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# INSURANCE & FINANCIAL MEETINGS MANAGEMENT

THE EXECUTIVE SOURCE FOR PLANNING MEETINGS & INCENTIVES



## What Incentive Winners Want Most From Hotels

Above All, an Experience That  
Makes Them Feel Special  
Page 22

TD Ameritrade's President's Club  
enjoys a beach event at Little Dix  
Bay in the British Virgin Islands.



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NOVEMBER/DECEMBER 2013 Vol. 20 No. 6

Photo courtesy of Spear One



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*Incorporating nature into event design was top of mind as Spear One produced this once-in-a-lifetime incentive travel program in Oahu for 1,200 attendees.*

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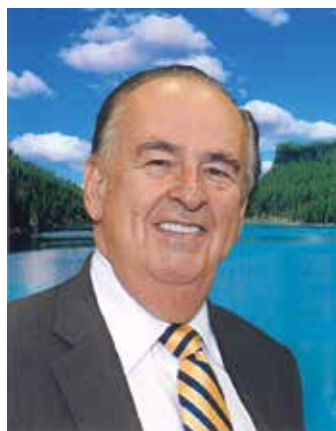
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# Publisher's Message

## Partners You Can Count On

Location, location, location. How many times have you heard that phrase? No doubt, location is an important factor especially when deciding upon the ideal destination for your next incentive program. But, as you will learn in "What Incentive Winners Want Most From Hotels — Above All, an Experience That Makes Them Feel Special," our cover story on page 22, there are many factors that professional meeting planners must consider as they strive to create the most memorable event to reward their top qualifiers.



For instance, Eldon Gale, incentive travel manager at Columbus, OH-based Nationwide Insurance, faced with a difficult decision between a Dublin experience and an Irish countryside experience, says "What it came down to for us was, what is the experience that we want our people to have?"

By the same token, Katrina L. Kent, CMP, CMM, director, The Event Group, TD Ameritrade, whose incentive winners are shown on this month's cover, says the most important factor

in their incentive marketing is "building the prestige associated with qualifying for the trip, and that elite accomplishment. Destination is foremost for incentives at TD Ameritrade, but the choice of venue is a close second."

When it comes to TD Ameritrade's site inspections for incentives, Kent looks at the sense of place "more holistically" than she may for a straight business meeting. "We are looking more closely at the entire destination, the local flavor, the differentiators within the location itself, activities, leisure vibe, local food and recreation," says Kent.

Thus, brand loyalty and consistent service are often at the top of the list as Kent explains, "Independent hotels actually don't factor in (as incentive site choices) as greatly for us as the more expansive, corporate hotel partners. One of the most important reasons is service levels. There is great service out there at some independents, of course, but overall service is something that we see is more consistent at luxury brands with established cachet. So we lean a lot on luxury hotel partners we can count on. Other four-star hotels actually also have some great upscale resorts that can be packaged as 'luxury,' especially given their destination, and that offer great value."

Harvey Grotsky

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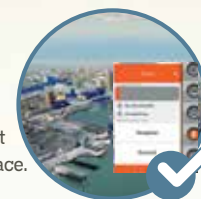
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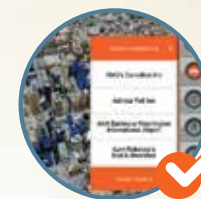
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## Hyatt Unveils All-Inclusive Brands



Hyatt Ziva Los Cabos.

CHICAGO, IL — Hyatt Hotels Corporation recently introduced its Hyatt Ziva and Hyatt Zilara all-inclusive resort brands. The first two resorts to debut under the new brands are owned and managed by Playa Hotels and Resorts. Launching in November, B.V. Hyatt Ziva Los Cabos and Hyatt Zilara Cancun will undergo multimillion-dollar renovations in 2014. The next resort in the portfolio, Hyatt Ziva Rose Hall in Jamaica, is currently undergoing an extensive renovation and will open in late 2014.

Hyatt is the first major global hospitality company to launch new brands exclusively focused on the all-inclusive segment. An adult-only all-inclusive brand, the all-suite Hyatt Zilara offers 21,000 sf of meeting space. Hyatt Ziva Los Cabos, for guests of all ages, offers 436 suites and 35,000 sf of meeting space. [www.allinclusive.hyatt.com](http://www.allinclusive.hyatt.com), [www.hyatt.com](http://www.hyatt.com)

## Planners Offered ‘Fairway Freedom’ at Omni’s Golf Resorts

IRVING, TX — Omni Hotels & Resorts is offering Fairway Freedom, a new golf meeting value. Meeting planners who book a qualifying meeting for 2014 from now through December 31, 2013, at any of Omni’s Golf Resorts will receive a complimentary round of golf for every peak room night booked. The offer is valid at any Omni Golf Resort including Omni Barton Creek Resort & Spa in Austin, TX, which is heralded as the No. 1 golf resort in Texas; The Omni Grove Park Inn in Asheville, NC, featuring panoramic views of the Blue Ridge Mountains; and Omni Bedford Springs Resort in Pennsylvania, which is home to one of the country’s first golf courses. The offer is also available for meetings and events held at these locations: Omni Amelia Island Plantation Resort; Omni Mount Washington Resort in New Hampshire; Omni Hilton Head Oceanfront Resort in South Carolina; Omni La Costa Resort & Spa and Omni Rancho Las Palmas Resort & Spa in Southern California; Omni Orlando Resort at ChampionsGate; Omni Tucson National Resort; Omni Interlocken Hotel near Denver; and The Omni Homestead Resort in Hot Springs, VA.

For details, terms and conditions regarding Omni Hotels & Resorts meeting offerings, customers can contact their Omni Global Sales representative, visit [www.omniunderstands.com](http://www.omniunderstands.com) or call 800-788-OMNI.

## Site Releases White Paper on Risk Assessment/Management for Incentive Events

CHICAGO, IL — The Site International Foundation has released “Risk Assessment/Management for Incentive Events,” the third White Paper in the “Incentives Move Business” series. According to Site, incentive planners face a wide array of potential risks in incentive travel and motivational events such as weather or natural disasters, government or labor unrest, transportation disruption, medical emergencies, acts of terrorism or violence, among others. Thus, mitigating risk is a vital consideration that should be addressed early in the program planning stage. “The White Paper emphasizes that managing risk is important to all members of the supply chain, and is a key differentiator applied by customers when selecting suppliers,” stated Site International Foundation President Jane Schuldt, CITE, CIS. “Ensuring that proper risk assessment has been performed and appropriate risk management plans have been put in place at all levels is a new fact of life and makes sense.” Risk management is an especially important consideration for destination-centered suppliers, particularly for the inevitable natural or man-made disaster. Some companies are budgeting for at least one disaster every decade, which may not be enough. Planners also must assess the risks involved in the activities that are included in a program. On a practical level, evaluating risk and planning how to manage it frequently plays a major role in whether a program is acceptable to a client’s legal department.

To download any of the three White Papers in the “Incentives Move Business” series, please visit [www.siteglobal.com](http://www.siteglobal.com).



