

Problem Statement: Event Registration App on Salesforce

Phase 1: Problem Understanding & Industry Analysis

1. Industry Overview – Event Management & Registrations

Organizations across industries regularly host events such as conferences, workshops, training programs, webinars, and networking sessions. Traditional event registration and management often rely on manual processes, spreadsheets, emails, or fragmented third-party tools. These methods lead to inefficiencies such as duplication of data, missed communications, and lack of centralized information.

As the demand for hybrid and virtual events grows, companies are moving toward digital platforms to automate event registration, provide real-time updates, and deliver personalized attendee experiences. Salesforce offers the flexibility and scalability to streamline these processes, ensuring smooth event execution and measurable outcomes.

2. Business Problem Statement

A mid-sized organization faced multiple challenges in managing its event registrations:

- Event and attendee data scattered across spreadsheets and emails with no centralization
- Manual registration processes leading to errors and delays
- Lack of automated confirmation and reminder notifications
- Difficulty in tracking attendance, cancellations, and waitlists
- Limited visibility for organizers into event performance and attendee engagement
- Absence of real-time reporting and analytics for decision-making

These issues caused inefficiencies, reduced attendee satisfaction, and limited insights into event success.

3. Objectives of the Salesforce Solution

The project aims to implement a Salesforce-based Event Registration App to optimize event management and registration by:

- Centralizing event, attendee, and registration data into a single CRM platform
- Automating event registration, confirmation, and reminder workflows
- Enabling role-based access for organizers, admins, and participants
- Providing dashboards and reports for tracking event performance and attendee engagement
- Sending automated updates, notifications, and feedback surveys to participants
- Allowing seamless scalability for handling multiple events (onsite, online, or hybrid)

4. Why Salesforce for Event Registration?

Salesforce offers a powerful ecosystem to streamline event management through:

- Custom Objects for Events, Attendees, Registrations, and Feedback with clear relationships
- Automation tools (Flows, Approvals, Notifications) to simplify registrations and communication
- Validation Rules to maintain data integrity (e.g., preventing duplicate registrations)
- Reports & Dashboards for insights into attendance, engagement, and event ROI
- Role-based Security to control access for Admins, Organizers, and Participants
- Scalability & Integration with marketing tools (e.g., Salesforce Marketing Cloud) for end-to-end event campaigns

5. Expected Impact

By implementing Salesforce CRM for event registration, organizations can expect:

- Seamless registration process with reduced manual intervention
- Improved attendee experience through timely confirmations and reminders
- Greater transparency and control for organizers

- Real-time insights into registrations, attendance, and feedback
- Enhanced collaboration across teams managing events
- Improved event ROI through actionable analytics and reporting