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# INSURANCE & FINANCIAL MEETINGS MANAGER

THE EXECUTIVE SOURCE FOR PLANNING INNOVATIVE

## Preparing for Worst-Case Scenarios

Planners Face a Heightened  
Duty of Care Amid Growing  
Safety & Security Risks

Page 44

## Incentives at Sea

All-Inclusive =  
Excellent Value

Page 18

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**Brenda Rivers, JD**, President and CEO of Andavo Meetings, Incentives and Consulting, and certified by the Institute of Crisis Management Communications, has firsthand experience with major meeting disruptors.



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ISSN 1095-9726 ..... USPS 012-991

A COASTAL COMMUNICATIONS CORPORATION PUBLICATION

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## INSURANCE & FINANCIAL MEETINGS MANAGEMENT

THE EXECUTIVE SOURCE FOR PLANNING MEETINGS & INCENTIVES

MAY/JUNE 2017

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*An Oceania luxury cruise ship visits picturesque Portofino, Italy.*

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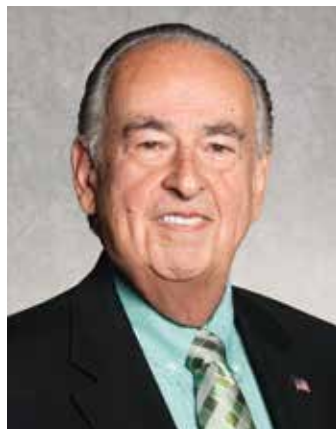
*The Broadmoor's East Course, one of three award-winning golf courses at the legendary Colorado Springs resort.*



# Publisher's Message

## When the Unthinkable Happens

The nation was rocked a year ago in June by the deadliest mass shooting in America's history at the Pulse nightclub in Orlando. An active shooter incident like this is a worst-case crisis management scenario and a meeting planner's worst nightmare. Less horrific but still frightening are other "disruptors" such as severe weather events, as in hurricanes. Imagine being impacted by both of the above for the same meeting.



It happened to Brenda Rivers, JD, president and CEO of Andavo Meetings, Incentives and Consulting (who graces our cover) in planning a five-day annual summit in Orlando, set to take place in October 2016. With news of the city in a panic over the shootings in June, registered attendees for the October event were in a panic, too. Rivers, who is certified by the Institute of Crisis Management Communications, and her team employed their skills and expertise to avert potential mass cancellations. As if that weren't enough, when the meeting finally convened in October — with record turnout — Hurricane

Matthew roared up the Florida coast, putting Orlando in its sights. "The entire group was on lockdown in the hotels for 24 hours, and the program agenda had to be restructured," Rivers remembers. "The team learned that response training for one type of crisis is transferable."

She was prepared, but are you? "When a crisis strikes an event, it is the meeting planner who is expected to know what to do," says Rivers, adding, "Planners are increasingly anxious about their responsibility for crisis preparation, yet most lack anything more than security handbooks and checklists to guide them. Reading the security handbook is not preparation. If the organization's response team does not know what to do in the first 10 minutes of a crisis, they are not prepared."

Unfortunately, in this day and age "duty of care" has extended way beyond accidents, medical emergencies, fires, power outages and the like, and now encompasses other grim "disruptors" such as terrorist attacks, weather disasters, and cyber crime and data theft.

Our cover story on page 44 "Preparing for the Worst-Case Scenario" is a wake-up call for all organizations and meeting planners to the need for extensive training and comprehensive duty-of-care policies and procedures to ensure the protection of attendees and staff, should the unexpected and unthinkable happen.

Harvey Grotsky

## www.TheMeetingMagazines.com INSURANCE & FINANCIAL MEETINGS MANAGEMENT THE EXECUTIVE SOURCE FOR PLANNING MEETINGS & INCENTIVES

A COASTAL COMMUNICATIONS CORPORATION PUBLICATION

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Insurance & Financial Meetings Management is published bi-monthly by Coastal Communications Corporation, 2700 N. Military Trail, Ste. 120, Boca Raton, FL 33431-6394; 561-989-0600. Single copies \$10.00 U.S.A.; back copies \$12. Yearly subscription price is \$65.00 in the U.S.A.; \$135.00 in Canada. Distributed without charge to qualified personnel. Periodicals Postage Paid at Boca Raton, FL, and additional mailing offices. POSTMASTER: Please send address changes to Insurance & Financial Meetings Management, 2700 N. Military Trail, Ste. 120, Boca Raton, FL 33431-6394. Nothing contained in this publication shall constitute an endorsement by Coastal Communications Corporation (Insurance & Financial Meetings Management), and the publication disclaims any liability with respect to the use of reliance on any such information. The information contained in this publication is no way to be construed as a recommendation by I&FMM of any industry standard, or as a recommendation of any kind to be adopted by or binding upon any corporate/incentive travel planner or agent. Reproduction of any portion of this publication by any means is strictly forbidden. Editorial contributions must be accompanied by return postage and will be handled with reasonable care. However, the publisher assumes no responsibility for return of unsolicited photographs or manuscripts. Subscriber: Send subscription inquiries and address changes to: Circulation Dept., Insurance & Financial Meetings Management, 2700 N. Military Trail, Ste. 120, Boca Raton, FL 33431-6394. Give old and new addresses including zip codes. Enclose address label from most recent issue and allow five weeks for change to become effective. Printed in U.S.A. © 2017

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## Universal Orlando Announces Meeting Enhancements

ORLANDO, FL — Universal Orlando Resort has announced its newest Meetings & Events offering — Meeting Enhancements. Now, when planners host meetings at Universal Orlando onsite hotels they can utilize Meeting Enhancements to create compelling experiences that connect attendees to their organization's message in impactful ways that engage, inspire and entertain.

Options include character interruptions, customizable performers and unique entertainment elements.

In the **Branded Character Moments**, powerful characters such as Optimus Prime can open a meeting or introduce a CEO. Picture a meeting interruption by the



A contingent of Minions crash a meeting to inject some fun.

Minions to excite and engage attendees, reminding them to have some fun.

**Custom Character Options** offer customizable character moments — such as an adventure guide, sports broadcaster or movie director — to help deliver specific messages and reinforce your conference theming.

**Inspirational Atmosphere.** Add another layer of enthusiasm with atmospheric elements taken right from Universal Orlando's three theme parks. From stilt walkers

to signature Mardi Gras entertainers and other specialty acts, these performers allow planners to meet attendees' high expectations with a boost of energy.

[www.uomeetingsandevents.com](http://www.uomeetingsandevents.com)

## Hilton Launches In-Room Gyms

MCLEAN, VA — Hilton has unveiled Five Feet to Fitness, an in-room wellness concept that brings more than 11 different fitness equipment and accessory options into the hotel room. The new room category makes it more convenient than ever for road warriors and exercise enthusiasts to maintain their routines while staying with Hilton.

The new room type features an indoor bike from British cycling innovator Wattbike that is used for either longer "indoor-cycling" type exercise sessions or focused interval-training workouts. Next, dynamic Gym Rax functional training station provides apparatus and accessory that deliver unlimited strength, core, suspension and High Intensity Interval Training (HIIT) style workouts to guests.

At the heart of the concept is the Fitness Kiosk, a touch screen display embedded within the Gym Rax system where guests receive equipment tutorials and follow guided workout routines. In partnership with Aktiv Solutions, Hilton has created more than 200 bespoke fitness videos in categories ranging from Cardio, Cycling, Endurance, Strength, HIIT, Yoga, Stretch and Recovery.



Hilton's new guest room category is stocked with fitness equipment.

Five Feet to Fitness also offers a meditation chair for the mindful traveler, blackout shades for restorative sleep, Biofreeze to ease muscle tension, and a selection of protein and hydration beverage options.

Hilton's Five Feet to Fitness is currently available at Parc 55 San Francisco - a Hilton Hotel and Hilton McLean Tysons Corner and is coming soon to markets including Atlanta, Austin, Chicago, Las Vegas, New York and San Diego. [www.hilton.com](http://www.hilton.com)

## New IRF Report: The Role of Emotion in Motivation

MCLEAN, VA — The Incentive Research Foundation released "Using Behavioral Economics Insights in Incentives, Rewards and Recognition: The Neuroscience," an innovative application of scientific findings to employee motivation and rewards. "(The report) curates and explains the research so that incentives, rewards and recognition professionals can...better understand what motivates employees and ultimately create more engaging and productive work environments," said Melissa Van Dyke, IRF president. Behavioral economics integrates social, cognitive and emotional factors to more fully explain human decision-making biases. The most powerful neuroeconomics finding is that all forms of reward are processed in the brain's master reward center, the striatum, and are experienced as rewarding feelings. Download the full study at [www.theirf.org](http://www.theirf.org).



VAN DYKE

## Waldorf Astoria Announces Iconic Property in Beverly Hills

BEVERLY HILLS, CA — The Waldorf Astoria Beverly Hills opened in June at the intersection of Wilshire and Santa Monica boulevards. Adjacent to The Beverly Hilton, the 12-story hotel is the Waldorf Astoria Hotels & Resorts' first new build on the West Coast and second California property. Gensler and Pierre-Yves Rochon Inc. are the co-design architects.

A Personal Concierge is assigned to every guest, from pre-arrival until departure, including an individual bespoke in-room check-in service. And, a private Rolls Royce house car offers complimentary drop-off service within a two-mile radius.

Each of the 170 guest rooms, inspired by the contemporary interpretation of Hollywood glamour and the Streamline Moderne style of the 1930s and '40s, has floor-to-ceiling windows that open onto oversized private balconies overlooking the Hollywood Hills and nearby Century City.



The rooftop pool deck, available only to hotel guests, is the loftiest and largest rooftop destination of its kind in Beverly Hills.

Three world-class dining venues include the legendary French chef Jean-Georges Vongerichten's eponymous signature restaurant Jean-

Georges Beverly Hills, as well as The Rooftop by JG and Jean-Georges Beverly Hills Bar.

The hotel also features 6,300 sf of meeting spaces, including two ballrooms, perfect for corporate meetings or gala celebrations.

[www.waldorfastoria.com](http://www.waldorfastoria.com)

## Christine Loomis Wins Gold Award for I&FMM's Human Trafficking Feature

CHARLESTON, SC — The Western Chapter of the Society of American Travel Writers held its annual writing awards competition in May, receiving 144 entries from 34 profes-



LOOMIS

sional travel journalists. The awards were announced at the annual chapter meeting in Charleston, South Carolina, in June. For the second year, University of Missouri School of Journalism faculty provided the judging, giving awards in nine categories. Among the categories is Service Articles, which should provide a combination of solid information and tips or action steps

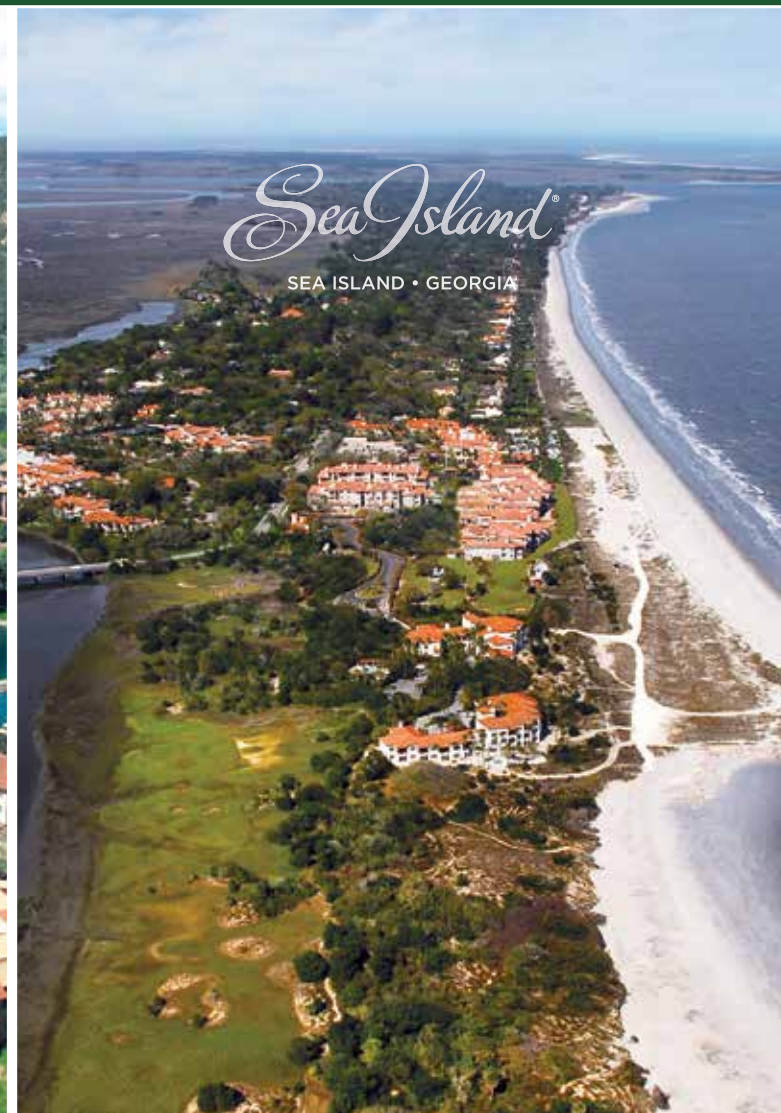
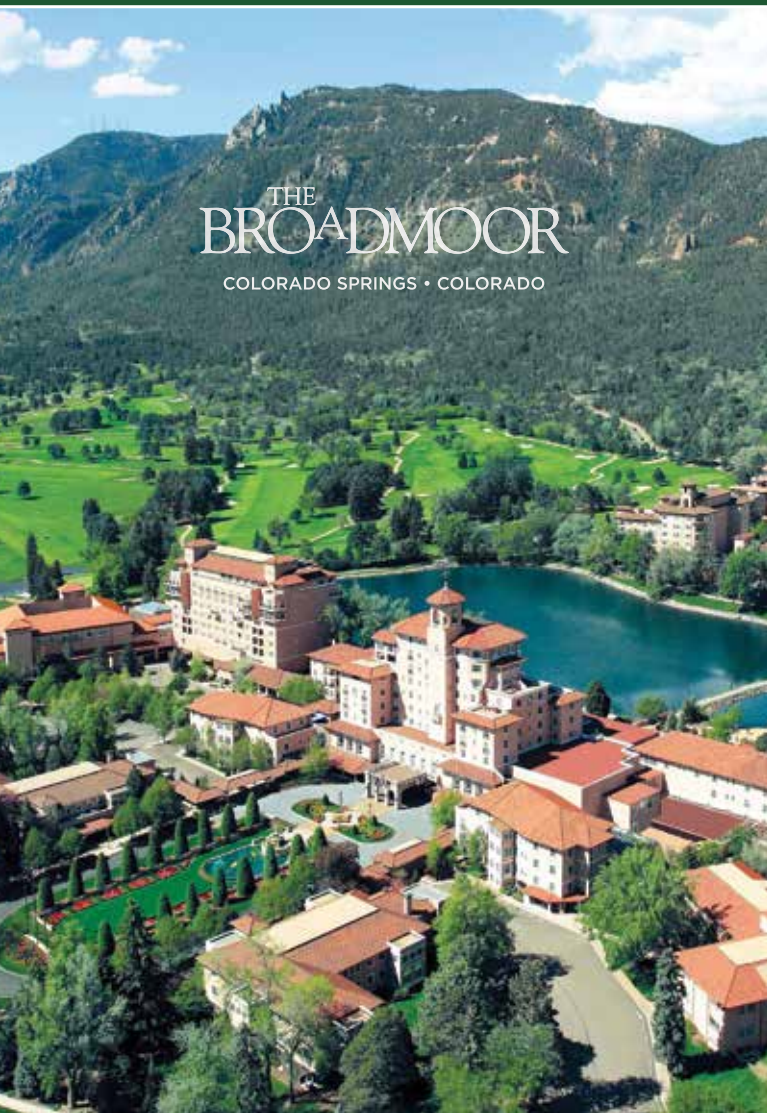
that readers can take. *Insurance & Financial Meetings Management* Contributing Editor Christine Loomis won the Gold Award in this category for her article "A Call to Action: Human Trafficking in the Meetings Industry," which appeared in the January/February 2016 issue of *Insurance & Financial Meetings Management*.

