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INSURANCE & FINANCIAL MEETINGS MANAGEMENT

THE EXECUTIVE SOURCE FOR PLANNING MEETINGS & INCENTIVES

At Machu Picchu in Peru are *(l to r)* Karen Gunther, planner, Dynamix Meetings and Events; Bill Kavanaugh, SVP distribution management, Securian Financial Group; and Koleen Roach, director, meetings and conference management, Securian Financial Group.

International Incentives

Move the Motivation Factor Up a Notch

Page 12

Photo courtesy of Wayne R. Martin – MartinPhotoMedia

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Page 12

Securian Financial Group brought 90 Leaders Conference qualifiers to Peru where they marveled at the Incan ruin of Machu Picchu and the Sacred Valley of the Incas.

FEATURES

Page 22

DEPARTMENTS

Photo courtesy of San Antonio River Walk

Page 28

DESTINATION

Groups can enjoy themed events and dining experiences on river boats that cruise along San Antonio's River Walk.

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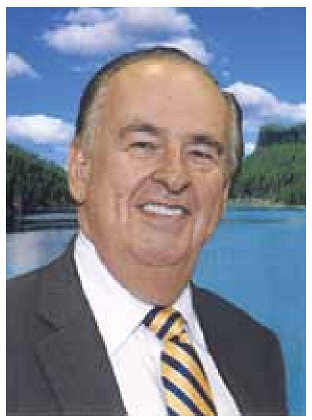
Publisher's Message

Peak Performance

Meeting Professionals International's (MPI) June 2011 Business Barometer indicates that the meetings industry continues along a steady albeit somewhat sluggish path to recovery. MPI's barometer, a bimonthly quantitative perspective of the global business of meetings and events, notes U.S. planners' No. 1 concern is still the increasing cost of fuel and travel costs. Across the pond, Europe struggles with low budgets and government budget cuts, but regional economies continue to show signs of recovery and support higher event activity levels.



Attendance level increases and growth in per meeting spending are both part of a more rosy picture. Moreover, 73 percent of Business Barometer respondents indicate current business conditions are favorable, up from 64 percent in April. U.S. and European respondents indicate net improvements in current business levels between 3 percent and 4 percent. Projected business levels remain high, showing an anticipated 4 percent improvement in the coming months.

In our cover story in this issue on page 12, "International Incentives: Move the Motivation Factor Up a Notch," we share the stories of insurance and financial services meeting planners who have discovered that events in international destinations can be very motivating and produce peak performance from qualifiers. As Chuck Lane, director of incentive travel for Green Bay, WI-based Humana says, "...going overseas provides people with something that they probably would not avail themselves of, and if they did, they probably couldn't do it without some of the imagination and access that we provide, working with vendors that enable us to get into venues that the average person couldn't." Koleen M. Roach most certainly agrees. The director of meetings and conference management for St. Paul, MN-based Securian Financial Group, staged, with help from an expert DMC, a dinner at the South African presidential residence, an experience she says, "would be the equivalent of having an offsite dinner at the White House."

Most recently, Roach and two of her colleagues, pictured on our cover in front of the world-famous Incan ruin Machu Picchu, joined qualifiers on incentive programs in Peru, Chile and Buenos Aires. "...We know our advisors work really hard to get to the level of performance they need to qualify for these trips, and we really want to make this a great experience for them," she says.

Harvey Grotsky

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The Homestead Marks 245-Year Anniversary

HOT SPRINGS, VA — The historic Homestead resort first opened its doors a decade before the American Revolution, and has been drawing guests to its home in the Allegheny Mountains of southwestern Virginia ever since. From George Washington to Bill Clinton, no fewer than 22 U.S. presidents have visited The Homestead, most notably Thomas Jefferson, who "took the waters," which are now known as the Jefferson Pools.

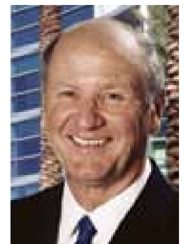
A special 245th Anniversary Meeting Package is offered throughout summer 2011 including luxurious guest accommodations with breakfast and dinner daily; morning and afternoon coffee breaks daily and a $20 activity credit daily. Rates for the meeting packages are based on a 25-room minimum. Rates start at $245 per person, per night, single occupancy and $175 per person, per night, double occupancy. The offer is available on special dates including: July 10–14, July 17–21, July 24–28, July 31–August 4, August 7–11, August 21–24, August 28–September 1, September 1–5.

Offering unparalleled hospitality and Southern charm, the Homestead features a full range of recreational activities within its 3,000-acre mountain setting, including the renowned natural healing springs, a world-class spa, three championship golf courses, a downhill ski area, a 48-stable Equestrian Center, one of the top-rated Shooting Clubs and many more options. The Homestead features 483 luxurious guest rooms and suites, 72,000 sf of meeting space, and fine and casual dining choices.

For more information, contact The Homestead at (877) 549-9506 or visit *www.thehomestead.com*.

Anaheim's Ambassador Program Is No. 1 in U.S.

ANAHEIM, CA — Anaheim Orange County Visitor & Convention Bureau's (AOCVCB) Certified Tourism Ambassador (CTA) program is the No. 1 CTA program in the country based on annual renewal percentages of more than 80 percent. Anaheim/OC's CTA program is comprised of more than 630 travel and hospitality professionals — ranging from frontline to executive staff. With more than 100 participating companies and more than 150 CTA taxi drivers in the destination, the Anaheim/OC CTA numbers continue to grow and build momentum since the program was launched in February 2009.



AHLERS

The CTA program is a nationwide certification program that goes beyond basic customer service training in order to provide visitors with a positive, impactful experience. The program provides in-depth information on the destination as well as best practices for providing exemplary service. Due to the success of the program, AOCVCB has launched an advertising campaign promoting the destination's CTAs entitled "Customer-centric." Charles Ahlers, president, AOCVCB, said, "We chose to create an advertising campaign around our CTA program for the meetings market because we feel that it speaks to our core values as a destination that prides itself on always providing exceptional customer service for our visitors and meeting planners." *http://anaheimoc.org/CTA*

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Seattle Hotels Propose $2 Fee

SEATTLE, WA — The Seattle Hotel Association and Seattle's Convention and Visitors Bureau are proponents of a plan to add a $2 per night fee to sales and room taxes to fill up the promotion coffers depleted when the state tourism office closed. According to msnbc.com, Tom Norwalk, president and CEO of Seattle's Convention and Visitors Bureau, says fees could raise an estimated $5 million to $6 million in 2012. "This is not unlike fees charged by cities such as San Francisco and San Diego, where the average room rates are much higher," says Norwalk. "For someone planning on booking a hotel room in downtown Seattle for $150 or $200 a night, a $2 assessment isn't going to be a significant barrier," says Howard Cohen, president of the Seattle Hotel Association and manager of three downtown-area hotels. "When the state was promoting tourism, Seattle benefited," Cohen said. "Now that no one is going out there to sell the state, we have to move forward for ourselves." If approved by the Seattle City Council, the new fee could go into effect by November and be added to the current 15.6 percent sales and room tax. *www.visitseattle.org*

NORWALK

Meeting Planners Invited to Los Cabos VIP Summit

LOS CABOS, MEXICO — The Los Cabos Convention & Visitors Bureau (LCCVB) will host its inaugural Meeting Planner VIP Summit, a hosted buyer program on October 30–November 2, 2011. Informational seminars and interactive events will take place at a variety of Los Cabos properties, including One & Only Palmilla, Dream Los Cabos, Puerto Los Cabos, RIU Palace Cabo San Lucas and Pueblo Bonito Pacifica. Complimentary registration for the VIP Summit includes accommodations for three nights in a top Los Cabos resort, breakfast daily, airport transfers, a 30-minute massage, one recreational activity, a complete itinerary of activities and programs for the duration of stay and special rates for early arrivals or late departures. Contact Adrian Schjetnan, LCCVB director of sales and marketing, at *adrian.schjetnan@loscaboscvb.com*.

Meeting Value Line

The Ritz-Carlton, Charlotte, Charlotte, NC. The Summer Meeting Offer, valid for meetings booked and held by September 5, 2011, allows planners to choose from two to eight of the following incentive options depending on the number of room nights booked: complimentary banquet breakfast daily or welcome reception; one complimentary banquet coffee daily; 1/20 comp room; 1/25 comp suite upgrade; complimentary Internet in guest rooms and general session meeting room; 15 percent attrition; 10 percent off AV and standard banquet menu F&B pricing. 704-547-2244, *www.ritzcarlton.com/charlotte*

■ **Lakeway Resort and Spa, Austin, TX.** The Meetings Your Way package allows planners to choose two of the following 14 meeting upgrades at no extra cost: two-hour Legacy yacht sunset charter; free golf for all attendees; free airport transfers for attendees; chili cook-off challenge; team mixology cocktail reception; themed dining event upgrades; "s'mores and more" at a dinner function or poolside overlooking Lake Travis; 10 percent off all private events; one-hour complimentary reception (beer and wine); complimentary menu upgrades; 10 percent off AV; complimentary weekend stay for two; 2/40 comp rooms; 10 percent off all spa services. *www.lakewayresortandspa.com/meetings.aspx*

■ **Sanctuary on Camelback Mountain Resort & Spa, Scottsdale, AZ.** The On the House promotion, valid through September 14, 2011, grants meeting groups of 40 or more rooms staying for two or more consecutive nights, with a complimentary private home during their event. Savings are valued at more than $3,500 per night for Mountainside Estates homes ranging in size up to 5,500 square feet. 480-607-2350, *www.sanctuaryaz.com*

■ **Omni Bedford Springs Resort, Bedford, PA.** Planners are offered one of the following complimentary services: one-hour group reception of beer, wine and passed hors d'oeuvres; one room for every 25 paid rooms; one group activity for one hour. Groups that choose the one-hour activity can take part in yoga or cooking classes, guided hikes, a historical tour or group golf lesson. Omni Bedford's Meetings Special offer is valid for meetings with a minimum of 20 rooms booked by December 31, 2011 and actualized by March 12, 2012. 814-623-8100, *www.omnibedfordspringsresort.com*

Hyatt Breaks Ground in The Palm Beaches

PALM BEACH COUNTY, FL — The Palm Beach County Convention and Visitors Bureau joined Hyatt Hotels & Resorts and Kolter Group LLC recently as they broke ground on their newest Hyatt Place hotel, located in the heart of downtown Delray Beach. The new hotel will be the second Hyatt Place in The Palm Beaches — the first opened in February 2009 in downtown West Palm Beach — and the first new property developed in the county since the Seagate Resort & Spa in November 2009, also located in downtown Delray Beach. "Of the 750 hotel rooms in Delray Beach, 314 have become available since 2001, meaning an astounding 72 percent of the area's current hotel product in Delray has been developed in the last 10 years," said Palm Beach County CVB President and CEO Jorge Pesquera. "When the new Hyatt Place opens next year, it will bring the town's hotel inventory to 884 rooms, increasing Delray's total inventory by another 18 percent. We are grateful to our partners at Hyatt Hotels & Resorts for their commitment to and continued investment in The Palm Beaches, and look forward to helping fill those new, beautiful rooms for years to come."

