Creating the Ideal Registration Form

By AnnMarie Branagan and Vivian McLaughlin

If you've never created a registration form before, you may think it doesn't require much thought or effort. You may assume it simply needs to present the basics — name, address, phone number, fax number, choices for educational sessions, cost, and method of payment. But creating a registration form that actually works for you and your organization, and allows you to report critical information for all stakeholders, does require considerable effort.

The challenge is to fit everything you need to know about the attendee on an easy-to-read, one-page document. (Two-sided forms should be avoided due to faxing logistics. Inevitably, some delegates forget to write their name on the second page, and it gets separated from the first page.) You should strive to make it as simple as possible for a delegate to register and arrange for housing for your event. Ideally, you will weave these two components into one process and allow registration and housing transactions to be processed via all mediums — Web, fax, mail, and phone.

How Do You Go About Doing This?

To help you get started, we have prepared the following registration form outline. Keep in mind that it is only an outline. Your document must be adapted to the unique requirements of your meeting. You may not offer post-conference events, for example, but you may need to find out the attendee's shirt size if you're hosting a golf tournament. Simply add and subtract items from the outline until it meets your individual needs.

It's also important to make sure that your registration form corresponds with the format of your database. If your database lists last name followed by first name, for example, your registration form should use the same format to help reduce data entry errors.

1. "Belly button" information — First Name, Middle Initial, Last Name, Suffix or Credentials, Badge Name, Organization, Title, Street Address, City, State or Province, Zip Code, Country, Work Phone Number, Home Phone Number, Fax Number, E-Mail Address.

2. Registration category and fees — Member, Associate Member, Non-Member, Student, Exhibitor, Exhibits Only, Press, Spouse/Guest, One-Day Registrant. Clearly define the inclusions for each registration category and consider using color-coded badge holders to define attendee types.

Registration categories often have varying fees depending on the date registered. Think about offering a discount for early registration (45 to 60 days prior) and adding a premium for registering on site ($50 to $100). Some groups also offer discounts, ranging from $25 to $100, to encourage participants to register via the Web. If you decide to offer Web registration, be sure to use a secure server and allow attendees to also print the registration form from your Web site.

3. Member identification number — This usually helps in membership verification. If you outsource registration services, it also will provide a potential link between your membership database and your supplier's registration database.

4. Membership signup or renewal — Many organizations like to price their conference packages to encourage individuals to become members or to renew their membership along with their conference registration in order to obtain the discounted member rate.

5. Choices for educational sessions — If workshops tend to fill up quickly, you may want to ask registrants to indicate a second or third choice for each workshop. If there is a maximum capacity for any session, note it in the advance brochure as well as your database.

6. Optional pre- and post-conference events — Make sure you have inventory controls in place for minimum/maximum attendance and communicate any associated fees. Some groups offer a discount for pre- and post-conference educational sessions when coupled with the purchase of registration for the full conference.

7. Optional tours/activities/meal tickets — Know your maximum capacities for buses and specify any associated fees. Think about the recreational activities you'll be offering and whether you need to obtain any specific personal information from the registrant. What is your shirt size? Shoe size? Do you use right-handed or left-handed golf clubs? If you are selling tickets to a banquet or awards luncheon, identify those events in this section.

8. Demographic and marketing information — Take a hard look at this area to determine the absolutely critical information that you want to track. Some organizations track first-time attendees, number of conferences previously attended, number of years in the business, industry sector, role in purchasing decisions, number of employees, size of company in dollars, or how attendees heard about the conference. From an exhibit sales perspective, you definitely need to track some of this data to help market and grow your show in the future. In addition, if you're able to measure the success of any of your marketing initiatives, it will

How to Block Rooms Accurately

Once upon a time, hoteliers would let you slide if you overestimated attendance and didn't pick up the majority of your room block. Unfortunately for meeting managers, those days are long gone. Today, you're likely to incur stiff penalties if you miscalculate and fail to pick up 80 percent or more of your block. So unless your organization has very deep pockets, it's crucial to come up with room counts that are as close to "real life" as possible. Here's how to do just that:

Using last year's room pickup, calculate the percentage of peak for each day of the meeting by dividing the number of rooms used on a given day by the number of rooms used on peak night.

