

# FANTASY CLIENT Or Client Fantasy?

**A**s an independent consultant, destination management company or meeting planning company, how well do you qualify leads, projects or organizations knocking on your door with business?

Most of the time we've heard of the company or organization that we submit proposals to, but occasionally, especially with an association or group for every interest, profession and hobby, it may be that you're not familiar with the clients who approach you for your services. Do you research them before you prepare a proposal? If not, you should. Sometimes, albeit rare, the organization and project could be just a figment of someone's imagination.

In June, I followed a lead to nowhere. I had the time, the project intrigued me and the promise of big money was alluring. That should have been the clue that all was not as it seemed. I didn't see any reason to be suspicious. Why have a meeting planner research sites for an event that wasn't going to take place? That wouldn't make sense. Besides, the potential client was smart enough to want a professional and had called the local Meeting Professionals International chapter for a referral.

The director of the organization was charismatic. He spoke well, and the materials he presented were well written. He sometimes leaned toward the grandiose, but his enthusiasm was infectious. Also, the meeting and the project—a new building in New York City—sounded realistic.

Two weeks after starting the project, I learned I'd been chasing rabbits. We normally require a deposit but had begun initial work on good faith. We were told there would be an electronic transfer. Then a check was to be sent but it simply didn't materialize. Although we had a signed contract, it became clear that our fantasy client was becoming a client fantasy. We did not pursue legal remedy, expecting it would prove more costly than letting it go as a hard lesson learned.

My losses were two weeks of impromptu meetings and \$150 for a car rental for a day of site inspections and film developing for location pictures. Nevertheless, I consider myself lucky. Word has it that a computer

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A large, stylized monogram of the letters 'M' and 'B' in a serif font, with the 'M' and 'B' overlapping.

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company, hotel and construction company, among others, also failed to verify this organization and had losses starting at \$30,000. No one wants to lose this kind of money, but independent meeting planners must be especially careful.

It pays to do the research and even get a background check on first-time clients. Require a deposit for services at the time of the contract signing. Any legitimate organization will provide a timely deposit to start the project, and if they need research done yesterday, then they can get a check cut yesterday as well.



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Here are some suggestions about verifying a client's existence:

- Meet them in *their* offices. Make sure they are listed on the tenant directory of the building.
- Ask if they have a Web page or try finding it on your own. Most organizations use their name.org as their address. Try that first. If it fails, try your favorite search engine or yellow pages.
- If a prospective client is a name-dropper, try calling some of the people. For example, if they mention that a public relations firm is

working with them, call the PR firm and ask if the prospect is on their current or past client list.

- Whether on the Internet or by phone, contact Dun & Bradstreet. Nonprofit organizations and corporations often are listed. You may have to pay a fee for specific information.
- Ask the client about previous events then call the convention bureau, hotel and industry contacts to verify. Ask the facility to send you a wrap-up report of room pick-up, meeting space and catering used.
- Don't believe every written word. Letterhead and business cards are easily generated from personal computers and copy shops, and home pages on the Web are created from whatever information is supplied by the organization.

As a partner in business, you have the right to know about organizations wanting your services. Don't be afraid to ask hard-hitting questions. Potential clients feel free to ask you for references. You are entitled to check their references, too. After all, good business partnerships are two-way streets. Don't let yourself get caught going alone toward a dead end. ●

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