Event Registration Setup

This playbook outlines the procedure for selecting and setting up an online registration system for events. It covers essential features such as payment processing and automatic confirmations.

Step 1: **Needs Assessment**

Determine the specific requirements for the event, including expected attendee numbers, payment methods, and any unique features needed such as workshops, VIP options, or promotional codes.

Step 2: **Research Platforms**

Investigate various online registration platforms. Look for reviews, feature lists, and pricing models to find a few that match the event's needs.

Step 3: **Compare Features**

Create a comparison chart for the shortlisted platforms. Evaluate each on the basis of must-have features, like payment processing capabilities, automatic confirmations, user-friendliness, and scalability.

Step 4: **Test Platforms**

Sign up for free trials if available. Use the trials to set up a mock event and test the full registration process from the perspective of both the event organizer and the attendees.

Step 5: **Decision Making**

Discuss with the event organizing team to select the platform that best fits the event's needs based on the feature comparison and testing results.

Step 6: **Account Setup**

Create an account with the chosen platform. Provide business and contact information, set up user accounts for team members, and configure any necessary permissions.

Step 7: **Event Creation**

Utilize the platform to create the event listing. Add details such as event description, dates, locations, ticket types, pricing tiers, and any discounts.

Step 8: **Payment Setup**

Integrate a payment processor to handle transactions. Input necessary financial information, set up payment options, and ensure compliance with security standards.

Step 9: **Confirmation Emails**

Design automatic confirmation emails that will be sent to attendees upon registration. Make sure these emails contain essential event information and a clear confirmation of their registration status.

Step 10: **Testing**

Conduct end-to-end testing of the registration process to ensure everything functions smoothly. Registrations, payment processing, and automatic emails should work without errors.

Step 11: **Launch**

Announce the event and open registration. Share the event through social media, email newsletters, and other marketing channels to reach potential attendees.

Step 12: **Monitor & Support**

Regularly check the system for any issues and track registration progress. Provide support for registrants who encounter problems or have questions.

General Notes

Customer Support

Ensure the chosen platform has reliable customer support in case of technical difficulties or system outages.

Legal Compliance

Verify that the registration platform is compliant with data protection regulations like GDPR or CCPA if applicable.

Backup Plan

Have a backup plan in place for manual registration in the event of system failure to ensure continuous registration flow.