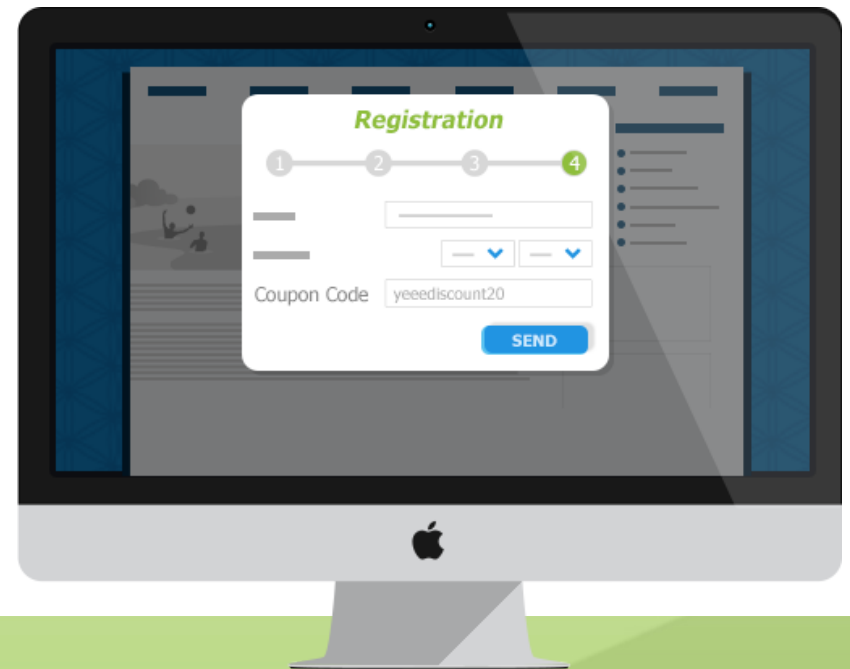Register | Charge | Manage

# YOUR ULTIMATE REGISTRATION GUIDE

Getting Online Registration and Payments Right

## What you'll find in this eBook:

✔ How to build your online registration process and application from scratch.

✔ Big registration mistakes and how to avoid making them.

✔ Why using an automated payment system within your registration software is crucial.



**Registration**

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# PART 1:
# INTRODUCTION

Manual and paper application processes are rife with issues. From lost checks in the mail to applications forgotten and lost in a large pile of paperwork, paper applications just aren't worth the hassle for both you and your applicants, especially now that sophisticated online registration software is available.

Users can register from anywhere, so long as there is an internet connection. No stamps or envelopes required! According to research, a survey of over 100 event participants showed that over 90% of them prefer an online registration method!

## WHY ONLINE REGISTRATION

**90%**
of applicants prefer registering online

**15-30 Days**
Faster Payments

**+25%**
More completed applications

## Below are 2 BIG reasons to consider when switching from paper to online registration:

**Reason #1:**
**Automation will net you more completed applications and more on time payments.**

An automated online system allows your application to be customized to each and every member who begins your process. Automation can allow you to auto-fill a returning member's information so they save time and complete their forms more quickly. Research done on online registration software shows that switching from paper to an online system can net you 25% more completed and on time applications and payments.

*According to research, a survey of over 100 event participants showed that over 90% of them prefer an online registration method!*

Automated systems also allow for quick and easy payment, including PayPal, credit cards and electronic checks. Not only is this easier for your applicants to use and a method they probably prefer over mailing their payments, it means you receive dues, on average, 15-30 days faster than you normally would. Online payments also offer you and your members and participants a safer and more secure method of payment.

**Reason #2:**
**Communicate Better with Members and Applicants**

An automated system can communicate with your members or applicants with just a click of a mouse. Create triggered emails that send automatically when a user completes a specific task in your application, like a payment or completing a form. You can even automate reminder emails that keep your members on task and in the loop, as well as schedule mass newsletters and mailings.

Manual and paper application processes are rife with issues. From lost checks in the mail to applications forgotten and lost in a large pile of paperwork, paper applications just aren't worth the hassle for both you and your applicants, especially now that sophisticated online registration software is available.

# PART 2: BUILDING YOUR APPLICATION ONLINE

**When you decide to move online, you need to build your application to work in an online space. Simply transferring what you did on paper to online isn't always the best option. Rethink how you can organize your application and registration process to be optimal for you and your users.**

You have a great opportunity to revamp your process and flow to work better and more efficiently for everyone! Below are the steps to take when beginning to build your online application.

## 1. Identify what's essential.

The best place to start when scaling down and streamlining your application is identifying the information you must have from your applicant. Make sure you put that information in the first form or two you are asking them to fill out. That way if they drop off after that, you've got the basic info you need.

*Creating an application that strategically and logically gives you the answers you need will net what's most important and you'll spend less time tracking down the information you really value.*

Asking too much will backfire on you. By asking questions you don't necessarily need the answer to, you might end up getting those useless answers over information that is really important and valuable. Creating an application that strategically and logically gives you the answers you need will net what's most important and you'll spend less time tracking down the information you really value.

## 2. Break up the process into stages.

Breaking up the application process into different stages is the first step towards creating a great registration process. It feels much better to start an application seeing that there are only two or three forms or sections to complete rather than ten. Applicants that see several forms right away can get frustrated or overwhelmed. At best, they will tell themselves that they will get to it later (and never will...). At worst, they will leave before they even get started.

Once you have your applicants engaged you can add the other stages to their application process as they go along. At this point, they will be more willing to continue through the process since they have already invested time and energy into it.

**Be aware!** There is a delicate balance here! You don't want to have too many stages in the process since that will make the applicant feel you are tricking them. But you still need enough information that gives you what you need for a completed applicant. Make sure you convey the process to them in the beginning, outlining what to expect in your application. But make it short, people in general will not read more than 2-3 lines of instructions.

## 3. Automate and Streamline

In an online process people expect things to happen instantly. Google has spoiled us all! Therefore, it is best to have each stage automatically open up to applicants as they move through the process. Why? Because getting the applicant to your site again is hard, so if you have a computerized system that can automatically open up the next stage as people move through the process, you have a winner!

