REGISTRATION MANAGEMENT SOFTWARE BUYERS' GUIDE

An introductory guide to researching and purchasing the software that best fits your organization's needs.

Though a niche product, registration management software features a wide range of functionality, serves numerous vertical markets and boasts dozens of providers. Some options are simple form builders; some are designed to sell tickets; and others are designed to handle more robust needs. These factors alone make choosing the right system difficult, and that's before even taking into consideration the myriad of pricing models that make apples to apples comparisons near impossible.

Because of its niche nature, online registration software has no buyers' guide of sorts in *Consumer Reports*, *PC Magazine* or other publication. You won't find bright red circles or stars assigned to providers in this document, either. Instead, the purpose of this guide is to help you ask the right questions to get the answers you need to make the most informed purchasing decision when in the market for an online registration system. In some cases, you should not only get the answers, you should actually see them through demos, case studies, contract language and so on.

Getting Started
What do you need the system to do?

If you know what you want, you have a much better chance of getting what you want. Your first and most important step is a self-assessment of what your organization needs from a registration management system. This assumes you have already answered the "Why do I need a system" question well enough to begin shopping.

Here are a few things your organization should determine, as best as possible:
- Do you have one big event, such as a conference, or do you need to accept registrations for multiple events such as classes and trainings over the course of a year?
- How many registrations do you anticipate processing over that time period?
- Are your programs so popular that you have to turn people away?
- If you only manage a single event, does it need a standalone website?
- Do you have complex pricing scenarios for your programs (e.g., multi-person discounts)?
- Do you need to customize confirmation, cancelation, wait-list and other automated e-mail notifications to registrants?
- Do you want to process payments online, and if so, do you already have a merchant account?
- Do your registrants need the ability to sign up multiple participants?

- Is reporting functionality – such as tracking attendance, financials and so on – essential to your program?
- Is it important for your system to be able to generate name tags, sign-in sheets, evaluations, surveys, certificates, etc.?
- Does the system need to track continuing education credits?
- Do your programs require a system that can integrate with hotel reservation software, ticketing software, membership software, accounting software, etc.?
- What type of budget do you have for a system?

Answer these questions and you are well on your way to cutting a path through the jungle of vendors. At the very least, your answers will help you refine your search, both literally and figuratively.

Regarding your literal search, approach your Google search (or other engine) to reflect the findings of your self-assessment. For instance, if you need a system for a single event or conference, work those keywords into your search. If you need something that handles multiple programs such as training or workshops, do the same. And if your budget is measured in a few hundred dollars, search for "free" or "cheap" vendors, understanding that you will get what you pay for in terms of functionality.

Your search will reveal paid results at the top of the list and organic results below. There is no right or wrong way to decide where to click, just know that the companies that paid for ads are very likely to be in the business, while organic search results tend to pick up some ancillary websites the further you page downward.

Visit a few sites and glean what you can about each company's history, customers, product capabilities, reputation, pricing and so on. Choose a few vendors that don't appear to have any visible "stop signs," and get ready to ask more questions.

Vendor Research

Technically, your first question should be: "May I speak to someone in sales?" After that, the sales rep should ask the questions. If they are good at what they do, they should try to identify your current challenges and what you need a system to do to make those challenges go away. That said, your first objective is to see if their product matches your requirements.

Paid search

Simple Event Registration | Sign Up Free Today | eventbri
[Ad] www.eventbrite.com/registration/online
Easily Manage Registrations & Payments. Create Your Own Event In Minutes!

Online Registration Software | No Download - Access Anywhere
[Ad] www.coursestorm.com/Registration/System
Impossibly Simple **Registration** System to Increase Enrollments - Start Today!
Dedicated Support Team · WCAG Compatible · Super Easy to Use · Risk-Free, Pay as You Go

Online Registration Software | Software that Drives Results | cvent.com
[Ad] www.cvent.com/eventreg/onlinesoftware
Cvent Event **Registration Software**. A Planner's Best Friend. See Why!
24-7 Customer Service · All-In-One platform · Free Daily Online Demos · Award-Winning Support
Types: Whitepapers, Webinars, Seminars, Online Demos
Mobile Event Apps · Custom Website for Events · Interested in Pricing? · Event Marketing Solutions

Top 10 Registration Systems | The Easy Way to Find Software
[Ad] www.capterra.com/Registration/Free-List
Review Free List of Top 10 **Online Registration Software**. Save Time, Start Today!
Latest Industry Research · 260k User Reviews · Trusted by Millions · 500+ Categories

Best Registration Software | 2018 Reviews of the Most Popular Systems
https://www.capterra.com/registration-software/
Apr 21, 2015 - Web-based **Online Registration Software** that provides everything your organization needs to run smoothly. Eliminate paperwork and administrative costs and manage your activities, members, events, inventory and finances with Amilia. Give your clients a great buying experience by centralizing the ...