**1** Site Nite Event Chairman Philip Eidsvold (l), account director, business loyalty for Aimia Inc., and 2014 Site International Foundation President Kurt Paben, senior vice president, head of channel and employee loyalty for Aimia Inc., are welcomed to Site Night held at Mandalay Bay, Las Vegas, during IMEX America. **2** The Pacesetter Award was presented to two young professionals early in their careers at the Convention Industry Council’s Hall of Leaders Gala in Las Vegas. Honored were Robyn Mietkiewicz (l), director, accounts and global meeting management services, Meeting Sites Resource, and Meghan Schilt, events manager, Apex Partners. **3** CIC guests enjoyed a night of entertainment including a live orchestra, a full cast of singers, dancers and music performances custom tailored for each of the Hall of Leaders’ honorees. **4** A record number of more than 936 participants from 61 countries such as these first-time attendees attended the 52nd ICCA Congress in Shanghai, China-PR. — the largest attendance for an ICCA Congress outside Europe, according to ICCA CEO Martin Sirk. **5** ICCA President Arnaldo Nardone presents the Moises Shuster Award to Connie Cheng from Shanghai Municipal Tourism Authority during the ICCA 50-year anniversary Gala at the ICCA Congress. **6** The World Travel Market (WTM) 2013, held November 3–6 in London, also broke attendance records. In native garb, David Johnson (l) and Francis Tuinisakea of the Fiji Tourism board greet delegates. **7** Geert Bourgeois (l), vice-minister-president of the government of Flanders, Flemish minister for tourism, and Simon Press, Reed Travel Exhibitions, senior director, WTM, cut the ceremonial ribbon at the start of the event.







## Video Recording Your Meetings: How to Save Money and Avoid Hassles

Although the video recording of events and conferences in the financial and insurance industries has been a trend for several years now, the use of these recordings has changed drastically. In fact, many planners are now requesting that the recording be available immediately after the program and in a digital format so it can be used on social channels as well as internal or external websites. While the use of these videos can be a great marketing tool, if the recording is not properly incorporated into the event-planning process, it can cause unneeded stress and unexpected expense. To alleviate this scenario, having an understanding of the different levels of recording an event, as well as the necessary review process on the final product, can pay big dividends. Here is an overview of different levels:

### **Level 0 No recording.**

This rarely, if ever, happens in today's meeting world. When there's a camera in play, chances are it is recording, but it never hurts to ask your audio-visual provider if recording is included in the price.

### **Level 1 Placed on the shelf.**

There are still plenty of planners who are recording meetings for archival purposes only. In the insurance and financial industries, this may be for the sake of having a record of the activity. For this level, there are typically two options: the "on-camera record" in which only the video taken by the camera is recorded. Older cameras record to DVCAM or BETACAM tapes, which are professional-grade tape formats. On newer "prosumer" high-definition models, the video is recorded on a tape format called HDV or directly to a portable hard drive. If your camera uses tapes, you may see a "tape charge" on your audio-visual bill, used to cover the cost of the tapes themselves, which can be expensive depending on the length of your program.

The second option is a "program feed" record. A separate recording (tape) deck or hard drive is inserted into the video rig, and whatever is being sent to the screen is recorded. Be careful as some audio-visual vendors use the terms "line cut" and "program feed" interchangeably. "Line cut" is a term derived from television production and refers to a

particular edit that just contains camera angle switches. In contrast, a "program feed" should include anything that is being shown on the screen. Note that the cost goes up by not only the price of the tapes, but also the cost of the deck. If recording to hard drive, you'll save the cost of the tapes, but your audio-visual company will still need a way to get the footage to you afterward, so you may have to provide, or have them provide, an external hard drive to copy the files to. When the show is over, your audio-visual vendor provides you the tapes or external hard drive, and they go in a box or on a shelf somewhere, never to be seen again.

### **Level 2 There's a chance we might use it someday.**

Still others in the insurance and financial industries go through the exercise of recording their events with the thought that maybe they'll use it someday. However, many are caught off guard with this option because most people do not have a DVCAM, HDV or BETACAM deck lying around the office. As such, see if your audio-visual vendor or production company will include a basic video transfer to DVD or to a digital video format like M4V (Mac and PC) or WMV (older PCs). If they can't, there's usually at least one company in every major city that specializes in media format changes: VHS->DVD for example. They can usually do this for a moderate fee.

If recording to a hard drive, you're not safe either! Recording to a hard drive is usually completed in one of the many Apple Quicktime formats used by professional editors. Even if you have a Mac, you may not have the proper software to view or edit the footage, so you will have to rely on your audio-visual company or a third-party to convert it to a more consumer-friendly format.

### **Level 3 We're definitely going to use it at some point.**

If you intend to hand over the footage to a video editing company, you may want to consider the combination of both the on-camera record (also known as ISO, as in "isolated") as well as the program feed. If the camera being used is not recording to a tape or drive internally, you may need to add a second deck behind the scenes. This is especially helpful when PowerPoint files or other PC/Mac-based presentations are involved, which is very common

for events with technical information or a great amount of detail as seen in the financial and insurance industries. The client can provide video editors both sets of footage, and the editor can use the program feed as a reference to add the PowerPoint files back into the final edit. For example, if you know the footage is going to be used, it may make sense to have three separate record decks rolling including Camera A ISO, Camera B ISO and the program feed.

For many shows, depending on the content, just the program feed may be sufficient for the client's post-event needs. During the live "in the room" meeting, video directors must choose on the fly whether to put the speaker or the speaker's presentations on the screens. Depending on the level of rehearsals, the director doesn't typically know exactly what the speaker is going to say or do, and has to guess when and for how long the camera should be on the speaker. Having the ISO in addition to the program feed lets you go back and edit with hindsight, striking the right balance between speaker and presentations.

Be advised that if you choose not to have both an ISO and a program record, you may pay for it later in the form of edit time.

### **Level 4 We're definitely going to use it next week (or tomorrow!).**

A growing trend is to share the information from a conference as soon as possible with shareholders, sales reps or other stakeholders. While this is fantastic from a marketing standpoint, this is where things can really get sticky if you haven't made plans in advance. One of the biggest challenges tape-based formats have is that getting the footage off the tape takes a lot of time. Many don't take into consideration that if a conference was three days long, eight hours a day, it is going to take that same amount of time to simply move the footage into an editable form. Video houses are probably going to charge rush charges to quickly turn around that much footage, or simply won't have time to do it. If your client knows they're going to use the footage, try and get a reasonable understanding of when they intend to do so, and set their expectations accordingly.

With hard-drive recorders, you can turn around the footage much faster. Though the price is coming down, be advised that these decks are going to be more expensive than tape-based decks. Although the footage isn't saved in a format the average consumer can use, it is being recorded in a format that can be edited almost right away in professional software such as Final Cut or Avid.

## Getting Started

Now that you have a proper understanding of video recording options, it is important to match up your end goal and your budget. Simply, recordings should be discussed before the event and before the equipment budget is finalized. With each level increase, there is an associated increase in cost as well as the equipment required. Therefore, it is important to discern from the onset of planning how you plan to use the footage. For example, for a recent meeting of financial auditors, it was decided early on that they would share the recordings with all of their sales team after the event. Because the planning team identified this need early on, the appropriate level of recording occurred. The organization was able to identify who would receive it, and how, based on their typical electronic tools before the conference. This helped speed up the delivery

Recordings should be discussed before the event and before the equipment budget is finalized.

after the event. Another key area to consider is a review process. Defining who needs to review the final product, especially if it is for public consumption, is essential in the planning stages of your event.

A final consideration is making sure you partner with a firm that is not only knowledgeable about recordings, but meeting management as a whole so they can ensure successful integration in all aspects of your event and help you deliver on your objectives.

