, triggered emails should go out to remind attendees to complete registration on time. These simple things make a world of difference both in saving time on your end and ensuring you receive on time completely applications and payments.

Quality reports.

The ability to create a report based on any set of data you choose is where your admin time savings really come into play. Getting information to those who need it, quickly, saves a ton of time and keeps everyone in the loop. Event planning needs to be organized, and a software that allows you to use your data effectively is priceless. Consider the reports you currently use and what you wish you could have. Does this software allow you to create these reports?

Identify problems, seek solutions!

While this list of features and abilities is nice (and essential) the real challenge in finding a software solution is deciding first the problems you have with your current process, and how your software choice acts as a solution to those issues. Prioritize the features you look for based on the most important solutions you are seeking.

Features just really are solutions to problems in disguise, but everyone's list of problems varies. Finding a software solution to meet your needs is easy when you've identified what your needs are! Spending money on a great event management software is worth it!

PART 1:
7 COMMON ISSUES EVENT PROFESSIONALS ENCOUNTER

The amount of time you will save switching to a full scale software is worth it's weight in gold compared to the cost of this kind of system. It is also worth giving your attendees a quality experience - customized registration, easy payments and 5 star email communication.

There are 7 main problems many event professionals encounter, that event management software solves. Below each problem is outlined with a detailed explanation as to how software solves the problem.

Software is a solution to common issues event managers face, and is at the core of WHY you should invest is a good quality software. Going through this process with your own process will be helpful and enlightening when you do your own search. Identify pain points that you and your attendees are facing, so you can ensure you find a software that addresses those issues.

Problem 1: Annual Contracts

So this isn't really a problem that EVERY event management software solves, but it is a key issue many event managers face when using their current system or something to consider when searching for another system.

It could be that an annual contract for software is no big deal because you need access to and use your data 365/24/7. Often times though, this isn't necessary and you can get more for your money by using a software that doesn't require an annual contract.

The best pricing model for software is pay per admin, which is a fee per the number of admins that need access to the system, month to month.

So if you need the use the system only 6 months out of the year and 3 months of those 6 you need different numbers of admins (say during your event and immediately before and after), the software's pricing offers this flexibility for your system. You pay for what you need and nothing more.

No annual contract obligation is also great for everyone just using a new software, regardless of their access needs, because it allows you to try out the software for a while and decide if it's a good fit.

If not, after your month is up (or after several months), you can walk away without being tied down to a yearly plan.

Problem 2: Customer Service

There is always a way to improve your customer service, so event software solves this for you, in that it makes your customer service awesome. How?

By automating much of your process, you will have less customer service issues to deal with and the ones you do - you'll have the time to give them the right amount of attention because your general service load will be dramatically smaller.

On the other end of things, find a software that offers YOU great service. Your software should be an extension of your own office. If there is a login problem or a bug that comes up, your software provider should respond to your issues promptly and get things back on track so your attendees can get back to the busy work of registering and paying you!

Registration is a hectic time for event planners, so minimizing issues is key, and having a software company that can quickly solve any hiccups, will keep registration flowing!

Problem 3: Hard to Use Software.

Often times, software developers create an amazing product but they aren't very easy or intuitive to use. A solution to this problem is finding a software that is easy to use. Ha! Sounds easy, but is it?

Keep in mind that you should avoid software that is complicated on your end to make changes or adjustments to. This is a red flag for you that the process itself is complicated and not user friendly.

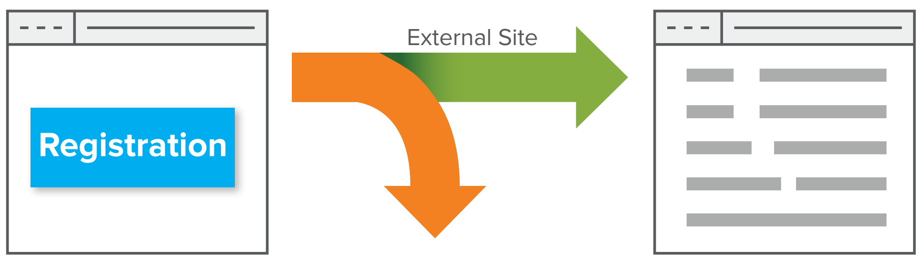
Have someone who doesn't have a working knowledge of your process and that would be considered an 'average' computer user and make sure they can move through the application and understand what is being asked of them, when things like payments and forms are due, and can access their dashboard easily.

Take advantage of a free demo before committing to a software, so you can see how the software looks and the way forms flow.

Problem 4: The application doesn't integrate into your website.

Sending attendees to a third party site for anything, whether for payment or registration, is just something you should avoid doing at all costs. Online registration software that can integrate into your website is part of your overall customer service and experience, and makes your event look polished and professionally run.

Sending them to a 3rd party site where they will enter sensitive information, including payment information can result in a loss of up to 27% of attendees.



27%

of people will leave the registration process when it's on an external site!

Problem 5: Limited Reporting Options.

Every event needs different kinds of reporting. Chances are, if you are unhappy with your registration process part of that is due to the inability to create the kind of reports you want or the inability to really understand your data and do with it what you want.

Think first about the kind of reporting you need and then evaluate your software choices to see which software offers what you truly need.

The point of software is to make your life easier and allow your event to run more smoothly by freeing up time you used to spend cobbling together reports from crazy databases and giving you the info and numbers you need so you can hit the ground running.

Problem 6: My software doesn't offer a group registration option.

This is purely about your attendees, and not you. It is a great feature that attendees love, and that saves them tons of time. And ultimately, happy attendees means you get paid faster and less attendees will abandon your process because they are fed up with your process.

Often times, especially at conferences or other company events, attendees want to register several people all at once, especially a company that is paying for its employees to attend. Why fill in all the payment details and general information for each and every employee from the same company? Sounds cumbersome.

Group registration should allow one person to register multiple people, while also allowing each individual attendee to go in and add or edit their own information, pay as a group, etc.

Features like these are important again, to the overall level of professionalism you are putting forward to attendees and will allow your clients to amp up their overall good impression of you!

Plus when you make registration go more quickly and easily for groups, you'll fill registration more quickly and get paid faster!