[www.themeetingmagazines.com/ifmm/human-trafficking](http://www.themeetingmagazines.com/ifmm/human-trafficking)



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*Recipient of the Forbes Five-Star award for 57 consecutive years, The Broadmoor is a strikingly unique destination for memorable meetings and events. The Broadmoor has offered guests an incredible way to experience the unique gateway to the American West for nearly a century.*

### ***Meeting Space— Unique***

With 185,000 square feet of sophisticated event space, The Broadmoor understands the unique needs and attention required to create memorable, successful meetings. From boardrooms and Broadmoor Hall's 60,000 square feet at the main campus to Cloud Camp's Overlook at 9,200-foot elevation, we have the space to make your meeting memorable.

### ***Activities— For Everyone***

Meeting attendees can hike scenic trails, experience horseback riding and mountain biking, or archery. Broadmoor Outfitters offers expert instruction in fly fishing, falconry, zip lining and much more. Championship golf courses, and our Forbes Five-Star Spa provide rest and reward.

### ***Accommodations— Variety***

The 784 guest rooms, suites, cottages, brownstones, and The Broadmoor Estate House feature the elegant touches and amenities at the main campus. Provide adventure at one of the three Broadmoor Wilderness Experiences: Cloud Camp, The Ranch at Emerald Valley, and The Broadmoor Fly Fishing Camp.



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*Where extraordinary facilities, activities and Southern hospitality blend to create exceptional meetings. Come see why we are the only resort in the world to receive four Forbes Five Stars for nine consecutive years and the only one in the U.S. chosen to host a G8 Summit.*



### ***Meeting Space— Flexibility***

With more than 87,000 square feet of indoor and outdoor function space, Sea Island venues range from boardrooms to ballrooms, accommodating 5 to 500 people. From food and décor to technical expertise, our seasoned team brings creativity and attention to detail to every conference, executive retreat, and customized meeting.

### ***Activities— Variety***

Sea Island provides an extensive array of options for your meeting attendees including customized team building activities, outdoor experiences such as fishing, water sports, shooting school and falconry, a 65,000-square-foot spa and fitness center, three championship golf courses, and the nation's finest Golf Performance Center.

### ***Accommodations— Choice***

Our 390 rooms and suites ensure we have a room type to meet your needs from The Cloister, nestled between the Black Banks River and the Atlantic Ocean to The Lodge, surrounded by two of our golf courses to The Inn, our select-service property. Or for those seeking outdoor adventure, we offer Broadfield, our 5,800-acre sporting club.



## Alabama's Grand Hotel Begins Massive Transformation

POINT CLEAR, AL — Opened in 1847, the Grand Hotel Marriott Resort, Golf Club & Spa in Point Clear, Alabama, will be transformed in the next 16 months during a major renovation. The transformation is scheduled to be complete in spring 2018. The Grand Hotel opened a new golf practice facility in 2016. The Grand Golf Experience features three acres of tee surface, 22,000 sf of USGA greens surfaces, today's most advanced teaching technology, club-fitting services, a two-acre short game area and a 1,500-sf range house. Renovations to the Lakewood Club's Azalea and Dogwood courses are planned in the future. The Grand currently has multiple restaurants both in the resort and at the Lakewood Club.



The Alabama Grand Hotel.

These offerings are being reviewed in preparation for the next chapter of the Grand's exceptional culinary history.

The rooms in the Spa Building will be renovated with a design inspired by the spa experience. While services and protocols will transform as the Grand becomes an Auto-graph Hotel, the Spa at the Grand

will maintain its current design and world-class offerings.

The Grand Hotel and the other seven properties in the Robert Trent Jones Golf Trail Resort Collection are owned by the Retirement Systems of Alabama. The Robert Trent Jones Golf Trail is celebrating its 25th year in 2017. [www.marriottgrand.com](http://www.marriottgrand.com)

## Visit Sacramento Names New Leader

SACRAMENTO, CA — Visit Sacramento, the region's destination marketing organization, has appointed current Chief Operating Officer Mike Testa as its next president and CEO.



TESTA

Testa, who begins serving as Visit Sacramento's president and CEO on July 1, 2017, will oversee the organization's role in booking conventions, meetings and trade shows for the Sacramento Convention Center and local hotels; promoting Sacramento's farm-to-fork identity nationally to consumers; and charting the course for the Sacramento Sports Commission. He succeeds Steve Hammond, who is retiring after serving as its president and CEO since 1999.

Testa was first hired by Visit Sacramento in 2001 as director of public relations and later assumed leadership roles in consumer marketing, convention sales and business development.

"I am honored to help lead our region's efforts to leverage Sacramento's many great assets to make our region more competitive as a visitor destination," said Testa. [www.visitsacramento.com](http://www.visitsacramento.com)

## Marriott to Double Luxury Hotel Footprint in Asia-Pacific

SHANGHAI — Marriott International unveiled plans to double its luxury presence in Asia-Pacific by adding more than 100 luxury hotels to its current footprint of 113 luxury properties. Announced at the International Luxury Travel Market (ILTM) conference in Shanghai, this represents over half of the company's global growth in this category.

With the introduction of 11 new hotels to its luxury portfolio in Asia-Pacific, 2017 is already on track to be a breakthrough year for Marriott International. China continues to contribute around half of the new hotels in the region with key cities such as Shanghai and Suzhou being flagged for new properties, while emerging luxury destinations such as Tasmania and Sri Lanka are also on the horizon. Globally, Marriott International has a total of 200 luxury hotels in its development pipeline, building its network of eight luxury brands, which includes The Ritz-Carlton, Ritz-Carlton Reserve, St. Regis Hotels & Resorts, W Hotels, The Luxury Collection, JW Marriott, Edition and Bulgari Hotels & Resorts, from 365 landmark properties to more than 500 luxury hotels.

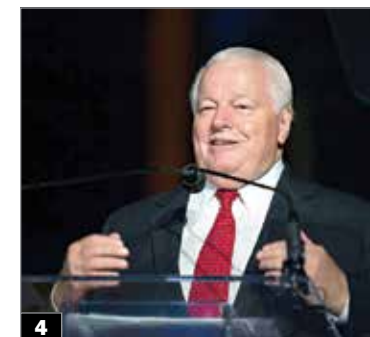
Each brand represents distinctive values, heritage, and personality, and this wide range offers guests the opportunity to access iconic hotspots and undiscovered gems. [www.marriott.com](http://www.marriott.com)



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**1-4** More than 6,400 attendees from 70 countries, including more than 1,300 international and domestic travel buyers and a record 530 journalists from the U.S. and abroad, attended the U.S. Travel Association's 49th annual IPW, held in Washington, DC, for the first time in its history, at the Walter E. Washington Convention Center in June. **1, 2** The closing party was held at Nationals Park, hosted by Capital Region USA. **3** The hosted-buyer floor. **4** U.S. Travel Association President and CEO Roger Dow. **5-7** More than 425 SITE members and industry colleagues, including over 100 IMEX hosted buyers, came together at SITE Nite Europe at the Kameha Suite, Frankfurt, Germany, for an evening of celebration. **5** SITE member reception at IMEX Frankfurt. **6** SITE President Rajeev Kohli (front center) with Past Presidents (l to r) Carolyn Dow (2001), Tasso Pappas (2000), Patrick Sullivan (2010), Fay Beauchine (1988), Patrick Delaney (1992), Padraic Gilligan (2008). **7** (l to r) Ray Bloom, Chairman IMEX Exhibitions & Kevin Hinton, SITE CEO.

## SnapShots



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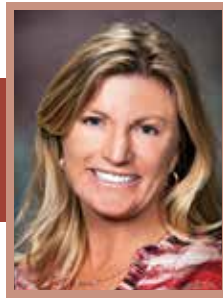


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## Uncovering Unconscious Bias in Today's Workplace

**T**raditional approaches to promoting diversity in the workplace have centered on addressing discriminatory conduct, but what about bias and unfair systems, practices and habits that we may not even be aware of?

Biases help us make sense of the millions of pieces of data that we encounter daily. It is a normal part of how humans make decisions. It's a "mental shortcut" that fills in gaps in our knowledge with similar data from past experiences and cultural norms. Unconscious bias applies to how we perceive other people. It is not necessarily a bad thing, but it can lead to bad decisions. These shortcuts create prejudices that over time create the lenses through which we process information and make decisions. If we are serious about promoting diversity in business, we need to ask ourselves about bias.

Skin color, gender and age are generally what people think of when they consider biases. Further, individuals can harbor unconscious prejudice about myriad characteristics. These include: height and weight, introversion and extroversion, marital and parental status, disability status, foreign accents, where someone attended college and hobbies or extracurricular activities.

### How Unconscious Bias Threatens Diversity

Unconscious bias undermines diversity because it can lead to group think — people automatically thinking and acting like those around them because it is familiar and comfortable. This plays out in the leaders we choose, the staff we hire and opportunities we extend. Harvard University launched a research project to demonstrate how common hidden biases are. The researchers found that at least 70 percent of hidden biases are directed toward African-Americans, the elderly, the disabled and overweight individuals.

In a well-documented experiment, Har-

vard MBA students evaluated the same successful case study of an entrepreneur. Half the class had a version where the person was a male, half had a version in which the person was a female. The students with the male character identified his traits for success as leadership and direction, while the students with the female entrepreneur identified her as bossy and overly direct. This reflected the students' hidden biases with how male and female leaders should act.

We may think that we never fall prey to such bias, but we do every day. Do we hire people who we can relate to or who look like us? Or do we promote people who remind us of ourselves? Are opportunities given to those we relate to? Do our board members resemble our perception of a typical leader in some way? Consider this: less than 15 percent of American men are over 6 feet tall, yet almost 60 percent of corporate CEOs are over 6 feet tall. Fewer than 4 percent of American men are over 6 feet 2 inches tall, yet more than 36 percent of corporate CEOs are over 6 feet 2 inches tall.

Needless to say, collective unconscious bias makes it an uneven playing field in business. Further, it can help form belief systems that people use to limit themselves. From an article in the U.K.'s *Guardian* titled "Is Women's Own Unconscious Bias Holding Them Back?" (April 2016): "Women's unconscious beliefs about career advancement could be holding them back from reaching the top. Bias comes in many forms, from assuming you need to take on more masculine characteristics to succeed to doubting your abilities and strengths."

In fact, men apply for a job when they meet only 60 percent of the qualifications, but women apply only if they meet 100 percent of them.

### How We Overcome Unconscious Bias

Even when identified, these prejudices can be difficult to abandon. As you identify with your prejudices, it can feel like you are surrendering

part of yourself up, or betraying your cultural identity for someone else you don't know. These issues often are the main cause why many are reluctant to overcome their bias. Of these problems, we ask the same question — is it causing you more harm than good?

The place to start in overcoming bias is realizing that it exists whether intentional or not — it's neuroscience. Once we agree that these prejudices exist, we need to build awareness of our own biases. Get others to check our assumptions. By doing so, we can think through how our prejudices may be formed from our history, emotion, friends or collective thought. Take the Harvard test on implicit awareness ([implicit.harvard.edu](http://implicit.harvard.edu)). You might be surprised with what you learn about yourself.

Next, we need to see how we can influence the cultures and groups we are in. Christine Lagard, CEO of the International Monetary Fund, describes how she creates an environment that welcomes divergent viewpoints as part of NPR's "The Changing Lives of Women" series: "I'm the single voice constantly in a room full of men, it's only going to carry the organization so far. Where I think it really makes a difference is when I can endorse women in the middle management or upper-middle management and make them — generally in the minority — comfortable, confident, prepared to share their views."

The Level Playing Institute in San Francisco suggests companies review every aspect of the employment life cycle for hidden bias. This would include screening resumes, interviews, on-boarding, assignment process, mentoring programs, performance evaluation, identifying high performers, promotion and termination. Further, see whether resumes with roughly equivalent education and experience are weighted equally. Make sure that the names are gender/race/culturally distinct

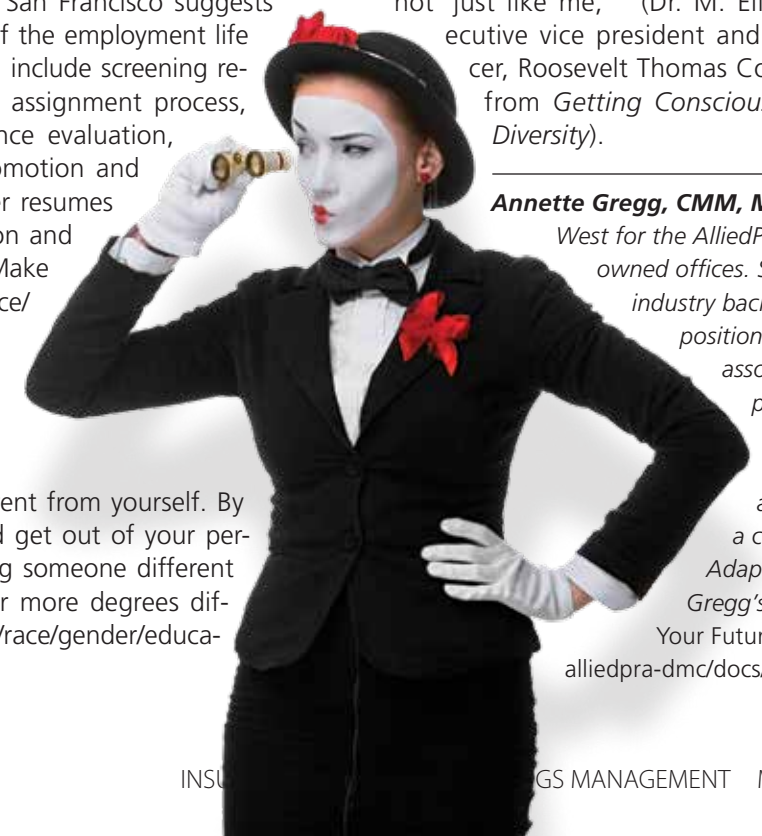
### Mentoring Someone Different From You

Try mentoring someone different from yourself. By giving back, you learn more and get out of your personal comfort zone by mentoring someone different from you. Ideally aim for two or more degrees different across dimensions like age/race/gender/educational background/politics/class.