If you cannot do that, then make sure that the next stages only appear once you've established good engagement with your applicant. This can be anything from an acceptance email, a special offer or even a personal welcome phone call. Once engagement is established you can ask them to go into the application process again to complete missing steps. Note that there is a chance you will lose them when moving from stage one to two if the process isn't clear, so again, if you can automate the stages, it is always better.

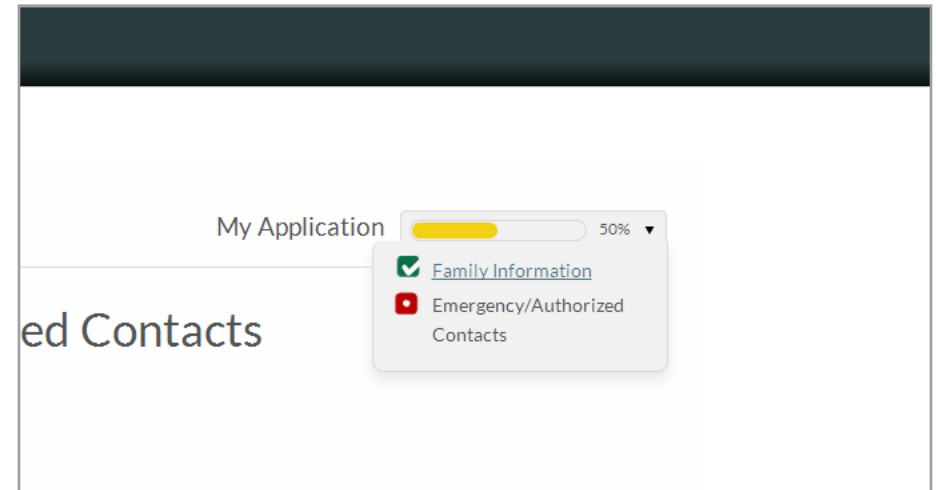## 4. Tell them where they are in the process.

Having a dashboard feature as part of your online registration system is a great tool and feature for your applicants. The dashboard can show them a lot of personalized information in a clear and concise way, keeping your applicants on task and

clued in to what you need from them personally. Some great features of a dashboard include:

✓ A progress bar showing how much of the application has been completed, or needs to be completed.

✓ A list of application sections with check marks next to the completed sections and links to go back to that particular section for review.

✓ Suggestions for other products the applicant might be interested in.

✓ Dates and important deadlines relevant only to his products.

✓ Social media features.

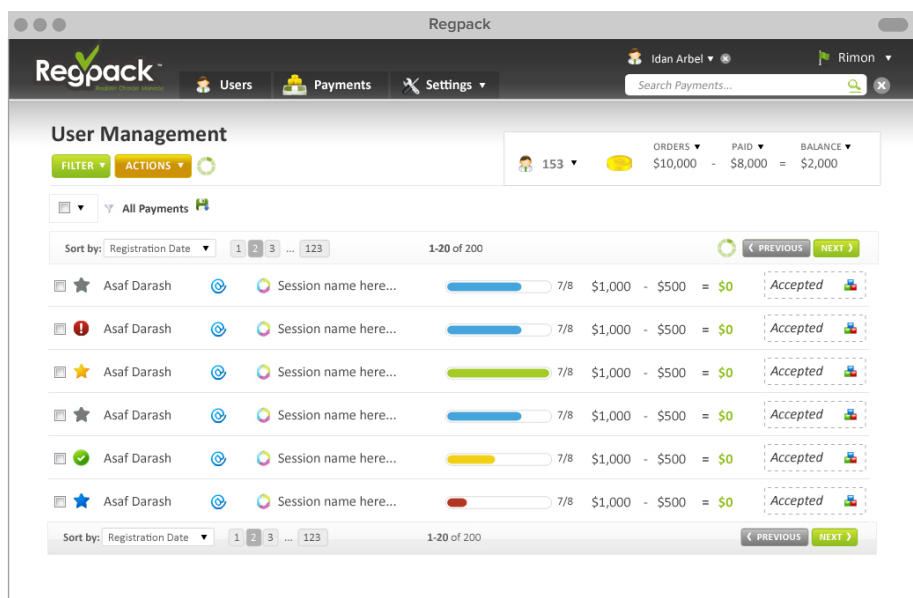Remember that presentation and functionality are also key aspects of your dashboard and registration process as a whole. Think about functionality and other tools you can use to make

your registration system simpler and more straightforward (applicants hate to think!).



**For example,** if there is only one product or answer to a question among many that an applicant can select, then you should use radio buttons instead of checkboxes as the method for answering or choosing the appropriate item. Once they choose one, the other options should be disabled to ensure correct responses. Plus, the applicant's choices or answers will be obvious and clear to them, again so they don't have to think!

Check out Regack's user dashboard image on the next page to get an idea of what a great dashboard can look like.

The ability to provide an up-to-date, technologically advanced and seamless online registration system to applicants and the ability to use this system as part of your company- wide registration database is priceless in the long run.

Sure you're still in business so obviously what you're doing works. But having something that "just works" and having something that can improve your business and allow you to spend your newly found free time on other projects that could potentially net you more income or improve other aspects of your business (like your products!) can be worth the time, energy and cost of a registration system like this.

We know what you might be thinking. All that sounds great and useful and fancy. But is it really worth the investment of both time and money to overhaul our registration system? What we're doing now works just fine for our needs and we don't have the time (or energy, or money) to revamp everything.

We can't tell you what is right for your business, your budget or for your products.

But what we can tell you is, from years of experience, we've never seen someone that wants to go back to paper after having a registration system that really works!

Having a system that works, for both your applicants and for you and your team helps you convert applicants to participants, helps keep your team on task and informed, helps your bottom line and most importantly saves everyone time.

Your applicants will spend less time scratching their heads and making sense of your application, you'll spend less time assisting applicants with basic questions that arise from being confused and more time investing in your products. You'll get the information you need and nothing more. You'll be able to generate an array of clever, intelligent and relevant reporting for your team, bosses and beyond.