**I&FMM**

**Brandt Krueger** is metroConnection's director, video and production technology. As "the man on the headset," Krueger has experienced hundreds of productions. Since 1984, Minneapolis-based metroConnections has provided complete conference, event, stage production, audio-visual, production and transportation services for meeting and event planners nationwide. The company produces more than 1,400 programs per year. [www.metroconnections.com](http://www.metroconnections.com)

# Planners Look Ahead



By  
Karen Brost

When asked how 2014 was shaping up in terms of the meetings she plans, Debbie Lipsky, CMP, senior meeting planner for SEI, a financial services firm headquartered in Oaks, PA, had good news to report. “We definitely see that things are on the upswing again. It’s busier, more positive,” she says, adding, “not that it was ever really slow.”

As evidence of the upswing, she explained that while SEI has a conference center on its campus, many meetings that had been held there for years are now being taken offsite. “It was a good year,” she notes. “They want to celebrate it.”

Lipsky and her team play a role in more than 500 sales and client meetings a year. In addition to the meetings they plan from start to finish, they also provide support to other departments. “In our organization, our team is valued by the service levels we provide and experiences we provide, so we get pulled into a lot of things that in most companies, a planner might

now playing a bigger role in her company’s meetings. “We did a big change last year,” she states. “We had event apps for four to five of our larger client events and one internal event. It was great. With each one we had increased engagement. We were able to decrease our printing. Everything was accessible via the app. It was a great experience.”

Lipsky explained that before introducing event apps into their external meetings, they tested the technology within the company. “We experimented with it with an internal group, which was senior

OK. It wasn’t as great as we thought it would be, but we learned from it and for the next two client events, the presentations were on there. Everything was on there. They loved it. They could follow along, and they could take notes in (the app).”

When SEI used the event app at a large client event, it resulted in another welcome benefit. “There was a lot of networking amongst the attendees, which is what we always want to create,” Lipsky notes. She says that

the app allowed attendees to post and comment on different elements of the meeting, which allowed them to connect in ways they wouldn’t have done before. “It was good. We’re definitely doing (the apps) again next year. Having attended a lot of event planning industry functions, we’ve used apps, and we thought ‘this is what everyone is doing, we ought to do it.’ But we came to find out not everyone is doing it.”

Amy Ingalls, senior meeting and event planner for Transamerica Life & Protection in Cedar Rapids, IA, also reports that technology is having a greater impact on her meetings. For example, they use RFID technology to track attendance at continuing educa-

***“We had event apps for four to five of our larger client events and one internal event. ...With each one we had increased engagement.”***



Debbie Lipsky, CMP, Senior Meeting Planner  
SEI, Oaks, PA

not get pulled into,” she explains. “It’s more to make sure everything is covered so that our salesmen and women or our relationship managers can focus on what they need to do and leave the logistical aspects up to us.”

## Technology Trends

She also noted that technology is

management and leaders in the company,” she describes. “For one of their offsites last fall, we said, ‘Can we experiment with this?’ It wasn’t the most robust program, but it was all of our key stakeholders for future programs, and they all liked it and bought into it so we did it. The first client event we used an app for, engagement was



tion sessions to ensure that attendees receive proper credit.

Transamerica also uses mobile apps at its meetings, and Ingalls says this is another item that impacts a meeting's budget. "Years ago, you didn't have to have a line item for mobile apps. You do have to make room (in the budget) for that now."

She made another important point about the use of mobile apps. "When you're in an international destination, you can't really offer them. You have to go back to the old-fashioned paper because not everybody has international service on their phone. You have to keep that in mind."

Sarah Whitlock, CMP, meeting and event manager for Pioneer Investments in Boston, reports that her company is also using technology differently now. First of all, all members of their salesforce have iPads. "We also did something at our sales meeting last year where people could take out their smartphones and do voting that way," she explains.

Lipsky described a very creative way her team recently used technology. "We did a virtual cocktail reception." The event was designed to celebrate the completion of a project with one of SEI's clients. "They're in Minnesota and we're in Pennsylvania, and a lot of the people who worked on the project have never met face to face," she explains. We videoconferenced from our facility here and from their celebration in Minnesota. They were at a hotel. It worked really well. The key stakeholders for that project from both organizations were able to speak to both parties and thank everyone for the hard work on the projects. Everyone had a good time. People said, 'This is great, I finally got to see this person.'" (And just in case you were wondering, the cocktails were real, not virtual.)

She adds, "We always challenge ourselves with 'what can we do better than other people aren't doing?' A lot of times our internal clients who are the host of the program are OK with keeping things the way they are, but

we ask, 'What can we do different to make it more exciting and a unique experience for them?'"

Ingalls has added some meeting planning apps to her iPad, but admits she hasn't found time yet to use them a lot. She laughingly shares a sentiment that many other planners can likely relate to: "I'm running around with my hair on fire, just trying to keep up!"

Planners surveyed for a recent New York University study on how technology is used to enhance meetings and events reported that the advantages of using mobile apps include: allowing a more robust give-and-take between attendees and presenters than is typically possible with audience response/polling systems; reducing printing costs through paperless agendas; en-



gaging and maintaining contact with incentive event attendees; and ease of disseminating information.

Other findings from the study, which was summarized by the Incentive Research Foundation ([www.irq.org](http://www.irq.org)), reveal that planners believe Wi-Fi connectivity should be provided as a free or low-cost service; social media can enhance event engagement, but also can be a time-consuming distraction; virtual meetings will not replace face-to-face meetings altogether, "especially incentive events where attendees receive rewards and expect unique experiences," the IRF notes.

### Budget Matters

As usual, budgets will be top of mind for planners in the coming year.

"I am still planning the same number of meetings," Ingalls says, noting that they plan about 90 meetings and incentives per year. "The C-level executives are giving me the charge to be more cost-effective and look for more ways to trim the budgets. Not substantially, just being more conscientious about what we're spending the money on."

"Transamerica operates in a decentralized manner, meaning that I'm the planner here in Cedar Rapids but there's also a large distribution group in Atlanta," she continues. "They have their own planner. The same way with Los Angeles and Baltimore, and there's a planner in Little Rock. We each do our own meetings, but we have been just this year asked to look at ways that we can be more cost-effective together and share some expenses."

"Hotel rates are going up with lots of little hidden fees, the resort fee, the Internet fee, all of that, and it's frustrating when you're trying to do your budget. I wish they would just put it in the room rate and be done with it. And," she adds, "they still charge us an arm and a leg for flipcharts!"

The 2014 Industry Forecast by the travel management consultancy firm Advito also cites increasing hotel rates. The report states, "With a year of improved demand under their belts, hotels will look to increase meeting rates more sharply in 2014 than in 2013. The growing imbalance between supply and demand improves their chances of success. Once again, rates will rise faster in first-tier cities than elsewhere."

Whitlock is experiencing this shortage of hotel inventory firsthand. "Being a planner in the Boston area, it's a challenge, really, to find meeting space. There's a hotel shortage in Boston and it's really tough. I'm planning something right now, and I'm having trouble finding space (eight months out)."

The Advito forecast also indicates, "The issue for buyers is that contracts are taking longer to complete because hotels are becoming more resistant to amendments and addenda requested

by the client. Clients are coming under more pressure to accept contract terms they may otherwise reject." The research done for the forecast also found that a growing number of U.S. hotels are insisting on keeping meeting room rental fees in the contract instead of being willing to negotiate them away.

Ingalls also notes the rising cost of airfare having an impact on budgets. "That's always questionable. That budget item always just creeps up and up and up."