Unconscious bias applies to how we perceive other people. It is not necessarily a bad thing, but it can lead to bad decisions.

As we strive to understand others around us and their unique perspectives, we will all win. "When we get conscious about managing diversity, we are tuning in to the indicators around us that tell us everyone does not see the world the way we do. While we know that intellectually, when it plays out in a difference of opinion, a different response or a different way of being, behaving, dressing, talking — you name it, we forget that everyone is not 'just like me,'" (Dr. M. Elizabeth Holmes, executive vice president and chief learning officer, Roosevelt Thomas Consulting & Training, from *Getting Conscious About Managing Diversity*). **I&FMM**

**Annette Gregg, CMM, MBA**, is Vice President, West for the AlliedPRA corporately owned offices. She has an extensive industry background including positions as a corporate, association and non-profit planner, and leadership positions for event agencies, CVBs and a convention center. Adapted from Annette Gregg's e-book *Becoming Your Future*. [issuu.com/alliedpra-dmc/docs/alliedpra\\_ebook](http://issuu.com/alliedpra-dmc/docs/alliedpra_ebook)







## 7 Tips for Using Social Media to Engage Your Audience

**D**id you know that nearly 80 percent of businesses say that social media is more important than SEO, email, mobile apps and even websites?

I get it. Some days social media can feel like a fad and may even get push-back from leadership. And it's just one more thing to add to your list of things you have to do, right? So, let's cut to the chase. The following seven tips will not only help drive attendance using social media at your next event, but they will help you engage with your audience throughout the year — not just at event time — and provide ideas for better time management.

### 1. Maintain Content Calendars

While we all have good intentions of posting regularly, it rarely happens that way. Enter content calendars. They're easy to set up and serve as your one-stop-shop for planning, tracking and scheduling content. And while there are some digital tools out there to help manage content, I've yet to find anything as flexible as setting these calendars up in a good old fashioned spreadsheet.

Use a tab for each month of the year and then utilize columns to add headings such as date, day and notes (this is where you can input key holidays, deadlines and other events) across the top. Each channel (e.g. Facebook, Instagram, Twitter, etc.) gets a heading across the top as well. You can plan your content anywhere from one week to one month ahead of time. Use scheduling tools such as Hootsuite, SproutSocial or Spredfast and then include a "time scheduled" column so you know when the post has been scheduled to go up. Don't forget this step — it is very important, especially around crisis management. If you ever need to pull a scheduled post down due to current events or something that has changed on your end, you will easily have a place to go to see when, where and what time the original post was scheduled.

Don't forget to interact in real time, however. Scheduling content ahead of time is great, but make sure that someone is checking in on your accounts daily (even if for just 5 minutes) and answering any requests or conversations that may be happening.

### 2. Use Source Lists

You likely have great articles, websites and organizations you turn to in order to get information about your industry. Use these for ideas! Develop a source list of your go-to areas that you can turn to when it comes time to think up new content for the week/month/year (because you can't just use your digital channels to talk about your event all the time). Source lists should contain information such as the source name, website URL, social media links and an area for miscellaneous notes. This makes it easy to see what others are talking about as you're planning your content. It also can serve as a bit of competitor analysis so that you're keeping your eyes on other events and happenings in your industry or area.

### 3. Share Other Content

In conjunction with the sources lists you develop, don't be afraid to share other people's content. Sharing of other organizations' content is just as important as creating your own. It shows collaboration and support of others. It builds trust within your network and shows your followers that you are engaging with others and aren't just the people who come to a party and talk all about yourselves without including others. Be social. That's what digital is all about.

### 4. Engage Your Sponsors

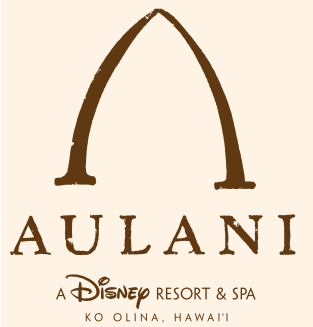
You may not have sponsors at every event, but this tip also can be for constituents, key partners or other stakeholders as well. Keep a running list (see tip No. 2) of these accounts and stick them into your content calendar each month. It is a super-easy way to make sure you're generating content, and it's likely that the key accounts have great content that you can already source from their social media channels, websites or blogs. It's a win-win!

**Bonus:** If you DO sell sponsorships for your event, add a number of social media call-outs each month depending on the sponsorship level as part of their sponsorship package. This is a great value-add for sponsors if they know you are also supporting their brand leading up to the event and you'll likely get a good amount of retweets, shared posts

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NA'AUAO ROOM	240 SQ FT

**TOTAL** 21,258 SQ FT

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RAINBOW REEF PATIO	1,766 SQ FT
KULA WAI	3,000 SQ FT
KA MAKA LANDING	16,000 SQ FT
HALAWAI LAWN	21,800 SQ FT
AULANI BEACH	20,000+*SQ FT
'AMA'AMA PATIO	4,869 SQ FT
'AMA'AMA VERANDA	
ALOHI POINT	

**TOTAL** 76,685 SQ FT

\* Additional function space may be available, depending on specific event configuration.

For more information contact:

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Phone  
808-674-6394

Fax  
808-674-6399

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and re-grams because of it. Even better? Share a discount code with your sponsors that they can give to their customers; another great way for them to spread the word and drive attendance on your behalf.

### 5. Budget for Paid Content

Organic content cannot be the only thing you rely on when creating social-media strategies for events. Just as you would have a print budget or traditional advertising budget, you need a budget for paid social content. The return

As you implement your strategy, make sure you are continuously monitoring your results.

that social media advertising can give you over some of the traditional methods is phenomenal. You can drill down by country, state, city, zip code, gender, interests, college degrees, industries, job titles — the choices are almost endless. Think about boosting specific Facebook posts throughout the month, creating one-week Twitter campaigns or sponsoring content on Instagram.

### 6. Live Tweet During the Event...

...Or Facebook, Instagram, etc. Whatever channels you are active on, use them in real time during your event. One of the largest events that my company manages sees more than 70 speakers. Our social team is onsite sitting in on sessions, snapping pictures to post online and using the event hashtag during all three days to engage not only the attendees, but those who may not have been able to be at the event in person. The increase in engagement and followers on channels is always at an all-time high during this time. Likewise, the attendees truly appreciate the quick response times and an avenue to reach people about things during the event (e.g. AV problems, questions about CEUs, room temperatures, etc.)

### 7. Use Attendee Registration to Your Advantage

When attendees register for your event, ask them where they heard about your event (and give them specific choices with your social media channels being some of them). This will help you determine the channels that are working to drive attendance. Take it a step further and ask for Twitter handles or LinkedIn profile URLs. As the manager of the event you or your marketing team can then export this list to follow and interact with the attendees online before, during and after the event. And, it gives you information on which channels to concentrate your efforts on and which channels where you can probably post a little less frequently.

All said and done, don't create content just for the sake of creating content. While we do our best to know who our target audiences are and where they may go to interact with our information, tracking the success of your social media efforts will provide you with great information on whether or not to continue using Facebook, to create that Instagram account or to use Twitter a little less and LinkedIn a little more. As you implement your strategy, make sure you are continuously monitoring your results — use platforms such as Google Analytics, Spredfast, SproutSocial or the native social media platforms' analytics to assess your average reach, impressions and most important, click-through rates (CTRs) because at the end of the day, if your digital audience isn't interacting with your content, they likely won't interact with you in person, either.

Start small. If it still seems overwhelming, tackle one channel (or two) at a time. Be really great at a few rather than mediocre at them all. Plan. Schedule. Analyze. You got this.

**I&FMM**

**Melissa Harrison**, CEO of Allee Creative, has 15 years of experience in marketing strategy, event management/marketing and business development. Recently named a "Top Young Entrepreneur" by Minnesota Business Magazine, Melissa also has received distinctions as a "Top Content Marketer" by the Content Marketing Institute, and one of 100 women to watch in the U.S. as part of The Inspirational Women Project. This year, she was selected to be a part of the SBA's Emerging Leaders program as well as an inductee in to the DeForest Area High School's Alumni Hall of Fame for her contributions and achievements in the industry. To have Melissa speak at your next event, help with upcoming event marketing and strategies, or strategize your next paid social media campaign, contact her at: 763-208-1384, [melissa@alleecreative.com](mailto:melissa@alleecreative.com) or [www.alleecreative.com](http://www.alleecreative.com).

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# Incentives

# at

# Sea

## All-Inclusive = Excellent Value

By David Swanson

Credit: (here and opposite page) Norwegian Cruise Line

A sleek bow piercing the waves, a never-ending canvas of passing scenery and all the creature comforts of a traditional resort close at hand... Who doesn't enjoy time spent aboard a cruise ship?

An improved economy combined with a steady supply of new and bigger ships is helping to fuel cruise industry growth. In May, Cruise Lines International Association (CLIA) announced that the number of cruisers in 2016 reached 24.7 million passengers, up almost 6.5 percent from 2015. CLIA is projecting a 4.5 percent increase for 2017.

This year alone, 13 new ocean cruise ships will debut, according to CLIA. Another 15 ships are under construction for 2018, while in 2019 we'll see 20 launched. And already, 32 cruise ships are on order for 2020 and beyond, including the first vessel from Sir Richard Branson's new line, Virgin Voyages.

Younger generations, including millennials and generation X, are embracing the cruise vacation like never before, while the demand for expedition cruises continues unabated, reaching ever more adventurous and exotic ports.

No wonder a growing number of companies are finding that corporate events at sea sometimes offer an edge over traditional land-based programs.

Cruise ships built over the last two decades have been plumped with conference and breakout rooms, along with state-of-the-art audio-visual equipment sufficient to hold meetings of various sizes, including trade shows. Incentive cruises can be terrific motivators for employees or clients, and a cruise-based meeting program has the benefit of controlling costs, in many instances reducing overall expenses against comparable land-based options.

Jennifer Mazza, director of travel operations for New Brunswick, New Jersey-based Next Level Performance, an organizational training, coaching and consulting firm, says cruises offer a number of advantages for groups.

"The all-inclusive nature of cruises is very appealing to the right audience. Because the product is already very packaged, costs and inclusions are high-

ly predictable and can offer excellent value. Planning can be made somewhat simpler, with existing infrastructure in place for excursions in destinations where otherwise program guests might not be able to visit. With enough participants, many can be privatized."

Mazza says that when Next Level Performance plans cruise incentives they often provide exclusive excursions or meals at each destination for VIP guests, organized with DMC partners to maximize the truly high-end, unique experiences clients expect.

"Another interesting advantage is the considerable marketing and advertising done by the cruise lines," Mazza adds. "If the ship and the program audience are well-matched, program participants will frequently see communications and images of the cruise in day-to-day media. This awareness can drive engagement with the incentive program."

"On one of our programs, the cruise line selected was highly aspirational for the audience. It was also running a successful ad campaign with a tagline familiar to all. The ad campaign amplified our own communications and heightened excitement. The incentive program was very successful."

While many groups take a block of cabins on a scheduled cruise — anywhere from a few dozen to a few hundred — others charter the whole ship. Mazza says that full-ship charters can be a tremendous value. "Especially if filling the whole ship and not just exterior cabins. Since it is also possible to adapt the itinerary and use all of the public space to suit the group, a charter provides a large group incentive planner with a lot of options."

The range of cruise options available to suit groups of all sizes continues to diversify. On the horizon:

The last \$2 billion vessels in Norwegian's "Breakaway-Plus" class of 4,200-passenger ships will be deliv-

ered in 2018–19, while the line recently placed an order for four more ships to launch starting in 2022. The newer, unnamed class will be slightly smaller, carrying 3,300 passengers apiece.

In March, Celebrity Cruises unveiled its new "Edge Class" design, with four ships ordered that will debut starting in fall 2018. The 2,900-passenger vessels are slightly smaller than Celebrity's groundbreaking "Solstice Class" line, and will have several innovative features, including a movable deck and cabins with balcony-like spaces that convert from outside to inside.

Seabourn Cruises follows up the well-received launch of Seabourn En-



Norwegian Breakaway ropes course.  
(Opposite) Norwegian Sky underway.

core with Seabourn Ovation, another 604-passenger ship for the luxury line launching next May.

MSC Cruises has two new ships out this year — both of them new classes. The 4,500-passenger MSC Mereviglia arrived in June, while 4,140-passenger MSC Seaside debuts in November. Both are targeted to the U.S. market and will sail out of Florida.

Holland America has a second and third ship in the "Pinnacle Class" series on order, following in the footsteps of Koningsdam, which launched in 2016.

### Caribbean Still Tops

CLIA says the leading cruise destination remains the Caribbean, capturing more than a third of all passengers in 2016. The Mediterranean was next (18.3





Rendering of the innovative "Magic Carpet" platform, which climbs up and down the outside of the 16-deck Celebrity Edge, set to debut in 2018.

Credit: Celebrity Cruises

percent) and the rest of Europe followed, with 11.1 percent. But one of the areas of the world seeing new growth is Asia, and cruise lines are not only dedicating ships to target the Asian market exclusively, but are increasing the number of cruises aimed at the English-speaking audience.

With its wealth of tantalizing, often exotic ports, Asia was the region Todd Zint, CMP, CMM, chose for an incentive program rewarding a top-producers group a few years ago. Zint is currently the director, corporate travel, meetings and events, for Omaha, Nebraska-based Mutual of Omaha. However, the incentive referenced by Zint in this story was arranged for a different insurance company.

"One of biggest challenges we have is that some agents or winners have been going on these trips for 20 or 30 years," says Zint. Finding fresh new destinations that provide a wow factor is a recurring hurdle that high-end planners must confront. "We announce the trip, and they go on the internet and do a Google search. We then have to exceed their expectations."

Zint's insurance company chose Silversea Cruises for its program, chartering Silver Shadow, a 382-passenger ship built in 2000. With a crew of 302 and cabins starting at 287 sf — almost double the size of cabins on most mainstream ships — the popular cruise review website Cruise Critic calls Silver Shadow an "ultra-luxury ship for savvy travelers who enjoy big-time pampering."

"Silversea runs parallel with hotels like Ritz-Carlton or Four Seasons," Zint

explains. "We wanted a high level of service and all-inclusive — we didn't want our group to have to use their credit card. We wanted it to be as seamless and easy as possible — that any time of day they can order a latte or a Bloody Mary, and it's taken care of. That also made it easier to manage our budget." Zint says that doing his program at sea was also probably less expensive. "When you go to a land-based program you're working with



**Jennifer Mazza**  
Director of Travel Operations  
Next Level Performance  
New Brunswick, NJ

DMCs, you have transportation, everything is à la carte."

