

# How to Effectively Organize Events and Handle Attendees Efficiently?

A guide for event managers and organizers of conferences, congresses, workshops, as well as other events

Author: Tomasz Chrościechowski (CONREGO)

Editor: Sylwia Kluczevska

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## What event are you about to organize?

What all these years of working in the industry have taught me is that there is no such thing as two identical events. Each conference, congress, or training course is defined by a set of unique features, even if it is carried out cyclically. Such differences cannot be ignored, as they can impact the final result, in a way we would rather not see. However, before commencing work, it is worth asking yourself a number of questions that are necessary to carry out an efficient organizational process, and, consequently, to carry out a memorable event.

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### Is it a one-time event or a cyclical one?

If you can answer this crucial question, then you will be able to draw up a plan of actions related to the event you are organizing, including its IT support. If it is a one-time event, you can afford to have a relatively high level of freedom in terms of preparing the registration process for participants and supporting communication, visual identification, payments, and accounting. However, as far as cyclical events are concerned, it is worth analyzing all processes thoroughly, in order to define the elements that are shared across the entire cycle. It will save a significant amount of work and let you maintain high quality of all processes, starting from assigning invitations, to completing the series of events.

The registration system you want to use to register the attendees of the entire cycle should allow you to conveniently edit all the registrations with a single piece of software. More details about achieving this effect with CONREGO can be found in our article [Supporting many events simultaneously](#).

### How big will the event you are about to organize be?

Try to estimate the number of participants that will attend your event, taking into account its type (a training course, a conference, or a festival), its nature (topic and prestige), inclusiveness (open or closed event), location, date, and other factors. It is sometimes necessary to reduce the number of people at the level of sending invitations or on-line registration. For example, you may be forced to do that because the capacity of lecture rooms is insufficient. Therefore, it is recommended to determine the limits of seats as early as possible, thus avoiding the unpleasant consequences of such an oversight.

### Is it an event on a national or an international scale?

The answer to that question will determine preparing appropriate channels of communication that enable a smooth flow of information. The organization of an international event entails the necessity to prepare a multi-language registration form. And if foreign guests are to attend, it is also worth making sure that they are divided according to their descent, as it will improve the process of sending email messages and/or text messages with

notifications in different languages. You also need to remember to draw up a clear instruction concerning transport to the event and to accommodation sites.

## Will participants pay to attend the event?

In the case of free-of-charge events, it is worth considering whether registered participants will be authorized to participate in the event directly after registering, or after positively completing a verification process. Perhaps not every registered participant should actually attend the event? A truly flexible event registration system should allow you to carry out free-of-charge and paid registration simultaneously.

You can read about this model of participant service in the article:

► [Simultaneous Free and Paid Registration](#)

As far as paid registration is concerned, it is necessary to take the payment method into account in the registration process. Adjust your payment gateways to local market conditions, different countries participants come from, and the target group (e.g. an industry) for which you are organizing the event. The registration system of your choice should enable convenient integration with the payment gateway of your preference.

The most commonly used method of accepting payments is a **regular bank transfer**. This form of settling payments does not require any additional integrations with external platforms and does not generate any additional costs related to payment processor's rates. However, it may turn out that your

attendees are foreigners. In this case, a much more convenient solution would be to accept credit card payments.

Payments using credit cards are especially advised in a situation when attendees are not citizens of the European Union member countries. In their case, transfer costs may be exceptionally high and it may be difficult to force the buyer to cover these costs. As an effect, these costs are usually covered by the transfer recipient. Credit card payments processors do have their rates you need to pay but it is a predictable cost, as opposed to the rates of banks that do not process **SEPA** transfers. Virtually all the payment processors accept payments using **VISA** and **MasterCard** credit cards. However, if you expect some of the attendees may want to pay for their registrations using **American Express** credit cards, do not forget to ask the payment processor if they support these cards (not all of them do). No matter which payment processor you select, make sure that your event registration system supports integration with that payment processing system.

If, for some reason, you are considering to accept payment during the event, you need to take into account that this method requires you to employ a cash register to process cash payments made by persons (as opposed to corporate entities) or payment terminals to process credit card payments. Processing payments during an event and preparing all the obligatory infrastructure are very time-consuming and call for trained desk attendants.



## Who are the participants?

Finding the answer to that basic question lets you address appropriate actions to proper target groups, and carry them out at the right time.