The property will feature 134 spacious guest rooms, all of which will include a spa-inspired bathroom, 42-inch HDTV, and an eight-foot sectional sofa-sleeper. The new Hyatt Place will feature a full-service lobby bar and mixed-use retail space, as well as executive boardrooms and flexible meeting space. *www.hyattplace.com*

Chicago Marriott O'Hare Renovations Underway

CHICAGO, IL — The Chicago Marriott O'Hare is currently undergoing a $40 million remodeling project throughout the entire property slated for completion by January 2012. The transformation includes a full redesign of 470 guest rooms and suites, and 7,400 sf of additional meeting space. The guest rooms will feature Plug In Panel technology that provides 10 easily accessible outlets. The renovated lobby will offer travelers a cutting-edge experience with flexible, modern space that can be used for business or pleasure with modular workspaces and social areas. The new American grill Brickton's will feature locally sourced ingredients. Other additions include a state-of-the-art fitness center and a porte-cochere. The hotel also is working to bring Wi-Fi access and on-the-go airport and weather reader boards to the lobby for added convenience. *www.marriott.com/chiap*

Norwegian Unveils Designs For New Builds

The new design for NCL Project Breakaway.

MIAMI, FL — Norwegian Cruise Line recently unveiled new balcony and mini-suite stateroom designs for Project Breakaway, the project name for the company's two new next generation Freestyle Cruising ships scheduled for delivery in April 2013 and April 2014. Each of the 144,017-gross-ton vessels will have approximately 4,000 passenger berths.

Project Breakaway ships represent an opportunity for guests to "break away" and find a true respite at sea. Each of the new ships will have 1,024 balcony staterooms and 238 mini-suites. Balcony staterooms will have king-size beds (that can be separated) with pillowtop mattresses and many more amenities. The energy-efficient staterooms utilize key-card access to control lighting in the room. *www.ncl.com/breakaway*

Events Calendar

AUGUST 25–27, 2011
FICP CANADIAN REGIONAL MEETING
The Ritz Carlton
Toronto, Ontario, Canada
Contact: 312-245-1023
www.ficpnet.com

SEPTEMBER 7–8, 2011
HSMAI'S MEET NATIONAL
Walter E. Washington Convention Center
Washington, DC
Contact: 800-564-4220
www.hsmaimeet.com

OCTOBER 4–6, 2011
THE MOTIVATION SHOW (IT&ME)
McCormick West
Chicago, IL
Contact: 630-434-7779
www.motivationshow.com

OCTOBER 11–13, 2011
IMEX AMERICA
Sands Expo at the Venetian/Palazzo Hotel
Las Vegas, NV
Contact: +44 1273 227311
www.imexamerica.com

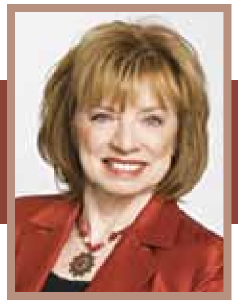
OCTOBER 13–15, 2011
SITE INTERNATIONAL CONFERENCE
Bellagio
Las Vegas, NV
Contact: 312-321-5148
www.siteglobal.com

NOVEMBER 13–16, 2011
FICP ANNUAL CONFERENCE
Grand Hyatt San Antonio
San Antonio, TX
Contact: 312-245-1023
www.ficpnet.com

NOVEMBER 11–14, 2012
FICP ANNUAL CONFERENCE
JW Marriott Los Angeles
Los Angeles, CA
Contact: 312-245-1023
www.ficpnet.com

Career Advice

By Gloria Petersen



The Art of Professional Connections

Professional meeting planners, especially third-party meeting planners, know how to be chameleon-like. They know how to adapt their personal presentation to meet the expectations of a wide range of industries. It is all about meeting the client's or prospective client's expectations by offering visual reassurances that their money is going to be well invested, and attention to detail will be paramount to a successful event. These visual reassurances begin with the statement planners make in their personal presentation.

For example, planners arranging a corporate conference with high-level executives need to present a powerful presence. On the other hand, planners arranging a kicked-back and relaxing retreat, need to appear creative and at ease. This is not easy because we all want to jump in and do the job. However, a solid foundation that incorporates both visual reassurances and social intelligence needs to be set first.

Building a Professional Identity

A professional connection is a connection that is made with the utmost adherence to business etiquette, protocol and ethics. It is a behavior that engages in building relationships with great competence, exudes the highest standards, exemplifies professional presence and commands business-building people skills. Consider the following scenario:

A well-dressed meeting planner walks confidently into a meeting or networking event, greeting everyone she encounters with a handshake. She calls on those she knows by name, introduces herself to those she has not met, and reintroduces herself to those she might know. In doing so, she establishes a confident and authoritative presence and carries on each conversation with profound ease throughout the meeting. She departs with an essence of class that leaves the client team with a feeling of inspiration, and the reassurance that their event is in the best hands.

Have you met or observed this type of individual? Did you think to yourself: "If only I could command that kind of confidence." Well you can. These learned and practiced skills create a professional identity that builds the foundation for respect.

When we meet new people, we make judgments based on their visual presentation. It is a fact that people look at what you display on the outside, and make assumptions about what is on the inside. Your professional identity begins with this impression and carries over into your personal presentation. Furthermore, these first impression judgments are made up of visual and emotional perceptions.

Successful relationships are not always built on the lowest cost or best quote. Long-term loyal relationships are built on the initial interaction and the continued care and feeding of the relationship connection. Seven steps will help you perfect this all-important greeting and interaction. Each step is designed to make "you" a pleasure to do business with and helps ensure continued contracts.

1. Make a powerful, confidence-inspired statement with your visual presence, and feel self-assured in the process. Presence is your aura. It is what people see and feel. Some refer to this as the IT factor (or the look). Simply put, it is a combination of presence and charisma. It is that thing about you that gets people's attention and makes them want to know you. It is composed of your appearance and posture.
2. The purpose of an introduction is to exchange names, learn something, establish a sense of comfort and engage others. Know how to deliver casual to formal introductions flawlessly. Introductions set the tone for every interaction.
3. Demonstrate your ability to remember and repeat names confidently and accurately. How you handle a person's name demonstrates respect. There are various techniques for pronouncing names correctly and remembering names; however, one technique does not fit all. You have to experiment and find what works for you.
4. The handshake creates a personal connection that sends a message about your character. It symbolizes the greeting, offers congratulations, or validates an agreement. It is the first physical evidence of your character. Furthermore, interpret the messages different types of handshakes deliver and make sure that your handshake sends the intended message.
5. Transition small talk into a meaningful discussion and know how to get beyond conversation dilemmas. This is probably the most difficult or challenging part of the interaction because conversation to learn needs can be very complex. Realize that attention spans are shorter than ever; the communicator must keep the information interesting and on task. It starts with small talk.
6. Make it easy for clients to remember you with a business card exchange that adds a nice finishing touch to your interaction. To make this impressive and lasting impression, present your card with the contact information facing the recipient. This also allows the recipient to discreetly see your name and title if he or she did not understand it during the introduction.
7. Keep the door open! Be sure to conclude the interaction with a handshake and a closing comment. Then reflect on your conversation and plan your follow-up. Your follow-up should be within three days of the meeting — the next day is best. Asking for their preferred method of follow-up such as email or telephone suggests courtesy and professionalism.

> A professional connection is a connection that is made with the utmost adherence to business etiquette, protocol and ethics.

This seven-step toolbox will guide you from the initial greeting through to successful negotiations. Once you have gained your client's confidence and trust, you are fully prepared to do what you do best — deliver a successful event. ***I&FMM***

Gloria Petersen is founder and president of Global Protocol Inc.and author of, The Art of Professional Connections: Seven Steps to Impressive Greetings and Confident Interactions *(Wheatmark, 2011). Contact her at 866-991-2660 or* www.GloriaPetersen.com.