Another benefit to doing a program at sea is that the host has a captive audience. "Everybody on the ship is your people," says Zint. "You can create camaraderie, and cool pocket events to stimulate the exchange. If I could do a charter with friends rather than go to a Four Seasons, I would. Now, if you're sharing a ship with leisure guests, that's a different thing."

To select a cruise line, a ship and the

destination, Zint says he had to juggle several qualifiers, starting with the size of the group — 285 attendees, including home office staff. As each qualifier was added, the options narrowed. "The client wanted a charter, something in the luxury market, and then the destination and itinerary really narrowed it down."

To help identify the ideal cruise line and destination and better define the parameters, Zint opted for a third-party broker who worked with Silversea to plot a nine-night itinerary from Singapore to Hong Kong.

"You need someone to partner with who really understands the demographics of your group, who can help you determine the goal and essence of the trip. A good partner or broker will take that information and recommend places in the world, and go out and find the right ship for you. As a meeting planner, it's hard if you've never chartered

a ship before. If you've never done a charter, you sit down with the hotel manager on the first day and they'll say, you could have put the slide show on the TVs in their cabins, you could have used our tech people to run the event — it's a laundry list of things you didn't know to ask for. A broker will know what you can get and what to ask."

But Zint says that even though a ship has a hotel manager, it's a different operation than a hotel, and the more you can learn about the options — and limitations — ahead of time, the better.

"I flew down to Silversea's home office in Fort Lauderdale and asked, how does it work? When you're committed on that level, what should I know? They were really receptive, and the nice thing is, when you charter it you own it. All the spaces can be utilized — the puzzle room, the cigar room, every space can be turned into anything you like. We converted one space into a war room to deal with contingency plans. We

**"If you match the guests to the cruise line — even down to the specific ship within the fleet — you can create a great, inclusive incentive or meeting experience that appeals to many participants."**

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A shore excursion on a Silversea Cruises voyage.

Credit: Silversea Cruises

used the dining room for a Texas hold-'em tournament, and used the upper lounge for a jam session. They were extremely flexible."

Zint says a ship-based program does have some limitations. "The ship is built more for leisure travelers, so everything is scaled down — the common areas are smaller. You can't necessarily get everyone into the disco, so when you have a large group you have to split them up. And on a lot of ships the entertainment can be sub-par, though when you do a charter you have ability to bring on your own entertainment. So, we brought on our own speaker that talked about each port, and we brought on a full band that we used every night, along with a photographer. Photography is pretty big for corporate groups, and they don't want photos of the group posing in black tie."

For the port calls, Zint primarily relied on the cruise line's preferred shore excursion operators. "We did due diligence on that, but in Vietnam you need to use their DMC. But we did do a hybrid approach for one evening event in Ho Chi Minh City. We held it in the home of a famous silk tycoon — a light party that incorporated a charitable event. It was for a foundation that supports underprivileged children in urban Vietnam, and the government used matching funds that helped build a kindergarten school."

While Zint says that a primary reason a cruise worked well for his group was budget-related, the key advantage

the cruise held over a land-based meeting was simple logistics for the guests. "It's the ability to get settled into your cabin and go from Singapore to three different ports in Vietnam and then on to Hong Kong — seeing three different cultures without ever having to re-pack. That was the real advantage for the guests, and for the client."

#### Call in the Experts

For the manager of meetings and events for a major insurance company, using cruise event specialist Landry & Kling for its annual incentive program in 2016 was essential to its program's success.

"When we do a land program we use hotels like Four Seasons and Ritz-Carlton, so we wanted to identify a really

deluxe cruise line," the planner explains. "We also wanted to charter a ship that had the right fit in terms of size, and the right itinerary." The insurance company needed to accommodate 600 couples, plus staff and vendors, and there are only a few upmarket cruise ships that can handle that size group. But, with Landry & Kling, the insurance company came up with a novel solution: to charter a slightly smaller ship than they required, but then split the group onto two back-to-back cruises. The ship that fit: Oceania's Riviera.

Oceania Cruises caters to a growing market segment sandwiched between the luxury, all-inclusive ships of sister line Regent Seven Seas Cruises and the premium cruise lines, such as Celebrity. Launched in 2012, Oceania's Riviera accommodates 1,250 passengers.

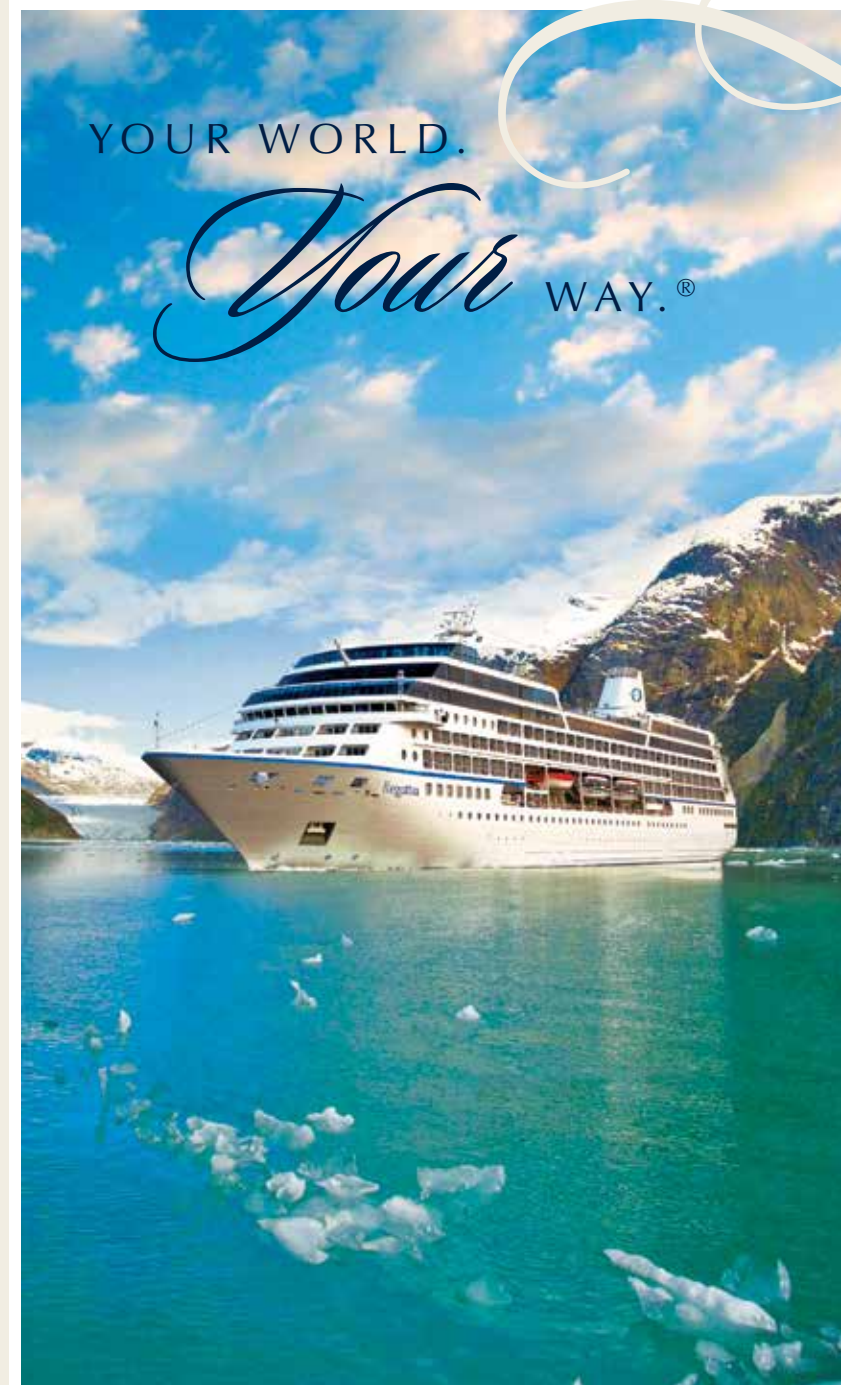
"The Riviera was a bit bigger than we needed to go with, but it turned out to be a nice size ship, and that capacity meant we got everyone into cabins with balconies. Plus, because they maintain the same size crew as with their public sailings, we had an excellent passenger-to-crew ratio. They happened to have eight days open between sailings out of Miami, so we were able to take this and do two four-night cruises with 300 couples each — one to San Juan, the other from San Juan back to Miami.

"We've worked with cruise lines directly in the past, but Landry & Kling



The Oceania Culinary Center is billed as the first culinary school at sea to offer hands-on instruction.

Credit: Oceania Cruises



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Regent Seven Seas Voyager observation lounge.

Credit: Regent Seven Seas

made the process a lot easier," he explains. "They have a single point person and, for every issue, they knew who we needed to track down at the cruise line. We met the ship's hotel manager, and he was really good, but in terms of making the arrangements, the corporate people in Miami set everything up and put together the specs. The hotel director takes those plans and implements them, but it's nice to get to know the people you'll be working with on the ship, so we went on planning cruises. The first one was three years ahead, the second one was one year out, and then we did a third cruise 90 days out."

By chartering, the group had the ability to set the schedule and itinerary. The ship had one sea day, a port stop in St. Thomas, and then docked at a "private island" off the Dominican Republic, Cayo Levantado, where they worked with a local DMC to organize a beach party. "Most importantly, we were able to design our evening functions, something we could never do if we hadn't chartered the cruise. We put together our own unique programming. One night we did it outside on deck and brought in a band. They built a stage over the swimming pool, and we were able to use the entire outside deck. We could never do that on a shared ship."

The ship's showroom was large enough to accommodate all 600 guests for one meeting when couples were invited, and the group was able to organize a dine-around program on another night, utilizing all eight of

Riviera's restaurants. Although the ship provided everything the group needed for the meeting portion of the itinerary, instead of using existing entertainment they brought in their own.

"We wanted entertainment that would be more appealing to our demographics, which is



**Todd Zint, CMP, CMM**  
Director, Corporate Travel  
Meetings & Events  
Mutual of Omaha  
Omaha, NE

younger than what Oceania usually has. Most of our people were age 35 to 50, so we upgraded the entertainment. Their technical rider required us to supplement what equipment the ship had, but we have our own production company for land programs."

In the end, the insurance company was able to do the cruise for about the same price as they spend on a land program. "It was comparable to what we spend for four nights in Palm Beach or San Diego at a luxury hotel, and a bit less than we spend in Hawaii."

## Compare Costs

Still, Mazza with Next Level Performance cautions that cruise meeting costs can be highly variable, depending on the departure port, the cruise line, the ship and whether the program is a full-ship charter or just a few cabins. "When weighing the costs, it's important to consider who the guests will be," suggests Mazza. "Are they well-traveled? What level of service are they accustomed to? This will drive the cruise line selection and will help to establish a fair cost comparison."

Mazza also notes that it is important to set realistic expectations about what is possible.

"Working primarily with high-end resorts, incentive planners expect a high degree of flexibility and creativity from their hotel and DMC partners," she says. "Meetings often require general sessions

and considerable breakout space, and requirements can change from one day to the next.

That is simply not possible aboard a ship. It can be challenging to adapt the space to the events, and there is no opportunity to go off property or make use of outdoor spaces, like beaches or lawns. If the program is not a full-ship charter, there will be strict limitations on when and what space can be made exclusive for the group."

Mazza continues, "Partnership with a knowledgeable conference service manager or cruise line representative is essential. They know what works on board their ships and what flexibility will be allowed. A CSM who understands the special requirements and expectations of incentive programs is invaluable."

It comes down to knowing your audience, as well as the cruise industry, says Mazza. "If you match the guests to the cruise line — even down to the specific ship within the fleet — you can create a great, inclusive incentive or meeting experience that appeals to many participants."

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Among the many elements that must come together for a successful meeting, the right speakers or entertainers can provide a lasting takeaway for attendees.

"Engaging the right speakers or entertainers is critical," says Adam Sloyer, CEO of Sequence, a New York events agency. "Speakers almost always tie back to content, and content is one of the key factors driving your meeting's success." He adds that meeting planners may have a bit more leeway with entertainers, but they should also bring positive results. "In both cases you are likely spending good money bringing in outside talent, and so it's in your best interest to make sure the fit is right."

As senior director at Octagon Speakers in the Washington, DC, area, Scott Horner manages a team that represents celebrity speakers from the sports and entertainment industries. He, too, emphasizes the value of finding the right speakers or entertainers.

"This is a critical part of the meet-

***"Speakers almost always tie back to content, and content is one of the key factors driving your meeting's success."***



**Adam Sloyer**  
CEO  
Sequence  
New York, NY

ing planning process, as an excellent keynote address or standout guest presenter can set the tone for the entire meeting," Horner says. "A positive, upbeat message or captivating storytelling session can leave the audience with a memorable experience and key life lessons that are transferable to any business or organization."

Says Mitch Williams, a Canton, Illinois, magician and speaker, "If the speaker or entertainer hits a home run, this will be the main impression that many of your attendees leave with," he

says. "You can have a lot of other factors go wrong somehow, and if the entertainer or speaker leaves a lasting, positive impression, those shortfalls will be largely forgotten."

"People will remember the speakers more than anything else," says Shaun Eli Breidbart, a comedian and executive director of the Ivy League of Comedy in Scarsdale, New York. "Planners put a lot of time choosing a menu for food, but nobody's going to remember the food unless they get food poisoning."

Williams adds that if on the other

hand the speaker doesn't deliver, it's remembered as just one more element that wasn't up to par and will tend to reinforce other negative opinions.

Not only are professional speakers and emcees vital for corporate meetings to have the best possible outcome, sometimes they are the key to overcoming problems, says David Ahearn, co-founder of the Fort Worth-based live comedy show Four Day Weekend.

"We always say that when it comes to speakers, especially the emcees and hosts of events, we are paid for being



# And Now, Presenting...

## Choosing the Right Speakers and Entertainers for Lasting Impact

By Mark Rowh

prepared if things start to break down during a show to get things back on track," he says. "It doesn't happen every show, but often something unexpected will crop up, and it will take a trained host to step in and remedy the situation." He adds that a great host also keeps the program engaging and fun.

### Spoonful of Sugar

"We also often say we are the spoonful of sugar that makes the medicine go down," he says. "After countless hours of PowerPoint speeches, having an enter-

taining host or speaker can make an otherwise boring meeting become something that attendees can take back to the office to reinvigorate their team."

Given the potential impact, how can planners make certain that the investments made in this area pay off? Horner says a key is checking out speakers or entertainers thoroughly before committing to them.

"It's vital to see video of a possible



**Mitch Williams**  
Magician and Speaker  
Canton, IL

***"You can have a lot of other factors go wrong somehow, and if the entertainer or speaker leaves a lasting, positive impression, those shortfalls will be largely forgotten."***





A professional comedian got this sit-down-dinner crowd up on its feet to participate in some entertaining antics.

