



CONFERENCE
& EXHIBITION
ONLINE TOOLKIT



CHEAT SHEET

Building a great delegate registration form

Your registration form, whether online or on paper, needs to both **look good** (see *DESIGN*) and **work well** (see *CONSTRUCTION*).

Before you put "pen to paper", spend plenty of time thinking about what information you need from your attendees...



Make sure the appearance of your form matches the event website, flyer or any other existing artwork, i.e. ensure that the same **logos, colours and branding** elements are used.

Make sure that **event information** is clear – conference name, venue, date, time – and not lost in a too-busy banner.

If the event is sponsored, provide space on the form for the **sponsor logos**. Be sure to use clear images – a blurry logo will reflect badly on the sponsor.

CONSTRUCTION

CONTACT INFORMATION

Most importantly, collect **delegate information**, such as title, name, contact details (email address/mobile number), relevant membership numbers, postal address, company name, and any other information you may require.

Don't ask for information that isn't needed, as this can be seen as an invasion of privacy by the delegate. For example, don't ask for a home address if you don't plan to post anything. Never ask for bank account information. (See the *Payment* section for more on this.)

If you plan to generate name badges, you may want to include **delegate type** (delegate/speaker/VIP).

ATTENDANCE FEES

The **registration fee** section covers the fees for attending the event.

You may want to provide for different **categories**, such as early/late registration, member/non-member/student, and perhaps single-day rates for a multi-day event.

Consider providing **complementary or discounted fees** for VIPs, sponsors, committee members.

Think about **logic and calculations** that depend on other answers; for example, the member fee should only be selectable if a membership number was supplied, or a tour may not be booked by single-day attendees.

Social events, such as a welcoming function or gala dinner, may carry a fee. Even if these events are included in the conference fee, you might still provide a checkbox to indicate attendance for catering purposes.

Partners are often included in the social events. Which ones may they attend and what is the cost involved? Do you need to capture their names or contact details?

OTHER FEES

In this section, show fees for any **tours, field trips or workshops** that are being offered, and allow the delegate to select the appropriate ones.

If there is **limited availability** (for example, the tour bus seats only 20) state that on the form. A good online form should be able to disable the option once the max-pax is reached. If not, alert the delegate that bookings are "first come, first served" and that his/her booking will be confirmed.

Remember to include **anything else** that is being offered for sale, e.g. t-shirts, abstract journals, advertising opportunities and so on.

Some events include an option to sponsor a student, or donate to a charity.



ACCOMMODATION AND TRANSPORT

Sometimes, the event organiser has **block-booked accommodation** at nearby hotels. If so, show the available room options on the form. Depending on whether the delegate will pay the organiser or the hotel, the hotel cost should be included/excluded in the total payable. As per *Other Fees* section above, if there is limited room availability, explain that on the form, or have the system automatically cut off bookings once capacity is reached.

If you offer **transfers/shuttles** between the airport and the venue, allow the delegate to select this, and show a price for one-way and return.

If airport transfers are offered, capture the delegate's incoming **flight** number, and time of arrival, as well as the outgoing flight number and time of departure. If there is more than one airport serving the city, also ask for the airport name.

DIETARY & SPECIAL NEEDS

Allow the delegate to specify any **dietary requirements** (e.g. vegetarian, halaal, kosher etc) and to notify you of any **allergies**, if food is being served at the event.

There may also be **special needs**, such as wheelchair access. Allow the delegate to state what is needed.

PAYMENT

This section is where the delegate is shown the **total payable**, and how to make payment. This would include the event's banking details for **EFTs**, and/or an online portal for **credit card** payments.

The delegate should never be asked to provide his bank details on a registration form. If online payments are provided for, they should go via an **online payment** portal which is encrypted and secure.

The delegate may need an **invoice** or proforma invoice. If so, capture the relevant details such as billing name and address, purchase order number, VAT number, and contact details of accountant's person.

OTHER

Some international delegates require a **visa letter**, which can also be generated by the system. Ask them if they require one. You may need to capture a passport or ID number to appear on the visa letter.

If you have a cancellation policy, or need the delegate to agree to terms and conditions, include a tickbox here, confirming that they have read and agreed to it.

ASSESS YOUR SYSTEM



YOUR REGISTRATION SYSTEM SHOULD:

- Be linked to an RSVP system.
- Automatically email registration confirmations to the delegate and organiser.
- Allow you to edit or delete registrations.
- Cope with more than one currency if necessary.
- Not ask for contact details before showing the fees.
- Offer downloads of information to Excel or similar.
- Be able to send an invoice automatically.
- Link to a payment portal for credit card payments.
- Have the option to send reminders to delegates with outstanding fees.
- Be able to print name-badges.
- Be able to send "visa letters" to international delegates.
- Offer the ability to bulk mail registered delegates.
- Give you statistics and totals at a glance.
- Be password-secured and automatically backed up

If you ticked less than 10 of the items above, you are lagging behind your competitors. Need to upgrade? Chat to us for a quote or advice.

Need more help?

Contact info@exbo.co.za
to request a free registration form template.