*If one of their first experiences with you is via an advanced and intelligent online registration system, you've already created the foundation for a great relationship with your participants.*

And most importantly, this kind of system gives a face lift to your business. Applicants will think highly of you and your organization based on their experiences with you. If one of their first experiences with you is via an advanced and intelligent online registration system, you've already created the foundation for a great relationship with your participants.

### ? 5. Ask questions only once.

Asking the same question several times throughout an application is annoying and quite frankly, unprofessional. So make sure you are not asking them to enter the same information again and again. Even with an application that is programmed minimally, you can auto-fill the answers to certain questions if you must ask them twice. If the "general information" section and the "housing form" require an age or address to be entered, do your applicants and yourself a favor by supplying that information the second time it appears with the answer they gave previously.

Also look at how the information can be grouped together Can you create categories and cluster similar questions and requirements together? Clustering related information can help you get what you need from your applicants while they save time with your succinct and logical application stages. Try to cluster information based on what makes logical sense for the applicant, not for you. With your reporting system (if you don't have one, you should!) you can draw out the information you'll need in the format that suits you best (another reason to not ask the same question more than once, even if you use an auto-fill feature) but the applicant should see a concise and logical application when they are filling it out.

*An often overlooked aspect of any registration process is style. People like a pleasing and beautiful interface. It is easier on the eyes, makes you look more professional and believe it or not, you will get more completed applications because of it.*

## 6. Style it!

An often overlooked aspect of any registration process is style. People like a pleasing and beautiful interface. It is easier on the eyes, makes you look more professional and believe it or not, you will get more completed applications because of it. Simply put, it's dangerous to overlook the importance of a well styled and easy on the eye registration process when you are trying to get as many applicants as possible to complete the process. Easy to read fonts, bolded sections to emphasize importance and adequate space for answers help aid applicants in completing everything. Space the form out, have error messages show up if and when errors occur and use all the new fancy web technology out there to make everything sleek and smooth.

## 7. Use the Internet (you know, that thing everyone is talking about...)!

Allow your applicants to fill out forms online, submit documents by uploading them and pay online. This will not only save you money, but will also save a lot of trees. You will also save loads of time filing endless documents in those file cabinets that have been in your office since 1987 (or, shudder, since before you were born). Your applicants will love it since they can do it at home, the office, or even on the train. And you'll love it because all the information you need for each application will be conveniently located in one place.

*Don't forget your applicants are smart, 21st century, computer savvy people and will most likely judge your organization negatively if you have an antiquated and confusing process.*

Having all of your data online also helps you see the bigger picture for every applicant and every project you have going. How much of the process has an applicant completed? How much do they have left? What is missing? Quickly assess how many applicants, completed and uncompleted, you have for each product. An online format that asks the right questions is key in helping you get what you need. And here's a secret, it also helps give the applicant the bigger picture too! Which means more completed applications and less confusion all around.

*Allow your applicants to fill out forms online, submit documents by uploading them and pay online.*

Remember that having an online registration process is different than having a paper. Your applicants assume you have a database and will find it funny if you ask the same questions twice or in different ways. Don't forget your applicants are smart, 21st century, computer savvy people and will most likely judge your organization negatively if you have an antiquated and confusing process. Make sure to have a dashboard where they can see their progress at a glance and also have links to every form if they want to do the process in a nonlinear way.

If you're going to go online then do it 100%. Don't ask them to fill out the application online and then print it out and fax or scan it to you. If you are doing that, then just go with a paper application. If they fill it out online then it should stay online (sorry printers, scanners and USPS).

## 8. Individualize the Process

Once you have everything online, forms created and prices set, you can begin the process of individualizing the application for every applicant. With an 'on the fly' kind of process, one that learns the applicant as he proceeds through the application and answers certain questions, you can further maximize the important and necessary information you get by minimizing what you ask for.

*An individualized process allows your applicants to go through your registration process without needing to understand your logic.*

**For example,** if you need to know if your applicant knows any other languages and if so, need to ask several questions to understand their fluency, you should start with a simple "Do you know any other languages", yes or no. If they answer yes, present the additional questions to the applicants that you need to ascertain their fluency. If they answer no, move on to the next question. This way you ensure that the extra questions are only presented to those applicants that really need to see them. And those that don't won't call you confused about how to answer questions on language fluency when they only speak English! Since an individualized process works by filtering out questions, requirements and payments that are irrelevant for that specific user, the applicant spends less time wading through confusing checklists and payment sheets and more time getting the application done. And you spend less time fielding calls and emails explaining why you don't need Form A but you do need Form B, and oh by the way you still owe $200. Confusing! An individualized process allows your applicants to go through your registration process without needing to understand your logic.

# PART 3: CHOOSING A SOFTWARE TYPE: PRE-SET WORKFLOWS VS. SELF-CREATED PROCESSES

**Tracking developments in the software industry can be a little overwhelming. Trends are constantly coming and going and sometimes it's hard to know which trends are the important changes that you should pay attention to and which ones are just hype.**

Obviously trends like mobile, social networking and Software as a Service (SaaS) are important, but there is one change you should care about and probably don't know is happening: the transformation from pre-set processes and workflows to processes and workflows that you create.

**So how did this development come about and what does it mean for you?**

First, many software companies began to understand that not all businesses are created equal and therefore cannot productively use a generic software that is built for everyone.

Second, the tools the software industry has now allows them to make customized software available to everyone for a price that won't break the bank! Big businesses can afford to buy a generic software and then tailor it to their needs. That's how General Electric uses Salesforce.com and that's why Oracle is one of

the biggest software companies in the world. This standard is also how Active networks makes most of its money – through customization costs. But not all businesses have a $100,000+ budget to meet their software needs.

To solve this issue companies like Asana and Regpack have popped up. These companies have invested extensive research and development into this issue in order to create software that works according to your process and with a price tag that makes sense for small or medium sized (or any size!) businesses. Even big businesses are seeing the change and choosing to work with these software's.

Below we delve deeper into the issue of generic software and how this new trend in customized online registration software could be right for your business.

## The flaws one-size-fits-all software options.

Normally a one-size-fits-all software is the cheapest solution but, there's just one problem: while there is no argument that using software to automate your processes is better than doing things manually, having a pre-set software that offers no flexibility will most likely have you running back to a manual process or worse – having you doing both.