Problem 7: Complicated Invoicing.

If you don't get invoicing right you are looking at a lost opportunity to gather the revenue you should be collecting and will cause headache after headache and much wasted time tracking down who owes you what, and when.

The admin of your registration system should be able to set up a quality system of emails and invoicing so no attendee is ever unsure of what they owe and when they owe it by.

Triggered emails and reminder emails for payments to be made should be thorough and personalized so there is never a doubt for the reader to understand how much they owe and how they can pay.

The following parts of this eBook will expand on the problems above. Each part will detail a specific feature of event software, why you need it and how it can improve your workflow, save you time, improve the experience of your attendees, and make you more money!

PART 2 Q&A: EVERYTHING YOU NEED TO KNOW ABOUT EVENT REGISTRATION SOFTWARE

In Part 2 we are tackling common questions many event professionals have about event management software and how the answers to these questions can help guide the selection process. These questions are also a great base list to refer to when speaking with an account manager at a software company when you are in the information gathering stage.

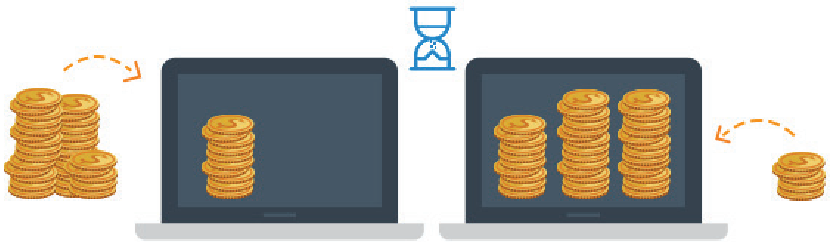
Does event software allow you to collect payments from within the system?

This is a huge question, and the answer should always be yes! Integrated payments are an essential part of making sure event dues are paid, in full and on time. It also helps to limit confusion on the attendee's end about what is owed and how they can pay.

With a convenient user dashboard, an attendee should not only be able to see their balance, but pay right then and there.

Integrated payments connects with automated invoicing, which will be discussed in a bit. The ability to take payments within your system saves everyone time, and saves you money! Research suggests that you will lose up to 27% of people if you send them to a 3rd party site to continue registration or make a payment. That is a huge revenue loss. Avoid this by using a software that integrates payments.

By allowing attendees to pay through your system, you can net your completed payments 15-30 days faster than the method you used before!



Can the software be customized to your exact needs?

Many popular event management softwares out there offer the ability to register attendees, but in a very rigid and inflexible way that might not jive with your workflow and process. Often times, you have many different 'types' of users using the system - attendees, speakers, vendors, exhibitors, etc so you need to make sure the software can allow for the variety of users you will have and will give them the unique experience they need.

Event software should allow you to customize the products offered to each individual user based on their user type and certain selections they make.

This not only creates a seamless and easy experience for all of your users, it also will cut down on service calls you receive due to confusion about what is owed, what forms need to be completed, etc. Less of that means more time spent planning your actual event and making it the best it can be!

What kind of features does a software have that will give me this capability?

The ability to trigger certain questions and options based on the answers to previous questions is the core of this idea, what we refer to as conditional logic.

For example, you first ask if they are an attendee, vendor, speaker, etc and the answer to that question then populates the questions/forms relevant to each individual user type. For events that are more than 1 day long, you first ask which days they will be attending and based on their selection, show the events happening only on the days they've selected.

If the software you are looking at cannot adapt itself to this kind of logic, it probably isn't the right choice.

Is there an automated email communication and contact management set up?

You need to send a variety of different emails through the life of your event, including before, during and after. Whether that includes frequent newsletters to past attendees, reminder emails for payments and form completion, or payment invoices, setting up triggered emails and scheduled communications is an integral part of your event planning, and automating as much of this process as possible will save you a ton of time.

> A system that provides not only the ability to set up triggered and scheduled email, but also to create groups based on your specific parameters will help to automate your communication and save you time.

Using a filtered search you should easily be able to filter for past attendees to send out newsletters, current attendees who have an open balance to send out a payment reminder email or filter for attendees who have chosen to attend a specific session with updated information regarding that session. Whatever the case may be, your software should allow you to find the exact recipients you need and quickly send out the message you need.

Can you create the kind of reporting you need?

Only you know what kind of reports you need to keep your event on task. Make sure to really define what you need when you are looking for a software, since choosing a software that doesn't give you the abilities you need isn't worth it.

The baseline for any great software reporting is the ability to export whatever filtered data you've selected into at least a few different formats.

And speaking of filtering, you should be able to filter any set of data you could possibly think of. Some questions to ask of your account manager:

1. How powerful is the filtering ability?
2. Can I generate a report from ANY combo of data in my system?
3. What formats can I export into?
4. Can you show you how do make the most of your reporting session?

Does the software support my marketing efforts?

You should have the ability to filter your data and generate statistics based on your data. Basically, you should be given the ability to understand your information and then use that to improve your business. For example, if you have data on where your attendees heard about your event, you can filter this information out and understand where you should spend more money and less money for your next event, based on where a majority of your attendees came from.

Keeping in touch with past attendees is a great way to continue your outreach and keep people connected to you. A great email system will allow you to do this easily.

You can also evaluate which parts of your event were most successful. Which sessions were most popular? What times worked best for people? What speaker was the biggest draw? If you use the system to conduct a post event survey, easily get the big picture from attendees on what they loved best, what they liked the least, etc and use that data to improve upon your event for next time.

PART 3: PERSONALIZING THE REGISTRATION EXPERIENCE

Personalizing the process for every unique user is important to running a smooth and problem free registration process.

The idea of event management software is to automate much of the process so that you can focus on other things, and your attendees, speakers and vendors can focus on getting their registration complete easily!

The key is making sure each attendee is kept in the loop about their status, without the need for you to update each one individually. And to have the process of answering questions, filling out forms and making payments automated as well.

Below are a few great ways an event management software should be personalizing the process for you.