Credit metroConnections

presenter to understand their personality and how they deliver their message," he says. He adds that social media is another great tool to research a speaker's brand or see what other current projects or opportunities that person is working on.

"It's also important for a meeting planner to understand what a speaker

or books onsite? Will they do a social media post from your event? "These are all questions you should have a good understanding of when making your final decision on a talent."

#### Firsthand Impression

Gaining a firsthand impression may be the best move of all, according to Ahearn.

"If possible, go see the speaker present at a live event so that you can get a feel for what they would bring to your event," he says. He notes that watching videos of a presenter has certain value, but often the video does not accurately reflect how a speaker is received.

"There is no substitute for seeing them live," he says. "If it's not possible to see them live, find a reliable recommendation from someone to see how the presenter did at another event. Fellow planners are usually very honest about what their experience was with a speaker."

He adds that just because someone

charges a lot of money doesn't necessarily make them the best fit for your conference or event.

"Find speakers who are easy to work with and whose primary goal is to make your event the very best it can be," Ahearn says. "You can tell the speakers that are there to make your event successful, and you can often see the ones that are there simply for a paycheck."

At the same time, cheaper isn't always better. You may spend less money but ultimately if your event fails then no one wins, Ahearn notes. He also points out that just because someone is famous that doesn't necessarily make that person the right fit for your event.

"I've seen plenty of well-known people fail to engage the audience they were presenting to," he says. "Don't be so impressed with someone's credits that you fail to see how they perform the speeches live." A great actor, for instance, may not be a great speaker. In fact, Ahearn says that he has seen quite a few very well-known speakers who added little to no value to an event.

Conversely, just because a speaker many not be a household name, that

doesn't take away from the value of what a good speaker may bring to a meeting.

"Some of the best speakers I've ever seen most people have never heard of," Ahearn says.

Sydney Wolf, event sales manager at metroConnections in the greater Minneapolis-St. Paul area, says that key considerations when picking a speaker or entertainer also include the demographic of the group, meeting theme or targeted messaging, as well as location of the meeting. In booking a musician, it's important know the demographic of the group to help determine what genre and age of a performer to select. That would mean, say, avoiding a current top-40 musician for a group of mostly 50- 70-year-old attendees. On the other hand, such a choice might be a good fit for a group of mostly 20- 30-year-old millennials.

"If the demographic is all across the board and very mixed, then you need to find someone that can please a large audience and has widespread appeal," Wolf says. That applies especially with speakers.

"Considering a meeting theme is really important with a keynote speaker," she says. "You want to find someone that elevates the conference messaging and works to drive it home."

She adds that, in fact, messaging can be critical, with the ideal speaker being someone who matches the tone and theme of the meeting. At the same time, industry relevance is important.

"For the insurance or finance industry, it's crucial to understand the background and history of the speaker," Wolf says. "Does that speaker align with the company's business? Does the speaker's narrative speak of your company in a positive way or does the story clash with your line of business?"

#### Flexibility Is Key

Wolf says a key is finding entertainment or speakers who are flexible. Most attractive are those who can tweak their mes-

sage, or take the time to get on the phone with clients prior to a presentation to get to know the company and target their message based on insights they have gained about the company.

"Too many times I have seen this step missed," Wolf says. "As a meeting planner, not only are you setting the speaker or entertainer up for failure, but you are setting yourself up for that as well. If they don't offer a meeting beforehand, push for it, and include it in your contracts."

Wayne Hoffman, founder of Hoffman Entertainment in Reading, Pennsylvania, advises against simply sticking with the tried-and-true.

"It's very easy for an event planner to get lost in other details and simply use a go-to act that has been used for years," he says. "However, I think it's important to really discover new and exciting things that will engage people. Many people use the same old band or DJ and forget about other options like a mentalist, illusionist or other unique act."

Hoffman adds that it's best when speakers or entertainers hit all the bullet points and feed into the concept for the program. With corporate events, he often customizes his act to reinforce corporate objectives. For one, he used a

**"For the insurance or finance industry, it's crucial to understand the background and history of the speaker. ...Does the speaker's narrative speak of your company in a positive way or does the story clash with your line of business?"**



**Sydney Wolf**  
Event Sales Manager  
metroConnections  
Greater Minneapolis-St. Paul, MN

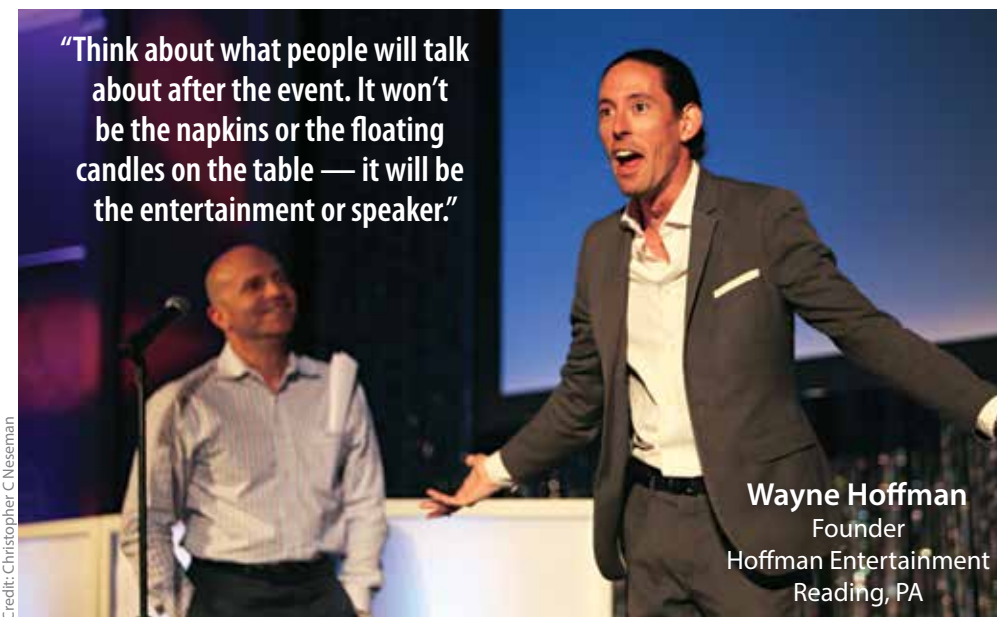
company's newest product in his finale. For another, he "magically" produced the prizes for the top salespeople.

"Both of these events were a huge success," he says. "There's nothing like a custom-tailored show for an event."

#### Comedians Are Not Always Funny

Sloyer says the trickiest type of entertainer to secure may be comedians.

"No matter how funny you might think an act is, your event attendees might not be laughing or worse, they might be insulted," he says. "So we always advise our clients to go a different, safer, route." He recalls working with one hedge fund client who was hosting an anniversary event for their employees



**"Think about what people will talk about after the event. It won't be the napkins or the floating candles on the table — it will be the entertainment or speaker."**

**Wayne Hoffman**  
Founder  
Hoffman Entertainment  
Reading, PA

Credit: Christopher C. Neseman



d guests, and planners were intent on bringing in a specific comedian.

"We worked very closely with the client and agent to make sure the act was completely scripted and bits were known in advance, to ensure there was nothing that would rub anyone the wrong way," Sloyer says.

In an age where audiences are as likely to be looking down at their cell-phones as focusing on stage in front of them, maintaining a high-energy level can be another key.

"You don't want to lose the attention of your audience, nor do you want to cause a corporate meeting to lose its energy," says David Mitroff, Ph.D., founder and CEO of San Francisco-based Piedmont Avenue Consulting and a frequent speaker at corporate events. "For example, having a strong speaker at the end of the corporate meeting can leave a strong impression for the event as a whole."

Mitroff relates his experience while presenting to an audience that was clearly bored and unfocused from the previous activities on the agenda.

"I observed the low-energy level and intuitively diverted my presentation to make a bold joke, which caused the audience to laugh and break the stiff ambience," he says. "After I did that, the audience listened and actually responded to my presentation. This successful engaging of the audience required me to quickly accommodate to their energy before proceeding with my presentation."

In lining up entertainers or speakers and prepping them for an event, be sure to avoid assumptions that may be off-base.

"Don't assume they are experts," Mitroff advises. "Each corporate meeting and event is different, so make sure the speaker or entertainer is prepared and informed."

Another mistake is making assumptions about what services will be provided.

"Do not assume all the extras such as pre-event calls, meet-and-greet and autographs are included in a speaker's quote," Horner says. "Each speaker is different with what they like to do when



Attendees of the 2016 European Fund Finance Symposium look on from Claridge's hotel in London.

Credit: Dan Burman

onsite, so the more research you do and set expectations in advance, the more comfortable your speaker will be."

Hoffman emphasizes the importance of identifying the right agency or contact to help find presenters, even if this takes some time.

"Don't rush things," he says. "There are tens of thousands of great acts, but only a few that will really fit perfectly." Once potential acts are identified, it pays to watch as much of their video content as possible to give you a better sense of what you'll be getting.

If researching potential speakers or entertainers on the internet, it's best to avoid mass "quoting" websites, Williams cautions, as they tend toward bidding wars that top-flight presenters may avoid. Instead, he says, go directly to the websites of the entertainer or speakers you are curious about. Locate or request information such as past experience and credits, testimonials from previous clients, and basic price ranges from each presenter that seem to be appropriate.

#### Pick Up the Phone

"Don't be afraid to take the extra time to have an actual conversation by phone with your top prospects," Williams says. He notes that while it may be tempting to do everything through email, it's more productive to have a short conversation to communicate your needs and determine whether a given individual or group is likely to meet your needs.

However it's done, advance research is a must.

"Do your research and make sure your speaker understands your audience," Mitroff says. "This will ensure that they don't bring up specific topics that might cause trouble or disagreements." He also says that when putting together a meeting or event agenda, care should be taken in deciding the best time to have a speaker present.

"Having a presenter present right after a high-energy activity can overwhelm the audience," he says. "And having a speaker after lunch will be difficult to capture their attention."

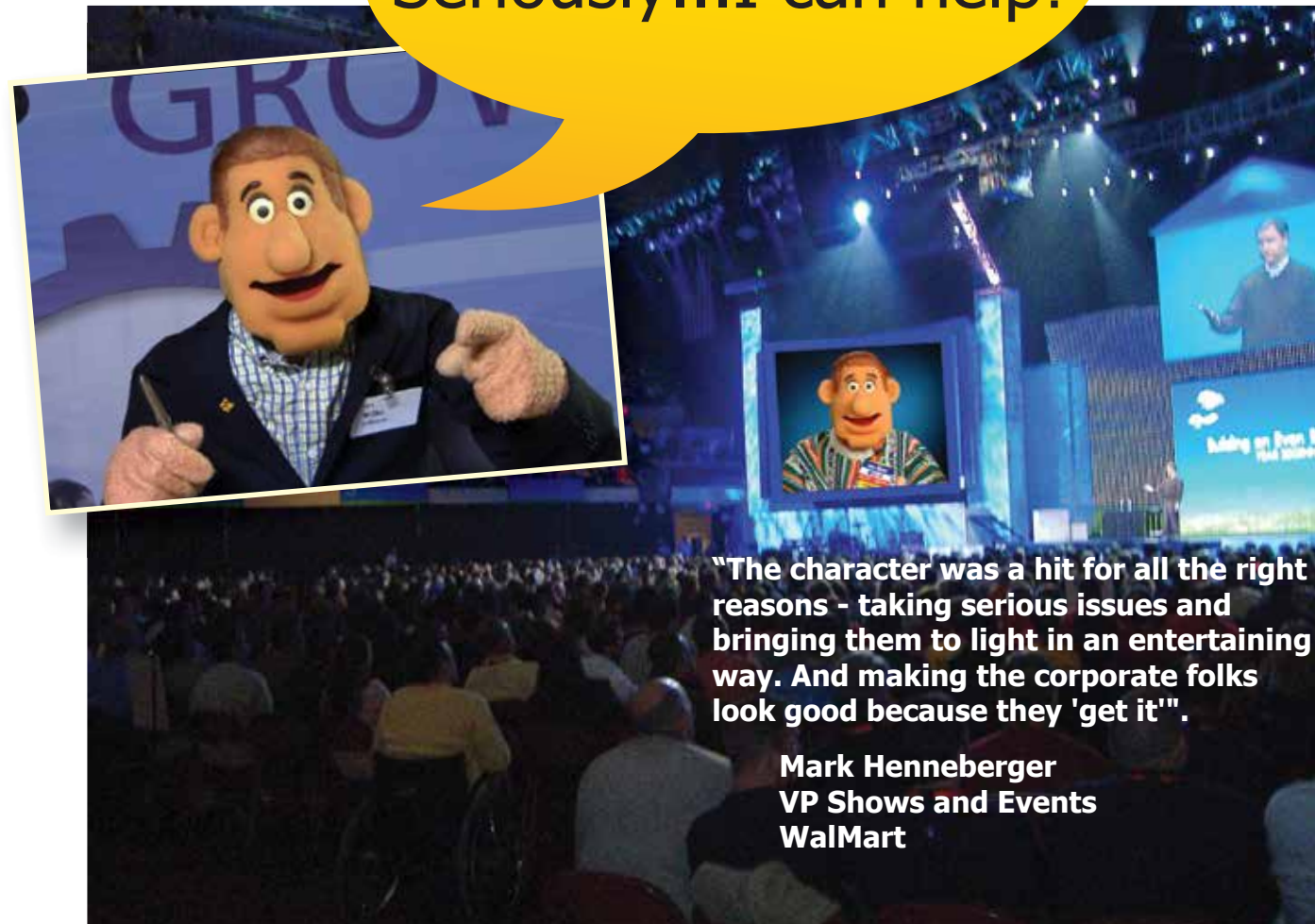
The same approach applies to the agreements made with entertainers, speakers or those who represent them.

"For entertainers, make sure you ask about a rider, and that those specs are factored into the budget as well," Sloyer says. For an event his firm produced a few months ago, the organization was able to secure an A-list performer pro bono through a personal connection. However, the performer's rider still needed to be adhered to, and it turned out to be massive. At the end of the day what the client thought would be a no-cost item ended up costing them over \$100,000.

Of course such instances are relatively rare, and there are many intangibles when it comes to the end results of the entertainment side of any meeting. But any extra efforts are likely to pay off.

"Think about what people will talk about after the event," Hoffman says. "It won't be the napkins or the floating candles on the table — it will be the entertainment or speaker." **I&FMM**

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# Where Business & Pleasure Converge

By Christine Loomis

**G**olf and spa resorts are more than places to play and indulge. Yes, they provide ways for hardworking corporate employees to recreate and relax, and they typically offer a setting in which incentive qualifiers are truly rewarded for all that they contribute to their company's bottom line.

