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Report to the Membership
September 1996

*"... building professionalism
in project management ..."*

*PMI Strategy:
To develop and implement a world class marketing program for PMI.*

Introduction

Shortly after assuming the elected office of Vice President-Public Relations in 1995 and discovering the extensive activities performed by the very limited resources at PMI's Executive Office, my main objectives were to 1) organize and formalize a written Marketing and Public Relations Plan; and, 2) expand the volunteer marketing team contributing to these activities.

Both Short and Long Range Marketing Plans were developed and submitted to the PMI Board of Directors for approval. Two main aspects of PMI's current Marketing and Public Relations program were implemented in 1995 and continue in 1996. The first major change was that PMI's marketing and PR activities were grouped into categories of activities which would help us to focus our energies and resources in line with the strategic plans of the entire PMI organization. The second major change was the expansion of the Marketing Team to include teams of PMI members, lead by Assistant Vice Presidents, in an effort to expand PMI's presence, reputation and members in selected "target markets", specifically the US Government, major corporations and the academic community.

While our Plans identified many objectives and activities needed to meet PMI's strategic goals, activities were prioritized against our limited resources of staff, volunteers and funds. Two areas still in need of more support include market research and academic relations. I am extremely proud of what we have accomplished in the past two years and highlight our most recent activities and accomplishments in the following paragraphs.

Marketing/Public Relations Management & Administration

Marketing Management: PMI's Vice President - Public Relations, who is organizationally responsible for planning and overseeing PMI's marketing and PR program, performs all work necessary to fulfill those responsibilities. Work has and will continue to include the completion of necessary plans and proposals required to organize and initiate desired marketing and PR activities in the near term, as well as on-going efforts to identify and recruit volunteer leaders and participants willing to contribute to PMI outreach efforts.

Marketing Administration (Executive Office): PMI's marketing administration is primarily performed by PMI's Marketing Manager, Karen Alfonsi. This position directs, administers and oversees all marketing activity performed by support staff at the PMI Executive Office, as well as professional activity for which PMI established contracts with outside organizations. During 1996, PMI's Marketing/PR staff have done an outstanding job of responding to inquiries, interfacing with the press, developing new materials and supporting all of PMI's marketing/PR activities.

Marketing Team Meetings & Activities: Our original intention was to conduct Marketing Team Meetings at least twice each year during PMI's bi-annual board meetings. Marketing Committee Co-Chairs, Lorraine Reiger and Sam Mack, were able to attend and make presentations to Chapter Presidents and Specific Interest Group Chairs during these meetings. Routine contact between the Vice President-Public Relations and volunteer marketing team members was maintained via phone, correspondence and several personal meetings.

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1996 General Marketing & Public Relations Programs

Marketing Materials: We have been working toward the establishment of a strong corporate identity on all PMI print pieces and marketing materials. The graphic design elements introduced in the new *PMI Membership Benefits and Applications Brochures* (targeted to both individuals & corporations) was carried through on the newly released *PMI Pocket Folder* (used for distributing information packets), the new *Standards and PMP Certification Brochure*, *Certification Qualifications Application*, *PMI Career Link Brochure*, *PMI'96 Annual Seminars & Symposium brochures* and the *PMI'96 Official Program*.

Efforts to establish this corporate identity were also extended to the PMI Publishing Division, who used the same graphic design firm to create their *PM NETWORK/PMJ Media Kit* and *related advertising materials*, as well as the *1996 Seminars USA catalog* released in early 1996 by the PMI education department.

Publicity: PMI renewed a contract with public relations firm, Eisner, Petrou & Associates in Washington, DC, to assist with publicity and public relations activities. News releases were distributed in 1996. Subjects of the releases included PMI's *A Guide to the Project Management Body of Knowledge*, the PMI Educational Foundation's *1996 Salary Survey*, Board Election Results, the Annual Seminar/Symposium, and numerous other PMI product and service releases made in 1996. Based on the circulation figures of those business and trade publications which indicated future publishing of our news release information, the potential exposure for PMI is over 15,000,000 readers.