### Categories of participants

If a particular event requires a complex registration process, it may be necessary to divide participants into categories. Such categorization will allow you to handle the event in a manner adapted both to the needs of guests and to the needs of organizers. A division into regular attendees and VIPs serves as a good example of such categorization. The regular participants will be charged for their participation, while the VIPs will enjoy a free-of-charge registration. The process of registration for both groups should take into account all the conditions of participation and handle them flawlessly.

### Registration statuses

It will be much easier to control the processes regarding registering, handling, and identifying guests if the tool you are using supports so-called registration statuses. Using such statuses, you will be able to single out sets of guests that have completed their registration correctly, paid for participation, or decided not to participate. The software you are using should include such data in reports to ensure that you always have access to the current information on the progress of registration.

## Open registration vs. closed registration

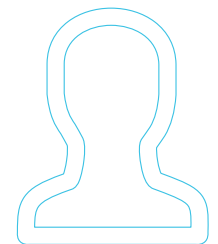
Before commencing registration, you need to determine whether it will remain publicly open or remain visible only to the invited guests. Perhaps you intend to allow both groups to register simultaneously? Using software adapted to your needs, you will be able to prepare a registration process that takes both these situations into account.

If registration is to be publicly open, make sure that it is well promoted in the media. This way, it will be easier for the people outside a potential group of invited guests to access registration. However, if you intend to start a registration system intended exclusively for invited guests, you should consider applying solutions based on securing the registration process with participant codes. Alternatively, you can secure it by applying the method based on sending unique links to a subpage, where the participant will make their choice using two available buttons:

- **I confirm participation** (after clicking this button, the participant will be redirected to the registration form, thus initiating the registration process),
- **I do not want to participate** (by clicking this button, the participant will be redirected to a sub-page that displays a suitable thank-you message for providing information about cancelling registration, and the status of their registration will be changed to "cancelled").

Thanks to this mechanism, your registration system will automatically divide the invited guests into three categories:

- Those who have not yet made their decision;
- Those who have cancelled registration;
- Those who have confirmed participation.



## How do you plan the registration process?

### When to start and finish the registration process?

Planning out the duration of the registration process depends, among others, on the type of the event you are about to organize. According to my personal experience, it takes the longest from the start to the completion of the registration process when you are organizing an academic conference. If that is the case, you need to consider the fact that participation and/or its nature are related to the categorization of the topic of a scientific paper a particular lecturer intends to present. Registration for such conferences should start as early as one year before the actual event takes place. However, it is a whole different story if you are organizing a business event. It is the usual practice that registration for commercial conferences is opened 2-3 months before the event, at the earliest. Similar time limits are usually used for sports events, music concerts, and training courses, as participants of such events are not supposed to be actively involved in the event, or obliged to prepare for it. Before opening registration, make sure that your plan takes into account that it will take a few days (or more than that) to implement and thoroughly test all the IT solutions, such as an event registration system, website, and social media profiles.

If you want the attendees to register as quickly as possible and you are looking for methods that will effectively help you achieve this, read our article:

► [How to Encourage Event Attendees to Register Early?](#)

Will the registration only include applying to participate in the event, or maybe it will also let attendees choose individual items on the agenda?

It is one of the most basic questions, since the nature of the registration process pre-determines the further part of the organizational process. It is not necessary to make an agenda of events available during the registration process if the sole purpose of the registration process is to confirm participation in the event, or if you already know that you will not be limited by the capacity of conference rooms. Otherwise, try to prepare at least a simple one. You will find many advantages in adding an agenda, during the registration process, such as:

- Your participants will have an offer divided into options that they may find particularly interesting – based on their choices, you will be able to assign particular lectures to rooms with specific limits of available seats, which will facilitate precise planning of logistics;
- Adding an agenda to your registration system may make it possible to block the option of selecting events that take place simultaneously, which will provide you with information about the actual interest in selected sessions;
- By providing the option of selecting specific events at the agenda level, you can offer additional paid options, thus increasing profit from the event you are organizing.

## Will it be possible to book accommodation in the registration process?

Each professional conference, both on a national and international scale, requires that you offer its participants assistance in booking accommodation. Not all organizers of events will opt to implement that solution because of the challenge it poses.

However, provided you have established cooperation with hotels, it is worth making it easier for participants to choose hotel rooms by including an additional step in the registration process. If a registration system has been designed well, it will be possible to impose limits on various types of rooms (singles, doubles, or suites) and select a specific date of accommodation. It is particularly important to implement such conveniences in the registration process as it may increase the profit from paid events.

