



Recommended Process for selecting your Professional Conference Organiser (PCO) or Event Manager

When an organization decides it would like to appoint a new service provider, it is not uncommon to go through the process of sending out an RFP (request for proposal) to a list of potential partners. This process can be time consuming, costly and divert staff and volunteer resources. What is a challenge for those receiving these generic RFPs is the time it takes to provide quality feedback and give the organization what it really needs to make a productive decision. Sending out blanket RFPs, without going through a prioritization process can impact not only who responds, but again the quality of the information received.

Below are some guidelines to help put a more efficient and effective RFP process for both the submitters and recipients.

Recommended RFP process to select a PCO or Event Manager

- The first step is to establish whether you really need to go through the RFP process. Having a dialogue with your current service provider including providing meaningful feedback and working as a partner to iron out any differences can save your organization time and money.

- However, once you have made the decision to move forward, it is important to restrict the number of PCOs offered to bid to no more than **four companies**. The reason for limiting the number is the amount of time it takes to analyse each tender, interview each applicant and determine the best match between the PCO and the Organising Committee. A professional approach is to allocate the appropriate time to investigate your organization's needs with the skills and experience of those you select to tender.

- Take the time to do **proper research** to identify suitable PCOs that match your needs. It is a good learning exercise to understand who the different PCOs are and why they have developed their reputation. A good source of information for a list of credible PCOs is the convention bureau in the destination where your meeting will take place as well as advice from contacts who have used PCO services in the past or to simply consult the list of [INCON partners](#).

- Establish clear **objectives and requirements** from the outset. If you are using your own standard RFP document please update it with relevant details about current conference needs. You should also include your anticipated final interview date in your RFP.

- **An industry standard RFP document** has been created which we encourage all clients to use. This RFP is available in 14 languages and can be adapted to suit the

needs of each individual client. Please [click here](#) for a copy.

- Provide an **open door approach** to all inquiries from the PCO which will help you get to know the PCO and whether they might be a good fit for your organisation in the future. Relying only on responses to a questionnaire without direct engagement with your potential provider may save time, but your organization will miss out on valuable dialogue to learn more about the potential partner.

- Some common pitfalls that you should try to avoid include:

- **Fees and costs** are not the most important selection criteria especially as they make up only 10-15% of the budget. It is more important to assess the PCO's ability to do the job.

- The selection process should focus on each candidate's business management and organisational **ability**, the commitment to the project, their **experience** in similar meetings and their **references** (not those given by their best friends—but an objective assessment from past clients—sometimes even criticism can be a good thing.)

- Be considerate of all parties and have **realistic expectations** for turnaround times. For instance setting a deadline of four to six weeks over a holiday period is not realistic. You should allow sufficient time for research and the preparation of a tailored offer which is reflective of your needs.

- Be efficient, provide a **timeline** for the various stages of the procurement process and adhere to it. Also it is common practice to acknowledge receipt of tenders.

- Do not set unrealistic expectations and be as honest as possible about the history

of the Congress. It is important to provide **reasonable targets not aspirations**.

- PCOs that take the time to respond to RFPs consider it as a cost to the company. Thousands of dollars and a huge amount of time is wasted by many PCOs and other parties who are subject to requests when it is a token process, a scattergun approach or a fishing expedition. Only start an RFP process if you have a **clear intent** to engage the services of the tenderer (fictitious procurement processes are not viewed favourably in the industry and can impact your ability in the future to secure the services of strong partners).

If the RFP process has integrity then the ability to analyse the best PCO candidate for the job has a much better chance of success.

Top 7 Steps to a Good RFP Process

1. Conduct preliminary research to determine the most suitable PCOs (no more than four).
2. Compile a meaningful RFP document.
3. Confirm each of the PCOs that have responded positively to your offer. If any decline, determine the need to send the RFP to the next PCO on your reserve list.
4. Review the proposals to gain an understanding of the offering.
5. Confirm receipt of the proposal and the anticipated interview time and date.
6. Allow a minimum of one hour for each interview with time in between for discussion.
7. Inform all the PCOs of the outcome and provide an opportunity to give feedback.