**Amy Ingalls, Senior Meeting and Event Planner**  
Transamerica Life & Protection, Cedar Rapids, IA

### Incentive Trends

According to the 2013 Spring Pulse Survey produced by the Incentive Research Foundation, 55 percent of survey respondents anticipate no changes to their budgets for incentive programs in the coming year as a result of recent economic conditions.

The report also notes that 42 percent of respondents indicated that North America was their chosen region for incentive travel programs followed by the Caribbean (32 percent), Europe (31


***"The C-level executives are giving me the charge to be more cost-effective and look for more ways to trim the budgets. Not substantially, just being more conscientious about what we're spending the money on."***

percent), Central America (18 percent), and South America (16 percent).

"We have been looking at more international lately in terms of all-inclusive properties," Ingalls notes in reference to her incentive programs. "That makes it really easy for us to stay on track with the food and beverage portion of the budget."


"I just got off of a program in Jamaica," she continues. "We had 680 people there. It was all-inclusive, and it worked quite well because I knew what my food and beverage spend was going to be (except for) some

little setup line items. It's also easy for the attendees. When you have attendees who are your top level versus your attendees who are new to the business and just coming in, they can go out to the pool and have drinks with each other, and they're on a level playing field. The top-level agent, at some other resort in Florida (for ex-



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ample), could say, 'I'll buy a round,' but the new agent, he can't buy a round for the whole pool. Those all-inclusive resorts really help the attendees feel equal."

She shared an experience one of her attendees had with an all-inclusive property. "One of our top agents, a

says, "Here at Transamerica, we haven't had any changes with our incentives. We have raised the qualifications for the agents, but in terms of content, meetings, what we offer and what we give, that has stayed the same. I do hear other



***"We are doing more free time. People enjoy that...especially on an incentive trip when you're there with your spouse or a good friend of yours."***

**Sarah Whitlock, CMP, Meeting and Event Manager  
Pioneer Investments, Boston, MA**

general agent with us, brags about how when he checked out a couple of years ago in the Dominican Republic, he only had a \$14 bill because he bought something like a toothbrush and toothpaste in the gift shop." She laughs, "How often does that happen? I thought that was wonderful."

Ingalls also uses cruises for her incentive programs. "In August we had an Alaskan cruise (on Royal Caribbean) and the attendees loved it. There again, for the most part, you can really budget ahead for your food and beverage. Your costs are going to be pretty much set in stone when you sign the contract for most of the food and beverage.

"I've also done quite a few Caribbean cruises," she adds. "I've used the Royal Caribbean Allure of the Seas for three different programs. That ship is just a 'wow' in itself. It's unbelievable — 17 stories tall. It's bigger than my home town! I'm from a really small home town of 3,800 people."

She noted another advantage of booking cruises. "With the cruises you also don't have to worry about arranging optional activities. The cruise line does that on its own. When you're doing a land program, you typically offer (something like a) swim with the dolphins excursion. You don't have to do that on the cruise because they are experts on that and do that every day."

When asked if her incentive programs are changing in any way, she

planners say that they've gone away from the in-room amenities, that type of thing. We have not changed. What



gets hard is always trying to improve and one-up yourself from the previous incentive trip. How are we going to outdo ourselves this year? That's the hard part."

Ingalls plans incentives for seven different distribution groups, and she says that the Caribbean is a popular destination. "The majority of our agents are from the Midwest, so going to those warmer climates in the winter is very popular. There are a couple of different distribution groups that really like the Mexico all-inclusives, and they always request those, and Hawaii is always on the surveys of destinations to go to. They like the palms trees and the beaches."

Whitlock plans one incentive

trip each year for her company's President's Club. "We stay within the continental U.S. The length is staying the same, content is staying the same.

It's always a challenge to keep it fresh, finding a place that not everybody has been to. We actually went to Lake Tahoe last year. That was our first time going into a snowy destination, but people really seemed to like it. We're going back to Florida this coming year." Pioneer's yearly trip is held in late March.

In terms of the activities offered in her incentive program, Whitlock notes, "We are doing more free time. People enjoy that. Having a free night is kind of nice, especially on an incentive trip when you're there with your spouse or a good friend of yours and are able to spend some quality time together."

### Managing the Menu

Whitlock noted another trend. "Something that I've noticed recently, and I think it's going to continue, is the trend towards healthy eating," she says, referring to increasing requests for carb-free, sugar-free and other healthful options, not to mention other issues such as shellfish allergies. "It's got to be a challenge to be a chef with all of those demands, and it's challenging for the planner, too, because you want to keep everyone happy. You've got people saying, 'Where are the hot pretzels and the make-your-own sundae bar?' and then you've got people saying, 'Where are the green juices? Where is the kale?' You've got to strike a medium ground, and it's a challenge."

### The Year Ahead

While the meetings industry will continue to evolve in 2014, one thing will likely remain the same: "Meeting everyone's expectations for the meeting while coming in under budget," Whitlock comments. "I think that's 'Outlook 1990 through 2090,' she laughs. "It's the permanent outlook!"

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**What ideas will CAMBRIDGE inspire at your meeting?**





Photo courtesy of Dorene Collier's Event Show Productions

# Event Design and Entertainment

## Trending Toward Luxury With a Nod to the New Normal

By Gabi Logan

**B**udgets have stabilized, but events and entertainment at insurance and financial meetings have changed forever. For the first time since the crash and the resulting cuts and spending restrictions, 2013 has given meeting planners a glimpse of the new status quo. Luxury is back, but with a different look: refined rather than extravagant, emphasizing local over imported, and firmly focused on individual engagement, due to a need to prove ROI at every turn.

**Believe:** Dorene Collier's Event Show Productions and Shapeology created a Beatles-themed general session opener that focused on teamwork and building relationships for a corporate client.

### Putting the Local in Your Locale

The crisis brought stark changes to the types of destinations planners chose. International bookings fell, destinations were selected more with price tag in mind than possibilities, and past destinations were reused in new ways. Doing more with less was not just about budget, but also about a destination's entertainment options.

"Meetings and events in the finance and insurance sector are back to pre-recession levels but are impacted by the 'new normal,'" says Padraic Gilligan, vice president of industry relations at MCI and vice president of MCI's destination services division, Ovation Global DMC. "They're quieter, more modest affairs anxious not to draw any attention to themselves. Company logos are often replaced by the name of the program or event and parties are muted with generic or folkloristic entertainment."

While the shift in musical acts is in part a financial issue, Gilligan says it highlights a larger shift toward highlighting local culture. "It's rare now to have big name acts or at least to have folks talk about it. Companies are now less likely to hire name brand entertainment — like Aerosmith — but to concentrate on the cultural aspects

of entertainment. This isn't necessarily because they've suddenly become culture-focused; it's merely the fact that perception increasingly plays a central role in what is included in a program. So name brand entertainers are out, golf is out, spa treatments are out, and culture is in."

In the post-recession environment, planners' experience digging deep and finding the unusual, exciting and, most im-



**Padraic Gilligan**  
Vice President  
Ovation Global DMC  
MCI Group  
Dublin, Ireland

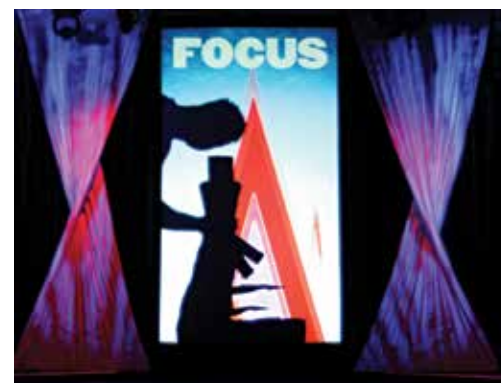
**"Perception increasingly plays a central role in what is included in a program. So name brand entertainers are out, golf is out, spa treatments are out, and culture is in."**

portant, budget-friendly options in a given location has had an unexpected side effect. Planners continue to substitute local entertainment options for the headliners of the past — often to rave responses from attendees.

