

Planning Helper **SAMPLE**

Event Registration Checklist

Name of Function or Event

Day / Date / Year

Location (Name of Venue, Address, City, State, Zip)

Preparation before date to open for advance registrations

- | | |
|---|--|
| <input type="checkbox"/> Review history from previous event | <input type="checkbox"/> Set up and test registration methods to be used |
| <input type="checkbox"/> Review current registration budget | <input type="checkbox"/> 1) Advance – thru website using online format |
| <input type="checkbox"/> Calendar printing deadline for marketing pieces | <input type="checkbox"/> 2) Advance – link to download form from website |
| <input type="checkbox"/> Verify merchant bank account set-up if to be used | <input type="checkbox"/> 3) Advance – acceptance by email, fax, std. mail |
| <input type="checkbox"/> Create paper versions of registration form | <input type="checkbox"/> 4) Confirmations – online, email, fax or std. mail |
| <input type="checkbox"/> 1) For Inclusion in hard copy invitations | <input type="checkbox"/> 5) Onsite – manual registration using paper forms |
| <input type="checkbox"/> 2) For downloading from website | <input type="checkbox"/> 6) Onsite – using computer and printers |
| <input type="checkbox"/> 3) To be returned by fax, mail, email attachment | <input type="checkbox"/> 7) Verify payment transactions work smoothly |
| <input type="checkbox"/> Online registration prep if your website will host | <input type="checkbox"/> 9) Verify who is designated for financial oversight |
| <input type="checkbox"/> 1) Provide user-friendly format (template) | <input type="checkbox"/> Calendar Save-the-Date distribution date |
| <input type="checkbox"/> 2) Provide step-by-step instructions | <input type="checkbox"/> Calendar reminder distribution dates |
| <input type="checkbox"/> 3) Designate which fields are required | <input type="checkbox"/> Calendar invitation distribution date |
| <input type="checkbox"/> 4) Give option to print form | <input type="checkbox"/> Set up registration back-up system |
| <input type="checkbox"/> 5) Use secure server for credit card processing | <input type="checkbox"/> Order registration supplies (see on next page) |
| <input type="checkbox"/> 6) Protect financial data using digital certificates | <input type="checkbox"/> Script to use when denying registration by phone |
| <input type="checkbox"/> 7) Verify credit cards automatically | <input type="checkbox"/> Prepare training materials for registration staff |
| <input type="checkbox"/> 8) Confirm registrations automatically | <input type="checkbox"/> Verify staff, volunteer resources and availability |
| <input type="checkbox"/> Online registration prep if using a service provider | <input type="checkbox"/> Prepare script to use for refusing phone registration |
| <input type="checkbox"/> 1) Define all services available | <input type="checkbox"/> |
| <input type="checkbox"/> 2) Compare services to those listed above | <input type="checkbox"/> |
| <input type="checkbox"/> 3) Determine transaction fees | <input type="checkbox"/> |
| <input type="checkbox"/> 4) Train all staff authorized for password access | <input type="checkbox"/> |
| <input type="checkbox"/> 5) Verify compatibility with registration database | <input type="checkbox"/> |
| <input type="checkbox"/> 6) Link to provider web site from event web site | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> |

Registration Form – Attendee Information

- | | |
|---|--|
| <input type="checkbox"/> First and last name | <input type="checkbox"/> Phone, fax, email, country codes if international |
| <input type="checkbox"/> Badge nickname | <input type="checkbox"/> Emergency contact information |
| <input type="checkbox"/> Organization | <input type="checkbox"/> Special accommodations or dietary needs |
| <input type="checkbox"/> Address, City, State, Zip, Country | <input type="checkbox"/> |

Registration Form – Event Information

- | | |
|---|---|
| <input type="checkbox"/> Host organization name and logo | <input type="checkbox"/> Registration fee categories |
| <input type="checkbox"/> Event name and logo | <input type="checkbox"/> Registration options if any (full event, one day only ...) |
| <input type="checkbox"/> Event location, venue, address, city, state, zip | <input type="checkbox"/> Sessions attending |
| <input type="checkbox"/> Event website URL | <input type="checkbox"/> Lodging information (handled separately) |
| <input type="checkbox"/> Registration contact phone and email | <input type="checkbox"/> Parking info |
| <input type="checkbox"/> Early bird registration details and deadline | <input type="checkbox"/> Directions with map |
| <input type="checkbox"/> Registration categories (member, non-member ...) | <input type="checkbox"/> Registration instructions |
| <input type="checkbox"/> | <input type="checkbox"/> |

Registration Form - Payment Method

- | | |
|--|---|
| <input type="checkbox"/> Credit card information | <input type="checkbox"/> Check |
| <input type="checkbox"/> 1) Credit card number and security code | <input type="checkbox"/> Make checks payable to |
| <input type="checkbox"/> 2) Expiration date | <input type="checkbox"/> Purchase order |
| <input type="checkbox"/> 3) Name on card | <input type="checkbox"/> Money order |
| <input type="checkbox"/> 4) Signature | <input type="checkbox"/> Mailing instructions |
| <input type="checkbox"/> 5) Billing address | <input type="checkbox"/> Registration contact name, phone and email |
| <input type="checkbox"/> | <input type="checkbox"/> |