Our public relations activities also help to establish PMI as a leading source of information for the project management profession. Major articles referencing PMI as a source for more information include, but are not limited to, the following:

- Aug 1996:** "Flying Solo: High-Tech Nomads Write New Program for Future of Work", August 19, 1996, *Wall Street Journal*
- Jun 1996:** "So Many Vendors, Too Many Questions", June 20, 1996, *Computing Canada*
- May 1996:** "Project Management Software: Functional or Fashionable?", May/June 1996, *Software Solutions*
- Apr 1996:** "IS-Friendly Project Management", April 1, 1996, *Datamation*
- Mar 1996:** "Project Management at Ground Zero" and "Project Management: Turning Fuzzy Ideas into Reality", March 1996 issue, *Government Technology News*

Advertising: Our advertising program continued in 1996 with efforts targeted to twelve (12) publications in the construction/engineering, information systems, telecommunications, financial services and environmental industries. Five (5) testimonial advertisements plus one advertisement for the PMI'96 Annual Seminars & Symposium were used to promote the Institute. Advertising must be repetitive to be effective, so we want to continue to concentrate our efforts in a few targeted publications rather than placing one ad in numerous publications.

Nearly 2,000 inquiries a month are received from individuals contacting PMI for the first time. Over 10% of these prospective members can be directly traced to advertising/publicity. When asked how an individual contacting PMI heard about the organization, advertising is second only to employment management which generates more than 25% of our prospects. Indirect benefits of advertising include increased awareness and recognition of the project management profession and PMI.

We also created an advertisement to members in 1996 offering bulk quantities of PMI Membership and Certification brochures. Since many members provide project management products and/or services, the distribution of PMI information provides their customer base with additional resources for project management information, thus adding value to the product or service offering. An additional advertisement for the PMI Educational Foundation's 1996 Salary Survey was also generated in 1996.

Trade Shows: PMI exhibited at numerous tradeshow and conferences in 1996 including the ABT Project Leadership Conference, Boston University's Frontiers in Project Management, ProjectWorld, and the IPMA'96 World Congress on PM in Paris. Tradeshow representation helps establish and maintain PMI's image as the leading project management association while generating new members and incredible exposure as the majority of these conference organizers are advocates of PMI and provide a nice write-up about the benefits of membership and/or PMP certification in their literature.

On-Line/Electronic: PMI program areas are utilizing the WWW for promotion. PMI's home page contains information on chapters, SIGs, the Annual Seminar/Symposium, Seminars USA, the PMBOK Guide, the Information SourceGuide and other related data (visit <http://www.pmi.org>).

The Web actually creates an alternate medium for advertising and public relations efforts. PMI marketing staff have been using the web to identify other sites which should receive news releases about our products and services. With so much frenzied activity on the web, it is hard to get our hands around this area without the staff time required to organize specific searches and tracking. We did test one advertisement in the WWW Directory of a trade publication and received close to 400 visits to our website as a result.

Direct Mail: Direct mail is utilized less than most other means in our marketing program, however the education program used it extensively for the 1996 Seminars USA. The key to direct mail success is the mailing list. Project management remains a profession with very little identifiable inclusion within the mailing lists available through list firms. PMI has the best list of prospective members with more than 2,000 direct inquiries per month.

Sector Oriented Marketing

Corporate Relations: The majority of corporate relations is currently provided by the Corporate Membership Coordinator at the PMI Executive Office who serves as the PMI liaison with organizations who express an interest in corporate membership. In reality, chapters serve as our front line sales force. Chapter leaders make presentations to corporations in their local area - and provide programs that can serve their local project management community on a more personal level. The redesign of existing PMI marketing materials was specifically initiated for Corporate Marketing purposes, and we are happy with the professional image portrayed by these materials. We have admittedly had a difficult time finalizing and distributing a high-quality professional presentation for chapters to use on their visits to local organizations. PMI's corporate marketing relations activity has been led in 1996 by Karen Alfonsi, PMI's Marketing Manager and Phil Simpson, Assistant Vice President of Corporate Relations.

Government Relations: Following the signing of Partnering Agreements with the US Army Corps of Engineers and US Department of Energy in 1995, PMI has continued to make progress in this area. A new partnering agreement with the US Department of Defense has been initiated, based on meetings between PMI's Vice President-Public Relations and DoD representatives in the Pentagon, and has now been reviewed and signed off by the DoD organizations affected. This new agreement should be approved and implemented in late 1996 or early 1997. Additional partnering agreements are being discussed with NASA, the General Services Agency (GSA), and several other major US Government agencies.

