

Phase 1: Problem Understanding & Industry Analysis

Project Title: Event Registration Management System

Problem Statement

Organizations and event organizers face significant challenges in efficiently managing the entire event registration lifecycle. Current reliance on manual processes, spreadsheets, and disconnected tools causes errors in attendee data, overbooking, delayed communications, and overall poor attendee experience. These inefficiencies lead to increased operational workload and affect event success, marketing effectiveness, and customer satisfaction.

The proposed Event Registration System built on Salesforce aims to:

- Centralize event and attendee data for better visibility and management.
- Automate workflows including registrations, confirmations, cancellations, and reminders.
- Enhance attendee experience through real-time updates and seamless communication.
- Provide dashboards and reporting for actionable insights into event performance.
- Ensure data accuracy with validation rules and duplicate management.
- Support secure, role-based access to different users such as organizers, attendees, and marketers.

1. Requirement Gathering

- Maintain a comprehensive record of events, sessions, locations, and attendees within a single Salesforce system.
- Automate registration confirmations, reminders, waitlist management, and cancellation notices.
- Track event capacity and automatically manage waitlists when events are full.
- Enable role-based access for event organizers, attendees, and marketing teams.

- Provide reporting and dashboards for real-time registration analytics and event insights.
- Integrate with payment gateways and calendar systems to enhance user experience.

2. Stakeholder Analysis

Stakeholder Role	Responsibilities
Event Organizer	Creates and manages events, tracks registrations, monitors capacity
Attendee	Registers for events, updates registration details, accesses event information
Marketing Team	Tracks leads generated from event registrations, runs campaigns
Admin/System Administrator	Maintains Salesforce org setup, manages users and permissions

3. Business Process Mapping (Sample Flow)

- Event Organizer creates an event with all details such as name, date, location, and capacity.
- Registration opens and attendees register via a Lightning web form or portal.
- Automated confirmation emails and reminders are sent to attendees.

- Registrations are monitored; when capacity is reached, new registrations go to a waitlist.
- Event Organizers monitor registrations and attendee status via dashboards and reports.
- Post-event, attendance is recorded and feedback requests are sent automatically.
- Leads are generated from registrations and handed over to marketing/sales for follow-up.

4. Industry-Specific Use Case Analysis

- Corporate events and conferences requiring efficient management of thousands of registrations.
- Training sessions and workshops needing session-wise capacity management.
- Community meetups where organizers need quick registration and communication.
- Product launches and demos requiring integration with payment and calendar services.

5. AppExchange Exploration

While Salesforce AppExchange provides event management apps, this custom-built solution will be focused on:

- Tailoring event registration features specific to organizational needs.
- Leveraging Salesforce automation (Flows, Process Builder, Apex) for scalable management.
- Implementing custom objects and Lightning Web Components for improved UX.
- Ensuring compliance with data security and privacy standards.

- Integrating seamlessly with existing Salesforce CRM and marketing clouds for lead management.