

# Project Management:

## IN CON

“Working with clients and managing their expectations,”



Establishing strong relationships with clients is key for a Professional Conference Organiser (PCO) to achieve success and the Project Manager is the face of the PCO.

### Understanding the client

It is crucial in the initial stage for the Project Manager to receive a thorough briefing on the background of the client event in the handover from the sales team. The first meeting agenda should allow for discussion of the financial and non-financial objectives, marketing and sponsorship targets and the delegate profile.

The Project Manager needs to know who has contracted the PCO (in other words who is the client?) and what relationship and expectations exist between the organising committee, the national association and international body. Who are the decision makers, how is each party to be involved and what are the lines of communication? This enables allocation of roles to the right people within the organising committee for scientific program, sponsorship and marketing in conjunction with the PCO. The Project Manager needs to understand the individuals, professionally and personally and how and why they wish to be involved in the planning. The chairperson must be a good leader and oversee the members in their roles.

Different personalities communicate differently – formally, casually, promptly, slowly etc. The Project Manager needs to adapt quickly and learn to work with them in the way that suits whilst at the same time balancing the challenge of managing a number of clients and conferences thus management should be firm with clear guidelines for communication and planning.

### Team work

Clients are experts in their industry sector and therefore should guide the PCO by sharing their knowledge and experience in past conference history; program themes and experts in the field to be invited as speakers; delegate expectations; marketing to the right people in the right places; sponsorship and exhibition, targeting the right sponsors at the right level; budgeting to qualify expected income and required items for expenditure. A detailed project plan is essential to encourage a collaborative approach clearly delegating responsibility to the PCO or the client to achieve outcomes.

### Developing and maintaining client relationships

It is important that the Project Manager develops strategies such as the following while maintaining client relationships to foster cohesion and trust:

- **Set realistic turnaround times and deadlines** considering client commitments
- **Be understanding and listen**
- **Share your experiences** with clients so they realise you have the expertise to guide and assist them (share case studies or testimonials)
- **Re-visit expectations and objectives** regularly and revise strategies as necessary to meet objectives
- **Transparency.** When external factors beyond your control impact negatively on planning, inform your client so they become aware of your challenges and how you are dedicated to the success of their event
- **Be adaptable.** Understand that sometimes boundaries change and within reason, work with the client to adapt.
- **Portray yourself** – allow your clients to know you as a person, not just a professional. For example, share hobbies or personal interests
- **Tailor your communication language** to reflect their level of formality
- **Celebrate conference and client milestones.** Take a treat to a meeting if you reach a budget or program target, or send a birthday card

### Client expectations

Clients have a right to a high expectation of their PCO for the success of their event. In recent years clients are more experienced and becoming more accustomed to planning processes and practices with some clients expecting to be more actively involved. On the other hand many clients are time poor and wish to delegate most action to the PCO.

Our industry, through industry forums and shows such as IMEX, AIME, EIBTM and even the internet, is constantly educating clients on trends, opportunities, even competitor services. Particularly with repeat clients, we are sharing our expertise and providing client training.

There is an increasing focus on the return on investment (ROI) from PCO management and service fees. Therefore one of the challenges PCOs face in this decade, is satisfying a client's changing expectations whilst continuing to invest in the development and growth of the PCO's business to be able to deliver in an environment of rapid change and increasing demands.

From the outset of the relationship it is crucial to clearly outline each party's role, expectations and objectives for the conference. That way, the PCO can strive to meet and even exceed their client's expectations .

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