Yet the best golf and spa resorts offer so much more than that, not the least of which is well-conceived meeting and function space with all the technical and design aspects necessary to support corporate gatherings and the professionals who plan them. The public may not fully understand the extraordinary business value of corporate meetings and incentive programs, but those in the hospitality and travel industries do. Golf and spa resorts ably play their part in providing industry leaders with what they need to create positive strategies, build client bases, educate and inspire employees, increase production, enhance business, launch new products and, ultimately, excel over competition.

## Golf & Spa Resorts Offer the Perfect Mix of Rewarding Amenities and First-Class Meeting Facilities



(Top) The new Streamsong Black golf course — one of three at Streamsong Resort — opens this fall. (Above) A meeting room overlooks Streamsong Resort's unique Central Florida landscape.

Of course, they also offer some of the top golf courses and spas in the nation.

### Secluded in Central Florida

When Ileen Hattem, Southeast regional event planner with UnitedHealthcare, was looking for a setting for an October 2016 broker event with approximately 60 attendees, an ideal choice presented itself in Streamsong Resort. "We tried this resort for the first time in August 2016," Hattem says. "It is a great location for our brokers coming from Tampa and Orlando. The resort is located in Central Florida about one hour from Tampa, 1½ hours from Orlando and three hours from South Florida, so it is a central location for most of the state. Also, for those flying in, there is a choice of two major airports, which gives more flexibility for our guests."

Hattem adds that the resort's excellent reputation was also a key reason for choosing Streamsong. "The golf, spa, resort and service are second to none," she



*"We host golf every year and have used all of the Sea Island courses. ...We do tournament style for two days with various 'hole' contests, and the Sea Island golf team has been great to work with."*

Tracy Wade, CMO  
Maxum Specialty Insurance Group, Alpharetta, GA

room" feel. "There are also some great outdoor options," she adds, "and AV is extensive and the staff is great. We had one program that required additional labor, and we got exactly what we needed."

The group has included golf as part of each of the three events they've held at Streamsong. "Not a tournament per se," Hattem says, "but rather a group of golfers. The golf staff is wonderful, and our attendees absolutely love the courses here. We did have a small group that mainly came to golf and have a small

in keeping me informed about availability and helping me get what I needed."

In April, Streamsong Resort was doubly honored. *Golfweek* listed the resort's Red and Blue golf courses as the No. 2 and No. 3 golf courses, respectively, to play in Florida. They bested 27 other Florida golf courses on the list. The courses at Streamsong — unlike any others in Florida — are designed around the unique, rolling landscape once occupied by phosphate mines.

The new Streamsong Black championship course, designed by Gil Hanse, will debut this fall. Hanse also is the architect of the Olympic Golf Course in Rio de Janeiro, Brazil, and co-designer of Castle Stuart Golf Links in Scotland. With the addition of Streamsong Black, the resort will become the only location in the world where guests can enjoy three distinct courses designed by four legendary architects, including Bill Coore and Ben Crenshaw of Coore & Crenshaw and Tom Doak of Renaissance Golf Design. And the resort plans to add a second practice facility, clubhouse and restaurant to serve guests playing Streamsong Black.

### Georgia Coastal Retreat

For an annual advisory council and producer summit in April, Maxum Specialty Insurance Group, based in Alpharetta Georgia, chose Sea Island Resort on the coast of Georgia. The number of attendees ranges from 40 to 76 over the course of six days.

"We are a Georgia-based business so we like that the resort is in our home state and that it's on the water," says Tracy Wade, chief marketing officer for the company. "It also offers multiple airport options, which is convenient

*"The golf staff is wonderful and our attendees absolutely love the courses (at Streamsong). We did have a small group that mainly came to golf and have a small meeting, so we housed them at the Golf Clubhouse."*

Ileen Hattem, Southeast Regional Event Planner  
UnitedHealthcare, Boca Raton, FL

says. "I also liked that it is more secluded."

This group did not go off-property as everything needed was at Streamsong.

While staff and service at the resort received kudos in general, Hattem singles out several staff members who went above and beyond. "Andrea Smith, senior sales manager, and Joy Valenti, conference services manager, were wonderful. I truly feel like we are a team and the relationship is one that benefits all of us. I am a former hotel sales director, so I really appreciate the relationships that I form with my hotel sales and support staff."

Hattem notes that Streamsong's meeting and function space is diverse and flexible, and that large windows in some rooms ensure that receptions and dinners do not have that "typical ball-

meeting, so we housed them at the Golf Clubhouse. There are a limited number of rooms there, and it was wonderful to keep these guys all in one small place close to golf. There is also a great restaurant there called Restaurant Fifty-Nine, as well as some meeting space and a lounge where they could 'hang out' after dinner."

Hattem arranged spa treatments for meeting guests, calling the spa personnel "excellent and flexible with all of the changes and late additions that typically come with a group."

The only challenge came when more rooms were needed than had been contracted for on busy nights. However, Hattem notes, "My conference service person and reservations person were great





Credit: Sea Island Resort

as our guests travel from across the United States.”

The primary decision-driver to set the meeting at Sea Island, however, was the initial RFP. “The Cloister delivered the best variety of activities, rooming options and meal venues with the service and class our customers appreciate,” Wade says about one of the most popular of Sea Island’s several lodging options. “Subsequently, over our eight years of hosting there, they have continued to invest and add on to the property so we get the benefit of the continuity of expectation with enough changes to make it fun for our guests.”

Wade says the resort delivers on multiple fronts, including activities. “The Rainbow Island experience is unique and always a crowd pleaser; I have not seen it duplicated anywhere else although a few try. The setting and the outside firepits and oyster roast are also always a highlight for our guests.”

In addition, the décor team has never let Wade down and is amazing. “Through the years we have tried a lot of out-of-the-box themes, and the team has risen to the challenge each time. The catering team is also great and the two really work hand-in-hand to ensure a seamless delivery.”

The golf and spa facilities have been part of these events as well. “We host golf every year and have used all of the Sea Island courses including Retreat, Plantation and, of course, Seaside,” Wade says. “Seaside remains the big draw, but our players like the variety of all of the courses.

We do tournament style for two days with various ‘hole’ contests, and the Sea Island golf team has been great to work with. They suggest ideas as well as execute those ideas we bring to the table.”

The planning team arranges spa time for the guests, and Wade says working with the spa director has been a very positive experience. The spa atmosphere and services also get top survey results from Wade’s guests who use the spa facilities.

Wade encourages any planners considering Sea Island Resort to do a site visit, but also to follow the resort team on Instagram and other social-media outlets. “I get a lot of great ideas from both. By partnering with the team we have been able to create some lasting themes and to execute them by working together.”

When it comes to meeting planning, it’s less about the problems and more about the solutions. “There are always challenges and changes when planning an event,” Wade notes, “but the Sea Island conference managers are great at bringing solutions and flexibility to the table so you don’t have to worry or micromanage.”

For groups considering Sea Island, Wade says, “Book early if you want to use The Cloister or The Lodge as the secret is out, and it’s getting more difficult to get the rooms and dates you want year after year. That’s a good problem for them to have but meeting professionals need to plan accordingly to secure the desired dates.”

Heather Fueger, manager, sports



Credit: Maxum Specialty Insurance Group



Credit: Sea Island Resort

marketing, with RSM US, an audit, tax and consulting firm, also works closely with Sea Island Resort. RSM is the title sponsor of the PGA Tour’s RSM Classic, a popular tournament held each fall at the Georgia resort that has raised millions for charitable causes.

The RSM group brings in approximately 500 guests throughout the days of the tournament. The Cloister, The Lodge, Beach Club Residences and The Inn are among the resort’s lodging options used to accommodate RSM guests.

“The accommodations and amenities are world-class,” Fueger says. “The staff is welcoming and showcases the epitome of Southern hospitality. Sea Island provides an ideal setting for our partners and principals to entertain our guests.”

Fueger gives the staff at Sea Island rave reviews across the board. “Every department strives to meet our needs and provide the best possible experience for us and for our guests,” she says.

During the week of the Classic, RSM guests use the golf facilities, particularly the Retreat and Plantation courses,

## 3 Bucket List Golf Experiences

These three golf resorts boast truly historic, unique and even sacred golf ground, and all of the courses are accessible by the public.

Today, when golfers walk between the tee box and the green at the par-3, 17th hole on Kingsmill Resort’s River Course, they are stepping on the same land where the Jamestown settlers stepped off their boat in 1607. The old pilings in the river are the location of their original port and start of the road from the James River to Colonial Williamsburg. To the left of the hole are the foundations of what was basically a pub, early warehouse, hotel — and some say a brothel — all dating way back before 1776. [www.kingsmill.com](http://www.kingsmill.com)

The 18th hole on the East Course at The Broadmoor is legendary because it’s here, in 1959, that a kid named Jack Nicklaus birdied the final hole to defeat Charlie Coe in the finals of the United States Amateur Championship. This was Nicklaus’ first major championship victory, on his way to winning 18 majors and 19 second-place finishes. The photos from that historic win are in the Club House, and the green-and-white scoreboard is still standing sentinel off of the green. The Broadmoor will host the U.S. Senior Open in 2018. [www.thebroadmoor.com](http://www.thebroadmoor.com)

In Death Valley, California, 120 miles northwest of Las Vegas is The Oasis at Death Valley and Furnace Creek Golf Course, a true oasis with the distinction of being the lowest golf course



Credit: The Broadmoor

Jack Nicklaus claimed his first major championship victory in 1959 when he birdied the 18th hole on The Broadmoor’s East Course.

in the world at 214 feet below sea level — meaning your drives will not travel as far. And golfers are advised to beware of golf-ball-stealing coyotes. It began as a three-hole golf course in 1927 to give the miners from the nearby Borax mines something to do in their spare time. It was the first grass golf course in the California desert, thanks to the ancient waters that bubble up out of the ground here. Now an irrigation system allows the 18-hole course to remain open all year. *Golf Digest* magazine put it on the list of “America’s 50 Toughest Courses.” [www.oasisatdeathvalley.com](http://www.oasisatdeathvalley.com)

I&FMM

which Fueger says garner rave reviews. But she notes that Sea Island has many other activities as well, including a top-of-the-line spa.

“While we don’t arrange spa time for our guests,” Fueger notes, “many of our guests choose to visit the spa on their own while at the resort. The guests with whom I have spoken have raved about the amenities and services available at the spa, and many have loved it enough to visit more than once during their stay!”

There’s no question that Sea Island Resort offers enough all on its own to keep guests happy and occupied for a multiday stay. However, there are good reasons to explore off-property, too.

“Most of our functions during the RSM Classic are held on resort property,” Fueger says, “but guests often try other Golden Isles restaurants. “Some of our favorites include Southern Soul Barbeque, Crabdaddy’s, Tramici, Halyard’s and Sal’s Pizza.”

When it comes to describing Sea Island Resort, Fueger uses descriptors

such as “world-class” and “spectacular.” That goes for the accommodations, the golf, the meeting space, the amenities and the people who work there. Translation: a meeting planner’s ideal destination. Sea Island’s secluded location does require extra travel time from the region’s airports, but Fueger says the resort is well worth that time spent.

### Revolutionary City

Peggy Berg, administrative assistant with Wells Fargo in Richmond Virginia, helped plan the company’s Central and Eastern Virginia Conference in October 2016, which was set at Kingsmill Resort in historic Williamsburg, Virginia, and included approximately 36 participants. The resort worked well, Berg says, because it is centrally located between commercial banking offices. The conference has been set there more than once.

“This was a repeat conference, Berg says, “because of the quality of the Kingsmill staff and the facility.”

Among the highlights of the con-

ference was an event that took place in the surrounding area. “We hosted a walking tour in Jamestown,” Berg says, adding that it is an activity that’s “highly recommended.”

At the resort, she calls the front desk staff and bell staff “always so accommodating,” and says that the resort works especially well for this group and conference because there is always a golf outing on the agenda.

On the downside, she notes that arranging spa treatments can be a challenge. “I tried to make spa accommodations only to find that appointments were not available. You need to make spa appointments well in advance,” she says. “I actually had to have a customer go to the spa at another site in Williamsburg.”

### More Options

In Colorado Springs, The Broadmoor, grande dame of the Rockies for the past 100 years, has a long history of pampering its guests as well as challenging them on the golf course. Resort history notes





Renderings of Pebble Beach Resorts' new 38-room Fairway One cottages and (inset) Fairway One Meeting Room.

Credits: Pebble Beach Resorts

that even back in 1918, "mountain men" were patrons of the spa in equal numbers to the women. The trend continues today, with modern mountain men opting most often for an 80-minute massage, according to Cassie Hernandez, the spa/salon and fitness director. The new 80-Minute Gentleman's Facial just joined the spa menu this spring.

In golf news, The Broadmoor is now offering a new "Hack and Hook" package for groups that combines fly fishing and golf.

***"This was a repeat conference because of the quality of the Kingsmill staff and the facility."***

Peggy Berg, Administrative Assistant  
Wells Fargo, Richmond, VA

The Broadmoor, a member of Associated Luxury Hotels, encompasses 5,000 acres and offers 784 luxurious guest rooms and suites, 185,000 sf of flexible meeting space, 54 holes of championship golf, a Forbes Five Star spa, 20 unique dining offerings, and 26 specialty boutiques.

Nemacolin Woodlands Resort, near Pittsburgh, Pennsylvania, has been honored with a *Golf Digest* Editors Choice Award in the "Best Golf Resorts in the Americas." In July, the resort will open a second course, Shepherd's Rock, designed by Pete Dye and Tim Liddy.

Up your game at Rosen Shingle Creek in Orlando, where the recently redesigned golf course provides new challenges, intriguing hazards, longer par 4 and par 5 layouts, and more. The redesign, in partnership with Arnold

Palmer Golf Company, makes what was already an excellent course even better. A new, open-air covered pavilion for 19th hole events is part of the mix. Additionally, all of the resort's 1,501 guest rooms and suites, lobby, restaurant and lounge spaces have undergone an extensive refurbishment.

At Grand Geneva Resort & Spa in Lake Geneva, Wisconsin, 29 new villas are scheduled for completion in July. The villas will be fully equipped and range in size from studios to three-bedroom ac-

commodations. The property includes a convention center.

In August, Pebble Beach Resorts will open the new 38-room Fairway One, an addition to The Lodge at Pebble Beach. The new accommodations include 30 guest rooms in three two-story buildings and eight rooms in two four-bedroom golf cottages fronting the first fairway of Pebble Beach Golf Links. The Fairway One complex also will include a new meeting facility anchored by a 2,500-sf meeting room. All of these enhancements are being completed in preparation for hosting the 2018 U.S. Amateur and 2019 U.S. Open championships, as well as the celebration of the resort's 100th anniversary in 2019.

Surrounded by the Topa Topa Mountains in Southern California, the Spanish colonial-inspired Ojai Valley Inn & Spa is

as adept at hosting PGA Tour events as it is corporate group tournaments. Expert golf directors help organize tournament pairings and competitive challenges, cart organization, gift distribution and scoreboard management. For less formal — and less time-consuming — golf activities, the resort also can put together a two-hour, nine-hole executive golf challenge that's fun and competitive, and also includes scoreboard management, gift distribution and more.