## Should the layout and content of a registration form be variable depending on the category of participation?

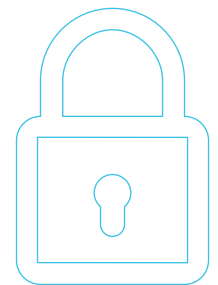
If a registration form has been designed thoroughly, it must be adjusted to specific categories of event participants. Show respect for the time that people invest to register and do not make them provide unnecessary information. Therefore, your registration form should be flexible enough to make it possible for you to adjust configuration to any number of categories. It means that you should be able to select the 'visible' and 'required' options for any field in the registration form, depending on the category a particular participant has been assigned to.

## How do you intend to protect the data collected in the registration process?

Remember that you are obliged to follow legal regulations that require you to protect data, and to undertake appropriate actions to secure it. Therefore, make sure that Terms & Conditions and all clauses that provide information about the methods and purposes for processing personal data are made available in the registration form. If you require participants to provide the so-called sensitive data (Personal Identification Numbers, bank account numbers, or credit card numbers), remember to use an SSL certificate for the domain on which the registration system will be launched.

## Is your online registration system secure?

Participants regard security of Internet applications as a crucial issue, which is not only a result of legal obligations. The hazard of hackers breaking into your server or through the interface of the application is just as real as robbers breaking into your flat or car. However, the results of an Internet hack can be more costly than the costs of having your car stolen. Make sure that your registration system has been verified in terms of its security, according to the **OWASP Top 10** standards, regardless of the type of a registration system in use.



## How do you wish to present information about your event?

An event is like a product – you need to plan all the actions regarding external communication beforehand in order to make sure that all interested parties are informed about your offer.

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### Do you need a responsive website?

Depending the category of the event you are about to organize, it may be necessary to present the information regarding your event in a more comprehensive way than through the content of an invitation. There is a number of solutions that enable you to build a website, which you may find useful. If you are aware that a website is necessary, then remember that it must be a responsive one. **Responsive Web Design** (RWD) is an approach to web design aimed at allowing website layout and style to be automatically adjusted to the screen size of the device you use to display the website. A responsive website will be clear and aesthetic regardless of the device it is displayed on, be it a desktop screen, a notebook, a tablet, or a smartphone. The most significant advantages of using RWD are:

- The possibility of employing functionalities on a website that provide a very cheap alternative to the mechanisms offered by mobile applications;
- Access to content that is not limited by the type of the device or size of the screen;

- The possibility of using solutions that are extremely useful when the event is in progress (e.g. launching a research questionnaire or a form for sending queries to lecturers);
- More efficient positioning of your website in popular search engines, such as Google. com, and – consequently – increasing your event’s reach.

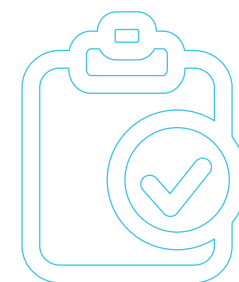
Building a sound event page is essential. However, the event website should satisfy a few other conditions of different kind. Read about creating a great event website on our blog:

► [How to Create a Perfect Event Website?](#)

Make sure that the product you offer is responsive regardless of whether you intend to make use of a website or not. Even if you plan to launch a stand-alone registration form, its responsiveness will facilitate access and make registration all the more convenient.

Would you like to know more? Read the article on CONREGO blog:

► [Why Do You Need a Responsive Event Website?](#)





## Do you intend to send invitations?

It is the usual practice in many organizations to send paper invitations. They are considered to show that participants are treated with special attention because they receive a tangible thing that means more than an invitation sent via e-mail. There are also target groups that require you to send correspondence in the form of letters, exclusively – in this case, no other form of invitation will be effective. Nonetheless, more than 80% of the events supported by CONREGO were based on sending electronic invitations. It lets you distribute invitations quickly and economically, and also offers the possibility of delivering successive, smaller portions of electronic correspondence, at any time. The following two types of invitations are distinguished depending on whether the registration is open or restricted:

- **Non-personalized invitations** with a universal link to the registration form (if it is an open registration) that is sent to all potential participants;
- **Personalized invitations with a unique code or link** to the page that lets the attendee to access the registration form (pre-filled with some information about a particular participant) or cancel participation in an event (if it is a closed registration).