Katie Wiesner, global meeting services program manager at Caledonia, WI-based M&I, says, "I have groups that will fly-in the same bands everywhere we go, which can be very

expensive. This past year I was able to talk the client out of it and found that YouTube is a great way to introduce local bands to my clients and allow them to view the bands' performances before hiring them. Just this past March we used some local bands in Mexico and they did an outstanding job at understanding their crowd and putting on a great show. After the event, my client admitted that, 'As much as I love the band we typically bring with us, I don't think I'll do that anymore. This was a huge success and a great cost savings.' We've also hired famous musicians that cost \$1K for smaller groups of only 80 people, but for the amount of money you spend on an entertainer like that, you're still better off hiring local bands."

For planners, highlighting what is available locally can uncover activities that come pre-packaged with an event location at no extra cost. Daniele Menache, managing director and global head of marketing events at AllianceBernstein LP, has found that incorporating the unique aspects of a destination is both "a good way to stay within these locales and save money. In August I'm going to L.A., and I'm going to do a Dodgers game for one of the nights and go to the Grammy museum. I'll use the entertainment



Photos courtesy of Dorene Collier's Event Show Productions



*Microscope, Statue of Liberty and Leader were produced for corporate clients by the creative directors of Shapeology — a unique spectacle combining dance, technology and messaging that brings ideas to life as seen on the TV show "America's Got Talent."*





Kelly Parisi of Irving, TX-based Spear One, which produced this once-in-a-lifetime incentive travel program in Oahu for 1,200 attendees on the beach in front of the Hilton Hawaiian Village Waikiki Beach Resort, says it's time to "bring the outside in and the inside out."

that's already there; they have a lot of interactive exhibits. I'm trying to save money, but also highlight what they have. There's a booth where you can sing a song or play drums with Whitney Houston."

Nowhere is local integration more evident than in menu choices. For Menache's Los Angeles event, she did a night of Mexican food and a Little Korea night, because, as she says, "I think people want that, they don't want to go to L.A. and not have Mexican food."

While serving the special dish of the location you're in — lobster rolls in Maine, anyone? — is not new, planners are turning more and more toward FLOSS (fresh, local, organic, seasonal and sustainable) when considering menus.

Kelly Parisi, solutions development manager at Irving, TX-based Spear

One, insists that you have to "get food that is locally sourced or organic and make sure attendees are aware of it. You can display cards on dining and buffet tables with interesting tidbits about menu items or, even better, have the chef or farmer come to tell attendees more about the food they are eating. You don't have to be a part of the 'green' revolution to appreciate fresh, local produce." The influence of local food in today's menus betrays another key trend: nature is in.

### Green — Literally and Figuratively

As Gilligan observes, "CSR and sustainability are becoming more and more mainstream with companies anxious to be seen to give back."

While the discourse in recent years has centered on keeping sustainability in mind early in the planning process,



the recent trend in greening events is much more visual and literal.

"If it's green, it's good," Menache says. "I went to something that was like a kale event — kale lettuce as the decoration centerpieces surrounded by kale chips and kale with lemons. It was both part of the decoration and part of the food that you are eating. Today, you don't just have a salad, you have five lettuces that are put into five different containers as a decorative and edible element."

Parisi says it's time to "bring the outside in and the inside out, such as using elements of nature to decorate a table or using traditionally inside furniture for an outdoor event or lamps for lighting outside." Both for budget and effect, it's even better to keep it simple. "The environment or surroundings are the impact — the décor is just there to enhance," Parisi continues. "Sometimes it is better to pay a little more for a unique location outside the ballroom," such as a rooftop bar, sporting arena, barn or flower shop.

"I think ballrooms are out and using outdoor spaces is definitely in," agrees Menache. "There are so many places where you can use the space in a different way than it is supposed to be used. A barn is a space where you can do an event or even a meeting; you can sit on haystacks. A flower shop can turn into a meeting space. The flower shop is definitely something I've seen more than once, and it allows you to use flower arranging as both a favor and a group activity. You have all these different flowers in buckets and you tell the people to take some flowers as their arrangement for their room, and that's their welcome gift," Menache says.

If you're using a ballroom, showing attendees exactly how their food arrives on their plate is one of the easiest ways to bring nature in. "Interactive experiences like dine-arounds, cooking classes, mixology sessions and progressive dinners are great ways to spice up a dinner event in a hotel ballroom," Parisi shares.

At a meeting in Florida, Menache says "the chef brought in big snapper and grouper from the water outside, took the fish and showed people how to clean it and cut it, and prepared it right there. We had the fish that we just saw, and they had a fabulous area where they cooked so you could watch."

But one of the most inventive approaches to uniting attendees with the people who make their food that Menache has experienced was a high science take on the juice bar. "They had people in charge of juice who ask you how you are feeling this morning and if anything is bothering you. The other day I smoked a cigar for the first time in my life, so I said to the woman, I have a cigar headache, and she prepared something with acai and certain berries, vitamins, herbs and juices that were perfect for that particular ailment. Someone else came in and said they were feeling a little weak in their muscles because they had just worked out, so she gave them a protein drink with components like spinach, cucumber, and honeydew. She's a specialist who creates a health and wellness component for the meeting."

### Participants as Protagonists

All of these novel ways to play with your food are versions of the latest trend in event entertainment: participant-focused entertainment.

On the surface, the new trend of participants as protagonists and interactive rather than passive entertainment looks like a reactionary move to event budget cuts or negative perception issues of high-end entertainment options. But it runs much deeper. An important side of the "new normal" is a firm focus on ROI. Activities and entertainment that draw participants in, bonding them in ways a cocktail hour or networking game never could, are a high-value addition to any program.

Some of these activities give participants something to physically bring (or ship) home with them, so the meeting and any important bonds and lessons stay front of mind.



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For events in Napa Valley, Menache likes to have participants make their own wine. “They blend it how you want, bottle it and ship it to you. It’s usually one bottle or two. The bottle has your name, and you name the wine what you want, and they give you crayons, watercolors and pastels to make your own wine label. Now I have my own wine in my apartment.”

Others still create an intimate, once-in-a-lifetime performance — even without a big headliner. Shapeology, which is produced by Doreen Collin’s Event Show Productions based in Tampa, FL, performed at the MPI 2011 General Session and on TV shows “America Got Talent” and “The Rachel Ray Show.” Shapeology creates custom performances based on the objectives and content of each event using digital projections and silhouetted performers to tell a company’s story, such as a performance visually creating a history of events that have transformed the world, culminating in the client’s product.

While the shapeologists can perform on their own, with their custom approach, they specialize in integrating both unsuspecting audience members, award winners and company VIPs into their show.

Some participatory events have the potential to create a deep and lasting impression on participants. “In Mexico this March, we did a teambuilding activity building bikes for a local shelter that brought tears to everyone’s eyes,” said Wiesner. “The attendees had no idea what the activity was. They were just told to wear casual clothes. The company that I worked with put the bike parts on banquet tables lined up around the room, and we assigned groups of four to each table and asked them to begin putting together the parts. It was a race, and they knew there was a prize at the end, but had no idea they would be putting the bikes in the hands of precious children that reside in the local shelter. The connection the attendees made with the children was breathtaking and a tear-jerker for everyone.”