Based on meetings between PMI and representatives of the US government, the first-ever "**American Project Management Forum**" was sponsored and lead by PMI on July 22, 1996. The American PM Forum, which will now continue in 1996 and 1997, included representatives of many US government agencies, major US government contractors from industry, and several professional societies, including PMI, PMA and NCMA. The American PM Forum will provide an ongoing opportunity for PMI to gain additional recognition, credibility and support among government leaders in Washington, DC, as well as US industry executives and organizations. PMI's Government Relations efforts are lead by the VP-PR and Mr. Rush Williamson, Assistant Vice President-Government Relations.

International Relations: As a result of the first "Global Project Management Forum" conducted by PMI last year in New Orleans, PMI has published a new book this year entitled *"Global Status of the Project Management Profession"*, a direct result of the international relations initiatives last year. A second Global PM Forum will be sponsored by PMI, and led by PMI's VP-Public Relations, at the PMI'96 Seminars & Symposium in Boston. These Global Forums bring together leaders of the project management profession from around the world to discuss important issues of common global interest such as international PM standards, certifications, PMBOK's cooperation, etc. They also provide a platform for presenting global project management issues and concerns, and encourage cooperation among professional societies in different countries and regions of the world. PMI's sponsorship of these Global Forums reflect PMI's leadership in the increasingly important globalization of the project management profession. The 1996 efforts will result in an update of the book "Global Status of the PM Profession", scheduled for release in early 1997.

In addition to the Global PM Forum, PMI's VP-Public Relations met during 1996 with leaders of project management associations in other countries, including Austria, Australia, Canada, Finland, France, Germany, Great Britain, Egypt, India, Norway, Pakistan, Portugal, Spain, Russia and Ukraine. In June, PMI's VP-Public Relations also participated in a small Global Forum sponsored by IPMA in Europe, and participated in the IPMA'96 World Congress on PM in Paris, France. In November 1996, he will participate in a workshop in Kiev, Ukraine, sponsored by NATO in Europe.

Intersociety Relations: The PMI Vice President-Public Relations and Assistant Vice President of Intersociety Relations, Saralee Newell, have worked with Executive Director, Debbie Bigelow, and Chair, Roger Glaser, in the coordination and finalization of numerous intersociety agreements. Many additional organizations have been identified as prospects for future cooperative relations.

University Relations: PMI and the PMI Educational Foundation offer a number of programs to support academic relations (PMI highly subsidizes student discounts on membership dues, annual seminar/symposium fees, the PMI Educational Foundation supports the Student Paper Award, etc.) To truly make an impact in this area, PMI needs to provide educational support to introduce project management curricula and supporting classroom materials to universities. As mentioned in the introduction of this report, this is an area that is highly deserving of resource allocation.

In mid-1996, Dr. Fran Webster, Fellow of PMI and retired editor-in-chief of the PM NETWORK/PMJ, joined the PMI Marketing/PR Team as Assistant Vice President-Academic Relations. Dr. Webster has now prepared a strategy and plan for broadening and improving PMI relations and activities with academic institutions around North America. That plan is being reviewed and coordinated with PMI's Director of Education for implementation in 1997.

Chapter/SIG: During the March meeting of PMI's Council of Chapter Presidents and SIG Council, Lorraine Reiger and Sam Mack, co-chairs of PMI's Marketing Committee, along with Karen Alfonsi and other members of PMI's Marketing/PR team presented "A Bag of Tricks: Marketing PMI in 96". A special PMI-logo bag of new and updated marketing materials and information was presented to PMI leaders to help in their efforts to introduce PMI to local executives and industry leaders. This initiative was extremely well received, proving PMI representatives in various chapters around the world with marketing tools which were badly needed. Similar efforts and activities will be continued in future meetings of PMI leaders. PMI's marketing staff also provides direct support to program areas, including the compilation and printing of the monthly leadership newsletter called the PMI Bulletin distributed to Chapter Presidents and SIG Chairs.

Program Oriented Marketing

PMI's marketing staff also provides direct support to PMI program areas and uses the various marketing activities outlined above to promote PMI's programs, technical products and services. Advertisements focus on the benefits of membership, PMP certification and the annual seminar/symposium, while public relations activities generally announce the release of new publications, seminar offerings or other PMI products and services.

All program areas are thriving with record breaking activity in most areas is a testament to more and more successful marketing and public relations strategies and activities.