Conditional Logic

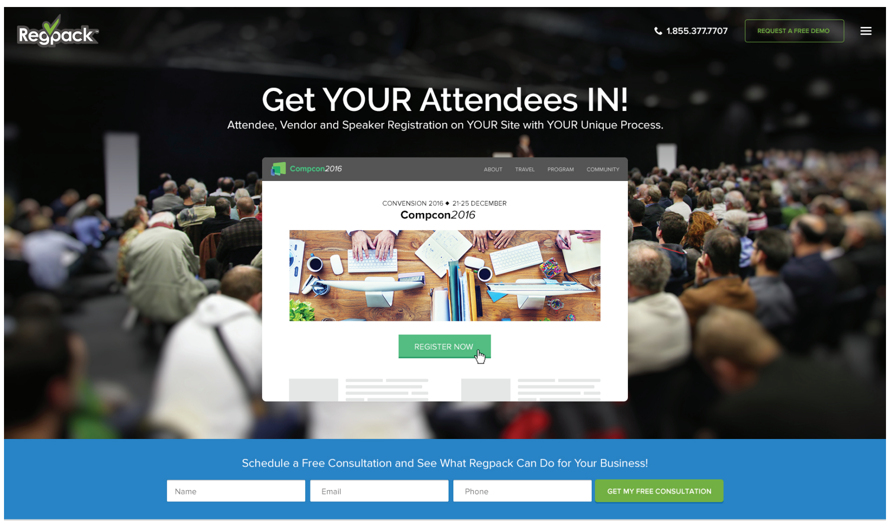
Any event management system should essentially make your registration process a unique one for every person who registers. This is achieved by a process called 'conditional logic', which basically means that the user will see forms and questions only relevant to him, based on how he answers previous questions.

For example, if you are offering a formal dinner on Saturday evening, that you must register for in addition to the main event and it costs extra money, you'd first ask if the attendee would like to attend the dinner. If they answer yes, they will then be given the opportunity to add the dinner and the cost will be reflected in their balance.

The system will also mark them as attending, so when you go to generate a report of all the guests attending the dinner so you can email them, or prepare for the right number of guests, that attendee will show up! Magic!

The purpose of building this type of logic into your process is to make the process unique for every attendee, but also to make the process as quick, seamless and streamlined as possible.

The attendee will understand that the process is personalized for them, and know that every form they are asked to fill out and their balance is correct.



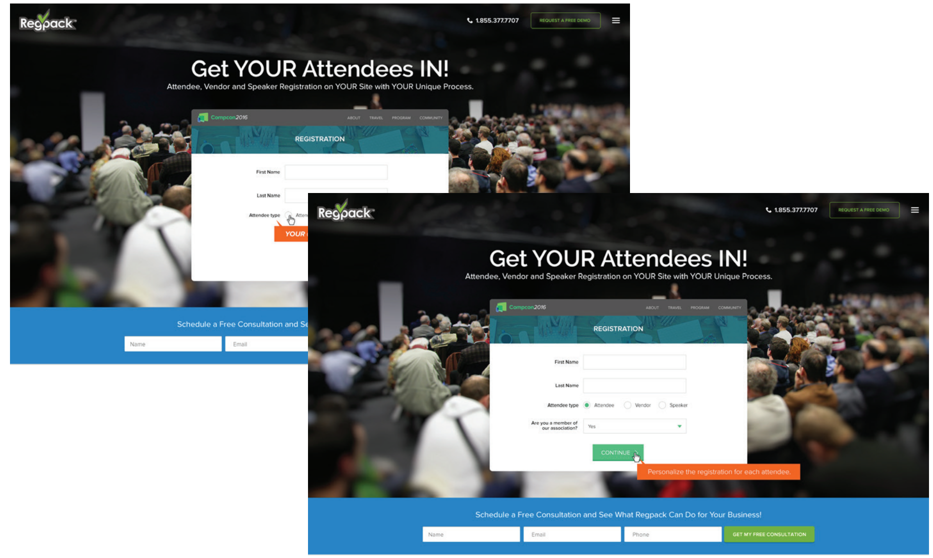
Admin tools that save you time!

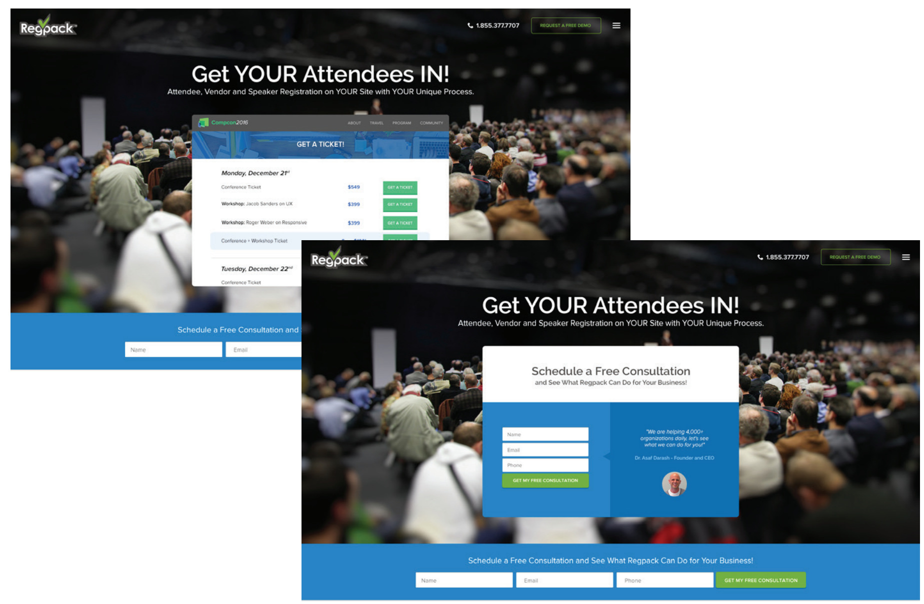
Search
Find and create attendee groups according to YOUR needs.

Reports
Create reports according to the needs of departments in your organization in seconds .

Auto Emailing
Schedule personalized emails to groups you create.

Statistics
Understand your data with tools that do the work for you.