The Ojai also boasts a world-class spa, with 31,000 sf of serenity. There are two pools, a fully equipped workout room, Mind and Body Studio, Spa Boutique and Artist Cottage and Apothecary. Custom aromatherapy courses also are offered for groups: In a class setting, participants learn how to create custom blends of aromatherapy oils and diffuse personalized blends into bath salts, soaps, lotions and more.

Meetings and events at Ojai can take place in two ballrooms, a pavilion, a "Big Red Barn" and a private estate.

The U.S. hospitality market is not the only one with golf courses, spas and other amenities that create an excellent base for conferences and incentives. From Ireland to Asia, the Caribbean to Canada, golf and spa resorts provide planners with substantial benefits for meetings. In addition to ample function space, chefs with skills that elevate F&B to new heights and, of course, some of the top golf courses on the planet, many of these resorts are long accustomed to hosting world leaders, celebrities and VIPs. They easily provide the privacy and security required for high-level executives and their guests.

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# 'Are You On It?'

## Meetings Are More Technology-Driven Than Ever — How Planners Can Keep Up

By Mark Rowh

When it comes to technology and meetings, change is the only constant. Just as you become comfortable with the latest and greatest tool, something new arrives to take its place. So it can be overwhelming just trying to keep up. But there's no getting around the real necessity of staying on top of today's robust technology options designed to improve meeting outcomes.

"Technology is an essential element when planning an event," says Alan Doyle, vice president of MICE for Palace Resorts. "New tools are constantly being developed that help planners enhance their meetings and drive engagement with attendees." As an example, he points to event apps, which continue to be cheaper to develop and easier to use, and which help attendees stay abreast of what's going on. With increased demand for working toward paperless meetings, he adds, such apps help meet those goals while also encouraging attendees to remain engaged and to ensure that everyone has up-to-date information that's available in real time.

In fact, meeting planners who aren't taking into account technology considerations for their business and that of their attendees are at an extreme disadvantage, according to Justin Guinn, market research associate of event management and meeting software reviews company Software Advice.

"Gone are the days of disregarding the technology behind the daily business needs of event-goers," Guinn says. "It will lead to bad event experiences and decreased retention rates."

### Staying Relevant

Part of the challenge involves adapting to different audience expectations as well as various technology options.

"To stay relevant, it's absolutely vital to take into consideration what technology is currently available," says Cindy Y. Lo, DMCP, president and event strategist for Red Velvet Events in Austin, Texas. This includes assessing exactly what technology platforms a given audience is using. "For older generation attendees, I don't worry about buying a custom SnapChat filter because they will most likely not even use it."





John Kirby, complex director of sales at Westin Crown Center at Kansas City and Sheraton Kansas City Hotel at Crown Center, affirms that the need for technology in meetings is more important than ever.

"Fifteen years ago, when interacting with planners, technology was an ancillary benefit that companies could use if there was any money left after dealing with the expense of rooms and food and beverage," he says. "Nowadays, decision-makers within any entity will not approve an expenditure for a meeting unless there is a specific message to be delivered that is complemented with technologically driven content." He says the usual expectation is for the audience to walk away with a clear message and call to action.

"The gambit that this covers is only getting bigger and bigger as the marketplace continues to expand and entities begin to collaborate in order to push their collective mission forward," he says. "Effective leveraging of technology is often the vehicle that allows that to happen these days."

Kirby recalls an event focusing on a new technology rollout that was targeting sales professionals. Problems began to surface when it became apparent that the group that had planned the meeting had not established an adequate budget.

"The meeting's budget had been established the prior year, and this rollout was a new development, but had not been accounted for in the group's scope of spending," Kirby says. "We worked hard with our event partner to learn every facet of what this program change would entail to provide them with technological solutions that would help them accomplish their changing goals, and were able to introduce them to some new technologies they had not employed."

The results included not only a successful meeting but insights on further technology development within the

company. "It was a lot of fun to take a situation that could have been terrible, and by working together, shape that event into something that became the vehicle for larger positive change within that company as a whole," says Kirby.



*"In today's socially connected world, attendees expect you to be on social, so there you should be."*

**Justin Guinn**  
Market Research Associate  
Software Advice, Austin, TX

### Connectivity Issues

When it comes to making full use of technology, a basic requirement is adequate connectivity. Not long ago this was considered an extra, but now it's a necessity.

"High-speed Wi-Fi internet must be available at every meeting," Doyle says. "People must stay connected as the internet and smart devices are part of everyday life." Other desirable technology applications for meetings include HD livestreaming, online translators and interactive voting.

Another consideration is the need to adjust to the needs of different groups and the local availability of support technology.

"Meeting planners need to identify the group's audience and demographic, and fully understand their technology habits and usage," Doyle says. "Learning this information ensures that the meeting planner has all the tools that are necessary to capture the attendees' attention during a meeting." He adds that meetings outside the U.S. may bring their own special challenges.

"Meeting planners need to identify the tech-

nology available at the host country, as well as the pricing," he says. "There could be compatibility challenges and increased costs for higher speeds, depending on the country."

With financial organizations, data security is especially critical, according to Ken Edwards, director, financial services for SmartSource Computer & Audio Visual Rentals. He says it's important to build a secure wired or Wi-Fi network so that data are less open to everyone than would be the case in relying on the Wi-Fi solution provided by the hotel or venue. Too, the Wi-Fi offered by many venues does not have sufficient bandwidth or signal distribution options to provide for reliable connectivity for accommodating audiences for larger events.

### Social Engagement

The right technology used during a meeting also can support event marketing, according to Doyle.

"Social media, videos, live videos and blogs are all great options when promoting an event and also great for engaging with attendees," he says. "These tools can help meeting planners under-



stand the attendees' opinions, likes and dislikes and can be used to ensure that future meetings are even better.

Guinn identifies attendee management and social engagement as the two most important technology functions for planning meetings and events.

"Attendee management offers meeting planners unparalleled organization and efficiency," he says. "The tool works to manage and even automate communication with attendees as well as gather and store valuable information to increase the quality of their experience. And for social engagement, he touts the practice of leveraging social channels to build awareness and excitement.

"In today's socially connected world, attendees expect you to be on social, so there you should be," Guinn adds. (See related story on page 14.)

### Mobile Meeting Apps

Karen Shackman, CEO of Shackman Associates, a New York destination management company, says a trend worth following is the development of turnkey apps that manage registration, help attendees network prior to arriving, optimize breakout sessions, geofence offsite after-hours opportunities and create a platform for continued engagement after the meeting ends. Among other options, planners and attendees can conduct private chats, connect via LinkedIn and view profiles of attendees they might not know before the meeting.

"Apps are becoming geo-enabled, which help attendees enhance their experience based on their location at a given moment," she says. "Have downtime between work sessions? Apps can now let you know that an attendee you were hoping to find for networking is down the street at Starbucks."

Kirby is high on mobile meeting apps. "The cellphone has become the single-most personal product in the marketplace that virtually everyone must have," he says. "We live on these devices, and are connected to them as much or more than a family member in a lot of cases." He says that leveraging this technology creates wins for both

the user and the environment. Advantages include reducing the use of paper, eliminating the associated cost of printing and shipping, and providing the organization a vehicle to mine data from users. With the latter, results may provide better insight into what does and doesn't work well when designing and laying out the schedule of events for a meeting.

Edwards also suggests leveraging technology to build relationships with attendees. To that end, his company created a technology lounge fully

*"There are many communication tools that can foster productive conversations and participation in meetings."*



**Don Joos, CEO**  
ShoreTel, Sunnyvale, CA

equipped with charging stations for mobile devices. While waiting, they can also view brand messages on kiosks or engage directly with representatives of the organization to build rapport and establish a relationship.

### Connecting Audience and Speakers

Shackman says developments with presentation options hold the potential to enhance communication among speakers and audiences.

"While there is continuing debate on how to use social media and texting during business components at meeting, we are seeing a trend that creates a hyper-intelligent, private system that increases face-to-face interaction," she says. "The key is to provide moderators with more control than ever over questions, answers and even who gets asked the questions."

With this kind of technology, attendees now can ask unlimited questions, and moderators can quickly filter out ones that don't make sense or disrupt the flow, Shackman says. Furthermore,

because speakers can clearly see the questions being asked, they do not get lost among the noise of status updates.

An ideal way to make a meeting more productive is to use technology that empowers the moderator, according to Don Joos, CEO of ShoreTel, a telecommunications company with headquarters in Sunnyvale, California.

"There are many communication tools that can foster productive conversations and participation in meetings," he says. "For instance, by integrating calendaring, instant messaging and presence into the meeting calendar, attendees are more likely to arrive on time and participate during the meeting."

Joos notes that temporarily shifting control to another moderator or participant to share documents fosters participation and inclusion. Too, some presentation technology includes the capacity for participants to display emoticons asking the speaker to slow down or speak more loudly, or allowing them to ask a question.

### Tracking Attendee Behavior

Also of great benefit is the use of tablets equipped with software applications to collect and aggregate data from attendees, notes Edwards.

"The data obtained can then be used to track and direct the meeting audience toward programs, areas and activities which will be most meaningful to them," he says. "The market intelligence gathered facilitates effective target marketing which, in turn, can generate solid leads." Other possibilities for attracting and engaging attendees include high-impact digital signage, charging stations for mobile devices, and kiosks imparting news and event-related program information.

Some technology can be especially attractive for planners seeking cost-effective, sustainable solutions, Edwards says. He points to lower-cost staging as especially responsive to budget containment, with some platforms available at half the cost of traditional stages



while also being more environmentally friendly. Similarly, beacon technology, QR codes and RFID enable collection of data from their event attendees to gain a better understanding of those constituents and their interests. By placing readers throughout a venue, planners can track attendees' behaviors and then target-market to them to generate better leads and conversions.

### Generational Differences

Edwards also emphasizes the importance of recognizing generational differences.

"Technology that meets the needs of today's multigenerational audience is something that should be on all meeting planners' radar," he says. For millennials, who tend to rely heavily on mobile devices for communications, sophisticated registration software solutions is appealing, and at the same time, it enables planners to produce and print coded badges that can be used for lead retrieval and attendee tracking. Baby boomers and others who grew up in the age of television, on the other hand, may value the digital signage as a much more entertaining and engaging way to get info on program agendas, exhibitors, sponsors, news tickers, entertainment schedules, transportation and weather information. At the same time,

notes that he has seen negative results when technology planning has been insufficient.

"If the audio is not working correctly or the video is not the right resolution, it can be frustrating and interfere with what you're trying to communicate," he says. "You need to be very careful with using frequencies when you're in the same area as translators, wireless microphones, Wi-Fi and other technology to avoid conflicts that could essentially disengage your audience."

Once a meeting is underway, other considerations should take precedence. To improve productivity, meeting attendees

have the right resource in-house, contracting with outside experts is a reasonable alternative.

Edwards suggests seeking out a technology partner who can help manage the entire event, from how to best convey your event's central theme, to determining how to capture and use data effectively to drive marketing and sales goals.

"That resource should have a proven track record in managing events in the financial sector and a deep understanding of industry-specific needs," he says.

Edwards advises including the event technology partner in planning meetings. "The more information your partner has at the earliest stage, the



**Ken Edwards**, Director, Financial Services  
SmartSource Computer & Audio-Visual Rentals, New York, NY

*"Technology that meets the needs of today's multigenerational audience is something that should be on all meeting planners' radar."*

should shut down any other apps and electronic devices, says Joos. He cites research findings that 25 percent of participants do other types of work during meetings.

"Instant messages and email can be distracting, so politely ask meeting attendees to silence their phones and computers to stay focused," he says.

In dealing with technology across

more helpful the partner can be in recommending technology strategies built around your event theme," he says. "Your technology partner also can help guide meeting planners from year-to-year on how to grow and develop their events with the latest technology without having to increase their budgets."

Whether working in-house or with outside firms, don't be afraid to experiment, Lo says.

"All too often, I see events not using the latest stuff because they are afraid or they don't make it a priority," she says. If you're willing to put yourself out there, it will often come back more positive than negative even if it didn't quite work out the way you had in mind. At least the attendees remembered you did try to do something different."

Kirby agrees with the value of checking out new technology: "Don't be afraid to explore different options in the marketplace that might be useful to enhance an event you are planning," he says. The world is getting smaller, and technology will ultimately allow you to bring the world to your event." **I&FMM**

*"To stay relevant, it's absolutely vital to take into consideration what technology is currently available."*

**Cindy Y. Lo**, DMCP, President and Event Strategist  
Red Velvet Events, a Global DMC Partner, Austin, TX

audience response systems allow all the generations to communicate their opinions and questions in real time with meeting planners as well as their exhibitors and sponsors.

### Event Preparation Tips

In pre-event preparation, it's important to check out basics such as audio and video in different venues well before meetings get under way. Doyle

the board, finding the right balance between internal and external support can be a key.

"If you are already overloaded with your meeting logistics, identify an individual on your team that can take charge of this area," Lo says. "It really does need a dedicated person to make sure it's happening pre-event, during the event and even the week following the event." She adds that if you don't

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Cover Story

# Preparing for the Worst-Case Scenario

## Planners Face a Heightened Duty of Care Amid Growing Safety & Security Risks

By Sara Churchville

Large-scale terrorist attacks. Extreme weather events. Massive incidents of data fraud/theft. These are three of the top-five risks in terms of likelihood, per World Economic Forum's Global Risk Report 2017. And while most meeting planners may believe they will never find themselves in the unfortunate position of responding to a huge crisis, increasingly they no longer have the option of acting on this belief. "When a crisis strikes an event, it is the meeting planner who is expected to know what to do," says Brenda Rivers, JD, President and CEO, Andavo Meetings, Incentives and Consulting.

### The Pulse Shooting and Hurricane Matthew

Rivers found herself at the intersection of two potential crises in planning a five-day annual summit at an Orlando convention hotel in fall 2016. Already set to attend were 3,000 executives and corporate sponsors when the Pulse nightclub shooting happened in June 2016. The city was in panic mode, with local law enforcement and national intelligence agencies on the lookout for possible repeat attacks. Registered attendees, too, began to panic, some asking for refunds prior to the summit. "If the event was cancelled, it could potentially mean a loss of over \$1 million, not covered by event cancellation insurance, as well as the loss of annual sponsorship revenue critical to the operations of this global organization. Most important, to cancel the event would mean that fear would triumph over the mission of this organization," says Rivers, who is certified by the Institute of Crisis Management Communications.

The organizers decided to provide crisis management training for the event staff and implement a safety messaging





campaign for the attendees, something Rivers specializes in providing through Andavo. “Led by the events team, mini-crisis scenarios were rehearsed with the C-suite and staff to cover event disruptions resulting from: fire, power outage, serious medical emergency, hurricane, bomb threat, protesters, guns in the meeting and active shooters,” she says. Ultimately, attendee fears were sufficiently assuaged that the event enjoyed record turnout. And while the group did not experience any type of terror attack, it was not so lucky with the weather: Hurricane Matthew struck in October during the conference. “The entire group was on lockdown in the hotels for 24 hours, and the program agenda had to be restructured. The team learned that response training for one type of crisis is transferable,” she says.