*You are competing in a marketplace that demands you to be different and innovative. When using a one-size-fits-all software you take away your biggest advantage as a small or medium business: your ability to adapt quickly according to changes that happen in the fast paced market.*

If you're going to spend money on a software to make your life easier, it shouldn't create work for you and it shouldn't demand you change your proven processes and methods. It should just make them easier, faster, and automated. Most one-size-fits-all software have a "right" way of doing things. So if you are a camp needing to register participants for your summer session or a school, there is a specific flow that a pre-set software gives you without much room for change. The problem with this is that you are competing in a marketplace that demands you to be different and innovative. When using a one-size-fits-all software you take away your biggest advantage as a small or medium business: your ability to adapt quickly according to changes that happen in the fast paced market.

## So hire a developer and build your own!

Ok you say, I'll build a custom software that is built to match my business exactly! Que the software developer you just hired. He or she builds you a great system from scratch (read: more money!) tailored to your needs and requirements. While this can be a great option for some businesses (and is an easy option for businesses with that huge budget!), the flaw with this option is that as your business grows and evolves, your software will need to change and adapt right along with you, meaning more money down the drain. Worst yet, if you suddenly need to make a major change to your process due to changes in the marketplace you will most likely need to redo your software since it was not build with that specific ability or concept in mind. More time, more money and ultimately less clients is the result. :-(

## The new trend in software: Processes that adapt to YOUR needs.

This new trend means that small and medium sized businesses can now work with and productively use a software that enables them to set what type of processes are included in their customized setup. These software offerings don't tell you what and HOW to do things, and in what order, but instead are FLEXIBLE and dynamic. They allow YOU to dictate how the software should function, what flow is best for YOUR clients, and how YOU process the onboarding of your clients internally.

**For example,** you might want people first to give basic information before selecting the services and products they want since this allows you to present the correct offerings for them. Another organization might want a user to first select a service and then based on that choice, the software knows what path to send them on. Another company might want users to go through an extensive process before registering them while yet another has specific workflows that are different based on where the client is coming from. As you can see, with so many variables and different needs, a generic software couldn't possibly address these needs without expensive customization costs.

However, all of that customization is now possible with this new trend. You will not hear software companies telling you that "this is the right way to do things" anymore. Hallelujah!

The fact that dynamic software like this is cropping up and becoming more popular speaks to the idea that switching from a manual process is finally worth the initial time and money, especially for businesses with limited budgets. At last there is a way to take the manual process that has proven itself and put that logic into a software that will automate it, thereby saving that you time and money in the long run.

# PART 4:
# 5 BIGGEST REGISTRATION MISTAKES

There are SO many pitfalls you can encounter when building your online application. A great software company will help guide you in avoiding this mistakes, but just in case, here is a list of the 5 biggest mistakes organizations make with their online registration process and how to avoid them!

## 1. Don't ask people to mail in an application, or anything for that matter.

In case you didn't get the memo, we've entered the second decade of the 21st century. Snail mail is a thing of the past and online is the only way to go. Paper applications that require, gasp, a pen to complete, is just not an option anymore. And neither is asking applicants to mail in checks or print out completed forms from a PDF you emailed them or that they downloaded.

But, you cry, we need some of our documents signed by our applicants and/or their parents! Again, it's 2012 and e-signing is now a legally binding method of getting the signature and authorization you need. Having the capability to sign documents online without a pen, paper and stamp is the way of the future. It saves time, eliminates waiting for the mailman and is hassle-free. It's worth it to build this ability into the application process. If you need applicants to sign multiple documents, arrange the forms in a way that allows them to sign once. You get the signatures you need, they spend 5 seconds giving it to you. Easy peasy! And if your lawyer says we're wrong, get a second opinion.

Even handwritten checks and balancing checkbooks are a thing of the past. Electronic bank transfers, credit cards and e-Checks are all safe and secure methods to transfer money online. Not to

mention if there are mix-ups on payments, refunds needed, etc. having everything online makes dealing with problems that much easier.

## 2. Less is always more.

We've already talked about how less is more when it comes to creating your application. But it bears repeating. Let's face it – people don't read instructions. For the minority that do, they probably get through the first sentence and then zone out and figure they can handle it from there. Don't get caught up in the mistake of having a confusing, redundant and long-winded registration process.

Ask only what you need to and no more! Don't ask questions that you might, sort of, maybe need the answer to. This just adds unnecessary length to your application and wears out your applicant. Personalized, succinct and straightforward applications are the way to go.

Clear and detailed instructions also limit the amount of emails and calls you receive because of the confusion YOU created. Cut down on this wasted communication and limit your instructions to only what is essential. Most people have filled out applications before, so most will understand what is expected of them.

*Ask only what you need to and no more! Don't ask questions that you might, sort of, maybe need the answer to. This just adds unnecessary length to your application and wears out your applicant. Personalized, succinct and straightforward applications are the way to go.*

Using technology to make instructions a thing of the past is also helpful. By this we mean having an application that is individualized and intelligent. A system that knows what questions to ask depending on the applicant and their needs (programmers call it 'conditional logic'). This will help cut down on the need for instructions and help make the process of completing the application for the user, easier and much more straightforward.

## 3. Don't send your applicants away from your site for payment.

What would you do if you were at a store, found something you wanted to buy, waited in line and when you finally reached the cash register were told to go across the street to pay? Then you're told that when you're done doing that, come back here and we'll give you a receipt. But the receipt might not be ready

for a few days due to processing time and we can't give you what you bought until we have the receipt ready. Cool?

Um, not cool! Payments must be an integrated part of your online application process. Even if you use a third party payment solution company, if they aren't offering you a way to integrate the payment process within your application then find another company. And stat. Once an applicant is in the groove of filling out your application they don't want to be sidetracked by a new site, a new set of rules, a new design, nothing! They want to finish and be done, otherwise they might never finish (which means no pay day for you)!