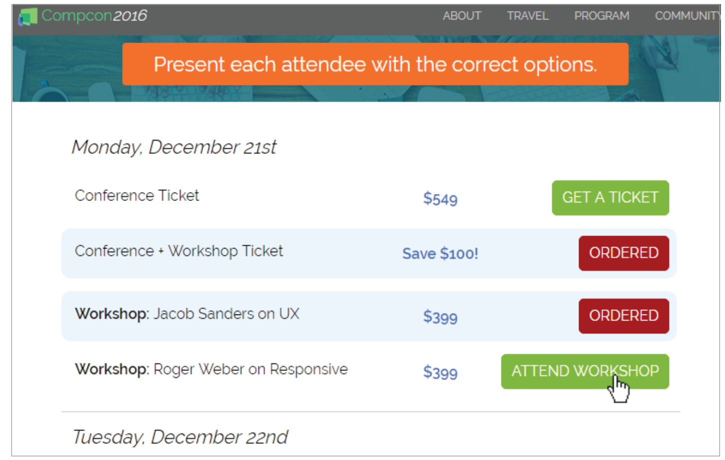


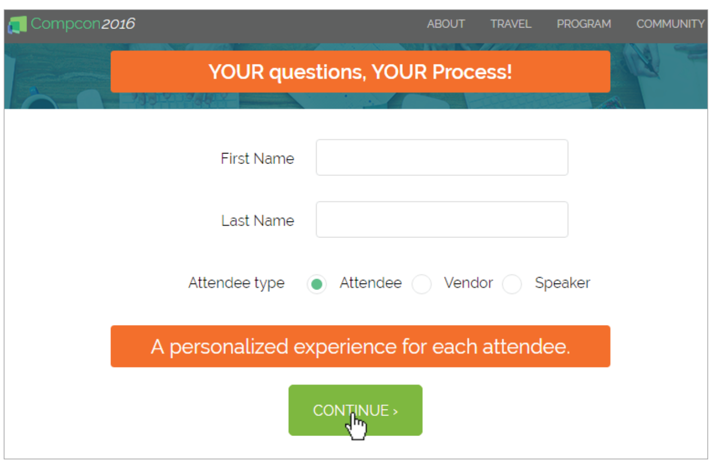


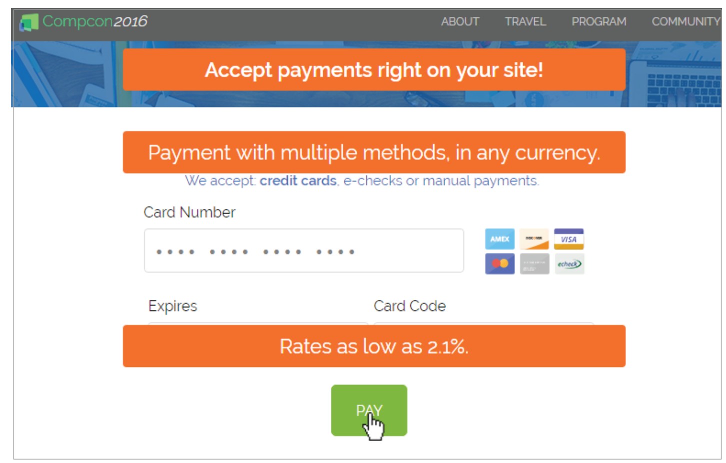
Dashboard and Presentation

Having a space for attendees, vendors, and speakers to go to and see any updates to their status is essential. The space is personal and should reflect all the aspects of your event that the user would want to know about, including:

1. A progress bar showing them how much of their application is complete.
2. A list of sections of your process with a check mark or an x, to indicate what is still outstanding.
3. A summary of their payments, including previous payments and their current balance.
4. Dates and other important reminders relevant to their attendance.







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PART 4: TOP 4 ADMIN TOOLS TO LOOK FOR IN EVENT SOFTWARE

The talk about what features to look for when evaluating event software is endless. This feature does this, we offer this feature, pick us because we have this long list of features! Quite honestly, it's tiring and misses the point of what a 'feature' really is.

A feature really is a solution to a problem. Many event professionals have problems, some of which we listed in Part 1 of this eBook. The key is finding a software that offers the tools, or the ability, to solve the problems YOU have.

While every event professional is going to have their own unique set of problems with their own specific features to solve them, below are the top 4 admin tools I believe every software should allow you to do.

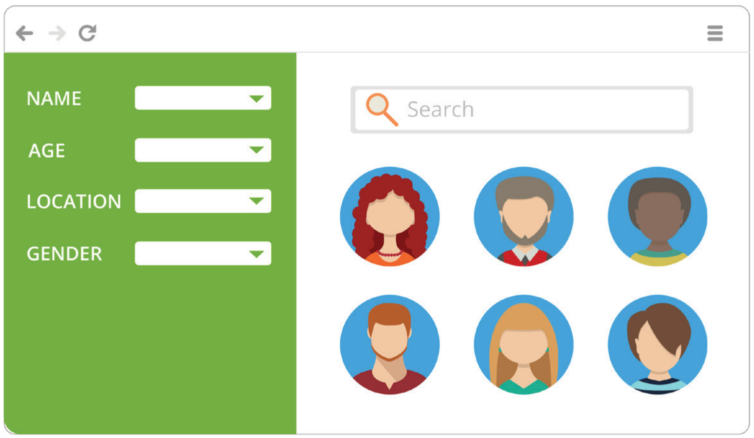
I've touched on these ideas above, and will go into detail about them in the parts that follow. But if you read nothing more of this book, but this section, make sure you take this list with you as you speak with different event management software companies and make sure their software offers these basic tools.

And keep in mind, just because a software offers a list of 100 features, doesn't mean that these features are right for you. If none of those abilities allow you to solve the problems YOU are having, then all those 'features' mean nothing to you!

Figure out what your biggest issues are and what you need out of a software to solve them.

Search

Any software you choose should allow you the ability to search your data IN ANY WAY YOU WANT. This means you should be able to filter and find any type of data you want, anytime, anywhere.



I'll stop right here and add that a system that stores it's data in the cloud is completely necessary.