Organic search

Best Registration Software - 2018 Reviews, Pricing & Demos
https://www.softwareadvice.com/registration/
What Is **Registration Software**? **Registration software** enables organizations to automate the process of event **registration** and streamline the process of payment collection. Among other things, the **software** helps with membership management, ticketing, on-site or **online** registrations, self check-in and badge management.
Common Functionality of ... · Key Considerations for Buyers

What can your system do?

If you've contacted a vendor, you already have a pretty good idea of their system's capabilities from viewing their website. Instead of having their salesperson tell you what you've already read, have him or her show you how it works through a demonstration.

Using any of the many web conferencing tools, the salesperson should be able to walk you through the software while you watch on your computer. A good demo will touch upon the tools you have identified as important, showing you how to set them up, what they will look like to your customers, what kind of data you can export, how online payments work and so on. What is covered in the demo should mirror the needs defined in your self-assessment, but don't be surprised if you see features and functionality that you hadn't considered but make great sense.

Ultimately, the demo should at least answer the question about the system's ability to meet your requirements. Just as important, it will give you a feel as to the ease of use of the software. In organizations with multiple program administrators, the software has to be simple enough for the least tech-savvy user. Do note, however, that most systems have training programs and help desks to get just about anyone up to speed.

REQUEST A DEMO

At this point – if you like what you see – you are ready for some essential follow-up questions.

*Live Demo vs. Static Demo: A lot of providers have a static demo posted on their websites that will give you some idea about the capabilities and look and feel of their software. However, while that demo may offer great animations or a cool sound track, it can't answer your questions. It is advisable **not** to make a purchasing decision until you've participated in live demonstrations with real sales persons showing you the software and answering your questions.*

How quickly can I get started?

Remember when you used to put those newly purchased shoes on in the store and wear them home? After doing the leg work to identify a registration solution, you are probably ready to get started *now*. Find out how long the setup process will take. The more complex your needs and process, the longer it will take. In most cases, you should be learning the system in a matter of days, and with more basic software, a matter of hours.

This will vary from one vendor to the next, but it mostly depends on your needs. If, for instance, you want to set up online payments, you will need time to align your merchant account

with the vendor's payment gateways, or your banking account with the vendor's merchant account. If, however, you just need to build a registration form and copy the code to a page on your site, you could be ready to go in minutes.

What kind of customer service can you expect?

Here's the deal. If you answered "yes" to most of the questions suggested earlier in your self-assessment, you are likely in the market for a robust registration system. And just as you don't simply learn Microsoft Excel or PowerPoint overnight, you likely aren't going to be immediately proficient with robust registration software. You will need *some* training.

Find out how soon you can get trained, and how long it will take. Find out what additional resources are available (support desk, help system in the software, video tutorials, users' forum, etc.). **And most important, what happens *after* training?** How accessible is a live person when you need help? Will you work with someone who will come to know your unique challenges? Will that person help you solve them?

Process Expectations:
Culling down your list of providers, viewing three or four demos, following up with questions and comparing pricing will likely take at least a couple of weeks to complete. You might need another week or more to get trained, set up your system, and have your online payments integrated. Consequently, you should start your process well in advance of your programs and the time needed to market them.

What is your process for setting up online payments?

Vendors will typically offer one of two paths to helping you set up your registration pages for online payment: 1) connect your existing (or new, if you need to create one) merchant account with one of their payment gateways; or 2) use their merchant account to collect your online payments, which they will periodically forward back to you (usually minus a percentage of each transaction).

If you don't have a merchant account and need to set one up, it isn't difficult, and any established, experienced vendor will walk you through the process.

What can you tell me about the security of your system?

Any software solution that collects personal data and payment transactions over the Internet needs to meet a host of security standards, Transport Layer Security (TLS) encryption, payment card industry (PCI) compliance, HIPAA, and so on. If you can't find this information somewhere on the provider's website, be sure to ask about security measures.

If you want even more peace of mind, have your IT person contact the vendor for a more thorough review of the system's security protocols.

Can I contact some of your customers?

Obviously, no vendor who wants your business is going to answer "No" to this question, and will most likely steer you toward satisfied clients. One thing you should note during your research is whether or not the vendor has a lot of customers that appear similar to your organization, especially in terms of the classes/programs they administer with the aid of a registration system. Don't hesitate to ask the vendor for a contact from such an organization, even if it isn't on their initial list of referrals.