International Incentives

By George Seli

Move the Motivation Factor Up a Notch

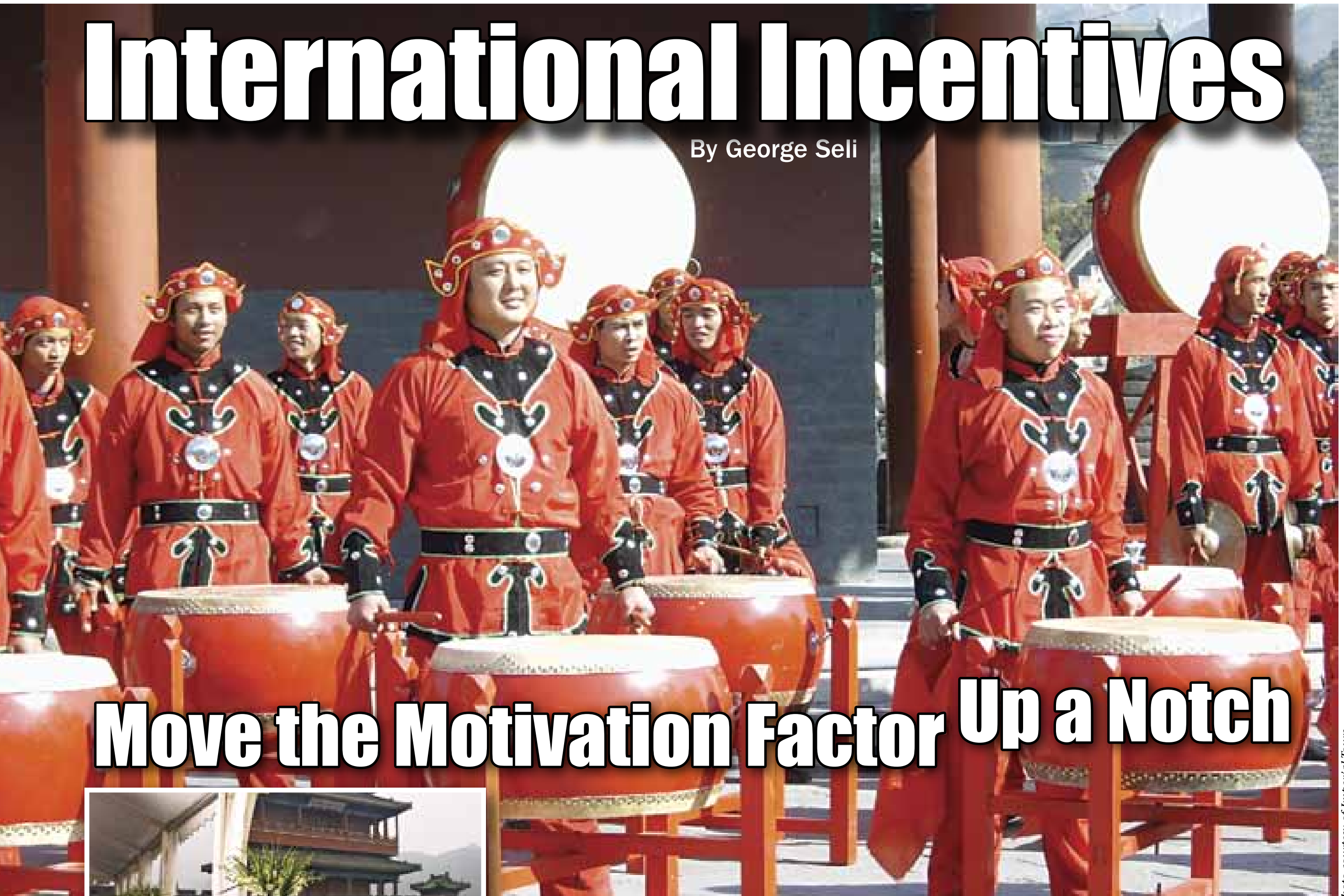


Photo courtesy of Imperial Tours

Drummers entertained a Raymond James Financial Inc. group on the Great Wall of China where they enjoyed a one-of-a-kind dining experience.

Among the tough decisions that many insurance and financial companies had to make during the height of the recession was to cut back on or eliminate international incentives. The U.S. has plenty of intriguing cities with outstanding meeting facilities, but there's no denying the adventurous quality of heading to a foreign country and experiencing what is often a very different culture, along with historical venues that date from long before the era of the 13 American Colonies.

Humana's Watchful Waiting

For Charles Lane, director of incentive travel and public relations for Green Bay, WI-based Humana, international is "without a doubt" more motivating to potential qualifiers than domestic. "Obviously we're not going to places like suburban Green Bay, we're taking people to nice places here on the continental 48," he says. "But I think going overseas provides people with something that they probably would not avail themselves of, and if they did, they probably couldn't do it without some of the imagination and access that we provide, working with vendors that enable us to get into venues that the average person couldn't."

Like many firms, however, Humana for several years wanted to avoid the perception that it was exporting U.S. dollars abroad and taking agents to "exotic" destinations, Lane explains. As a result, fewer annual incentive trips were held, and to strictly domestic destinations. "I'm hoping we're making a comeback and that we find out that it's more acceptable" to go abroad for motivational programs, he says. A small step to reintroducing international is a Puerto Rico incentive the company has proposed for next April. As a U.S. Commonwealth, Puerto Rico offers easy access and a USD-based currency, easing the logistics of meeting there.

Securian's Sensational Incentives

Unlike Humana, St. Paul, MN-based Securian Financial Group is a privately held company and less subject to the pressures of perception. The firm maintained its international incentive programs throughout the economic downturn and continues to explore less-trodden ground on that front, most recently taking about 300 Chairman's Club qualifiers to Chile and Buenos Aires, and 90 Leaders Conference qualifiers to Peru as part of the same May 2011 program. In Peru the participants experienced the modern capital city of Lima; Cusco, the capital of the Incan empire; and the picturesque Incan ruin of Machu Picchu and the Sacred Valley of the Incas, in the Andes.

Overall, the Southern Hemisphere — particularly South America, South Africa, Australia and New Zealand — has been rather popular lately with incentive groups, observes Koleen M. Roach, Securian's director of meetings and conference management. There is also a "trend a little more toward what people consider the safer destinations," she says. Countries such as Greece and Egypt suffer from unrest and may not be the first choice for insurance and financial companies looking to make a cautious reentry into the international meetings market.

That's a shame, given the striking venues those countries offer to incentive groups, Roach says. Per the common wisdom among planners, the most successful incentive programs give participants an experience they can't easily get on their own, and a major way to achieve that is to stage a special event at a venue that is not accessible without certain "connections."

For a 2009 incentive to South Africa, Securian worked with Dragonfly, a local DMC that was able to obtain a permit to hold a dinner for a group of about 100 at the presidential residence, "which would be the equivalent of having an offsite dinner at the White House," says Roach. "At the time that we were there the president wasn't actually living in the palace but in a different home on the property. But now the current president, I understand, has moved back into the palace and nobody had lived there since Nelson Mandela, so I don't think they're renting it out anymore for private groups."

Suffice it to say, the experience in retrospect turned out to be even more special. "We don't cut any corners in this company; we know our advisors work really hard to get to the level of performance they need to qualify for these trips, and we really want to make this a great experience for them," Roach says.

Marvelous Malta

Another great experience was had in Malta, a Mediterranean country home to nine UNESCO World Heritage Sites, including the Megalithic Temples. "It's a fabulous destination, very exotic with a vast history, and they speak English," Roach remarks.

"We don't cut any corners in this company; we know our advisors work really hard to get to the level of performance they need to qualify for these trips, and we really want to make this a great experience for them."

Koleen M. Roach
Director, Meetings and Conference Management
Securian Financial Group
St. Paul, MN

The latter feature is always a plus. "As exotic as my people like to think that they are, they're always much more comfortable in an environment where they can speak their own language," she adds. "We had our gala dinner at the MCC (Mediterranean Conference Centre), which is one of the oldest buildings in Malta."

Erected by the Order of St. John of Jerusalem in 1574, the MCC is located in Valletta, Malta's capital and itself a UNESCO site. The building is adjacent to Fort St. Elmo and overlooks the Grand Harbour. All of Malta's attractions are easily accessible given the island's size. "You're only 20 minutes away from anything," says Roach. "If you've driven 25 minutes you're likely in the water." Indeed, Roach advises planners to consider the amount of transportation to any prospective offsite activity: "'We were on buses for too long' is a common complaint," she says.

Among Malta's 16 five-star hotels and 41 four-star hotels are the 439-room Grand Hotel Excelsior (43,055 sf of meeting space) and the 136-room Phoenicia Hotel (meeting space for

Photo courtesy of Securian Financial Group

Koleen Roach, director, meetings and conference management for Securian Finanical Group (center) in Livingstone, Zambia, for a Leader's Conference.

Photo courtesy of Gstaad Palace

Switzerland's Gstaad Palace combines Old World sophistication with modern technology in its elegant event spaces.

up to 300 attendees), both located five minutes away from the MCC.

Brand Versus Independent

One of the site decisions a planner must make when going international is whether to book an independent property like the Excelsior or Phoenicia, or one that is part of a global brand. Independent properties do tend to create a more indigenous experience for attendees, but if a planner has done significant domestic business with Marriott or Starwood, for example, there may be a certain negotiating leverage in booking a hotel in that brand overseas. Plus, it's easier to know what to expect in terms of quality and service level.

> ***"I think going overseas provides people with something that they probably would not avail themselves of, and if they did, they probably couldn't do it without some of the imagination and access that we provide."***

Charles Lane
Director of Incentive Travel
Humana
Green Bay, WI

Roach typically takes this approach with U.S. hoteliers who have a global presence. "You tap into those relationships and they can really help you," she says. She has found that independent hotels in other countries sometimes "struggle with large group business because it really cuts into their leisure and business traveler service that they're very committed to."

For example, in negotiating with a hotelier based in Buenos Aires, "I wanted to use the property for six nights in a row, and when they saw that the size of my block was basically a buyout, they wouldn't do it," Roach relates. "The thought of turning away their business and leisure travelers was not something that they could process. They did end up giving me three nights at a total buyout, but they wouldn't give me six. Still, the hotel did a phenomenal job for us. And once we were actually there, I think they fully understood the amount of revenue that a large group can bring into a hotel. After we left, they said, 'If you need 14 nights we'll give it to you.'"

Lane's groups have stayed at brand hotels such as the 197-room Four Seasons Dublin (14,381 sf of meeting space), but also at the five-star 300-room Landmark London Hotel (18,000 sf of meeting space) and the 212-room Victoria-Jungfrau Grand Hotel & Spa (6,639 sf of meeting space) in Interlaken, Switzerland. "Certain properties have a connotation of high quality, and that's part of the experience that we're marketing," Lane says. The Victoria-Jungfrau is one such hotel, with a panoramic view of the Jungfrau mountain range. Jungfrau is one of the main summits of the Bernese Alps, and the town is a great choice for outdoorsy attendees who enjoy backpacking. Built in 1864, the Victoria-Jungfrau was one reason Interlaken itself became popular among travelers.

Swiss Wish List

Switzerland boasts many such picture-postcard cities in mountain and lake regions where adventure-of-a-lifetime activities await, including glacier trekking, mountaineering, canoeing, hiking, river rafting and hang gliding. For the less adventurous, there's golf and fishing — even city tours by Segway along the River Rhine, according to the Switzerland Convention & Incentive Bureau.

News includes the reopening of the five-star Hotel Schweizerhof in Bern, which completed a makeover of all 99 rooms and suites, with a new wellness complex to be added late this year. In the heart of French-speaking Lausanne is the Beaulieu Lausanne

Congress and Exhibition Centre, which began a renovation project in 2010 that will fully upgrade its conference and meeting rooms, and theater. The elegant lounge bar Locarno Lido is a new 4,000-sf event venue on the shore of Lake Maggiore in Ticino.

Airline Issues

Apart from overseas hoteliers, airlines also can be unfamiliar territory for planners and attendees. Among the information Securian gave its agents over the 14-month qualification period for the South America incentive was some guidance on using LAN Airlines, based in Santiago, Chile. “Many people in America aren’t familiar with it,” says Roach. “So we let them know how to get their frequent flier miles, what they could expect to pay in terms of fees if they were bringing family members, and so on.”

The information was included in a series of newsletters on the trip sent out every other month during the qualification period. The pieces cull useful facts on the destination from a variety of sources, says Roach, from *National Geographic* to convention bureaus and DMCs. “Participants love these newsletters, and they read them cover to cover. They’ll show up at the airport with their newsletter in their travel file folder,” she says.

“We always provide (attendees) with all types of reading materials,” notes Lane. “When we went down to Australia, I supplied everyone with a copy of *The Fatal Shore*, a book on the history of the founding of Australia and how its culture has evolved. So they had some required reading, which they may or may not have done.”