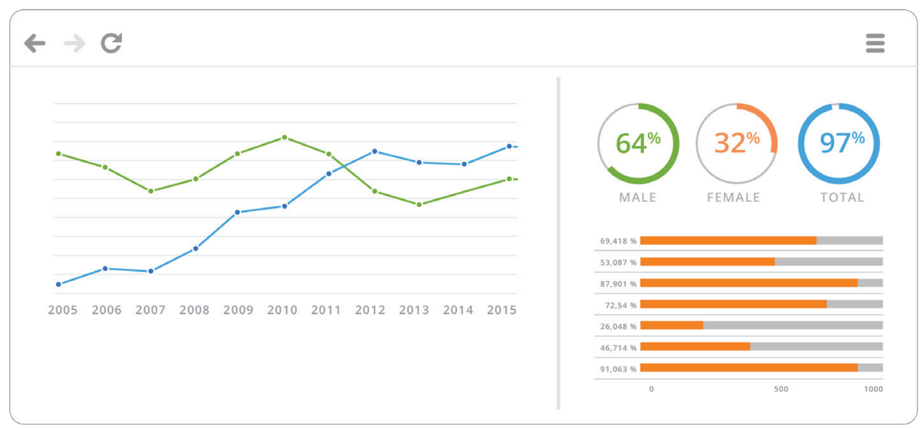
If you are on the road, working remotely or at your event site and not in the office, the ability to access your data, and then to search and filter it from anywhere you are in the world, is key to a great system and will solve a lot of problems.

Reports

There isn't a right way to do reports or a wrong way, there is the way you need to create reports that matters most when evaluating a software's reporting tools. Define your needs and then compare that with what the software can provide you.

Reports and the search feature of the software go hand in hand. If you do not have the ability to run reports on any set of data you have, then you are already missing out.

The whole point of having a great system is to gather up all the data you create and use it to improve your business, make your life easier, and make sure every member of your team has the information they need.



You should be able to export reports into a variety of formats, including the ones that suit you best. You should be able to gather and export data for one session, one day or for the entire event.

Another great reporting tool is to the ability to save your previous report parameters, so as information changes you can easily rerun a report to have the updated data you need. This helps you save even more time when you want the information you need fast, as often times we run the same small groups of reports frequently.

Auto Emailing

Schedule personalized emails to groups you create. While setting up groups initially can be time consuming, the amount of time you save once your automated and triggered emails start going out is worth it!

Part of the beauty of a email management system built in is that the system takes care of the boring emails you used to send manually - like thanking someone when they make a payment, timely reminders about completing a form and general correspondence.

Usually when you send mass emails to attendees, vendors or speakers, whether it was a reminder to complete registration or payment due date reminders, the message would go out to everyone and you'd get a ton of responses back, including "but I thought I was paid in full", or "can you remind me how much I owe"?

Auto emailing tools not only can send out the right messages to the right people (i.e. a payment reminder email only to those with outstanding payments) but should also allow you to populate each individual email, automatically, with the specifics of each user's account. So you can search for all attendees with a balance due, set the payment reminder email to go out and each attendee will receive an email addressed to them, with their payment history and their specific balance due.

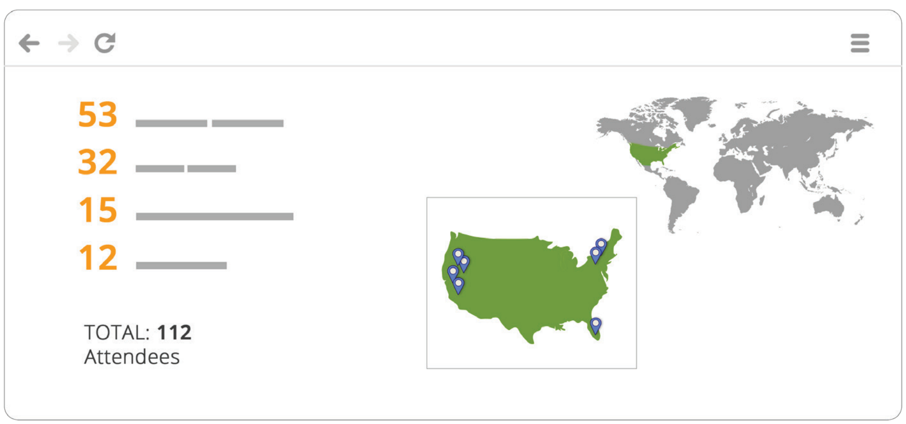
Talk about a time saver for you. You will stop getting tons of confused emails because every attendee will receive a personalized message so they know exactly where they stand and exactly what is expected of them.

Statistics

Understand your data with tools that do the work for you.

Statistics allow you to see your data and use it to make improvements across the entire scope of your event.

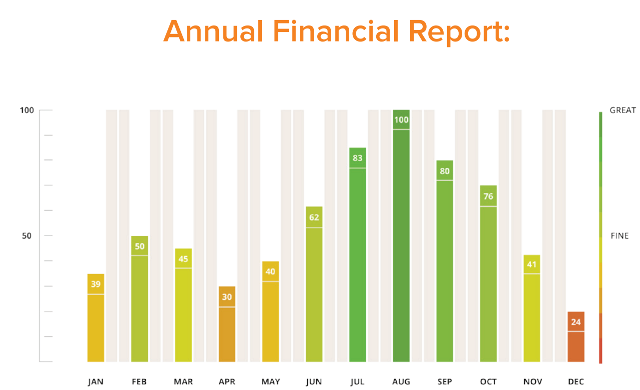
Create easy to view and understand charts from thousands of lines of data. Breakdown stats for whatever data you want - sessions, speakers, catering, income, etc. If you want to make a map of all the places your attendees are coming from, your software should make this easy!



Statistics help you to paint a picture of your event, from any angle you choose.

The ability to create pie charts, bar graphs and data graphs is priceless. Your software should allow you to easily create these visual aides on any set of data you want, general or, through filters, much more specific data.

Aside from creating statistics to understand your data, you should also be able to create graphs and visual charts based on reports you've already run, to use as a visual tool along with your report, or to include as an introduction to the meatier data section of your reports. For instance, creating a financial report for your accounting team can include a graph summary of the data at the top of the report as an easy reference point before you begin reviewing it.



PART 5: EVENT SOFTWARE AND REPORTING

Whatever method of registration and data collecting you are using, the purpose of course is to gather the information you need for every applicant (attendees, vendors, speakers, etc) and then do all the things necessary to prep and execute your event. You need names to make name tags, email addresses to send out email communication, food allergy info to send to the caterer, financial data for your accountants, and so on and so on.

