

Online Event Registration Checklist



RefTech Online Event Registration Checklist

Plan your online registration effectively and ensure a smooth experience for attendees, accurate data, and operational efficiency.

1 Define Your Event and Audience

- ☐ Identify your **event type**: conference, exhibition, corporate meeting, etc.
- ☐ Outline **attendee personas**: who they are, what they need, what motivates them to attend
- ☐ Set **event goals**: high attendance, session selection, attendee profiling

2 Set Your Budget

- ☐ Confirm **per-attendee pricing** or platform cost structure
- ☐ Check **scalability**: can the platform grow with your event?
- ☐ Plan for **hidden costs**: email sends, automated reminders, reporting, integrations

3 Research Platforms

- ☐ Compare **DIY vs managed services**
- ☐ Check **integration capabilities**: apps, CRM, marketing tools, reporting dashboards
- ☐ Review **automation features**: confirmations, reminders, session notifications

4 Specify Registration Requirements

- ☐ Define **customisable forms** and essential data fields
- ☐ Identify **attendee types and ticketing** needs
- ☐ Plan **communication workflows**: automated confirmations, reminders, follow-ups
- ☐ Determine **reporting and dashboards** for real-time tracking and post-event analysis

5 Optimise Registration Performance

- ☐ Track **registration sources** and conversion rates
- ☐ Monitor **drop-off points** in the form
- ☐ Test **communications** (e.g., A/B test emails)
- ☐ Use **post-event insights** to refine future registrations

6 Ensure Data Security & Compliance

- ☐ Confirm **GDPR compliance** and secure storage
- ☐ Capture **clear marketing consent**
- ☐ Maintain **audit trails** for accountability and reporting

7 Avoid Common Pitfalls

- ☐ Forms that are **too long or complicated**
- ☐ Lack of **attendee segmentation**
- ☐ Ignoring **integration opportunities**
- ☐ **Late planning** of registration workflows

✓ Tip

Treat registration as part of your **overall attendee journey** — a well-planned online process reduces admin, improves data, and strengthens your event strategy.