When participants are involved in

the event entertainment, and especially when they derive some tangible benefit in terms of skill development, networking or teambuilding, it’s a huge change in the take-away value of entertainment. Next to teambuilding events, one of the best ways to draw participants into your events is through integrated technology.

### High-Tech and Integrated

“It’s the way of the future. Technology to me is the biggest improvement in the meetings area,” confesses Menache.



**Kelly Parisi**  
Solutions  
Development Manager  
Spear One  
Irving, TX

*“Interactive experiences like dine-arounds, cooking classes, mixology sessions and progressive dinners are great ways to spice up a dinner event in a hotel ballroom.”*

“I use and rent iPads for a lot of my meetings now. You don’t need as many screens.”

iPads are “a great platform for meeting clients where they want to be met,” Menache continues. She has found that technology doesn’t just connect participants during the content portion of meetings and events. “I love using the iPads to put in a lot of information about not just the content, the agenda and the bios, but also things like, if you enjoyed the recipe at the function, the chef puts the recipes online.”

“Mobile apps are almost a must for a large enough event or conference. Mobile apps are especially useful when the right features are included based on the audience demographic,” Parisi agrees. She uses “QR code scavenger hunts that utilize QR codes in a gamified way to create a scavenger hunt at events like trade shows that

gets attendees to collect all the necessary information.”

Menache also has used tablets to revolutionize her scavenger hunts, both for participants and planners. “The cool way to do a scavenger hunt is to use iPads and have those photos go directly to a shared server. You create a program that takes all the pictures from the scavenger hunt and creates a montage that plays as participants come back. Someone at home base sifts through and decides what to put in the montage.”

According to Wiesner, “Live touch screens are something that is really picking up as integrated decoration and a great networking tool. You can line up the bars and tables so it almost creates a type of infinity bar. During a cocktail reception they’ve used baby photos of the attendees and the attendees had a blast guessing.”

Technological integration even allows you to connect meeting participants in ways that seemed impossible before. Menache uses tablets to submit questions during panels for her clients, because “some clients don’t want to ask questions live. We have an Asian client we tried this with, and we have never had more questions. It’s fantastic when you have different languages, and you can have people ask and answer questions in different languages,” she says.

The extra bonus of app and Web-based activities? Participation, completion and team interaction are easily measured and turned into reports to demonstrate event ROI. Because while planners have and will keep creating inventive, eye-opening, enjoyable insurance and financial events in any circumstances, the new status quo demands that companies can easily see and digest the benefits of their events.

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# What Incentive Winners Want Most From Hotels

## Above All, an Experience That Makes Them Feel Special

By Patrick Simms

Business travelers have a variety of expectations, or at least wishes, when it comes to hotels, everything from ergonomic desks to free Wi-Fi to digital safes to lobby kiosks that provide airport check-in. But incentive travelers aren't just looking for a pleasant, convenient lodging experience. They want a hotel or resort that is part of the reward for making their sales quota over a long, challenging qualifying period. That means luxurious amenities and, ideally, something that catches their eye after a career of upscale trips to many corners of the world.

"Generally these folks have been all over the world because they do these trips often, and many of them go on our competitors' trips," says Lisa Ramsay, CMP, director of meetings and incentives, life and annuity division, for Protective Life Insurance Company, Birmingham, AL. "The ele-

ment of surprise may set us apart from our competitors to get them to come on our trip."

Most recently, a Protective Life incentive group visited Coeur d'Alene Resort in Idaho, and many golfers among the group had a "surprising" encounter with the famed 14th hole, which lies on a made-made island, essentially a floating green.

### Brand Loyalty

Unusual amenities and experiences help to make an incentive memorable, but in a different respect, recognizability and familiarity also can be desirable in a hotel. When insurance agents hear the name of a renowned independent property, such as The Broadmoor or The Greenbrier, or an elite brand name such as Ritz-Carlton or Four Seasons,

***"The most important factor in our incentive marketing is building the prestige associated with qualifying for the trip. ...Destination is foremost for incentives at TD Ameritrade, but the choice of venue is a close second."***



**Katrina L. Kent, CMP, CMM**  
Director, The Event Group  
TD Ameritrade  
Jersey City, NJ

they feel assured they will enjoy a lodging experience that is worth the effort to qualify. But since companies often have longstanding relationships with international hoteliers and thus

enjoy negotiating leverage with them, economic considerations sometimes weigh in favor of the big-chain properties vs. independents as incentive locales. After all, incentive programs have rebounded since the recession, but unchecked spending has not.

Another reason in favor of the big-chain hotels is consistent service across many properties. "Independent hotels actually don't factor in (as incentive site choices) as greatly for us as the more expansive, corporate hotel partners," says Katrina L. Kent, CMP, CMM, director, The Event Group, TD Ameritrade, Jersey City, NJ. "One of the most important reasons is service levels. There is great service out there at some independents, of course, but overall service is something that we see is more consistent at luxury brands with established cachet. So we lean a lot on luxury hotel partners we can count on. Other four-star hotels

actually also have some great upscale resorts that can be packaged as 'luxury,' especially given their destination, and that offer great value."

Luxury hotel brand names alone can sometimes draw a planner's attention to a potential incentive destination. For instance, when Eldon Gale, incentive travel manager at Columbus, OH-based Nationwide Insurance, was considering Dublin, "it was really the brands that got us there in the first place," he explains, referring to the Four Seasons Hotel Dublin and the Ritz-Carlton Powerscourt, County Wicklow. "The two brands by themselves were strong enough that they gave cachet to the location. I thought, 'There is obviously enough draw to support those brands, so it's (incumbent) upon me to look at the location.' And then once we got there, we

dug in a little bit deeper and discovered there was enough (activities and attractions) to support our five-day program."

Green Bay, WI-based Humana has its sights set on the Penha Longa Resort in Portugal, managed by Ritz-Carlton. "They have a huge monas-

***"We visit the golf course and look through the pro shop because we do give out a number of gifts. ...We also look at the spa rooms and their best treatments."***



**Charles Lane**  
Strategic Consultant, Incentive Travel  
Humana  
Green Bay, WI



Photo courtesy of Rainbow Visions Photography



Photo courtesy of Four Seasons Hotels & Resorts



Photo courtesy of Coeur d'Alene Resort

(Above) TD Ameritrade's President's Club meeting at Little Dix Bay in the British Virgin Islands; a spa break at the Four Seasons Resort Lana'i at Manele Bay; and the Coeur d'Alene Resort's 'floating 14th,' a man-made island green accessible only by boat.



# Reserve a Unique Experience

Oftentimes incentive qualifiers in the insurance and financial fields have practically “been everywhere,” observes Lulu H. Stribling, Site board member and director of global accounts, The Ritz-Carlton Hotel Company. Numerous incentive trips combine with their own business travels to produce very worldly professionals, whose interest is not necessarily piqued by another trip to Hawaii, the Caribbean, Scotland, Spain or Austria.

When they consider their ideal hotel, they’ll clearly want that four- or five-star experience, but it’s mostly about where the experience will take place. If the property represents an escape to a less-trodden, less-touristy part of the globe, they’ll tend to be keener on achieving the award. In view of that attitude, planners “have a huge job in finding the right destination, the right property, to create that ‘wow’ experience,” Stribling says.