The way to make the most out of your data is the ability to create dynamic reports.

What is the difference between static reports and dynamic reports?

In order to truly get the most out of your data, you need a great filtering tool to gather the information you are after and create a dynamic report. A static report, which most people use, is just a report you run on a certain set of parameters. For example, a date range + all paid applicants. The system will then spit out a static report of what you requested.

A dynamic report is a template of your data put together in a very specific way.

Using the same parameters you described above, instead of just creating that 1 report, you can create an unlimited amount of reports from that same set of data. For example, a dynamic report would be a report that shows all applicants that ordered a specific product (formal dinner on Saturday night, let's say), who paid in the last 10 days and indicated they are also interested in Sunday brunch as well.

The ability to filter and choose the data you include in the report gives you the power to use your data, understand your data, gain a perspective on your event planning like, what's working and what isn't.

To go beyond static reports, or a list of applicants and the sessions they are attending, you need event software that will filter and put together any number of combinations of data and export that data into a format that you need.

What does a dynamic report look like?

If your caterer needs information on food allergies or other relevant food issues, run a report for all attendees coming to your event (go further and break it down by day if you have an event where attendees pick and choose the dates and/or activities they attend where food is involved). Click "Run Report" and that's it! You just created a dynamic report for your caterer (and for you!)

What's the difference between a normal report and a multi-dimensional report?

A normal report is flat, meaning it is like ONE HUGE excel with ALL THE DATA listed within the document. Your caterer might have to search for the data they need and then copy paste the data relevant to them into their own document to use.

This is the type of report that most organizations without a good registration and data management software use. This gets messy fast. No one knows after a few days which report is the most recent, with the most updated information. Flat reports are fine when you don't have a ton of information to begin with but this is rarely the case. If all of your data cannot fit into a normal view of excel, all bets are off.

multi-dimensional reports gives you on demand data abilities. You get the data you need, and nothing more and all of that data is updated to the second.

Group sets of data and user information together in a way that makes sense for your event. Every event is different so event software that doesn't offer the flexibility to conform to the type of event you are running isn't worth the cost.

Why do I need dynamic reporting abilities?

The whole point of a great event software is to give you a powerful tool to create dynamic reports so you can make the most of your event, work smarter and faster, communicate better with your team and provide the best service to your attendees, speakers and vendors.

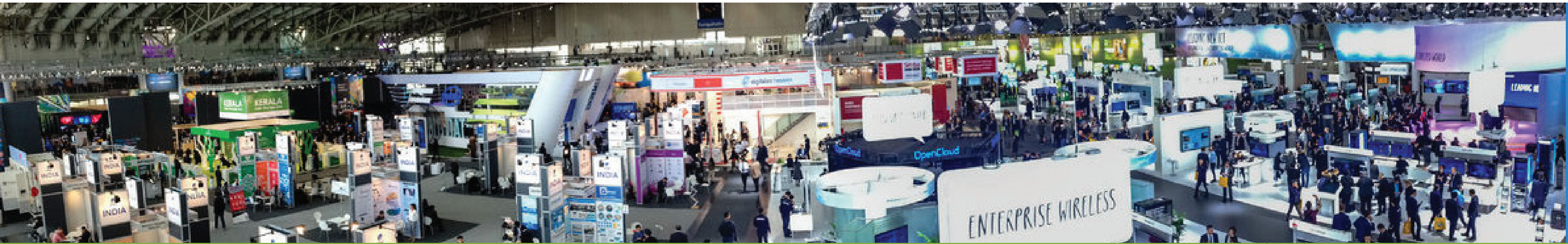
Better reports should save you time, make your workflow easier and ultimately should allow you to spend more time on the more important things - getting ready for your event and interacting meaningfully with your event participants.

If you are looking for a specific list of features when it comes to event reporting, these are my top 3 picks!

- ✔ The ability to run reports from anywhere (cloud based software).
- ✔ The ability to run reports on anything (great filtering tools)!
- ✔ The ability to turn reports into knowledge and action items.

Reporting is an integral part of your event planning. The ability to visualize your data and learn from it is incredibly valuable.

If you can summarize your data and see it in action, you can ease the burden of making sense of tons of information all at once and get down to business faster.



PART 6: IMPROVING EMAIL COMMUNICATION WITH EVENT SOFTWARE

Improving email communication is high on the wish list of many event professionals looking at event software. There are so many different things you communicate through email about over the course of your event, before your event, and after - newsletters, payment reminders, registration deadlines, etc.

A great event software should allow you, at the very basic level, to create email groups so you can easily email the right people the right information, whenever you need to.

The filtering capabilities of the software, which we've discussed previously, should help you create these groups easily and allow you to create any number of combinations. Your communication system should also allow you to have each email personalized to each recipient, without you needing to set up each individual email.

For example, a payment reminder email that needs to go out can be accomplished in a few easy steps:

1. **Filter and find all of the attendees for a specific event who have a balance.**
2. **Select the email draft you'd like to send them (in this case: payment reminder).**
3. **Press send.**

That's it! The software should populate the information into your email automatically including the attendee's name, any previous payments, their balance, when the balance is due, and a link to login to their account.

New Message

TO Cc

We're waiting for your FINAL PAYMENT for Program name

GOOD EMAIL

Dear Name,

We are thrilled that you will be joining us on Feb 3rd for the Program name!

I wanted to personally update you regarding your outstanding balance of **$2,400**.

The **deadline** for full payment is: **January 14, 2014**. Please go into the online registration system at www.yourwebsite.com/register and make a payment before the payment deadline. Once you login the system will take you right to your payment page. If you have a card on file, paying will be as easy as clicking the "approve" button.

The email you used in order to register is: support@regpacks.com

If you do not remember your password please use the "forgot password" option on the login page

Below is a great example of a payment reminder email draft. The ultimate goal of this email is to inform the reader of an action item needing to be completed, in this case a payment, and HOW they can do this ASAP. You want the email to allow the reader to complete what you want, without feeling the need to hit reply to ask follow up questions.