*Payments must be an integrated part of your online application process.*

Plus with an integrated system, you can make things even easier by auto-filling the name, email and billing address for the user based on previous answers already provided from within the application. You will be able to control the look and feel of the payment page to match it with your application. And you can ensure the applicant both understands what they are paying for and that their payments are correct. When payments are integrated the system knows already which products the

applicant is receiving, knows the correct cost of each product and presents it clearly to the applicant so they understand what they owe and why.

And most importantly, keeping payments within your application increases the trust and security the applicant will feel both with you and with giving their payment information online. Being redirected to a new site to pay money, meaning entering your credit card and other personal details to a company you aren't familiar with, doesn't always feel safe. By keeping everything in one place, your applicants will feel confident that everything is safe and secure.

*And most importantly, keeping payments within your application increases the trust and security the applicant will feel both with you and with giving their payment information online.*

## 4. Don't not communicate (and don't use double negatives either!)

Don't you hate it when you send something to someone and you never hear a word from them? No "Thank you" or "Hey Bob, got your message!", zilch, nada, nothin', zero. It's frustrating. Imagine

you actually need a response or an answer of some sort, not just confirmation that something was received. You're left in the dark and wondering each day if something went wrong or you did something to mess it up.

*These tools allow you to passively guide your applicants along and help them to feel you're with them every step of the way, even though you're not. It also saves you time in actively helping applicants through a process they could probably figure out themselves.*

Your applicants feel the same way. Receiving an email that such and such was received, that the application is now complete or a reminder that a form or payment is missing gives you results (when you need something from the applicant) and makes the applicant feel that they are on track and doing what they need in order to complete the process. Your communication with them says a lot about your company, so you don't want bad communication to be what your applicants remember most about you. Obviously balance is always key. You don't want to send a daily email bombarding your applicants with what you've received and what you still need. But people like to feel

in the loop not in the center of the circle. So keep them in it in a balanced way!

You can employ other tools to help applicants feel like they are on the right track. A progress bar within the application showing them the percentage of the application they've completed or have yet to complete goes a long way in making a person feel like they are making progress and getting somewhere. Certain big milestones throughout the application can trigger emails confirming its completion, for instance when a payment is made and received successfully.

A good dashboard within your online application is always helpful. Use check marks next to sections, forms and payments to visually show the applicant what they've completed and what they still need to check off their to-do list. The application itself can also provide confirmation in real time. When a user makes a payment, have a big green message noting that information was received and uploaded to your database so the applicant can feel confident everything is in order and no mistakes were made. Conversely, having red error messages pop up when there is an incomplete question also guides the applicant to problems he needs to resolve.

These tools allow you to passively guide your applicants along and help them to feel you're with them every step of the way,

even though you're not. It also saves you time in actively helping applicants through a process they could probably figure out themselves.

### 5. Your registration process is a part of your brand.

Too many people make the mistake of not branding themselves effectively. Your website graphics should match your business cards and your business cards should match your Facebook page and your Facebook page should match your registration process. Using a generic template as the design for your registration process only does you a disservice.

Your "style" should come through even on your online application. It grounds your applicants and gives them a familiar and comfortable starting point.

All of your applicant's first experience with you will probably be your website. It's important when they transition to the registration process that the transition is a fluid continuation of that space. This makes you look good and encourages trust between you and your applicants. Even if you're using a third party registration system, continuity is key. And if your registration system doesn't allow for this kind of continuity, get a second opinion!

If you're applicants feel they are being redirected to a third party site, they might feel uncomfortable, insecure and less inclined to give you their information. If there is no distinction to the naked eye between your website and the application, applicants will unknowingly trust the process since they associate the entire process with you, your brand and your style.

*All of your applicant's first experience with you will probably be your website. It's important when they transition to the registration process that the transition is a fluid continuation of that space.*

Creating consistency in your products and your brand isn't a new idea, but something that is forgotten often. Making sure your clients recognize your brand not only makes them feel secure but continues building on the trust and security they feel working with you and ultimately paying for and attending the programs you provide.

# PART 5:
# SIMPLICITY IN REGISTRATION

**The basis for any great registration process is simplicity. And registration is anything but simple so achieving this is sometimes much easier said than done. In order to make a registration process simple you need to make a lot of smart decisions.**

The first is deciding what questions to ask and how many questions to ask. Should the registration process be short and simple or an extensive and all-encompassing one? What if it takes a million questions in order to judge an applicant's eligibility or whether he's fit for your program? What if your application process involves multiple steps that are contingent on one another? What happens if there are some applicants that need to answer additional questions when others do not?

The challenge of creating a 'simplistic' application process lies in the fact that there is no one-size-fits-all solution when making a simple yet comprehensive application. There is no one right way to ask a million questions in a simple and straightforward way! Normally to achieve simplicity you need to scale back content. The secret in any great process lies in the balance between asking the right questions, at the right time!

Every company's needs are different, so it stands to reason that every registration process will require different things and the solution to creating a simplistic yet appropriate process will be different for everyone. So if you were hoping to get an easy ride, you're out of luck! The good news is, anything that takes blood, sweat and tears is usually worth it in the end. So buck up and follow the tips and tricks below as a guideline when building your own registration process. We promise the end result will be worth it!

*The good news is, anything that takes blood, sweat and tears is usually worth it in the end. So buck up and follow the tips and tricks below as a guideline when building your own registration process. We promise the end result will be worth it!*

## 🧠 Don't make your applicants think!
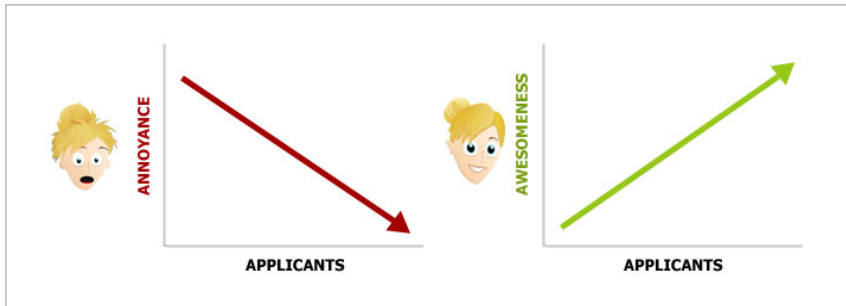


There is one thing everyone likes when filling out forms – not having to think! People love a process that doesn't make them think about what they are doing and why they are doing it. A registration process that allows the user to move through each step without having to understand your logic or needing to read instructions in order to decide whether this form is relevant to them, is the secret behind getting more people to complete the process.