Would you like to know more? Read the article on CONREGO blog:

► [Communication With Attendees via Email](#)

Invitations of the first type can be distributed using any application (even a standard e-mail client). As far as personalized invitations are concerned, you can use an application that supports event organization, which has been adapted specifically for that purpose.

### Such an application should enable the following:

- **Importing data from external files** (e.g. XLS files), thus feeding the database with information that can be used to provide the participant with a registration form that contains a number of pre-filled fields (such as name, surname, name of organization, and email address), thus increasing the comfort of registration;
- **Preparing a template of the email message** with an invitation, and embedding appropriate tags in its content, which will enable complete personalization of the message;
- **Sending mailings with invitations** to the participants whose data have been imported.

## SMS

Text messages are still considered an efficient method of communication if you need to send short messages with lightning speed. There are a few platforms intended for mass text messaging. It is worth making use of them if you intend to send a welcoming message to participants, or a reminder that they have a lecture or a gala evening coming soon. However, it takes a lot of time to feed the system database with data required to send text messages. For one thing, it requires exporting personal data and telephone numbers from the registration system, and then importing all records to the database of an external application. If that is the case, the ideal solution is to use event registration software which lets you distribute text messages by integrating with an external platform. Make sure that the provider of your application has seen to it that the application could be integrated, and also check the cost of distributing text messages.

## How do you wish to handle guests at your event?

Marketing, communication, and all the processes related to registering participants before the actual event mark the very beginning of your mission. The toughest part, though, is the efficient handling of participants when they arrive.

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### Where is the event to take place?

The location where the event will take place is significant from the perspective of IT solutions alone. You need to make sure you have Internet connection if you intend to handle the reception desk using an online application. It should not be a problem since we live in the era of mobile networks. Unfortunately, it may turn out that there are no mobile network transmitters that provide the appropriate capacity to support cell phones of all participants, which also means that there is no mobile network that your reception desks can work with. Therefore, you must always test the network when visiting a location, regardless of whether it is an outdoor event, or it takes place inside a modern facility. Sometimes a relatively strong Wi-Fi signal cannot be distributed effectively as it is obstructed by the very structure of the facility. If that is the case, you need to determine the cause of the problem. You can use applications like **SpeedTest.net** in locations where the success of your event heavily relies on Internet access.

What should you know to select the best means of accessing the Internet and prepare for any possible event? Read the article on CONREGO blog:

► [How to Check Network Connection at the Conference Venue?](#)

### How many reception areas should be available?

Besides the number of participants and the design of the room in which a reception desk will operate, the methodology according to which your reception areas operate has a very significant impact on their number, too. If you are considering applying the traditional method of marking attendance on previously printed lists, you should do the following:

- Estimate the average time it will take to serve a single participant (approx. 20-25s);
- Determine the timespan in which the reception desk is supposed to handle all guests (e.g. 30 minutes).

You can learn more on planning an effective reception desk on CONREGO blog:

► [How to Ensure Efficient Event Check-in?](#)

Based on the aforementioned assumptions, it is clear that a single reception area is capable of handling between 70 and 90 guests within the mentioned period of time. So, you will need 4 reception areas if you intend to accept 300 guests. Believe me, that the last thing you need is a queue of dissatisfied participants at the very beginning of your event.

## How to make 2 reception areas handle 300 guests in only 30 minutes?

All it takes is to apply the proven technology of QR codes (Quick Response – it is a square-shaped graphic code designed by Denso-Wave from Japan in 1994). The codes embedded in the content of passes distributed through the registration system will enable quick identification of guests, and they will not even have to introduce themselves. It only takes 1-2 seconds to scan a QR code with a reader. In the end, a single reception area will handle 300 people within 1,500 seconds, which equals 25 minutes. The truth is, however, that it is impossible to maintain such speed of scanning since participants may require additional attention, which increases the time it takes to serve them. We recommend setting two reception areas, just to play safe and avoid any unexpected situations.

## Will participants receive ID badges?

The issue of ID badges is a complex one. To cut the long story short, you have the following options available if you have to stay within a reasonable budget:

- Printing out paper or plastic ID badges before the event;
- Using plastic wristbands;
- Using passes that participants print out as ID badges;
- Printing out self-adhesive labels when accepting participants at the reception desk, which can be easily put on blank ID badges of any size and type.