When your emails go out with a few clicks and are informative enough to allow attendees to take care of their business on their own - not only are you getting paid on time, but you are saving the customer service time responding to individual attendees wanting to know details of their account.

You have better things to do with your time, and paying for event software should afford you this!

How to write an effective email.

1. Keep the text as simple as possible.

People read their emails on their phone, iPad, quickly at work while they are supposed to be doing other things...don't pollute your email with tons of graphics and superfluous information. Get down to the point and make sure your action item is clear - pay now, complete this form, etc and then easily understand how they can do what you are asking.

Ensure that it is easy to spot dates, payment amounts, and links so the eye can easily go to these things and get down to business. Most people don't read emails in full anyway, and will be more likely to do what you're asking if they can quickly understand what it is you are asking!

2. Personalize your emails.

As you saw in the example email in the previous section, adding personal details to an email not only make the email more effective (cutting down on the recipient hitting reply and asking follow up questions), it also legitimizes your email.

If you sent a basic email that said “Hi, Please pay your balance by Friday. Thanks!” the reader might assume you aren't talking to them and that they are getting a mass email. Worse, they might email you and ask “Hey! Do I owe a balance? If so, what is it and how do I pay?”.

When you personalize the email, the reader understands that it is meant for them and the answers to their questions are contained in the body of the email.

Here's another great example of an email to an attendee about missing forms in their registration materials.

New Message

Dear First Name,
Thank you for registering to the Program Title program!

We're writing to let you know that you have not yet completed the registration process and are missing a few important items. Below are the forms you still have left to complete:

GOOD EMAIL

- Participant Information
- Parent/Guardian Information
- Medical Questionnaire for Parents
- Passport Information
- Allergy Information Form
- Insurance Beneficiary Designation Form
- You have already completed the following forms (thanks!):
- Behavioral Health Form
- Public Transportation Form

At your earliest convenience, please log in to your application. I would like to remind you that registration closes on January 15, 2014 and incomplete applicants will not be considered.

Just as a reminder, the email address you used to login with is: support@regpacks.com.

If you do not remember your password, please feel free to use the "forgot password" option present in the login page.

Please feel free to contact us (by replying to this email) if you have any questions.

Best,
The Project Team

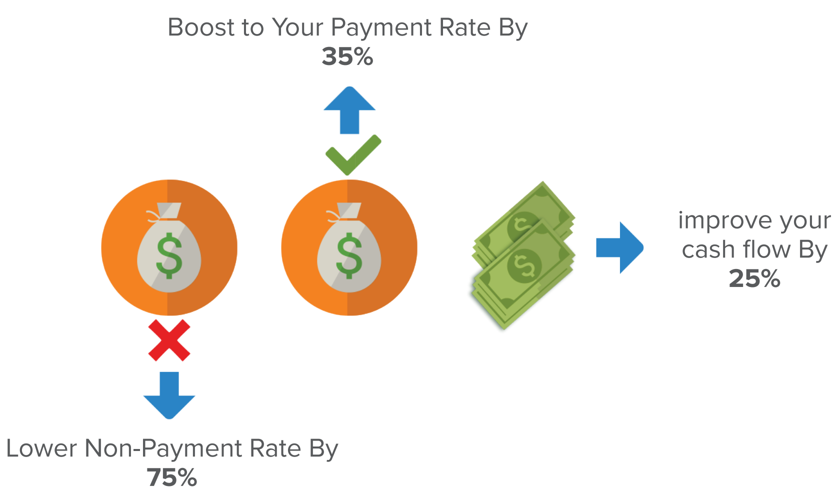
Giving a Personal Touch

Don't forget that even though you have this elaborate email communication system, you are still YOU! If your thing is to write funny and witty emails, include that in your email templates so that when attendees receive your messages, they feel your presence behind them.

The time you invest into setting up all of these email templates, what emails you want triggered to go out when, etc takes some time. But it is worth it! After your initial investment, the time you save not having to send out personalized emails to everyone manually and all the emails you WON'T get asking for clarification or details of their account, will not only make you jump for joy, it will also allow you to redirect your energy to other tasks at hand, which ultimately will improve your event.

PART 7: INTEGRATING PAYMENTS WITH EVENT SOFTWARE

With the right integrated payment solution built into your event software, you can lower your non-payment rate by 75%, boost your payment rate by 35% and improve your cash flow by 25%.



Think this sounds impossible? Well it isn't. Below are the features you should consider when evaluating event software to maximize your payment rate and get paid on time.

Accept payments online!

Before we discuss WHERE your attendees will pay for their registration, let's first confirm that offering payments ONLINE versus checks in the mail or credit cards over the phone is the baseline for integrated payments the right way.

The reasons for collecting payments for your event online are many! And collecting them on your site, versus sending the attendee to another site to complete the payment, and therefore their registration, is an integral part of integrating payments into your process.

It isn't enough to just offer an online payment but somewhere else. 27% of people will leave the process, according to our research, if they are redirected to an external site. The rates mentioned above come from offering payments as a PART of your process, all of which is on YOUR site!

5 Reasons to Collect Payments Online

1. You get paid faster.

Aside from the impressive stats at the beginning of this section, it's just good business sense to offer an easy and convenient way to pay that also gets money in your account faster. Waiting for checks to clear, or even arrive in the mail, is a waste of time and can cause a whole host of problems - lost checks in the mail, bounced checks, bad record keeping of who paid what and when they paid.

2. Attendees are expecting this option!

Not only is paying online easier, it's also kind of the norm now and an expected option for payments. Plus, paying online is quicker and safer than writing a check and sending it in the mail, or filling out a credit card form and faxing, emailing or mailing it.

3. It will help your accounting!

Accounting for money is so much easier when everything is online and automated. With integrated payments through your software, can you easily get a picture of who has paid what, how much you've collected for a particular event or session, what is still outstanding, and easily communicate with attendees about their balance. Plus not having to file and manually enter payments is an awesome perk!

4. Prevent fraud and human error.

By allowing attendees to pay online, with a safe and secure payment process, prevents fraud as well as other errors that come when you are doing payments manually. A refund for example, is just a few clicks on your end rather than cutting a check, mailing it, etc.

