



best practices | plan of action for registration materials

RECOMMENDATIONS & TATICS FOR EFFICIENCY

As we prepare for our conferences and events, it is imperative to focus on the following key areas to ensure seamless execution and participant satisfaction:

- **Comprehensive Participants Listing** – Maintain an accurate and up-to-date list of all attendees.
- **Efficient Staff and Speaker Registration** – Ensure all personnel and speakers are registered promptly and accurately.
- **Custom Badge Creation** – Design and produce personalized badges for easy identification and access.
- **Preparation of Registration Materials** – Compile and organize all necessary materials (reports, badging, registration crate with miscellaneous and additional items, QR code, etc.).
- **Onsite Registration and Meeting Support** – Provide robust support to facilitate smooth onsite registration and address any immediate needs during the events.
- **Addressing Miscellaneous Needs** – Proactively manage any additional requirements or unforeseen circumstances that may arise.

By concentrating on these critical components, we will enhance the overall experience for our participants and ensure the success of our events.

Participants Listing

- **Participant List Cutoff Date** – The deadline for finalizing the participant list is set for two weeks prior to the commencement of the meeting. This timeline allows the registrar to compile a comprehensive and accurate list of attendees, ensuring that all necessary information is included in the printed conference packet.
- **Participants List Quality Control** – When creating the participants list, conduct a meticulous quality control process. This includes verifying formatting, fonts, titles, and ensuring the inclusion of all company names, contact information, and speakers. The participants list should align seamlessly with the fonts, headers, and style of the conference agenda to maintain consistency in branding across all printed materials. Ensure that attendees who **“opted out”** are removed from the participants listing



By adhering to these guidelines, we ensure that our conference materials are professional, accurate, and cohesive, thereby enhancing the overall attendee experience.

Staff and Speaker Registration

- **Staff and Speaker Registration Management** – Register staff consistently throughout the registration period, avoiding delays until the week before the event. This proactive approach ensures efficient processing and minimizes last-minute complications.
- **Proactive Coordination with Conference Manager** – Collaborate with the conference manager early to obtain the list of speakers and the agenda. Do not wait until the creation of the participants list to confirm speaker registrations. Additionally, regularly check the conference webpage where the agenda is posted.

This proactive coordination provides accurate attendance data, enabling conference managers to effectively develop, revise, and finalize meeting specifications, including room layout and food and beverage arrangements.

Badge Creation

On-Arrival Badging

Most events will use Cvent for badge printing. When utilizing Cvent's OnArrival or OnArrival In-a-Box solutions, be sure to document all related tasks and deadlines in the conference Monday Project Board to ensure proper planning and execution.

- Meeting with CM to discuss badging needs
 - **To be completed within 30 days after the launch of registration**
- Ordering of OnArrival Equipment and Badge materials
 - **To be completed within 30 days after the launch of registration**
- Deliver date of Equipment
- Creation of Event in Cvent
- Dates to upload data into Cvent

Once information and dates have been verified and confirmed, provide the CM with the information via email and enter the information into Basecamp (or current project management tool).

In-House Badging

Preparation of badges can be a heavy lift. Things to consider when preparing for in-house badge preparation:

- Date to have badges ready for shipping
- Items to include in badge (i.e., tours, PD sessions, and ribbons)
- Level of effort it will take to complete task

For conferences that have over 300 attendees, consider preparing and printing badges in batches (i.e., 7 days out, 3 days out, 1 day out) to avoid potential stress and errors before the deadline or onsite. **ALL badges must be printed and prepared for shipping two (2) full days before the shipping date.**

Last-minute badges are considered attendees who registered during shipping dates and should be prepared onsite. This level of effort should not take more than two (2) hours and should be **completed one (1) day before the start of onsite registration.**

Preparation of Registration Materials

The conference department now has a point of contact (shipping coordinator) to facilitate how we prepare, print, and ship our conference materials. To ensure that our registration materials are ready to ship, let us take the following steps:

- QR Codes
 - ✓ registrar will execute all steps for creation and distribution of the QR code
 - ✓ registrar will provide the CM the QR code link **one (1) week** before distribution of the WTK email
- Badges – completely prepped and ready **two (2) days** before day of shipping
 - ✓ tickets
 - ✓ outstanding payments labeled
 - ✓ ribbon(s) prep
- Extra badge holders and badge stock
- Reports (guests, tour attendees, attendees for paid professional development, attendees for training sessions, etc.)
- Tag all balance due, speaker, and staff badges

Note: All materials listed above must be prepared, packed, and clearly labeled. Request the necessary shipping label(s) from the shipping coordinator, and ensure all items are delivered to the designated shipping prep location by the stated deadline.

Onsite Registration and Meeting Support

- **Registration is to be set up and ready 30 minutes prior to the start of registration.**
The onsite registrar is responsible for gathering all the registration materials from the conference shipment to set up the registration area.

By having the registration desk up and running 30 minutes prior to start, we can demonstrate the following:

- present the visual of preparedness and readiness of the event
- allows staff to be prepared physically and mentally for the arrival of our members, nonmembers, sponsors, and exhibitors
- showcase customer service to attendees that show up early



Once the registration area is setup/torn down, the onsite registrar will assist the team with conference material distribution, setup, and breakdown.

Miscellaneous Needs

- **Food and Beverage Special Needs Report** – prepare and distribute report **weekly** starting one (1) month prior to start of meeting

Conference managers prepare the specs for an event starting 30 days from the start of the event. A major factor in those specs is the preparation of food and beverage. It is imperative that conference managers have ample time to notify the hotel/venue of all special food requirements (vegan, kosher, non-dairy, etc.).

- **Discrepancy Report** – run and review a data report each week (preferably Mondays) to ensure there are no errors within attendee registration rates. Ex: member companies receiving nonmember rates or complimentary rates.

If a mistake is discovered, save the data report in event specific folder and prepare to make the following next steps:

- Research cause of discrepancy and resolve the issue
- Communicate discrepancy to Manager of the registration team
- Collaborate with Manager to communicate discrepancy to Conference Manager
- Create plan to communicate and adjust affected registrants
- Execute plan