I have described all the ID printing methods known to me and summed up their approximate costs on CONREGO blog:

### ► [Comparison of 5 Event Badge Printing Techniques](#)

I have intentionally ignored the options of using smart cards or printing paper/plastic ID badges during the event as such solutions significantly increase the costs of production and the costs of renting and using equipment.

It is a safe option to print ID badges before the event, but it requires you to prepare an efficient method of distributing ID badges when accepting participants at the reception desk. It is recommended to sort them in an alphabetical order and divide reception areas according to last name initials. However, if you intend to accept various types of participants, you can divide reception areas depending on the categories relating to each type. The solution based on distributing plastic wristbands is a good option for the events that do not require identifying various types of participants, and when guests will not consider such wristbands as “unjustified tagging”. Another interesting option is providing a pass that becomes an ID badge when a desk attendant provides the participant with a PVC holder and a lanyard. In CONREGO, we have designed and applied a method based on providing participants with electronic passes (PDF files, A4 size) which can be folded into A6 size.

This way, we can print out a two-sided ID badge that can contain participant personal data and a QR code on both sides, or their data on the front, and (for example) personalized/general agenda of the conference on the back.

The method of creating ID badges based on passes has been discussed in detail in the article on the blog run by CONREGO experts:

► **[How to Minimize Costs of Conference Badges?](#)**

You will learn how to properly design IDs for your participants in the article on our blog:

► **[How to Design and Personalize Conference Badges?](#)**

## Do you have the equipment necessary to handle the reception desk?

The reception desk model based on scanning barcodes or QR codes requires access to computers and readers. I strongly advise against using tablets because they are operated with an on-screen touch keyboard. It significantly hinders the work of the reception desk when you need to quickly find personal data by entering a name. It is far better to use notebooks for that purpose (optionally with a touch screen). The issue of readers is heavily dependent on the type of codes you intend to scan. The cheapest 1D reader is capable of supporting only bar codes, while a 2D reader can handle both barcodes and QR codes. Unfortunately, the price of a 2D reader is usually two times higher than the basic option.

You are not sure if using QR codes is a good solution to identify attendees?

Then the following article is a must-read for you:

► **[QR Codes and Their Applications in CONREGO](#)**

I have scrutinized the issue of selecting the right computers, barcodes, QR codes, and printers to be used at the reception desk in the article:

► **[Equipment to Handle Check-In & Access Control](#)**

## Do you intend to verify access of participants to selected zones?

Event organizers often ask me questions regarding the flow of participants and their access to selected rooms/zones during events. It is not always justified to control such aspects using your registration system.

## When Access Control is advisable and justified?

Sometimes such an approach results from financial matters. Access control is applied if participants have to pay to access particular lectures and we need to verify whether participants attending a lecture have actually purchased an appropriate package, or when lecture rooms offer only a limited number of seats. We can also have safety in mind – some facilities can only accept a strictly limited number of people, which cannot be exceeded. In the case of a restricted area, it may be necessary to verify the identity of each person who wants to access it. Estimated level of interest, based on the number of attending people may help you analyze the level of guests' involvement. If you note down the times participants checked in and out of the event, you will have information about the time each one of them spent at an event. Such information will become priceless when you decide to organize another event that is a part of the same series.

## What is the cheap method of launching an efficient Access Control?

As far as access control is concerned, the following three basic tools are used most often as they can handle the technical side of the problem in a convenient and simple manner:

- ID badges or passes with barcodes or QR codes that I have discussed in the section dedicated to the solutions for reception areas;
- Notebooks or tablet computers;
- Barcode/QR code readers;
- An application that supports access control checkpoints.

The application used to control access should also operate on the the data collected during the registration process, and the data imported to the database from external sources. A good registration system will enable you to download reports generated on the fly, based on readings made at access control checkpoints, thus making you aware of the directions and scale of migration of your participants while the event is already in progress.

[These are all the important pieces of information that you should become familiar with before organizing events that will be both effective and spectacular. Good luck!](#)

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## Other guides

Basing on the experience I accumulated working with professional event managers, I have also prepared another guide that can help you organize events:

### [9 technik promocji wydarzenia, które zwiększają sprzedaż wejściówek](#)

► **POBIERZ PORADNIK**

### [Zgodność z RODO - Poradnik Organizatora Wydarzeń](#)

► **POBIERZ PORADNIK**

Your Event Registration Software should simplify event management for in-person and virtual events.

Congratulations! Your search is over.

<https://conrego.com>