5. You are making money 24/7.

If you accept online payments, it means you are 'open' all the time and can collect and record payments all the time, instead of only when you're in the office to manage this. Attendees can pay with a variety of methods and can do so when it's convenient for them.

The whole point of offering payments within your process is to keep the registration process simple and streamlined. If you redirect attendees to another site to pay, or complete additional forms, you can confuse them and cause them to abandon the process without finishing.

Scheduled Payments

Offering scheduled payments will seriously improve your payment rate and help you achieve lowering your non-payment rate by 75%. Especially for events that have a high cost to attend, or for groups who are registering together, the ability to schedule payments aka offering payment plans, is the epitome of automating the registration process.

If an attendee can't pay their full balance at the time they are registering they will usually just decide to pay later, when they can. This seems fine except, how often do people forget and you are stuck chasing them down - phone calls, emails, etc.

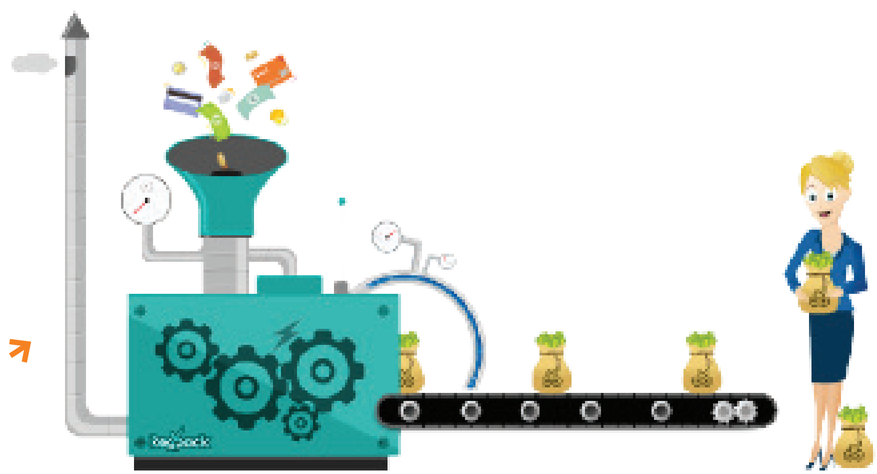
By offering the ability right at the start to set up payments that they can afford, with a few clicks you get paid and the attendee, or attendee group can check that task of their list and not worry about remembering to make a payment before attending your event!

By offering flexible scheduled payments, some of Regpack's clients have converted 35% more applicants into payment clients!

Sending Payment Invoices & Reminders: Timed and Triggered Emails

Having the ability to send strategically timed emails, such as payment reminder emails as well as triggered emails, like a payment invoice email is key to a system saving you time and increasing your bottom line.

Below are 2 great examples of these emails so you can see both how easy it is to send a quality, detailed email without more than a few clicks and what great communication looks like with an event management software.



Payment Invoice Email

New Message

To Cc

Thank you for your payment for Program name of $350

GOOD EMAIL

Dear Joe,

Thank you for registering for Program name!

We have received your payment for $350 that you submitted on date. The payment has been authorized and approved.

This is your current order:

Name	Price	Status
domestic flight	$450	Paid
Application Fee > Application Fee	$100	Paid
Program Fee > Program Fee	$2,410	Outstanding

Your overall order is: $2,960 Please note that items are considered paid only when they are paid in full. If there is a balance remaining, the cost of the item will be presented as "outstanding".

This is your payment history:

Trans ID	Method	Date	Amount	Status
44768	Cash	Tue, 11.6.12	$100	approved
54044	Check	Fri, 3.1.13	$100	approved
65619	Grant	Wed, 5.22.13	$1,000	approved
74305	Credit card	Tue, 7.23.13	$1,155	approved
76175	Refund	Thu, 8.8.13	$-100	refund
87694	Credit card	Mon, 12.16.13	$350	approved

Your current balance is: $355

If you wish to close your balance now, please go login to your account through our online registration system at www.yourwebsite.com/register and make a payment.

The Deadline for final payment is: January 10, 2014!

Please make sure not to miss the date. You can also view in your account your current balance by going to "My Payments" from the main account page. The email you used in order to register is: clientname@gmail.com If you do not remember your password please use the "forgot password" option on the login page. The system will send you an email with instructions on how to reset your password.

If you have any questions or just want to chat, feel free to reply to this email :-)

Payment Request Email

The key to these emails being successful is that they are full of details and personalized to every recipient. This means that you will cut down on emails and phone calls from attendees asking follow up questions to emails that aren't as detailed, since your email should be answering any questions they have, like "how much do I owe", "when do I owe it by?", and "where can I go to make a payment".

It's details and functionalities like these with your software that will save you time, and improve your payment rate!

New Message

To Cc

We're waiting for your FINAL PAYMENT for Program name

GOOD EMAIL

Dear Name,

We are thrilled that you will be joining us on Feb 3rd for the Program name!

I wanted to personally update you regarding your outstanding balance of **$2,400**.

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The email you used in order to register is: support@regpacks.com

If you do not remember your password please use the "forgot password" option on the login page.


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CONCLUSION: IS THERE A PERFECT EVENT SOFTWARE?

There is probably no "perfect" event management software out there for anyone. Because of this, you should ideally find a system that allows you to tailor what they offer to fit with the needs of your organization.

- First, you MUST figure out what your registration problems are, what works for you in your current method and what doesn't.
- After that, prioritize what is most important for you to have in a new system vs. what would be great, but you can live without. This will help to narrow your choices considerably.

Even though the answer to this question is going to vary for every event professional, a general list to get you started should include these key features:

- The ability to embed the software into your website.
- The ability to create your own logic and personalize the process for each attendee.
- Options for date and specific events that adapt automatically.
- Allow registration for multiple events at once, and offer discounts for multiple signups all within the process.
- Make paying easy - multiple payment methods, payment plans, multiple currencies accepted, etc.
- An attendee dashboard that allows attendees to manage their registration at all times, including viewing payments and the status of all forms including what has been completed and what is missing.

I promise there is an affordable software solution out there for your event, that will give you what you need at the price you can afford. It might take a little leg work but the time and money you save using a great software will pay you back year after year!