Part of not making the applicant think is having clear labels and descriptions for the information you are asking. For example, if you know there is a high chance the person filling out the form will be the parent of the actual applicant ask for "applicant's first name" rather than just "first name". You will get more accurate information but more importantly the person filling out the form will not need to stop and think "is it my name or the applicant name they want?"

## 🔍 Find out what's essential!

The first thing you need to do when creating your questions is to identify the most important aspects of your application. What documents and information are essential for you to receive in order to turn this person into an actual participant? Define those and include them at the start of the application.

Start by writing down, in no specific order, what you need to know about your applicants. Write everything down, including the obvious like "first name" and "last name", as well as the things that will help you understand the applicant better and what products you should offer them. Then, cross out all the questions you know no one will enter, like "Please enter your social security number". Once you have some basic questions created, number them from the most important to the least important. Your first 10-15 questions should be in the first and second form that your applicants fill out.

## ▦ Create Sections and Categories

Next, try to group your questions together in a logical way. By logical, we mean not what's logical for you but what would make sense to an applicant who isn't familiar with your organization or the application requirements. Remember that logical to you might be separating educational information needed for application

eligibility and information you need for statistics, but an applicant doesn't know the difference. Try to imagine yourself applying to a program that you aren't familiar with. How would you expect the questions to be grouped and group them that way. Still having trouble? **Maybe it's time to....**

## ? Ask For Help!

Sometimes asking someone that does not know your organization to help out is the best way to gain some perspective both on your application as a whole and the logic you are hoping to achieve. An outsider's opinion is the best way to see what you can't. If your helpful friend asks a lot of questions, is confused by why you're asking a certain question or the way in which you're asking, you know you have some work to do. And more often than not, this will happen. And then it will happen some more, until you get it right.

Don't believe us? Try it! It's a very humbling but important and invaluable experience! And it will help you take your registration process to the next level. Promise.

## Reduce Redundancy

Finally, comb through your application once you've arranged it into sections to see where you can cut down on length without

sacrificing on information you need to receive. Remember, your first 10-15 questions should be the ones that you marked as essential in the beginning of the process. Sometimes one question might seem to be appropriate in a few different sections. While this is logical to you, it's repetitive, confusing and annoying to someone filling out your application.

Look to see if there are any areas of your registration process that are redundant or require similar information that you might be able to merge together. Often times you encounter a lot of redundancy when you try to mirror your previous paper process to an online one.

If you are going to use a computerized system remember that when the information is filled out once, you can always access it in a variety of different ways. So there really is no need to ask for the age of the applicant in the "personal information" section and in the "medical information" section like you might have had to do with a paper application. When you generate a report from an online database, you can incorporate the applicant's age in every report if you want, and you don't need to ask for it more than once in the actual application. If you really need to ask the question twice, make sure that the computerized system automatically populates information that has been already entered to reduce the time your applicant will spend on data entry.

## So to review...

Remember that one of the most important things in getting people to finish your registration process is to not make them think. They really do not care about your inner organizational logic. If they reached your registration process, they want to buy something from you, come on your program, come to your conference or be a part of your project. Help them out! Make it a process for the brain dead so they can put all their mental effort into what you are actually offering and not the process of getting there.

Here is a point by point summary (we all love them, no?) of what to ask your applicants and how. Ask yourself these questions when going over your registration process and if you hit these marks, then you're on the right track!

- Do I really need to ask this question?
- Is the question label specific enough and understandable?
- Do these questions really belong together?
- Have I already asked this question in a previous section?

✔ Don't make your applicants think.     *Summing it up*

✔ Find out what's essential.

✔ Create sections and categories.

✔ Ask for help!

✔ Reduce Redundancy

# PART 6:
# WHY SHOULD YOU HAVE AN INTELLIGENT REGISTRATION SYSTEM

**An individualized registration system is a system that can guide each individual applicant through the application and provide him or her with only the forms and information pertinent to them.**

How can you achieve this? By building a system that uses "conditional logic". This allows you to create a smooth and logical process for the applicant that is personalized for him.

A one-size-fits-all registration process isn't the most effective or efficient way to get what you need and convert as many applicants into participants. Why? Because it lacks the personalization and automation that an individualized set-up can achieve. Conditional logic allows you to move applicants automatically between stages, show them the proper forms they need for their specific application and make the applicant feel as though you are right there with them when completing the application.

*A one-size-fits-all registration process isn't the most effective or efficient way to get what you need and convert as many applicants into participants. Why? Because it lacks the personalization and automation that an individualized set-up can achieve.*

You can use conditional logic to present only the products you offer that will be relevant and meaningful to your applicants. This

could net you more products purchased, but it also shows your applicants that you care about them and are attuned to their interests and needs. It also shows them that the information they are providing you nets them useful information and suggestions about products they might enjoy, which will make them feel as if your company, and not just your application, is with them every step of the way.

created by a "one-size-fits-all application". It also helps the applicant avoid thinking about what they are doing when filling out your application since they do not need to wade through all the paperwork in order to decide which forms and fees are a match to their specific situation. While it can take time and concentration setting this kind of system up at the beginning, it pays back the initial time invested almost immediately and then some.
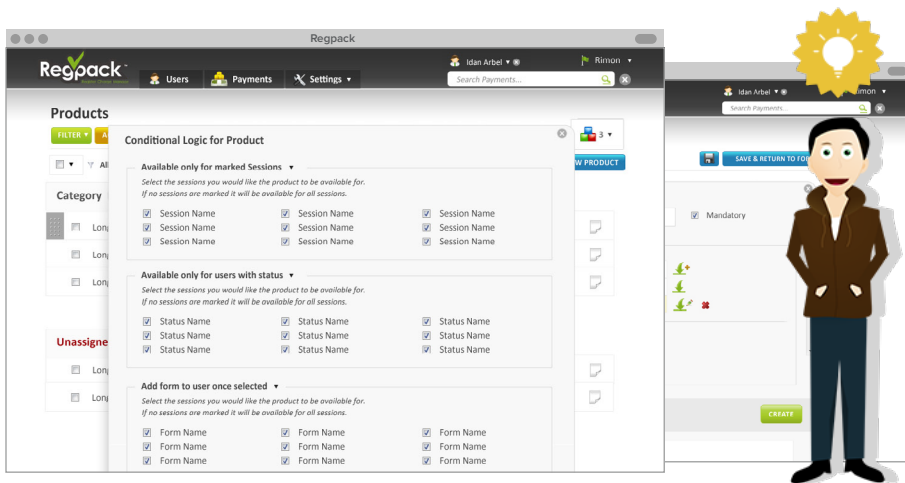


