

Registration Software Checklist

This is a guide to help start the search for the right software for your department. Distribute it to all parties involved in this process, as different people/roles will have different needs.

Remember that no software will likely meet all your requirements out of the box. There's a worksheet at the end of this document, so be sure to fill it out.

Identify Requirements:

- How many people are going to use the software internally?
- Do you need any integrations?
- What are the most important features you need this software to have?
- What challenges are you trying to overcome?
- What goals would you like to achieve by using this software?
- Who are the stakeholders? Depending on the size of the group using the software, there may need to be a point person for each sub-set of the user group (continuing education, workforce, lifelong learning, youth programs, contract training) instead one for the entire department.

Research & Compare Options:

- Search Google, review websites (Capterra, G2, etc.), and software directories.
- Put together a small list of registration and course management software for Continuing Education to investigate and review with your team.
- Consider the features, goals, and challenges identified above that are important to you in your search.

Read Reviews & Seek Recommendations:

- Checkout reviews from reputable sites like Capterra, G2, etc. (start with a search for non-credit registration software or registration for continuing education).
- If you or your department is attending conferences, visit with the exhibitors.
- Request references from a few vendors and contact existing customers directly.
- Inquire about their experiences, challenges, and satisfaction with the software.
- Ask about the vendor's implementation process, responsiveness, and support quality.

Request Demos & Trials:

- Contact a short list of up to 10 vendors via their website or email to set up a discovery call for asking questions and determining a good fit.
- Set up demos with the vendors.
- Ask the vendors about trials or sandbox environments to preview the software.
- Follow up with the vendors via email with any post-demo questions.

Consider Support, Security, & Scalability:

- Ask about the timeline for implementation.
- Inquire about customer support offerings, including response times and availability.
- Find out how training is offered during implementation.
- Check if there is documentation or a help center available.
- Ask if there is a user community or user conference.
- Understand the protocols in place for user security and data protection.
- Assess the scalability of the software. Will you be able to grow your business while using this software long-term, or will you need to switch again in the near future?

Evaluate Cost & Licensing:

- Understand the software's pricing structure, including upfront costs and ongoing fees.
- Determine if the licensing model aligns with your budget and usage requirements.
- Consider any additional costs for customization, implementation, or integration.

Consider Integration & Data Migration:

- Assess the software's compatibility with your existing systems.
- Determine if it supports integration with other tools or platforms you use (College ERP, Learning Management Systems, Payment Gateways, Identity Management Providers, etc.).
- Evaluate the ease and cost of data migration from your current software.

Make an Informed Decision:

- Consolidate all the information gathered during the research phase.
- Evaluate the shortlisted options based on requirements, reviews, and trials.
- Consider the overall fit, including functionality, user experience, support, security, scalability, and cost.
- Seek input from key stakeholders and decision-makers.
- Make an informed decision based on your evaluation and select the software that best aligns with your needs.

For more information about Enrole Registration Management, go to www.entrinsik.com/enrole

Registration Search Worksheet

What are the most important 5 features you need this software to do?

#	Requirements
1	
2	
3	
4	
5	

What are 3 challenges you are trying to overcome?

#	Challenges or Problems to Overcome
1	
2	
3	

What are 3 goals you'd like to achieve by using this software?

#	Goals to achieve by using this software
1	
2	
3	

Identify stakeholders. Depending on the size of the group using the software, there may need to be a point person for each department instead of the whole department.

Name	Department	Email

Identify 5 solutions that may address your registration software needs. Review these with your team.

#	Software Name
1	
2	
3	
4	
5	