Safety and Security

While reading background material may not be “due diligence” for participants, planners have a major responsibility in researching the safety of a prospective destination. “The U.S. Department of State website is the first place I check. If there are travel warnings established or any indication of terror cells for a particular area that I may be looking at, I’ll just take it right off my list. You’d be really surprised about the places where terror cells are located, places that seem like they’d be really nice to travel to,” Roach points out.

It’s fair to say that a planner should not expect 100 percent safety in any destination. “We’ve been to South Africa and people can argue there are safety issues there, but one can also argue there are safety issues in northeast Minneapolis. Americans are funny, they tend to think we live in the safest country on the planet, which is not necessarily true.”

Roach takes the approach of traveling with both a doctor and security personnel. In addition, she arranges for ambulances to be onsite for any activities in remote venues, such as a polo farm the group visited 90 minutes outside of Buenos Aires.

Another safety measure comes through working with a DMC that can arrange plenty of tours to keep attendees together in manageable groups. “It’s a lot less worrisome to be on an organized tour on buses where you have some semblance of control,” says Lane. “You can limit the number of people who are going to ride off into the sunset and do something foolish” he quips.

Photo courtesy of Imperial Tours

An event setup at Tai Miao, an imperial ancestral hall in the Forbidden City in Beijing, east of Tiananmen.

China’s MICE Market

Planners interested in China have a new DMC option now that San Francisco-based Imperial Tours is targeting the MICE market. “We’ve done meetings and incentives in China in the past, but this is the first time we’re actively seeking MICE business,” says Margot Kong, vice president, marketing and business development. Kong has a professional background in the financial world, having worked for Merrill Lynch, Citicorp and other firms. She sees more U.S. companies doing business with China, “and so if you’re doing business there it only makes sense for you to send your employees there as an incentive: You want them to have a good time obviously, but you also want them to see what’s going on and the dynamics of what’s changing in China.”

It seems many firms are doing just that. According to Reed Travel Exhibition’s 2010 China and Asia Meetings Industry Research Report, the overall number of events held in China increased 51 percent in 2010 over 2009, vs. a 28 percent increase for the rest of the world over the same period. One plus is China’s relative affordability.

“We focus on the top end of the China market, but even on the top end you’ll find that China is still a huge bargain compared to Europe or the U.S.,” says Kong. “For five-star hotels you’re looking at $500 to $600 a night compared to $800 to $1,000 in Europe. And if we’re working directly with the hotel and we can guarantee the booking, then we can lock in the exchange rate.”

Imperials Tours has partnered with several financial groups for small meetings in China, ranging from about 20–110 attendees. They include:

- Boston-based Cambridge Associates’ meeting in Shanghai, which featured a cruise on the Huangpu River and a tour of the Bund area with its colonial-era financial buildings.
- A banquet on the Great Wall for St. Petersburg, FL-based Raymond James Financial Inc., complete with drummers and dancers.

Imperial Tours can offer incentive groups special access to the floor of the pit at the Terracotta Warriors, a collection of sculptures depicting the armies of the first emperor of China, discovered in the Shaanxi province.

The company also can gain access to a section of the Forbidden City that’s not open to the public, stage a dinner on the rostrum of Tiananmen Square in front of the portrait of Mao Zedong among many other intriguing possibilities. Groups also are provided “China Hosts,” Westerners who have lived in China for many years and speak Chinese fluently. “They act like a traveling concierge,” Kong explains. “We have one for every 20–30 attendees. They help ensure the best service in restaurants or airports.”

In addition, Imperial Tours can source local experts in China to serve on panel discussions or give keynotes, such as the first hedge fund manager in China, a New Yorker who’s been in China for 20 years; economists; and the foreign correspondent for *The Wall Street Journal*.

China is thus an example of an incentive destination that makes good business sense due to its affordability and position in the world economy, while at the same time being “exotic,” particularly its less conventional destinations Hangzhou and Lhasa.

“We focus on the top end of the China market, but even on the top end you’ll find that China is still a huge bargain compared to Europe or the U.S.”

Margot Kong
V.P. Marketing & Business Development
Imperial Tours
San Francisco, CA

Attendee Preferences

For planners, determining what will wow seasoned incentive participants isn’t easy. Lane says, “We send out a survey at the end of each of our programs and ask them for their input on future locations, and we get the whole realm. Some want to sleep in a tent in Tanzania and others wouldn’t go near it for the world.”

And while Roach’s team informally asks participants what destinations are on their “bucket list,” given the company’s 30 years of international travel and significant number of repeat qualifiers, “they’ve gotten to the point where they like that element of surprise,” she says. ***I&FMM***

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Negotiations

The Proverbial Pendulum Swings Back Again

By John Buchanan

Now that both the U.S. economy and the meetings market are in recovery, it's no surprise that the Great Recession of 2008–10 has spurned some sea changes in the way meetings business is being negotiated. After making concessions such as the waiver of attrition and reducing rates to record lows just to attract survival business during the worst of the crisis, hotels are now getting tough again, on everything from rates and space, to concessions and F&B minimums.

And as the proverbial pendulum swings from a buyer's market back to a seller's market, hotels are imposing a new standard.

"Hotels are becoming much more selective in terms of the groups they are taking," says Mark Bice, regional vice president at HPN Global, a Natick, MA-based independent meeting planning company. "They're paying much more attention to total spend. And they're being less flexible in room rate than they were before the recession."

Sue Daly, CMP, manager of meeting services and sourcing at insurance and industry services vendor Aon Service Corporation in Minneapolis, MN, concurs with that assessment. "In some destinations where there is high demand, like New York or Las Vegas," says Daly, whose department is based in procurement and plans about 300 meetings a year, "they're at the point where they're willing to walk away from a piece of business."

The New Normal

That stance is likely to become more common. Bice and other experts note that it will be a while before it is again a seller's market. But, they say, there is indeed a "new normal" when it comes to booking meetings. "In a true seller's market," Bice says, "the hotels would be less flexible on room rate and wouldn't give many concessions. In a true seller's market, the hotels say, 'Here's the deal — take it or leave it.' But I do see hotels getting back to that position today."

As a result, says Donna Wikstrand, CMP, vice president of Hull, MA-based Conference Hotels Unlimited, a site selection and contract negotiation/management consultancy, planners must learn to leverage what she calls the "proportionate strength" of their meetings and events. For example, she says, if a planner uses one-third of a hotel's allocated group rooms, but uses two-thirds of its meeting space and half of its F&B capacity for that period of time, he or she is automatically in a strong negotiating position because the meeting is particularly attractive to the hotel. "It means you are a very profitable piece of business," says Wikstrand. "So, the rooms-to-space ratio is one of the most important factors that a hotel is going to consider in terms of assessing the value of your business."

Another key issue cited by Wikstrand is the shorter booking windows that have become common today. "You're dealing with a perishable product," Wikstrand says. "So, if you're coming to a hotel and you want to book a meeting taking place within 30 days, and the hotel is looking behind you, and they're not seeing anyone else knocking on their door wanting those dates, they are going to be highly motivated to negotiate the most favorable terms and conditions, or the best deal, for you."

While meeting planners and hotel executives debate old issues such as a buyer's versus seller's market or the relative leverage of a short-term booking, there are genuinely new factors impacting the market now, too.

"You have more people involved in the contract negotiation process today," says Richard Harper, executive vice president of sales and marketing at MGM Resorts International in Las Vegas. "You've got the planner, procurement, legal and maybe even a third-party meeting planning company. And everybody has an opinion. Often, having that many people involved really delays the process. I'd love to see the process get simplified, because I think it has become too complex."

Flora Lloyd, assistant director of convention services at the landmark Gaylord Palms Resort and Convention Center near Orlando, shares Harper's concern. "Instead of selling to one person," Lloyd says, "you have to sell to four or five."

> ***"So negotiating complimentary wireless — not just in guest rooms, but in the meeting space, too — is a big, newer kind of concession that you'll see more and more."***
>
> **Donna Wikstrand,** CMP, Vice President
> Conference Hotels Unlimited, Hull, MA

At the same time, most hotels are struggling to maintain rates in a recovering market. "Hotels are being less flexible with room rates, but they're not scaling back concessions," Bice says. "So the savvy planner should understand that he or she can't fight the hotel on room rate. But they can ask for more things and get them as concessions."

At Gaylord Palms, in a destination saturated with new hotel product before and during the recession, Lloyd is having a different experience. "The biggest challenge we've noticed," she says, "is that a lot of planners who had been tasked with doing meetings with a lot less money during the downturn are continuing to do things the same way now. They're still being stressed by budgets and costs. So, although our rates are getting back to normal, it has been very hard for us to drive rate in negotiations. And another factor is that a lot of companies are sending fewer people to their meeting now. In some cases, they're sending half what they used to send. And that diminishes a planner's negotiating leverage."

At MGM Resorts, Harper preaches what he calls a holistic approach to assessing a piece of business. "Smart hoteliers look at the overall value of a piece of business holistically, looking at the revenue streams and the margins," Harper says. "And the potential for future business. All of those factors come into it."

Planners must understand, Harper says, that rate was the most compromised factor

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Sue Daly, CMP, Manager of Meeting Services & Sourcing, Aon Service Corporation, Minneapolis,MN

over the past two years — especially in Las Vegas. To maintain brand standards and service levels, he says, hotels must get back to reasonable rates.

Meanwhile, when it comes to concessions, change is afoot, too. "Because of the AIG effect and optics during the downturn, planners feel like they're much more under a microscope," says Wikstrand. "So that means the focus is becoming less on the fluffy stuff, like suite upgrades, and gravitating toward value-added things that can really affect the quality of this meeting and the bottom line." She cites the example of increasingly important Wi-Fi access. "So negotiating complimentary wireless — not just in guest rooms, but in the meeting space, too — is a big, newer kind of concession that you'll see more and more," Wikstrand says.

Attrition and Cancellation

Yet another result of the recession is a relaxation of once strict attrition and cancellation requirements. While most hoteliers considered 10 percent the standard attrition provision before the debacle of '08, that number has ef-

"So the savvy planner should understand that he or she can't fight the hotel on room rate. But they can ask for more things and get them as concessions."

Mark Bice, Regional Vice President HPN Global, Natick, MA

fectively doubled today, with 20 percent being the new industry standard, Wikstrand says — with 30 or 35 percent negotiable with some hotels in some destinations. Bice agrees. "But it's something you're going to have to ask for."

But in high-demand, high-occupancy Las Vegas, Harper aims to get back to the 10 percent standard. "We like that number," he says. "We think it's a fair number."

Nathan Breen, an attorney with Chicago-based Howe & Hutton, specializes in hospitality industry contract negotiation for meeting planner clients. He cautions planners to be aware of and prepared for the possibility that it might not be them who cancels the meeting. Although not a common practice, hotels have been known to cancel one meeting — even on short notice — if a better one comes along.