**For example,** you might want to ask first whether he is interested in housing. If he says yes, then he will be asked to fill in the forms needed for that product and included in his program total, the appropriate fees for housing. If he indicates he does not want housing, his personalized application will not include housing forms and fees. This kind of intelligence eliminates the confusion

# PART 7: PAYMENTS

**Offering online payments... is it worth it? Will it bring you more sales or is it just an extra and unnecessary expense for your business?**

Online payments are not only going to get you more clients and faster payments but are also going to lower your administration costs. There is no getting around the fact that online payments cost you money, but long term you WILL make more when you enable them!

Before we go into the reasons online payments are great, there is nothing like a real life example to sway you. One of our clients, Noam Masorti Youth, offer extremely popular camps and classes in the UK. They require participants to put down a deposit in order to reserve their space for upcoming sessions. In the past, each camp or class session usually filled up within 2-3 weeks but it took Noam Masorti Youth 2-3 months to actually collect all of the deposits, which naturally affected their cash flow. Even more, every year they always ended up with open spots on their programs because some deposits mysteriously "never arrived".

When Noam Masorti Youth began offering online payments they were able to close their programs at the same rate of 2-3 weeks but they also received ALL of their deposits in that same time frame! This made a huge difference for them and the way they can ultimately do business!

*Online payments are the fastest growing method of payment, even suppressing cash as the preferred method for consumers and there's a reason.*
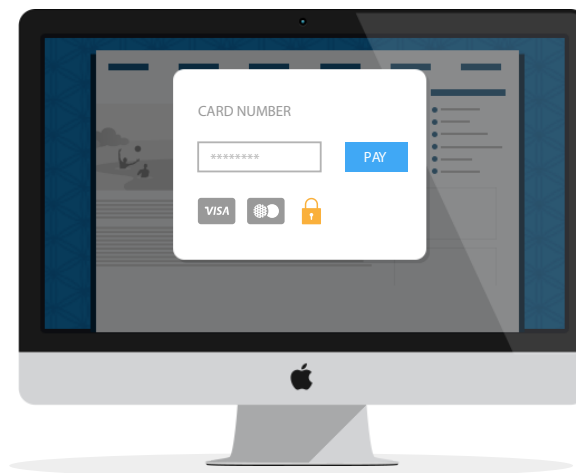
Online payments are the fastest growing method of payment, even suppressing cash as the preferred method for consumers and there's a reason. While paper checks and cold hard cash were the currency of the 20th century, the 21st century is all about the credit card. Credit cards and online transfers are safer, faster and always available. While that's all well and good, actually transforming YOUR small or medium sized business from cash and checks to online payment processing can be scary and overwhelming. First of all, there is a cost associated with accepting payments online. And second, there are more things to worry about which could take precious time away from your other tasks, or so you think.

## Is switching to online payments worth the investment?

### 1. You get your money faster!

No more waiting for checks to clear or even arrive in the mail! Purchases made online are transferred quickly so you have more cash at your disposal. Your cash flow will improve, which will allow you to pay for business expenses more quickly, saving you time and money. More important, you will know right away which clients you should be holding a spot for in your program. How many times have you heard "the check is in the mail" and it never arrives? With online payments this will never happen. That spot which before would have been wasted revenue, can now be given away to another paying client.

### 2. Better for your clients.

Let's face it, people will always choose the easier option. Typing in credit card information (that they might even know by heart) or entering an e-check into an online system is way faster and easier than writing a check, stamping and sealing an envelope and putting it in the mail. Make it easier for your clients to pay you! Offering online payments will net you more clients paid in full for your services in a faster amount of time than traditional methods.

### 3. Streamline your accounting.

Online payments allow you to account for your client's money automatically. When someone posts a payment online it is automatically tagged and connected with that client in your database. No more guessing what check goes with which client. Online payments also make it easier to communicate to your clients their balance due as well as allow you to see how much money you are taking in daily, monthly, weekly and beyond. Your bookkeeper will love you for doing it (after they admit they were wrong in trying to convince you NOT to move to online payments)!

### 4. Prevent fraud, mailing and accounting errors.

Offering a safe and secure payment process online for your clients prevents fraud and other unfortunate errors when sending money through the mail. Moving money back and forth between clients, for instance in the case of a refund, takes a few clicks instead of tons of paperwork and the work of several of your staff.

### 5. Receive payments 24/7, not just when you're at your desk.

The best reason to switch to an online payment process is your business is essentially open 24/7. You will receive and process revenue at all times instead of only when you're in the office. Your clients can pay quickly and easily at their convenience and everything, data and multiple payments, are safely stored online. Having registration and payments all in one place ensures on time and early payments, safe and secure processing and the ultimate data management and accounting tool!

While the cost to process payments online is more than traditional payment processing, the time and money you save in the long run far outweighs the cost to offer this service. So what are you waiting for?!

*How you price your services also determines whether or not you'll have a red bottom line or a smiling black one at the end of each quarter.*

Business is simple, right? You offer a service for a fee, the client pays your fee and you make money. Rinse and repeat. However, the way in which you price your services can determine how many paying and repeat customers you get vs. how many potential customers might walk away. How you price your services also determines whether or not you'll have a red bottom line or a smiling black one at the end of each quarter. In a way, your business' pricing model affects every single aspect of your business. Which means you have to get it right, right?