A Merchant Account is a type of bank account that allows businesses to accept payments by debit or credit cards. These include commercial banks as well as third parties such as PayPal.

A Payment Gateway is an e-commerce service that authorizes payments for e-businesses and online retailers. Your provider should offer several gateways – such as Authorize.net– that work with the various merchant accounts.

It is essential to your due diligence to follow through with these customer conversations. You will probably gain a lot of comfort in your decision after speaking with individuals who somewhat mirror your situation.

But, don't feel too comfortable – because next up is perhaps the biggest challenge to buying an online registration software system.

Deciphering Pricing

What does your system cost?

It seems like a simple question. But because there isn't any sort of standard pricing in this industry, the answers you receive will be all over the map and depend on a variety of factors. Here is a piece of advice: have a calculator handy.

You might find one or two providers that offer a "one size fits all" price. There are others that charge a set fee per registration, and others that discount that fee based on volume. Others charge a setup fee and per registration fee, and a host of others that have tiered, monthly pricing packages.

Some of the pricing variables you will encounter include:

- Contract length
- Setup fee
- Price per registration/number of registrations
- Price per transaction
- Tiered pricing based on features or registration numbers
- Additional fees (per additional feature or license)

Many providers do not list their pricing on their websites, in part because of the lack of a standard pricing and the misperceptions that might arise from apples to oranges comparisons. To get an accurate price you can compare from one vendor to the next, you will need to describe those needs defined in your self-assessment to each vendor. They can then apply their pricing model and give you a cost over a certain period of time.

With pricing in hand, feedback from customers and knowledge of what you need and what the systems can do, you should be ready to make an informed decision.

Final Thoughts

First, because you'll find plenty of reputable providers of online registration software in the market, there really is no need to sign for a multi-year agreement unless you are sure you've found your registration soul mate. Even then, it might not be the best idea. Technology changes, providers change, program administrators change and your registrants change – being locked into an three-year agreement might prevent you from adapting to such a fluid environment.

Second, as you view various demos, keep in mind a few things that your registrants will expect from your online registration system. Anything less than the following, and you might want to move on to the next vendor:

- Single screen simplicity: registrants want to see the entire registration form on a single screen, not multiple pages or extensive scrolling
- Remember me: registrants prefer a system that remembers them, retrieving their data and not forcing them to fill out a form again (credit card info being the exception)
- One-stop shopping: registrants want to close the entire deal at one location, from filling out the form, paying online and being notified that a seat is awaiting them
- Communications: registrants appreciate e-mail confirmations, reminders, invoices or receipts, wait-list notifications, etc.
- More dependable than the mail: registrants expect a dependable system, one that doesn't crash halfway through the registration process or never tell you that your submission failed (something you don't want to discover when you arrive, unregistered, at a sold-out event)

The bottom line: if you were to spend a few thousand dollars of your own money on a car, you would do more than kick the tires. Similarly, if you tap your organization's budget to improve registration management, please do more research than merely picking the first name that comes up in an Internet search.

Most providers offer excellent products that will help you achieve your goals. But, not all providers are created equal; some will definitely be a better fit for your niche, size, industry, or specific need. Use the questions and information in this document to find the right provider for your organization.
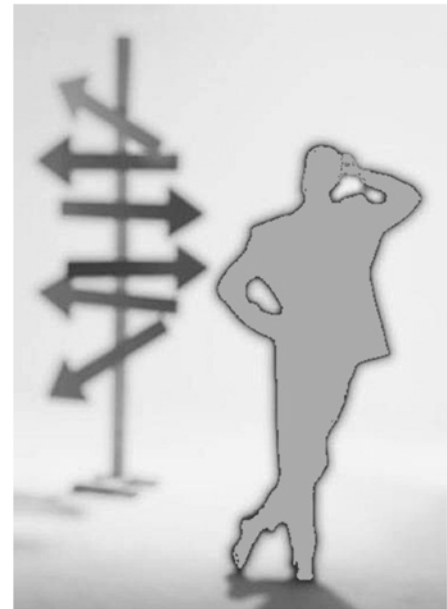
About Learning Stream

Learning Stream is a robust registration management solution designed to handle the unique challenges of education and training professionals. Our customers, which include schools, universities, non-profits, and Fortune 500 corporations, choose Learning Stream because of our flexibility and hands -on customer service.

For more information about our software – or online registration software in general – feel free to contact us by e-mail or phone (866.791.8268 press 4).