To protect both parties, Breen recommends a sliding scale of payments designed to mitigate the damages suffered by meeting planner or hotel. "What we're seeing now as a trend," says Breen, "is a sliding scale that applies to either party in the case of a cancellation. And the amounts of payment get higher as the meeting gets closer."

Other Legal Considerations

Another critical contract issue is risk management, Breen says. "That should be a planner's top concern," he says, "because the contract they get is usually not geared in a way that is equitable as far as the risks involved in performing under the terms of the contract."

The most important consideration is mutual indemnification, advises Breen. "A typical contract from a hotel or venue will say that the group is obligated to indemnify, defend and hold harmless the facility from any claims that may arise due to any aspect of the group's performance of that contract," he says. "But that provision is usually not reciprocal. It doesn't usually have a mutual indemnification obligation. So that's one of the main things you want to watch for in negotiating a contract. And it's not going to be there when you get the contract. You have to know enough to make sure it's put in."

Another contract provision that has taken on increased importance in the wake of an unprecedented wave of tornadoes, floods, earthquakes and other natural disasters, is the force majeure clause. "That provision of a hotel contract is more important than it ever has been before," says Wikstrand. "And that's also an issue over which planners and hotels are usually in opposite corners."

A meeting planner should seek a more broad-based definition of circumstances that would not only make it "illegal or impossible" to hold meetings — the time-honored language used in contracts — but make it "commercially impracticable," the legal term now being negotiated into some meeting contracts. As an example of "commercially impracticable," Wikstrand cites September 12, 2001. "On that day, it was neither illegal nor impossible to hold a meeting," she argues. "But it was commercially impracticable."

Understandably, some hotels refuse to use the term. "It would be a deal breaker for us," says Harper. "You can't define it. It's too vague. So what we do is put in very specific trigger points by mutual agreement on where force majeure comes into play."

Harper also raises an important and valid caveat. "The problem," he says, "is you have some customers — not many, but some — who try to take advantage of situations that had nothing to do with their ability to get attendees to this meeting."

Breen is not surprised by Harper's reaction to "commercially impracticable." "The hotel just equates that to 'we're losing money,'" he says. "They don't see it as a legitimate force majeure issue. And it is vague. But that's because it's meant to be to the planner's advantage."

There are better ways to negotiate the issue, Breen says. "You can get away from 'impossible' or 'illegal' and put in some benchmarks as to what circumstances are doing to your attendance," he says. "Or you can put in specific concerns about weather or terrorism. The more concrete the circumstances that are laid out in the contract that would create a force majeure situation, the more likely you're going to get a hotel or venue to accept them."

Despite any current debate or controversy over force majeure provisions, the established system and language seem to work, says Daly, who had a meeting fall apart as a record blizzard hit Chicago in January. "Most of our attendees left because of the (approaching) storm," Daly says. "I find that hotels work with you very well in that kind of situation."

Tips and Best Practices

Despite the recession or any notion of a new normal today, the fundamentals of contract negotiation for meeting planners are easy to understand and are time-tested, Wikstrand says. "The tried-and-true stuff is still in play and very important," she says. "The more flexibility that you have, the better deal you are going to be able to get. If you can keep an open mind to different days or dates or booking patterns, and not pigeon-hole yourself into a particular date, you're going to be more successful."

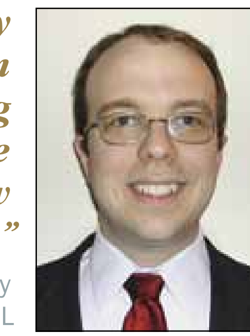
At the same time, says Daly, savvy planners must work harder to be more informed. "We're always aware of the market," she says. "We're always aware of how things are changing in the meeting industry. We keep our eyes on those things."

But, she adds, Aon also uses preferred vendor programs to maximize the company's negotiating leverage. Daly generally works from a list of preferred hotels in the cities where Aon has offices and hosts many of its meetings.

Interestingly, Lloyd raises a negotiating strategy that not many planners seem to appreciate. "One thing I think they should take more into consideration as they're negotiating is what's important to their attendees," she

"It (the contract) doesn't usually have a mutual indemnification obligation. ...And it's not going to be there when you get the contract. You have to know enough to make sure it's put in."

Nathan Breen, Attorney Howe & Hutton, Chicago, IL



says. "A lot of times, the attention is on the board or the executives, or the planner. They forget they're putting on a conference for 100 or 1,000 people. And just because a hotel can give you a lower rate, that doesn't mean you're going to be creating the best experience for your attendees."

For veteran hotel sales executive Harper, it all comes down to what he calls "sales 101." "The planner should tell the hotel what is most important to them," he says. "Then it's incumbent upon us as hoteliers to provide solutions that speak to that. I don't feel that a planner has to come in here and leverage their piece of business to make it look great to us. All business is great to us. What we're looking for is a very open, honest dialogue about what's most important to the planner and the event. Then I want to focus on that and not get caught up in the minutiae. Let's focus on the two or three things that are most important to the meeting and important to make a deal that is fair for both sides." ***I&FMM***

Sales Training

ADDRESSING A CHANGING MARKETPLACE

By Karen Brost

As the founder and executive chairman of the board of Richardson, a global sales training and consulting firm, Linda Richardson has seen plenty of changes in the insurance and financial services marketplace. Those changes, in turn, are driving changes in the content and delivery of sales training programs.

"There's been a tremendous shake-out in sales organizations, so I think the organizations are more lean," she notes. "In addition to that, what we're seeing is that the sales cycle has become longer. There are more people involved in the sale from the client side. Clients are much more careful and looking for more value."

Richardson describes how these trends are impacting the sales training process. "In the past, sales training was pretty much skills training. (For example), do people have the ability to pick up the phone and get that appointment? Do people have the ability to get into a meeting and secure a second meeting? That's all critical, but the ante has been raised for what it takes to close an opportunity, and there are fewer opportunities. So the ones that they have, they need to be able to close.

Dual Impact

"A lot of our clients," she continues, "in financial institutions in particular, are saying, 'We want two things: We want sales process training and we want sales skills training.'" And, she adds, they want these two types of training put together.

Richardson explains that some research organizations, such as Aberdeen, are publishing data about best practices in the insurance and financial services industries. "(The research shows) what the best practice organizations are doing, what the middle-of-the-road organizations are doing, and what the laggers are doing or not doing.

"What this (research) has done," she continues, "is made it very clear that in this economy, salespeople will do better if they have strong dialogue skills and if they understand their sales process. Let's say the typical sales process would have six stages, so the first stage might be to qualify, and the second stage is to identify needs to see if this is really an opportunity. What we're doing with clients now is we are aligning the dialogue skills with each stage of the process." She explains that this training includes activities and tools for each stage, and it identifies verifiable outcomes for use in measuring whether the salesperson is ready to move to the next stage in the process.

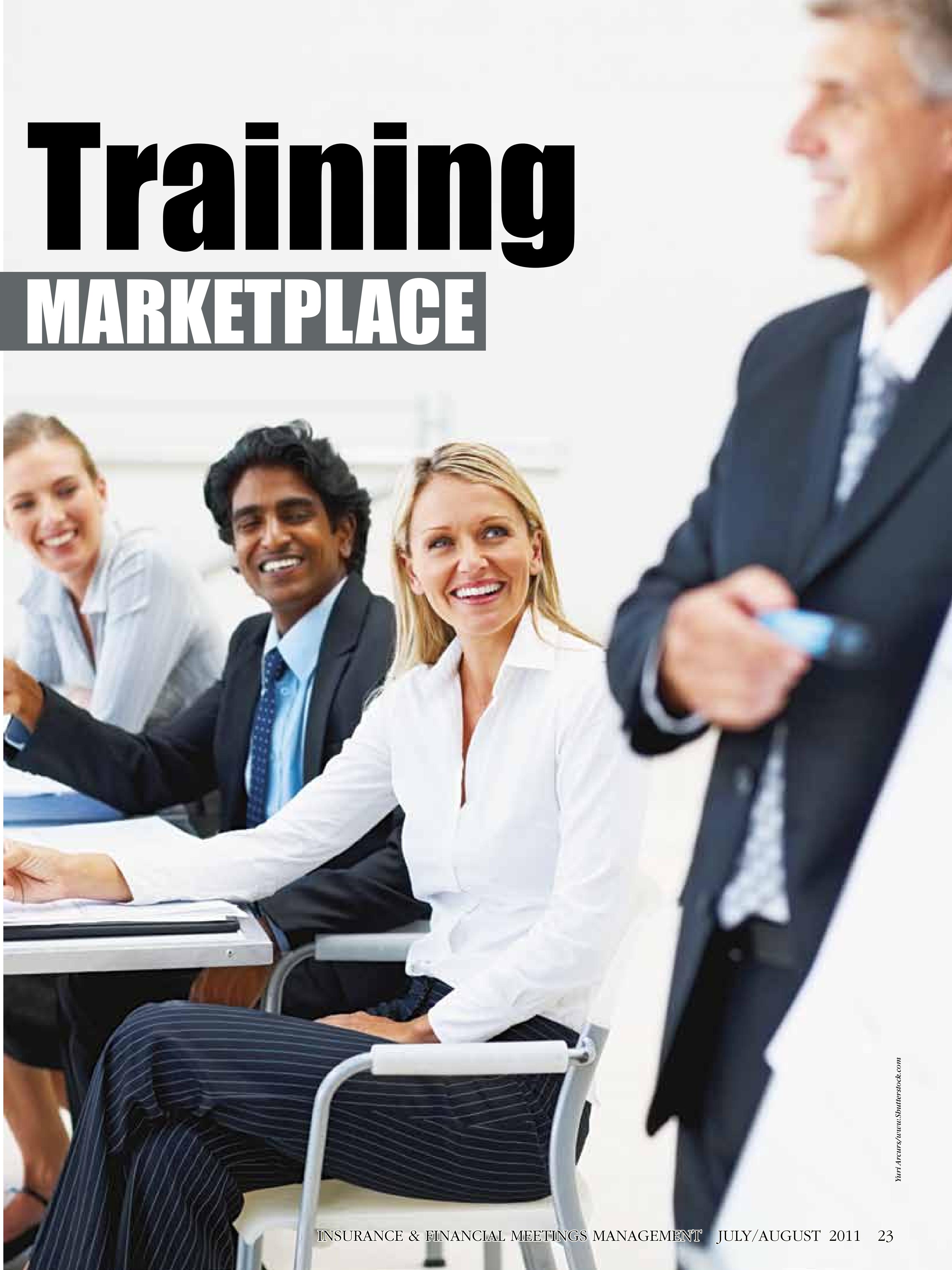
Tools for Success

Richardson also says that attendees need to be able to walk out of the session knowing that they'll be supported with the right tools. "They shouldn't just leave the seminar with a big, thick book. They should leave the seminar with some pretty sleek tools they can use." She mentions online sales planners as one example. "Most importantly, they need to have a module for the managers, so they are aware of what their people just went through so they can coach to it."