The name of the game these days is make it simple. You might not be the cheapest on the market, but if your pricing is the simplest to understand you can count on beating out your competition! Clients want to understand what they are going to pay so they can plan ahead. They don't want to wade through fine print, tons of options that confuse them and they don't want any surprises. Structure a pricing plan that avoids these pitfalls and you will grow your business. If your pricing model is confusing to a customer, they will probably go elsewhere.

When advertising your services and their cost, stick to keywords that jump out at people and make them feel at ease. Phrases, like the ones below, are great to use (and it goes without saying these phrases should also be true, not just for show, but we're saying it anyway):

✔ Simple (duh!)

✔ Straightforward

✔ No Nonsense

✔ No Hidden Fees

✔ No Fine Print

If relevant to your business, offer a few different packages and include a chart that easily and visually compares what each package offers so it is clear what more money buys the client and also what they can get for less! A great idea is to reward customers who pay more in advance with discounts. If you offer swim lessons, for example, charging $50 for a lesson but $95 for two lessons is a great way to lock people in for repeat visits while also making them feel like they aren't getting hosed and are being rewarded for loyalty.

Consider simplifying your pricing even if you offer a wide range of services. It might be that every service you offer should in theory have a higher or lower price in comparison but try streamlining so as not to confuse or overwhelm your customers with too many options.

**For example,** if you offer a variety of services to both children and adults, try creating a simple "Child" price and "Adult" price with overly expensive "add-ons" limited and priced out separately or create tiers of services for children and adults with separate pricing for each.

*Automation can be a great solution to this problem and is a solution you should consider implementing.*

If the above suggestion isn't feasible for what you offer (or even if it is) consider automating your pricing! Especially if you have a lot of products or the discounts you want to offer (like in the swimming example above) your pricing strategy is probably not optimal and you might be stuck trying to figure out how to simplify and streamline your pricing system. Automation can be a great solution to this problem and is a solution you should consider implementing.

# How do you automate your pricing?

When you offer online registration and payments, automating your pricing is easy to do. As each user selects the products or services they want, the system can automatically calculate the price owed, add the appropriate discounts and formulate the correct package based on their selections. As the user changes or removes selections, the price dynamically changes with it. A user simply has to click what they want and their price is automatically generated, so they get a simple and clear understanding of what they owe and can easily make changes if they want to pay less or test out what their cost would be if they added more services.

Usually this kind of customization can cost big bucks for a business to implement. You always have the option of hiring a developer to implement this, but what happens when your pricing changes (as it does and will do constantly). Amdocs for example offers a dynamic pricing and billing technology but the cost is upwards of $100K. Yikes! There are ways to create this system for less. Companies like Regpack offer automated pricing as part of their custom registration which can be a great and more affordable option.

Simple should extend from every point, not just your price. While price is key, no one will even consider working with you

if accessing your services is also confusing. If the process to sign up and register, for example, for your February course is complicated, long and time consuming you've just lost a customer. Simple and easy sign-up and registration processes coupled with an easy and straightforward way to pay AND a simple pricing model is the ticket to happy, satisfied and MORE clients. Making your pricing easy and clear to understand means less time explaining how things work and more time getting stuff done.

Our biggest piece of advice is simple (see what we did there?!): look at what the norm is for your industry and build from there. Or go a step further and change your industry standard if you feel like the norm can be confusing or isn't optimal for your customer base. This will help your company stand out amongst your competition and can give you a leg up. For almost any company big or small, simple and straightforward pricing works, period.
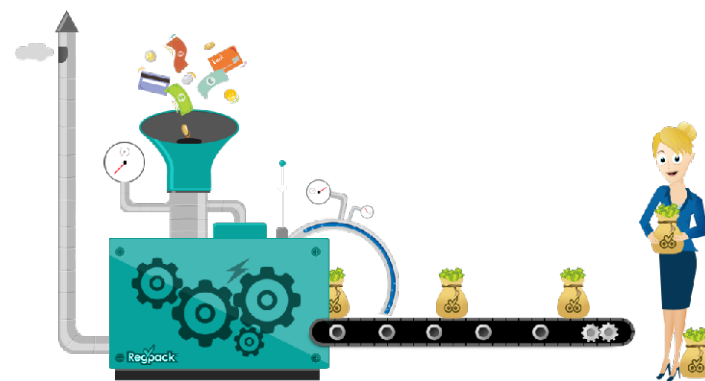
# PART 8: CONCLUSION

**When looking for an online solution for your registration process and application, the biggest piece of advice is first truly identifying the challenges you are facing with your current process and what aspects are most important to you.**

Shop around, do demos, read the white papers, ask questions. This way you will educate yourself about what is out there, what is possible, and most important what you need! Your goal should be finding a software that automates your individual process as much as possible. Don't just choose the software based on "general features", choose it based on features you need and will be using. Compare the time (and money!) you are spending to accomplish registration related tasks (from marketing to invoicing to communication) and compare the cost of a system. Most likely, spending money on a software solution for your registration is WORTH it but only if you find the right system that is optimal for your organization and your budget.

Your application and registration process serve many important functions for your business. Not only does it provide the information you and your staff need to evaluate your applicants and build your programs, it is also the first point of contact that potential clients make with your business. For this reason alone, having an efficient and seamless system is imperative.

*Having an online registration software that allows you to customize your process with infinite options so the choices are endless is key to a successful registration season, lightening your work load and improving your completion and payment completion rates!*

It's important that when asking questions and creating forms for your client that you get it right the first time. Keeping in mind the stark reality that at any moment you could lose a potential client to your competition should serve as motivation to get your process on target ASAP. If a registrant feels like your process is frustrating, confusing or too time consuming, they will stop and go somewhere else.

On the flip side, even if you have an easy and straightforward process, if you aren't getting the information you need, you are just creating more work for yourself and your staff. And worst of all you might lose a few clients along the way when you contact them to gather more information or to follow-up with any unanswered questions. Not good!

Remember applicants don't know what goes on behind the scenes, and frankly, they don't care. So if you find yourself asking applicants more questions via follow up emails and phone calls after they think they have completed your application is just bad business and will send them packing.

Having an online registration software that allows you to customize your process with infinite options so the choices are endless is key to a successful registration season, lightening your work load and improving your completion and payment completion rates!

Happy registering!