Printing

- | | |
|--|--|
| <input type="checkbox"/> Badges | <input type="checkbox"/> Pre- and post-event briefing formats |
| <input type="checkbox"/> Badge change forms | <input type="checkbox"/> Pre- and post-event evaluation formats |
| <input type="checkbox"/> Walk-In registration forms | <input type="checkbox"/> Check-in, Check-out procedures |
| <input type="checkbox"/> Registration signage | <input type="checkbox"/> Parking instructions |
| <input type="checkbox"/> Registration lists: alpha, orgn, category order | <input type="checkbox"/> Directions to venue with map |
| <input type="checkbox"/> Seating assignments | <input type="checkbox"/> Floorplan of venue |
| <input type="checkbox"/> Program | <input type="checkbox"/> Credit card authorizations |
| <input type="checkbox"/> Tickets | <input type="checkbox"/> Receipts |
| <input type="checkbox"/> Membership or promotional materials | <input type="checkbox"/> Registration personnel instructions, policies |
| <input type="checkbox"/> Schedule changes | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> |

Registration Supplies to Order (examples)

- | | |
|--|--|
| <input type="checkbox"/> Blank badges with color coding strips and cases | <input type="checkbox"/> Lanyards |
| <input type="checkbox"/> Badge cases | <input type="checkbox"/> Card stock paper |
| <input type="checkbox"/> Recognition ribbons (committee, sponsor ...) | <input type="checkbox"/> Double-stick tape |
| <input type="checkbox"/> Directional signage | <input type="checkbox"/> Magnetic strips |
| <input type="checkbox"/> Alphabetical signage | <input type="checkbox"/> Portable file boxes |
| <input type="checkbox"/> Registration packet envelopes | <input type="checkbox"/> Printer paper |
| <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> |

Scheduling

- | | |
|---|---|
| <input type="checkbox"/> Temp personnel | <input type="checkbox"/> Supplies pickup |
| <input type="checkbox"/> Temp personnel orientation | <input type="checkbox"/> Supplies delivery |
| <input type="checkbox"/> Name badge assembly | <input type="checkbox"/> Printing delivery |
| <input type="checkbox"/> Registration envelope or packet assembly | <input type="checkbox"/> Signage delivery and setup |
| <input type="checkbox"/> Van to transport supplies and personnel | <input type="checkbox"/> |

On-Site Supplies and Set-Up Preparation

- | | |
|--|---|
| <input type="checkbox"/> Registration function setup specifications | <input type="checkbox"/> 15) Signage locations |
| <input type="checkbox"/> 1) Skirted tables and chairs for | <input type="checkbox"/> 16) Information and message desk |
| <input type="checkbox"/> a. Pre-registered attendees | <input type="checkbox"/> Office Supplies |
| <input type="checkbox"/> b. Onsite registration | <input type="checkbox"/> Pens, pencils |
| <input type="checkbox"/> c. Ticket sales | <input type="checkbox"/> Rubber bands |
| <input type="checkbox"/> d. Membership or promotional materials display | <input type="checkbox"/> Stapler, staples |
| <input type="checkbox"/> e. Information and message center | <input type="checkbox"/> Paper clips |
| <input type="checkbox"/> 2) Counters or highboy tables | <input type="checkbox"/> Small clipboards |
| <input type="checkbox"/> 3) Computers, printers | <input type="checkbox"/> Scissors |
| <input type="checkbox"/> 4) Credit card scanners (dedicated phone lines) | <input type="checkbox"/> Tape measure |
| <input type="checkbox"/> 5) Copiers or access to copiers | <input type="checkbox"/> Envelopes |
| <input type="checkbox"/> 7) High speed Internet and wireless connections | <input type="checkbox"/> Printer paper |
| <input type="checkbox"/> 8) Fax machine or access to one | <input type="checkbox"/> Extra badges and badge cases |
| <input type="checkbox"/> 9) Lighting | <input type="checkbox"/> Badge change forms |
| <input type="checkbox"/> 10) Electrical hook-up | <input type="checkbox"/> Cash boxes |
| <input type="checkbox"/> 11) Easels | <input type="checkbox"/> Scratch paper |
| <input type="checkbox"/> 12) Water station, refreshments | <input type="checkbox"/> Tool kit (small hammer, screwdriver, etc.) |
| <input type="checkbox"/> 13) Stanchions and ropes for traffic control | <input type="checkbox"/> Plastic display cases (8 ½ x 11 and 5 x 7) |
| <input type="checkbox"/> 14) Banners to be hung | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> |

On-Site Supplies and Set-Up Preparation

- Thank you letters to venue manager
- Include names of exceptional employees
- Confirm final guest room pickup per day
- Confirm total room nights used
- Review invoice promptly
- Pay undisputed charges immediately
- Resolve disputed charges within 30 days
- Critique and record what went well or didn't
- Record number of advance reservations
- Record number of cancellations and walk-ins
- Record total rooms used per night
- Record type of rooms used per night
- Record actual guest room revenue generated
- Record and report final financial results
- Document changes recommended for next time
- Notes of appreciation to registration staff