Richardson, who is also the author of *The New York Times* bestseller *Perfect Selling* (McGraw-Hill, 2008), offers a free monthly cyber sales tip for those who sign up for the service on her company's website, *www.richardson.com*. "Many websites have a place where you can sign up for free resources," she adds.

Building Trust

Dean Lindsay is a motivational speaker, sales trainer and co-au-



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thor of two books, *Cracking the Networking Code: Four Steps to Priceless Business Relationships* (World Gumbo Publishing, 2005) and *The Progress Challenge: Working and Winning in a World of Change* (World Gumbo Publishing, 2010). "There's no quick way to sell insurance and financial services," he says. "Doing a great service to your community by providing insurance and financial services takes patience and persistence to build what is vital, which is trust. A sale comes from trust. Referrals come from trust. All of my programs that I've had the opportunity to do in that arena talk about building trust.

"The first trust doesn't even come from the trust that you build with potential clients," he continues. "The first trust is trust in yourself and trust in your organization, and trust in your products and services. That's what brings out the confidence in you as you're out there connecting with people.

"The other big thing that comes up is the whole issue of connecting. A lot of times, people use the word networking. So many people have a negative connotation to networking because so many people do it so poorly. They've tried to meet somebody and sell them something at the same time. My programs usually build on confidence and communication that builds trust.

Progress Versus Change

"People don't want insurance," he explains. "They want the benefits of the insurance. We should be able to show prospects and clients how it brings them progress. They're not going to do it if they think it's change. We embrace what we view as progress, but we resist what we view as change. If they see it as progress, they'll want to move forward."

Lindsay explains how human motivation is based on what he calls "the six Ps." "Everything we do, consciously or subconsciously, we do because we believe the perceived consequences will be a mixture of pleasure, peace of mind, profit, prestige, pain avoidance and power. What's insurance? It's peace of mind, it's pain avoidance. It also can be profit. What are financial services? They're pain avoidance. People don't want to be in pain when they retire."

Session Size

"What we're seeing is that clients are looking for a more comprehensive solution as far as sales training goes," Richardson says. She explains that large general sessions are better suited to building awareness of new concepts and to charge people up about them. "Then, if they really want to get into training, which means behavior change, then they have to divide the large group. If, for example, there are 90 salespeople, you can't do training with 90 people in the room with one trainer. The largest group would be 25." That way, she says, the training can be customized to meet the needs of the group. "If it's customized, they're going to get a lot more out of the program."

Linda Richardson
Founder
Richardson
Philadelphia, PA

> ***"What we're seeing is that clients are looking for a more comprehensive solution as far as sales training goes."***

Having smaller groups also makes it easier for the training sessions to be interactive. "There needs to be some role playing, some coaching," she says. "It can be competitive, it can be fun, but it needs to be substantive."

As a motivational speaker, Lindsay is used to presenting to large groups. "In my profession, you have to meet them where they're at. When you're working with a larger dynamic, you're working with more people who have specific needs, so you have to get more general with your overall points. My favorite thing to do is to work with smaller groups, 15-25 folks. In that regard, we really do have much more of a dialogue."

Preparation Pays

Lindsay is a big believer in doing his homework to prepare for his training sessions. "I ask to interview three to six people who will be participants in the room to gain their insight," he notes. "I'm always customizing the program for each group, so when they get in (to the meeting room), I'm very comfortable that I understand both where their heads are at and where the organization would like them to consider going. I can't make them go, and neither can the organization, but we can lay out a thought process that would encourage them to make the choices we'd like them to make.

"I make a point to get in there early and greet people, to have some extra one-on-one time," he adds. He also uses a multimedia approach with his PowerPoint presentations. "It's kind of an extra added dimension to the program," he says. "Just because it's insurance and financial services, doesn't mean the presentation can't be fresh and upbeat and even downright funny. I think people learn and receive ideas best when they're in a positive state of mind." He believes in combining thought-provoking material with intelligent humor.

Outside Forces

One training executive with a major insurer describes the value of bringing in an outside speaker like Dean Lindsay. "It's very valuable because the salespeople view home office people as a pseudo-partner. They value what the home office does, but...they don't view what we tell them as very authoritative.

"It's very helpful to bring in a third party, someone whom the salesforce will respect," he notes. "We could say the same thing, but they won't listen. When someone else says the same thing, they'll run out the door to do it!

"Also, you have your personalities like a Dean Lindsay, like an Ed Slott. He's one of the premier authorities on IRAs. He's very insurance-friendly. More important than what he talks about is how he does it. They're both extremely good presenters. When you have the mixture of someone who is successful in their field, they're a third party, and may, like Dean, have written a book, and they're a good presenter, it's a very powerful mix."

The training executive notes another important trend at his company. "We're synergizing more with other areas in the company that do training, for instance, human resources. They do training on completely different topics. We're getting together with them, and we're exchanging a lot of ideas...best practices so we can all take advantage of each other's knowledge instead of living in huge silos. I've found that to be very helpful."

Technology Trends

He also says that e-meetings are on the rise in his company. "It saves a lot of money, and, in many instances, the agents like it because they don't have to leave the field in order to attend a meeting. If they do leave it, they leave it for hours and not days. The negative is that they don't get to interact with their peers in the same way that they do at a luncheon or after hours or even in a classroom."

When asked how he determines whether a particular training meeting should be presented online or in person, he replies, "That's a tricky question. It's when the political importance of the meeting warrants getting together. Either management feels it's so important we have to get them together in person or the agents push back and say we want meetings in person, as well."

Richardson notes how advances in technology have impacted the sales process. "Sales managers now can get a tremendous amount of information that before would take a week or weeks to gather," she explains. "If they are using a CRM (customer relationship management) system, for example, they can take a look at what's in everyone's pipeline, where the deals are, when they're forecasting to close, and what they think the probability is. So if a sales manager takes a look and sees that a deal has been delayed, that sales manager can work with the salesperson in real time and see if they can help. Technology has impacted sales and therefore it's impacting sales training.

"Another aspect of technology is

social media and being able to use things like LinkedIn,” she continues. “Before, you’d have to go to a trade show, you’d have to join the Chamber (of Commerce), and you’d have to meet people. That’s still valid, but there’s so much happening on sites like LinkedIn or Jigsaw where if I’m calling on ‘X’ company, I could have that company’s alerts sent to me so if there’s a new head of technology, or a new head of finance and I want to sell to them, I’ll be alerted so I know there’s been a change in that organization.

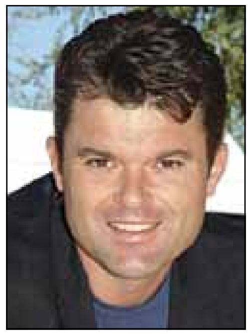
“Technology has profoundly impacted selling,” she continues. “The clients are using technology to really prepare, so by the time the salesperson is actually involved in the sales cycle, the client is pretty far along, having done his or her research. They know much more about the competitors, about the options, and they have gotten feedback from other users. Salespeople have to do the same kind of research. They have to know about who their competitors are and build a competitive strategy.”

Working the Network

One Fortune 1000 insurance brokerage firm took CRM, social media and networking to a whole new level at a sales training conference it held at Aria Resort & Casino in Las Vegas. Aria, which opened in CityCenter in 2009, has made an extensive investment in technology to make it possible for groups to take advantage of services such as global videoconferencing, network broadcasting, high-speed wired and wireless Internet connections and concert-quality sound.

A technology executive from the company describes what made the program unique. “We set up 120 different booths for all of our products so that the salespeople could learn more about the other things that are sold within our company.” He explains that the goal was to increase cross-selling opportunities.

“We had recently implemented Salesforce, and there’s an application within Salesforce called Chatter, which is an instant message/Facebook kind of capability.” To help introduce conference attendees to the new application, they were each assigned a unique barcode that they could scan at each booth. “We used the Aria wireless network to upload to a central database, and we wrote our own integration into Salesforce to make it so (the attendee) immediately got added into a Chatter group, and they could start to receive information about the product that they were just talking with a person on the floor about. They would get access to the conversations around that product and see all of the brochureware.”



Dean Lindsay
Author, Speaker
Business Consultant
Plano, TX

“Just because it’s insurance and financial services, doesn’t mean the presentation can’t be fresh and upbeat and even downright funny. I think people learn and receive ideas best when they’re in a positive state of mind.”

Accomplishing this task essentially required that 120 separate networks be set up. “That was a pretty hefty undertaking,” he adds. “One of our biggest concerns was that the network wouldn’t work the way we needed it to for real-time access. We raised those questions with (Aria) early on, and they set up those networks almost immediately. The week we were there doing setup we were able to test and validate. We had absolutely no issues during the conference with anything that Aria was providing for us.

“We also ran a little contest,” he adds, explaining that each time an attendee’s barcode was scanned at a booth, he or she would be entered into a drawing to win an iPad. “We actually did north of 26,000 connections,” he comments. “There were 1,200 people and each person averaged visiting about 26 booths.”

The program successfully reached its goal of setting the stage to increase cross-selling opportunities throughout the company. “They made the connection with those folks so now they can include them into an account team if they want to do an upsell or a cross sell,” the technology executive states. “It wasn’t that they were trained on the product itself. It was really about connecting them with the people that had the expertise.

“Beyond that, we did Salesforce training in some of the breakout rooms that were on the periphery of our convention area, so we had all of the different technology pieces that Aria provided. We walked into those (sessions) with a trainer and a laptop the day of and we got them set up and were done. We had no issues with getting that all set up.”

He lauded the technological expertise of Aria’s team. “It was probably the smoothest conference, even of the conferences that I just go to, that I’ve ever seen. They knew the questions (we should ask) before we knew the questions. Overall, it was a great experience.”

The End Result

Regardless of the technology or meeting format used to conduct sales training, it’s important for everyone to stay focused on the ultimate outcome. As Lindsay notes, “At the end of the day, it’s not about the program. The goal is not to hear stuff, or even to know stuff. The goal is to do stuff. The goal of learning is not knowing, the goal is doing.” *I&FMM*

Texas

Delivers Big-Time Meetings and Huge Value

By John Buchanan

Location has played a critical role in the colorful history of Texas, from The Alamo to the historic turn-of-the-20th-century port at Galveston. Today, the Lone Star state's convenient location in the middle of the country — combined with formidable airlift into both Dallas and Houston and a strong, well-demonstrated value proposition — is helping it attract more meeting business from beyond its storied borders. Adding even more to its selling equation is its down-home ambience.