The social media crisis communication plan was the one sticking point, leading Rivers to conclude that a team should be designated specifically to that task months in advance of any event, “including decision-making authority, preapproved messaging for levels of severity, contact lists, press policies and social network monitoring during and after the crisis. Always remember to rehearse your social media response for different types of crises before you are caught in the panic and fear of the actual disaster.”

Rivers’ background in hospitality law already predisposes her to think in terms of meeting organizers’ fiduciary responsibility toward their attendees — and increasingly, the world around us does, too. A terrorist attack is, unfortunately, now a “foreseeable risk for an event,” she says. “Organizations must understand there is a heightened duty of care to protect the safety of event attendees, not just their own employees. Your events team must be trained to know what to do, how to get help, how to keep people calm, and where the evacuation routes are. Attendees expect to have safety procedures readily available to them; therefore, not to publish reasonable information could be a failure of duty of care. Integrating crisis management training into the meeting

**“Planners are increasingly anxious about their responsibility for crisis preparation, yet most lack anything more than security handbooks and checklists to guide them.”**

**Brenda Rivers, JD, President and CEO**  
Andavo Meetings, Incentives and Consulting  
Greenwood Village, CO

Courtesy Andavo

design will meet the duty of care for all foreseeable risks.”

Certainly, when it comes to internal safeguards, insurance and financial services companies are in the vanguard of risk management initiatives. But the situation becomes a bit murkier when it comes to offsite gatherings.

#### **A Black Cloud**

“I had a black cloud over my head, which always turned into a sunny day,” says Pete Dowling of his 13 years as managing director, operational risk management with AXA Equitable Financial Services LLC, where he landed after a 26-year career with the U.S. Secret Service. During his time at AXA, he chaired the Bankers and Brokers Roundtable, a consortium of the chief security officers of the world’s

20 largest financial services firms who share information and best practices with each other constantly in the wake of the September 11 attacks. “If it hits the fan again, we’re all in it together,” he says. He also handled eight crises for AXA, including shepherding them through two hurricanes, one of which caused an electrical fire, as well as a protest during a political party convention.

“We have to sell a product that people don’t necessarily want to buy,” says Dowling, who now is special adviser to the CEO at Group Do Lists Powered by Centrallo. The “product” isn’t so much security solutions as it is planning for the worst case — no meeting planner (no person, really) is eager to think about, much less methodically plan for, a catastrophe. As such, Dowling made a point of developing

trust with event planners, understanding their goals and working toward them as a team. Ultimately, he wanted to present an image of confidence and great preparation for planners and attendees, rather than coming off as a menacing presence.

“Advance preparation is always my mindset,” he says. “If you do a proper amount of preplanning, you don’t need a heavy-handed presence.” His preparation could include, for example, visiting the local precincts to ask: “If a cop was hurt, where would you take him?” and designating in advance a person to travel to the hospital with anyone who became injured or ill; staying in continuous contact with the U.S. Department of State when needed — as it was during a weeklong Paris meeting for top producers and their spouses during a period of

**“If you know the security people in your company...ask what you think we can do. Planners would be pleasantly surprised at the good coordination they can have.”**

**Pete Dowling, Special Advisor to the CEO**  
Group Do Lists Powered by Centrallo, New York, NY



significant rioting and arson in the French capital’s banlieues. Dowling’s CEO sent him overseas to suss out the situation and connect with his contacts there, and he followed each point in the itinerary, which included trips to the surrounding countryside, to determine where weak points might be.

To planners of meetings abroad, Dowling recommends getting in touch with the U.S. Department of State’s Overseas Advisory Council, which caters specifically to the needs of corporate travelers. He also recommends setting up a line of communication with the in-house security team. “If you know the security people in your company and you have a good relationship with them, sit down and have a cup of coffee and ask what you think we can do. Planners would be pleasantly surprised at the good coordination they can have.”

#### **Who’s Responsible?**

“Planners are increasingly anxious about their responsibility for crisis prep-

aration, yet most lack anything more than security handbooks and checklists to guide them. Reading the security handbook is not preparation. If the organization’s response team does not know what to do in the first 10 minutes of a crisis, they are not prepared,” says Rivers.

Underlining the undisputed requirement to keep attendees safe is who, in an era of increased need for security, should foot the bill for reinforcements: “A conversation or dialogue between the event planner and venue should address whose responsibility is it to cover the costs for increased security,” says Stuart Ruff-Lyon, V.P. of events and education, RIMS, the Risk Management Society, and executive committee member of the board

people come to an event, everyone is carrying something. So do you want to screen all that like an airport situation, like TSA? People are paying to come to these things, and you don’t want to increase the fear level because people won’t come back,” says Michael Bouchard, chief security officer, Janus Global Operations, based in Reston, Virginia. “So in the back of your mind, you’re always thinking: If I do these things, what will people say, what will their reaction be? If we can soften it in any way, we do.”

In practice, that can mean relatively unobtrusive measures such as circulating “observers” to check for suspicious

behavior, asking for ID at the entrance as a protection beyond just the attendee badge and, perhaps, signs crafted in an event-friendly way indicating that bags may be subject to random search. IMEX Frankfurt had just such signs as well as metal-detecting wands, Ruff-Lyon notes, and a recent meeting in Nice even had metal detectors at every entrance. “Europe is probably a little ahead of us right now,” he says. “I think we will see more security screening at bigger conventions to ensure attendees are safe: a constant plainclothes police presence, metal detector or screening component.” RIMS has already added bomb-sniffing dogs in its loading area, he says.

As for the cost, the consensus is that pennywise equals pound foolish: The loss of trust, reputation or, at the most extreme end, life, always will be far greater than any funds spent on the front end.

As for the cost, the consensus is that pennywise equals pound foolish: The loss of trust, reputation or, at the most extreme end, life, always will be far greater than any funds spent on the front end.

#### **Everyday Threats**

A retired Marine who has worked with the U.S. Department of Defense and with financial services and insurance companies, among others, George Taylor is a member of the Global Business Travel Association Risk Committee and V.P. Global Operations for iJET International, an integrated risk management provider. For meeting planners, he has found, “The average threat is ill-

#### **Balancing Safety and Convenience**

The obvious drawbacks to a fully up-and-running crisis management system are twofold: diminished attendee experience and exorbitant price. “When



ness, car accident or crime.” Establishing where the nearest hospital is, liaising with local police to determine where pickpockets might be lurking, designating someone to step in if the event planner is taken ill: these are just a few of the precautions that have become routine.

Still, having worked in hotspots around the world, he is hardly one to downplay the potential for a crisis. “Venues need to be chosen less on price and more on safety and security” is his opinion on the matter. Ideally, an event planner and an embedded security person should “have an integrated effort to actually choose the location,” he says.

a private session or penetrate a secure event, and whether it’s worth it to confiscate attendees’ phones and, if so, how do so graciously.

“What kind of safety do vendors have?” Ruff-Lyon suggests planners ponder. He notes that even benign elements such as PowerPoints and other presentations can be encrypted and attacked. “We need to understand on a basic level, when we outsource registration, what measures they have in place so attendees won’t be breached.”

Rivers also gives special mention to the need



Stuart Ruff-Lyon, CMP, DES, Vice President, Events and Education  
The Risk Management Society, New York, NY

*“Europe is probably a little ahead of us right now. I think we will see more security screening at bigger conventions to ensure attendees are safe.”*

Failing that not-always-feasible scenario, he recommends, as do all security professionals, that planners do a risk-based analysis that answers three basic questions: “What do I have to protect? What do I need to protect it from? What do I have to protect it with?”

#### Cyber Risk

Event planners also need to be on guard for cyber threats, particularly corporate espionage and data/identity theft, both of which become increasingly sophisticated almost in lockstep with the increased sophistication of technology. A successful infiltration needn’t even be high-tech: At what Bouchard calls “soft targets” — venues with little security that are unarmed — it can be sufficient for an unauthorized attendee to simply walk in with a hazily acquired badge.

“Risk management is not just crisis management — crisis management is one component,” says Ruff-Lyon. It’s also about managing cybersecurity, both within the venue and along the supply chain. A site security assessment should include, along with the more routine safety checks, considerations such as how easy it might be to record

to “involve your IT team and the hotel network team” in determining what information third-party apps might be collecting and what their privacy policy is, and finding out whether a vendor is carrying cyber fraud insurance to protect attendees. “Engage a cyber fraud consultant to analyze your network configuration, encryption for online and offline services when transferring data to mobile devices, document tracking and secure privacy filters on laptops to secure data from roving eyes,” she recommends.

#### ‘Think Like the Bad Guys Will’

“It’s only a ‘crisis’ if you haven’t planned for it,” asserts Bouchard, who is retired from the Department of Justice, where he managed the Bureau of Alcohol, Tobacco, Firearms and Explosives’ efforts at the Pentagon after the 9/11 attacks and was one of the three incident commanders during the Beltway Sniper Investigation. Once you’ve already addressed the scenario in theory, if it happens, it’s simply “an incident that you have to deal with,” he says.

For him, risk assessment is not only about intelligence-gathering but asking about the risks: Can I do anything about

them? Are they important enough for me to have to do anything about them?

“Planners aren’t thinking outside the box, but they need to think like the bad guys will,” Bouchard says. Given the nature of his industry, where kidnappings are not uncommon, he has learned to think in this way, and standard practice for returning executives is to have their computers scrubbed in case a foreign agent has tried to infest it with something.

And while most insurance and financial services meeting executives won’t need to contend with this eventuality, they still can institute tighter controls over their proprietary information. For example, Bouchard recommends never leaving company-sensitive information on the laptop itself; instead, he recommends storing it in on an encrypted thumb drive that stays with the attendee at all times, then having the IT department scan the laptop once back in the office.

Wi-Fi and videoconferencing, too, can be remarkably easy targets, with a password that is “whatever the conference name is in lowercase. Anyone can just jump in on it. Be a little more creative with passwords,” Bouchard recommends. He also notes even something as simple as putting up signs reminding attendees that their connection is not secure can go a long way toward increasing awareness. He also recommends planners monitor social media about any controversial topics that may be broached during the event.

Although it’s a truism in event planning, still, security professionals emphasize that only through a physical walk-through of a venue with an eye toward security can planners really learn what a hotel’s crisis plan is. Taylor says, “You can do simple things: look at CCTV coverage, how doormen act, and make determinations and feed that to the coordinator.”

Bouchard concludes: “You really can’t make the threat go away; you just have to manage it. If something bad does happen, you need to have a plan ready and people available.” **I&FMM**

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Teneo Hospitality Group has named **Julie Stovroff** as vice president of sales, insurance and financial services. She was previously vice president group sales insurance and financial services for Preferred Hotels & Resorts.

Atlantis, Paradise Island in The Bahamas has named **Jim Curtis** as vice president of group sales. He was most recently director of sales and marketing for The Diplomat Beach Resort in Hollywood, Florida.

The Ritz-Carlton, Lake Tahoe has named **Marian Wilson** as director of sales and marketing. She was director of sales at Horseshoe Bay Resort in Austin, Texas.

Palace Resorts has named **Michaela Foley** as director of sales for the Northeast region and **Lisa Josoff** as director of sales for the Midwest region. Foley was area director of group sales for SLS Park Avenue and The Redbury New York. Josoff was global account manager for Starwood Hotels & Resorts.

Rancho Valencia Resort & Spa in Rancho Santa Fe, California, has promoted **Mark Philips** to director of sales and catering. He most recently was director of leisure sales at Rancho Valencia.

**Kristin Thompson** was appointed director of sales and marketing for Rosewood Baha Mar, which will open in

2018 in Nassau, Bahamas. She was with Four Seasons Hotels & Resorts in various sales and marketing roles at Four Seasons properties around the world.

**Robert Dorr** was named director of sales and marketing for The Chattanooga, a Benchmark Resorts & Hotels property in Chattanooga, Tennessee. He was director of sales and marketing for The Westin Virginia Beach Town Center.

**Sarah Farrell** has joined Mount Airy Casino Resort in Mount Pocono, Pennsylvania, as director of sales. She was director of sales and marketing at Holiday Inn Wilkes Barre – East Mountain. **I&FMM**

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<b>17</b>	Celebrity Cruises	800-722-5934	www.celebritycorporatekit.com	Corporate Sales	N/A
<b>COV II</b>	Greater Miami Convention & Visitors Bureau	800-933-8448	www.miamimeetings.com	Ileana Castillo	ileana@miamimeetings.com
<b>31</b>	Jack Fiala's Corporate Sidekicks	877-856-1160	www.corporatesidekicks.com	Jack Fiala	jack@corporatesidekicks.com
<b>49</b>	Naples Marco Island Everglades CVB	239-252-2379	www.paradisecoast.com/meetings	Debi DeBenedetto	Debide@colliergov.ne
<b>21</b>	Norwegian Cruise Line	866-ncl-meet	www.events.ncl.com	Group Sales	events@ncl.com
<b>43</b>	Oasis Hotels & Resorts	770-662-1805	www.groupsatoasis.com	Group Sales	groups@oasishotels.com
<b>23</b>	Oceania Cruises	954-940-7315	www.oceaniacruises.com/incentives	Katrina Athanasiou	kathanasiou@nclcorp.com
<b>25</b>	Regent Seven Seas Cruises	305-514-4920	www.rssc.com/charter	Katrina Athanasiou	kathanasiou@rssc.com
<b>8-9</b>	Sea Island	888-906-8048	www.seaisland.com	Group Sales	sales@seaisland.com
<b>37</b>	Streamsong Resort	863-428-1000	www.streamsongresort.com	Group Sales	meetings@streamsongresort.com
<b>5</b>	Trump International Beach Resort Miami	305-692-5660	www.trumpmiami.com	Marty Bussey	mbussey@trumpmiami.com
<b>COV IV</b>	Walt Disney World Swan and Dolphin Hotel	800-524-4939	www.swandolphinmeetings.com	Gino Marasco	meetings@swandolphin.com

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The Walt Disney World Dolphin lobby will undergo a \$12 million re-design, the final stage of a \$140 million renovation project, the largest makeover in the resort's history. It will be completely transformed into a sleek, contemporary space featuring new food and beverage options and offer an inviting area for guests to relax or network. A recipient of the prestigious Meetings & Conventions Hall of Fame Award, the Walt Disney World Swan and Dolphin is a nationally respected and recognized leader in the convention resort arena. The resort offers more than 329,000 sq. ft. of meeting space, 84 meeting rooms, and 2,267 guest rooms and suites which feature the Westin Heavenly® Bed. Attendees can also relax in the luxurious Mandara Spa, indulge in one of our 17 world-class restaurants and lounges or enjoy our unique Disney Differences.



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