Sample Room Block

Day	Fri.	Sat.	Sun.	Mon.	Tues.	Wed.	Thurs.
# Rooms	50	125	950	1,650	1,650	1,300	75
% Peak	3%	8%	58%	100%	100%	79%	5%
Example for Saturday: 125 ÷ 1,650 = .08 or 8%							

Application

When booking multi-hotel or citywide events, use the percentage of peak to calculate the number of rooms needed at each hotel on each night. (This formula also can also be used for single-hotel events.)

Example: The hotel can commit 500 of your needed 1,650 rooms on peak night. How many rooms do you need each night? Multiply 500 by the percentage of peak, as shown below:

Day	Fri.	Sat.	Sun.	Mon.	Tues.	Wed.	Thurs.
# Rooms	15	40	290	500	500	395	25
% Peak	3%	8%	58%	100%	100%	79%	5%
Example for Saturday: 500 x .08 = 40 rooms							

Be sure to block as close as possible to actual room pickup, which will maximize occupancy for the hotels, protect you from performance clauses, and ensure room availability for the duration of your event. Also make certain that you review your room flow after each year's event and make adjustments based on the most current trends.

Staffing the Registration Area

Registering on site or picking up credentials is often an attendee's first impression of your convention or trade show. So it's important to make that impression a good one, meaning delegates must be able to complete the registration process quickly. To help ensure this happens, take the following steps:

Number of Pre-registration Counters

Pre-registration counters are usually reserved for people who are only picking up their credentials. Typically, they are also prepaid registrants. Use the guidelines below to help you determine how many pre-registration counters to set up. Remember to round all numbers up; it's definitely better to have too many counters than not enough.

- Less than 1,000 attendees – 1 counter per 300 people
- 1,000 to 2,000 attendees – 1 counter per 400 people
- 2,000 or more attendees – 1 counter per 500 people

Some groups can increase these ratios by as much as 30 percent to 40 percent if they have heavy spouse or youth registration and distribute all badges as a group. This also holds true for exhibitor badges that are distributed by company.

Staff two or three temporary employees or volunteers per counter to disseminate credentials. Many organizations have heavy badge pickup during the first few hours of the morning and often can cut staffing in half for the afternoon shift. To help you staff the registration areas properly for your show, create a history of badge pickup by hour.

Number of Computers/Printers for On-Site Registration

To figure out the correct number of computers and printers needed to handle on-site registration demands, you need to know the number of people expected to register on site on the busiest day.

For simple registration forms (i.e., not more than 10 demographics or ticketed options), have one computer and one printer to support every 75 to 100 on-site registrants expected that day. For more complex registration forms, order one computer and one printer to support every 50 to 75 on-site registrants expected that day. (Note: Often a printer can be shared by two entry stations.) You may find it advantageous to place data entry terminals and printers on tables behind the registration counters to allow for more work space and a greater focus on customer service.

Consider staffing two people per computer — one to enter the data and one cashier to handle the financial transaction. For larger shows, you should be able to make do with fewer cashiers than data entry people.

Crowd Control

If there's a mad rush at the registration counter, look for ways to move people through the lines quickly.

- Consider not entering demographic or other information that is not essential to registrants receiving their credentials. Note: Most lead retrieval applications require the entry of name, address, and contact information.
- Consider handing out a ticket or voucher that allows attendees to enter the trade show or not miss the opening session and return afterward to complete the registration process.

help your decision making in coming years.

9. Do you have any special needs? — Theoretically, this is where a registrant would indicate that he or she is wheelchair-bound, a vegetarian, a diabetic, or other specific consideration. Many groups insert a wheelchair icon to draw attention to this section.

10. Method of payment — Note credit card, check, money order, or purchase order. Be sure to include credit card type, name on card, card number, and expiration date.

11. Cancellation policy — Clearly state whether the registrants will receive a refund if they cancel, how much money they will receive, the method by which they will receive the money, and the cancellation cutoff date.

12. Housing — If you're coordinating housing, list all the hotels (indicating the headquarters hotel) along with their rates and locations, as well as the housing cutoff date. Require attendees to request their first three choices to help fulfill their requests. Also ask for their arrival and departure date, method of guarantee or deposit, roommate name(s), bedding configuration request, smoking preference, and special needs.

Finally, remember to provide check boxes on the registration form rather than blank lines whenever possible in order to avoid receiving indecipherable handwriting. If you'd like to know how large an attendee's company is, for example, provide boxes for "less than $5 million," "$5 to $25 million," "$25 million to $100 million," "more than $100 million," or whatever categories your prefer. The person completing the form and the people inputting the information will thank you ... and you will be able to more completely categorize and report on these fields.

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