"Texas is a very friendly, hospitable state," says Regina A. Earls, CMP, event planner for State Farm Mutual Automobile Insurance Company, who plans about 125 meetings a year — almost all of them hosted in her home state. "Just about anything a meeting planner could ever want can be found in Texas. If you like beaches, we have great beaches. If you like mountains, we have the Hill Country outside San Antonio. If you like fine dining, Dallas and Houston offer excellent restaurants. No matter what you're looking for, you can find it in Texas."

Kelli Livers, CMP, director, travel and administrative services, at Houston-based Forethought Financial Group, notes that another benefit of Texas meetings is their bottom-line value. "In Texas, you're going to get good value on a four- or five-star hotel experience," says Livers, who plans about 30-35 meetings a year, with a half-dozen or so hosted in Texas. "Those hotel rooms are generally more economical in Texas than they are in many other major meeting destinations."

Greater Dallas Area

The greater Dallas area ranks high among the most sophisticated urban centers in the U.S., offering world-class hotels, a globally acclaimed dining scene, and a broad range of venues and activities. In addition to its sprawling downtown metroplex, Dallas delivers popular enclaves such as Arlington, Grapevine, Plano and Irving — home of the Dallas Cowboys and Texas Stadium.

Last year, Earls planned back-to-back meetings in Irving, an independent municipality located northwest of Dallas, adjacent to Dallas-Fort Worth International Airport (DFW). She hosted 300 attendees for a two-day meeting at the 519-room Omni Mandalay Hotel Las Colinas, and a month later, she hosted 355 attendees for a three-day meeting at the 457-room Four Seasons Resort & Club Las Colinas.

Earls particularly likes Irving for its convenient location. "It's right there in the Dallas hub, so in-and-out access is very easy," she says. "Irving has also been very good about working with us when we need something. The Irving Convention & Visitors Bureau brings a lot to the table."

Irving's meeting industry profile has gotten a significant boost with the debut of the $133 million Irving Convention Center at Las Colinas, which features 100,000 sf of meeting and exhibit space packaged in stunning modern architecture. Situated on 40 acres in the heart of Irving's Las Colinas Urban Center, the convention center is the first phase of a mixed-use entertainment district that will include a 6,000-person capacity performance venue, as well as upscale dining and shopping.

Grapevine — the actual home of Dallas-Fort Worth International Airport — offers 11,000 hotel rooms and more than 800,000 sf of meeting and event space. Its major meeting hotels include the 336-room Grand Hyatt DFW, 401-room Hilton DFW Lakes & Executive Conference Center, 1,511-room Gaylord Texan Resort and 828-room Hyatt Regency DFW. Grapevine also features a number of fun offsite venues, such as The Main Event, with

Situated atop one of the highest points in San Antonio, The Westin La Cantera Resort offers panoramic views of the beautiful Texas Hill Country from its 3,200-sf terraced event pavilion, which is adjacent to the golf clubhouse.

Photo courtesy of The Westin La Cantera Resort a bowling alley, pool tables, laser tag, video games and big-screen TVs.

Located 20 miles north of downtown Dallas, Plano is another upscale, exclusive enclave that combines the amenities of a major American city with small-town charm and personalized service. The Plano Convention & Visitors Bureau is also known for its extensive planner support services.

Photo courtesy of Omni Hotels & Resorts

Connected to the Dallas Convention Center via skybridge, the Omni Dallas Hotel will open two months early on 11-11-11.

Plano's meeting facilities include the 122,500-sf Plano Centre, popular for corporate trade shows, conferences and product launches.

Located between Dallas and Fort Worth, Arlington — home of the Texas Rangers baseball team — is another destination that combines big-city amenities with small-town hospitality. It offers a number of unique meeting venues including: the 1010 Collins Entertainment and Event Center, with more than 16,000 sf of meeting space; Mediterranean Villa, which features crystal chandeliers, marble floors, ceilings etched in gold and 15,000 sf of meeting space; and the 18,000-sf International Bowling Museum and Hall of Fame, which has two breakout meeting rooms and can accommodate groups of 20–400 attendees.

The big meeting news in Dallas is the highly anticipated opening of the 1,001-room Omni Dallas Hotel, which will be connected to the Dallas Convention Center via skybridge. The new property will make its debut in November with 110,000 sf of meeting space, which includes a 32,000-sf grand ballroom and 15,000-sf junior ballroom. The property also will feature 10,000 sf of outdoor event space. The Omni Dallas will have five restaurants, including Bob's Steak & Chop House and a farm-to-table eatery.

Meanwhile, a number of major Dallas hotels have undergone renovations.

On the heels of a $125 million renovation, the 1,606-room Hilton Anatole, with 600,000 sf of meeting and event space, has completed the $2.3 million addition of Trinity Corridor, an enclosed, air-conditioned passageway that connects attendees to the Trinity Ballroom and exhibit space.

The six-year-old, 298-room Grand Hyatt DFW, with 34,000 sf of space, is in the midst of a $13 million renovation that will be completed in September. The 1,840-room Sheraton Dallas, with 230,000 sf of meeting and event space, completed a $90 million renovation last year.

Other Dallas properties that have undergone renovations include the 1,162-room Hyatt Regency Dallas, 544-room Renaissance Dallas and 559-room InterContinental Dallas. The Westin City Center has been renamed Dallas Marriott City Center and is in the midst of a major renovation.

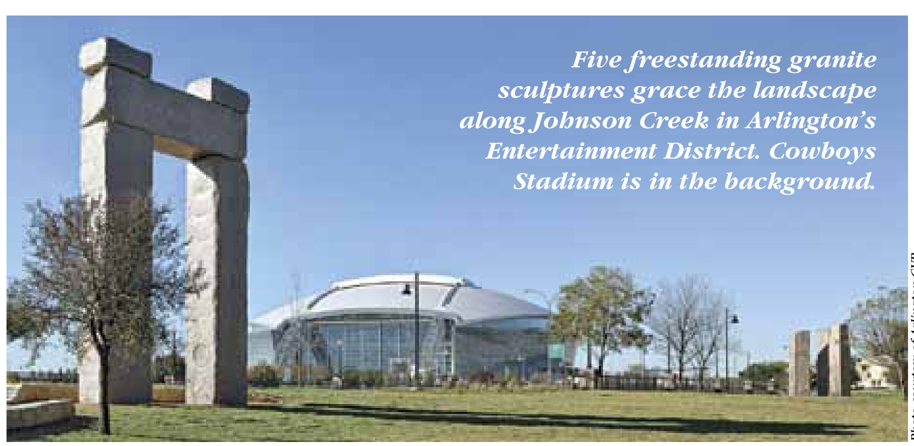
Fort Worth

Located west of Dallas, Fort Worth ranks as one of the Lone Star state's more eclectic destinations, featuring a genuine Texas experience often defined by a good steak dinner and live honky-tonk music at world-famous venues such as Billy Bob's Texas, located in the city's historic stockyards.

In February, Tammy Lewert, manager of education and enrollment at Prudential Retirement in Scranton, PA, hosted 30 attendees for a three-day meeting at the 614-room Hilton Fort Worth Downtown, with 68,000 sf of meeting space. "We chose Fort Worth because it was centrally located for attendees coming in from the east and also from the west," says Lewert, who plans two meetings a year. Fort Worth, she adds, was also highly recommended by a senior-level attendee who lives in Dallas. "We chose the Hilton because it's centrally located to all of the things to do in downtown Fort Worth," Lewert says. "In terms of cost, it was very reasonable. And we were also able to get good airlift into Dallas-Fort Worth airport."

Like Dallas, Fort Worth can claim a new convention center hotel — the 614-room Omni Fort Worth Hotel with 68,000 sf of meeting space. The property will feature a Bob's Steak & Chop House, a Mokara spa, wine bar and rooftop pool.

The city's only Starwood property, the 431-room Sheraton Fort Worth Hotel & Spa, with 22,000 sf of space, has undergone a $48 million renovation.



Five freestanding granite sculptures grace the landscape along Johnson Creek in Arlington's Entertainment District. Cowboys Stadium is in the background.

Photo courtesy of Arlington CVB

Houston

"Houston is a very upscale, elegant city," says Earls. "I call it 'cowboy chic.' They have the oil industry, but you can also go to the opera or a play. But if you want to put your boots on and be a cowboy, you can do that, too. It's also a very business-oriented city because of the oil industry and the port. And that means there are a lot of good business speakers in Houston."

In March, Earls hosted 175 attendees for a one-day, one-night meeting at the 301-room Marriott West Loop by the Galleria with 17,000 sf of meeting space. The hotel completed the first phase of an $18 million renovation earlier this year. The entire makeover will be completed in 2013.

Livers also likes Houston as a destination. In March, she hosted 20 VIP client attendees for a two-day, two-night meeting at the 289-room Houstonian Hotel, Club & Spa, which offers more than 32,000 sf of meeting space. The historic hotel completed a $7.1 million renovation in 2009.

"The Houstonian is one of the top hotels in Houston," Livers says. "It has that lush resort feel, but it's smack dab in the middle of the city. And the amenities are outstanding, especially the spa and fitness center."

Livers is fond of Houston because the weather is mild and consistently nice from November to April. She also likes the airlift and ease of getting attendees in and out. "If you're a planner doing fairly large meetings, like training meetings, then you'll find great value in Houston," Livers says.

In March, Houston saw the debut of the 267-room Westin Houston Memorial City with more than 30,000 sf of meeting space. The new hotel features Trattoria Il Mulino restaurant, The 024 Lounge and an 18th-floor infinity pool with sweeping views of the city's skyline.

The 400-room Omni Houston Hotel at Westside, with 25,000 sf of space, has completed a renovation of its lobby, restaurant and bar. Last summer, the 519-room Four Seasons Hotel Houston completed a $25 million renovation. In May last year, the 86-room Hilton University of Houston, located on the university campus and featuring 25,000 sf of space, completed a $12.5 million renovation.

Austin is especially appropriate for think tank-style meetings or retreats "...because there's a lot of creativity in Austin. It's a place where you can work hard during the day and have a lot of fun in the evening."

Regina A. Earls, CMP, Event Planner
State Farm Mutual Automobile Insurance Company, Austin, TX

In 2009, the 947-room Hyatt Regency Houston, featuring 71,300 sf of meeting space, completed a $50 million renovation. The 232-room, AAA Five Diamond St. Regis Houston, with 13,900 sf of meeting space, completed a $15 million renovation.