For “wow,” one might substitute “exotic” or “adventurous” when it comes to Ritz-Carlton’s Reserve brand, launched a couple of years ago with the debut of the Phulay Bay resort in Thailand, and which now includes a resort in Dorado Beach, Puerto Rico. Future hotels are

planned for Los Cabos, Mexico; Muscat, Oman; Tamuda Bay, Morocco; and the Turks and Caicos Islands. The latter destination, in the Bahamas, will be home to the Molasses Reef resort, which is a good example of the thinking behind the brand: it’s reachable only by boat, small plane or helicopter, creating a true sense of adventure.

At 100 guest rooms or fewer, the properties are intended for small groups of incentive travelers who really want an inspired, unforgettable experience, Stribling says. “The Reserve brand is very experiential, for the most discerning traveler.” She suggests planners “reserve” one of the resorts for a top-tier incentive group. For example, “you might take 200 qualifiers to The Ritz-Carlton, San Juan for the big program and then take your top 25 achievers for a few days afterward with their spouses or significant others to the Dorado Beach Reserve.” Set on 1,400 lush, tropical acres, the Dorado Beach resort is not just about luxury, but also authentic-

ity: It includes Su Casa, the original plantation hacienda renovated back to its original 1920s style — truly something for qualifiers to write home about. — PS



Photos courtesy of Ritz-Carlton



The exclusive Dorado Beach, a Ritz-Carlton Reserve in Puerto Rico is tailor-made for top-tier incentive qualifiers.

tery on-property, a golf course, a very beautiful spa, and it’s located where the royal family used to summer,” comments Charles Lane, strategic consultant, incentive travel, for Humana. Furthermore, the Ritz-Carlton brand “comes with high expectations, and I’ve never seen them not deliver,” he adds.

“The insurance market is trending quite consistently and remains strong for The Ritz-Carlton,” says Lulu Stribling, director of global accounts, The Ritz-Carlton Hotel Company and Site board member. “Europe and Caribbean requests continue to lead in popularity, with growing interest in Asia and/or the Middle

East. For the financial market, most of the companies remain loyal to our resorts in the United States, Caribbean and Hawaii, with a growing percentage



**“We try to get the best rooms in the hotel: large, with balconies and the best views.”**

**Lisa Ramsay, CMP**  
Director of Meetings and Incentives Life and Annuity Division  
Protective Life Insurance Company  
Birmingham, AL

of very high-tier incentive groups going abroad to our more exotic destinations.”

According to Stribling, among the newer Ritz-Carlton properties that are especially viable for incentives is Dorado Beach, a Ritz-Carlton Reserve, located 45 minutes outside of San Juan, PR. Opened in 2012, the boutique property is situated along a three-mile stretch of Caribbean coastline that is the former site of the Laurence Rockefeller estate. In addition, “The Ritz-Carlton, Aruba is scheduled to open at the end of this calendar year. It’s a very exciting project, and clients are sending a great number of leads for 2014 and beyond,” Stribling comments.

## Location, Location, Location

While the quality of the resort is a

prime site choice consideration when it comes to incentives, typically the destination takes precedence in the marketing initiative. Says Kent, “The most important factor in our incentive marketing is building the prestige associated with qualifying for the trip, and that elite accomplishment. Destination is foremost for incentives at TD Ameritrade, but the choice of venue is a close second.” Ramsay, in effect, concurs: “Usually our first priority is destination. It needs to have a ‘wow’ factor or big draw, because if it doesn’t excite the attendees right off, then certainly they will not want to attend just because of a particular hotel chain that we are going to use.”

Thus, three features that incentive travelers look for in a hotel are, as the old adage goes, location, location, location. Accordingly, Kent’s site inspections for incentives “really take a look at the sense of place more holistically than they do for a straight business meeting,” she ex-

plains. “We are looking more closely at the entire destination, the local flavor, the differentiators within the location itself, activities, leisure vibe, local food and recreation.”

## The Experience

Once the destination has been determined, the hotel choice still can be challenging, because most top cities in the incentive market have a variety of luxury properties. And oftentimes, the properties’ specific locations will afford distinct experiences of the destination.

Gale’s team faced that kind of decision with respect to the Four Seasons Hotel Dublin and The Ritz-Carlton Powerscourt, County Wicklow: the former enables an energetic, urban experience of Dublin, while the latter is located 30 minutes outside of the city on a 1,000-acre estate in the countryside, with nothing but golf and gardens in the vicinity. Both hotels, Gale notes, have comparable in-room

product and meeting space, and both have brand cachet.

“It was a difficult decision, so what it came down to for us was, what is the experience that we want our people to have? Is the program about going to Dublin and having a Dublin experience, or is it about having kind of an Irish countryside experience?” The desirability of each hotel, then, was relative to the program design and goals. After Gale’s team spent a week exploring the hotel’s respective areas, they decided that the rural experience would be the focus of the incentive. Qualifiers could “have a beautiful view of the countryside, walk out of their door to these gorgeous gardens and just really feel like they’ve escaped.”

A similar decision had to be made with respect to two New York City properties for a mid-July incentive program with about 700 attendees, including children. Would the group be based at the Marriott Marquis in Times Square, or at the historic Waldorf



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Astoria, a little more removed from the heart of the city near Central Park? “For us, it was again an issue of the kind of experience we wanted our people to have,” Gale says. “We recognized that this was first and foremost a family program, and that people were coming here to have a quintessential New York City experience rather than a luxury experience near Central Park. So that put us in more of a tourist frame of mind, and that’s why we put the group right in the heart of Times Square at the Marquis. You can’t get more centralized than that.” The many first-time visitors to the city would appreciate the Marriott’s accessibility to all the iconic sights, Gale explains.

Hotel Amenities

While incentive qualifiers will sometimes be new to a destination, they tend to be very experienced travelers in general, and know what they want in terms of hotel amenities. Kent cites several: “freshly renovated guest rooms, cutting-edge technology (superior wireless at no charge, digital televisions), fantastic service, healthy food (organic, whole foods, locally sourced) and access to fitness activities.” All of

these aspects become part of the site inspection checklist, not to mention the two standbys: golf and spa. “We visit the golf course and look through the pro shop because we do give out a number of gifts,” Lane says. “We chat with the golf pro and get his ideas and input on the tournament. “We also look at the spa rooms and their best treatments,” he continues. “The capacity of the spa is very important. Two years ago we had a program at a very nice resort that had a very nice spa, but they sold it out in advance, and by the time our people came to the property, there was no space available for them.”

Another important feature, Lane remarks, is the size of the swimming pool. “It doesn’t sound like a major thing, but people like to gather during the day at the pool and chitchat with each other,” he says.

Personalized Service and Rooms With a View

Elegant spaces for a reception, poolside or otherwise, are also an im-



Eldon Gale  
Incentive Travel Manager  
Nationwide Insurance  
Columbus, OH

“It was a difficult (venue) decision, so what it came down to for us was, what is the experience that we want our people to have?”

portant criterion, but meeting space and AV capabilities, even if less than ideal, are not “deal-breakers” for incentives, Ramsay explains. “Rooms with a view,” she adds, are preferable for incentive guests. “We try to get the best rooms in the hotel: large, with balconies and the best views.”

And then there is guest service, which always can be improved with the right pre-meeting communication with the staff. “When we go out to do the site inspection, that’s when we sit down and lay out what we expect of them in a program like this, and so nobody is confused about who the group is or (the nature of the program), whether it’s an incentive or a business meeting.”