San Antonio

Located in southwest Texas, San Antonio is another unique Texas destination, most famous for the historic, iconic Alamo, the more modern but just as celebrated River Walk, and the Hill Country, which defines the landscape outside of town.

"San Antonio has history, but it also has culture," says Livers. This year, those two elements are being combined into a year-long celebration of the 175th anniversary of the Battle of The Alamo, one of the defining moments in American history.

Earls likes San Antonio for its flavor and luxury properties. In March, she hosted 325 attendees for a two-day meeting at The Westin La Cantera, located in the Hill Country. The 508-room resort features more than 39,000 sf of indoor/outdoor space, including a 17,000-sf ballroom. The hotel celebrated its 10th anniversary in 2009 with a $12 million renovation. Last year, The Westin La Cantera completed an outdoor renovation of its exclusive Casita Village, which offers 11 individual "little houses" that range from an 1,800-sf main house to smaller structures, which are perfect for executive retreats or teambuilding. The property also features two championship golf courses.

"Westin La Cantera is a gorgeous property," says Earls. "The staff there is excellent. I love that hotel."

Earls also has high praise for the River Walk complex, which combines dining, shopping and entertainment into one of the most critically acclaimed urban centers in the U.S.

"The River Walk is a great place to have a meeting," Earls says. "There are a lot of unique venues and an excellent dining scene."

In May 2009, the River Walk complex added another 1.3 miles of attractions, bringing its total length to four miles. The addition also connects the original River Walk to San Antonio's museums, the historic Pearl Brewery and a range of cultural attractions located just to the north.

The city also boasts a new offsite meeting venue, the new Lonesome Dove Room at the Henry B. Gonzalez Convention Center. The new venue, which features fine Western art and rich rustic furnishings, can accommodate groups of 150 to 500.

In January 2010, the 1,002-room JW Marriott San Antonio Hill Country Resort & Spa made its debut, featuring more than 140,000 sf of meeting space, a 26,000-sf spa, and a PGA Tour-quality golf course that will serve as new host of the Valero Texas Open. Another new San Antonio hotel is the 285-room Embassy Suites, located on the River Walk and boasting an acclaimed new restaurant from chef John Besh. The property features more than 11,000 sf of meeting space and 4,500 sf of outdoor event space.

The 632-room Hyatt Regency San Antonio, located on the River Walk and overlooking The Alamo, has completed the first phase of a $30 million renovation. The hotel offers 40,000 sf of meeting space.

Austin

Like other major Texas destinations, Austin can claim a unique mix of compelling attributes. It's the state capital, but it's also a high-tech center and the live music capital of the country, with a thriving entertainment and dining scene.

"For meetings, Austin is a very relaxed community," says Earls, who hosted her most recent meeting there in February for 125 attendees. "You can get dressed up if you want to, but it's very laid-back and casual."

Austin is especially appropriate for think tank-style meetings or retreats, Earls says. "That's because there's a lot of creativity in Austin. It's a place where you can work hard during the day and have a lot of fun in the evening."

"In Texas, you're going to get good value on a four- or five-star hotel experience. Those hotel rooms are generally more economical in Texas than they are in many other major meeting destinations."

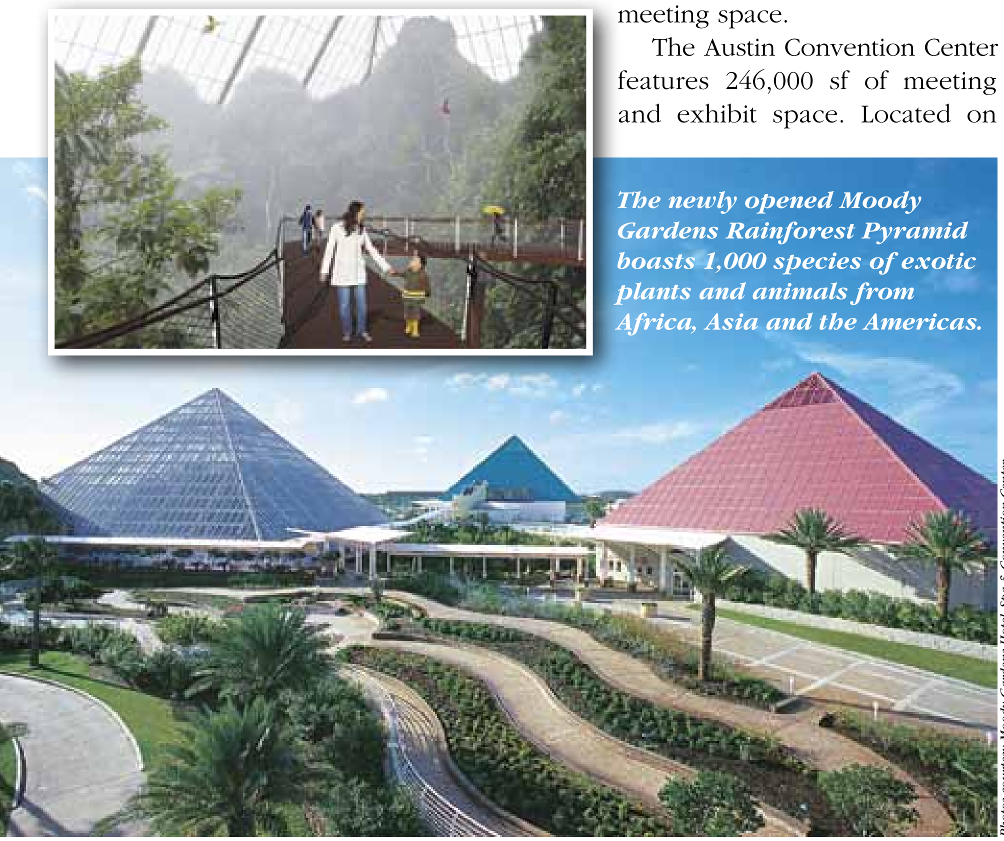
Kelli Livers, CMP, Director, Travel and Administrative Services
Forethought Financial Group Inc., Houston, TX

Livers shares Earls' enthusiasm for Austin. "It has a little bit of that hip, cultural, musical aspect to it — versus Houston," she says. "It also has that rolling hills kind of feel." She deems it perfect for younger, entertainment-oriented attendees who want an eclectic experience.

Austin also offers a wide array of hotel options, from major meeting properties such as the 491-room Hyatt Regency Lost Pines Resort & Spa, with 290,000 sf of meeting space, to the historic, one-of-a-kind Driskill Hotel, with 188 guest rooms and 18,080 sf of meeting space.

The Austin Convention Center features 246,000 sf of meeting and exhibit space. Located on Lady Bird Lake next to a popular city park, the Palmer Events Center offers 131,000 sf of meeting and event space. The Arthouse at the Jones Center has completed a renovation that expanded its meeting space to 21,000 sf.

Two new hotels recently debuted in Austin: The 251-room W Austin Hotel, which offers 10,500 sf of meeting space, anchors a $225 million mixed-use project in the 2nd Street district; and the 340-room Westin at The Domain, with 14,000 sf of meeting space, features a shopping arcade that includes a Neiman-Marcus store.



The newly opened Moody Gardens Rainforest Pyramid boasts 1,000 species of exotic plants and animals from Africa, Asia and the Americas.

Photos courtesy Moody Gardens Hotel, Spa & Convention Center

Galveston

Located an hour's drive east of Houston, Galveston Island is a barrier island resort community on the Gulf of Mexico. Ranking as one of the wealthiest cities in the U.S. at the turn of the 20th century thanks to a thriving port, Galveston today showcases the mansions and other grand structures the shipping barons built more than 100 years ago, including the most cherished collection of Victorian architecture outside of New England.

Galveston's meeting properties include the 428-room Moody Gardens Hotel, Spa & Convention Center, which has more than 100,000 sf of meeting space. The property recently completed a $25 million renovation of its unique Rainforest Pyramid, which allows a bird's eye view of more than 1,000 species of plants and animals.

The Hotel Galvez & Spa, a Wyndham Grand Hotel and National Trust Historic Hotel of America and now celebrating its 100th anniversary, has completed an $11 million renovation. ***I&FMM***

Corporate Ladder

VAN VECHTEN

MCKAY

CONNOLLY

ARCEO

HERSHENOW

Fantasy Springs Resort Casino, Indio, CA, has named **Shawn Sande** as director of sales. He most recently served as sales manager at Agua Caliente in Rancho Mirage, CA.

Tod Roadarmel was named director of sales and marketing for the Omni Nashville Hotel, which is scheduled to open late 2013. He joins the Omni Nashville Hotel from RevSource, a Nashville-based hospitality sales and marketing firm that he founded in 2002.

The Westin Westminster, Westminster, CO, has named **Chris Claydon** as senior sales manager. He most recently served as sales manager at the Sheraton Downtown Denver Hotel in Denver, CO.

The DoubleTree Atlanta-Northlake in Atlanta, GA, has named **Ciaran Daly** as area director of sales and marketing. He formerly directed sales and marketing for two Sage hotels in the Atlanta market.

Kathy Van Vechten was named vice president sales and marketing for the Hilton Carlsbad Oceanfront Resort and Spa in Carlsbad, CA, which is scheduled to make its debut in the spring of 2012. Van Vechten most recently served as vice president of marketing and sales at Terranea Resort, Rancho Palos Verdes, CA.

Marta Hagan was named director of sales and marketing for the new Shore Hotel, opening in late summer 2011 in Santa Monica, CA. She formerly served as sales manager for the Standard Hollywood, West Hollywood, CA.

Hilton Orlando, Orlando, FL, has named **Bill McKay** as director of sales. He most recently oversaw citywide bookings for the Savannah Convention and Visitors Bureau in Savannah, GA.

The Inn at Pocono Manor, Pocono Manor, PA, has named **John Gadbois** as sales manager. He previously was with Fairmont Hotels & Resorts responsible for selling Canadian resorts to Northeastern U.S. clients.

The Omni Bedford Springs Resort, Bedford, PA, has named **Lesly Connolly** as senior sales manager based in the Washington, DC, area. She most recently served as group sales manager at the Mason Inn Conference Center & Hotel at George Mason University, Fairfax, VA.

Peter Arceo was appointed senior director of sales and marketing for Casino Arizona and Talking Stick Resort, two enterprises of the Salt River Pima-Maricopa Indian Community in Scottsdale, AZ. He was formerly with the Las Vegas Hilton, Las Vegas, NV, where he served as executive director of casino marketing.

Stan Hershenow was named regional director of group sales for Starwood Hotels & Resorts Hawaii. He most recently served as a services and solutions executive for the Xerox Corporation in St. Louis. *I&FMM*

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