It’s important to “understand how the participants got there, what they did to be able to partake in this special incentive trip,” Stribling stresses. A great hotel staff makes it a point to learn and use guests’ names, and find out their service preferences. But in the case of incentive travelers, it’s helpful if they also know the effort the guests made to be on the trip, and its status as a reward for that workplace performance. Such a perspective will encourage staff to give the group not just the fine service that all guests receive, but optimum personalized recognition. What incentive travelers want, above all else, is the feeling of exclusivity, and the level of attention from door-men, caterers, front desk representatives and other staff can certainly help to foster that feeling.

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There was a time when the term “business ethics” might have sounded like an oxymoron, but the term hardly raises an eyebrow today. A few years ago, Occupy Wall Street protestors took to the streets to challenge businesses “behaving badly” but the movement has mostly faded. Still, the fervor in some camps has not died down. In fact, the subject of ethics in business is a very relevant topic of conversation at meetings and events throughout the country, especially among insurance and financial services companies.

FICP and other industry associations such as MPI and PCMA regularly revise their codes of ethics and/or conduct for their members, especially now that connecting via social media is all the rage.

For example, the first item listed in PCMA’s E-Group Rules and Etiquette section is “Don’t challenge or attack others. The discussions and comments are meant to stimulate conversation not to create contention. Let others have their say, just as you may.”

Furthermore, the Convention Industry Council (CIC) in 2011 released a revised version of its Ethics Statement and Policy for the CMP program “to protect the public against unprofessional and unethical conduct by certified meeting professionals.” All CMP hopefuls, as well as planners who wish to recertify, must sign a nine-point pledge in order to merit the CMP professional designation. Non-compliance with the code may result in stern enforcement from the CIC and loss of one’s professional designation as a CMP.

“The new ethics statement and disciplinary policy are an extension of policies that were already in place within the program,” said Karen Kotowski, CAE, CMP and CEO of the Convention Industry Council in a statement. “Having both...are a best practice and a necessity for all credible certification programs that set profes-



## Why You Should Forget the Freebies and Go Down the Right Path

By Stella Johnson



***“I’m pleased to see the CIC refresh its code of ethics. It helps to reinforce the competence and effectiveness of the meeting planning profession.”***



**Florine Edwards, CMP, CMM**  
Vice President of Corporate Programs  
and Exhibit Management  
FM Global, Johnston, RI

sional standards. The ethics statement outlines norms of professional conduct that should guide and act as a compass in day-to-day business dealings. The disciplinary policy establishes procedures and avenues of recourse in the very rare event when they are needed.”

Martie Sparks, CMP, the 2011 chair of the CMP board of directors and vice president of catering and convention services at Mandalay Bay Resort & Casino, Las Vegas, noted that an ethics statement without enforcement is an empty one: “Having an ethics statement is not new for the CMP. The CMP board felt it was important to make it more visible. It needed to be available as a resource for CMPs,

outside of the application and recertification processes. And, of course, it also needed to be a public document. As for the disciplinary procedures, from an administrative perspective the board also felt it important to have written procedures in place to handle any ethics complaints, should they arise.”

### **Positive Response**

The response from planners of the insurance community has been favorable. As Florine Edwards, CMP, CMM, vice president of corporate programs and exhibit management for FM Global, a provider of commercial and industrial property insurance located in Johnston, RI, states, “I’m pleased to see the CIC refresh its code of ethics. It helps to reinforce the competence and effectiveness of the meeting planning profession and puts our line of work on a par with other organizations.

“For example, in the insurance world, if you have the letters CPCU after your name, that designation indicates that the recipient has achieved a level of competence in the field and has completed a course on Ethics and the CPCU Code of Professional

Conduct,” she says. “The letters CMP and CMM should send a similar message regarding our own profession. A code of ethics that is consistently applied can build confidence with clients and business partners who can expect a level of professionalism and expertise in their strategic as well as day-to-day dealings with the meeting planning team. It’s a win/win situation for both,” adds Edwards.

Wayne M. Robinson, CMP is equally enthused. As director of agency meetings for Northwestern Mutual in Milwaukee, WI, he says it’s great that the CIC is sharing ethics information across the industry.

“I think it’s needed because our profession is very unique,” notes Robinson. “The standard code of conduct at most companies looks at travel, entertainment and related products and services such as gifts and amenities as definite no-nos. But in our business, they are a part of how a meeting planner experiences and plans for what the attendee experience will be.”

Robinson points out a typical dilemma most planners face: “We need to experience everything to evaluate the meeting from their perspective in order to achieve a full understanding of all of the elements of the hospi-

ality experience. Having a standard framework that addresses the meeting profession would be beneficial to the industry in order to avoid going down the wrong path.

Robinson adds, “I’ve been around the block a few times to know there are instances where some people take advantage of opportunities that may be seen as crossing the line. But, one also has to keep in mind that sometimes what can be perceived as unethical behavior is not always so.”

As for the matter of coordinating incentive sales programs in ways that are ethical at all times, Robinson believes it’s a matter of common sense. “Use your better judgment at all times,” he says. “We have to ask ourselves if our CEO was standing there, would we conduct business in the same manner? We are all very fortunate to be able to represent our companies and our industry, so there is way too much at risk to be losing it all because of unethical behavior.”

Independent planners such as Dianne Davis, president of TulNet, a full-service meeting and marketing group based in Tulsa, OK, applaud efforts to shore-up ethics in the meetings industry. “The very nature of our industry opens meeting professionals

up to the possibility of many ethical issues. Between FAM trip abuses and gifts given to sway business, the possibilities for ethical violations are everywhere,” Davis cautions. “I say, let’s keep everything aboveboard. I don’t want to be offered anything that could possibly give me a sense of indebtedness to use a particular destination or property.”

### **Transparency Is Key**

Judy Johnson, CMP, president and CEO of Rx Worldwide Meetings in Plano, TX, gave her second presentation on the subject of business ethics at MPI’s World Education Congress in St. Louis, MO. Even though Johnson’s company is a pharmaceutical event and meeting planning company, she tailored her talk for a broader corporate audience. Johnson is on the advisory boards of the Richland College Travel and Meeting Management program, the San Diego CVB, Associated Luxury Hotels International and the Pharmaceutical Meeting Planners Forum

“Everyone can develop bad habits after a time including meeting planners and people from hotels,” Johnson claims. “For instance, abuses occur



**Judy Johnson, CMP**  
President and CEO  
Rx Worldwide Meetings  
Plano, TX

when planners go on FAM trips that they have no intention of ever booking; or, when planners don’t disclose the fact that they might have received a commission, gift or reward for booking one hotel or destination over another. Sure, sometimes it’s a lapse in judgment, but sometimes not. Planners must be transparent at all times.”

Johnson also advises that if companies are to have their own internal Ethics Risk Management policy (ERM) in place, it is important that they implement it across the board, meaning all departments, and have specific guidelines in place for people to follow.

“As in the old days, whenever an employee breached corporate policy,

***“Abuses occur when planners go on FAM trips that they have no intention of ever booking... Planners must be transparent at all times.”***

## **Ethics Enforcement: ‘Do the Right Thing’**

Having an ethics code is one thing, enforcing it is quite another. That’s the hard part. But doing so will elevate everyone’s professional status in the meeting planning industry say many experts such as Bob Dawson, CITE.



**DAWSON**

Dawson dons many hats; however, all of them are tilted toward the incentive travel side of the meeting planning business. As managing consultant at San Francisco, CA-based i-Myth, an incentive management and research company, Dawson sometimes compares the meeting planning business to a candy store, full of treats. “But,” Dawson cautions, “it must be remembered that nothing is free. Someone has to pay the cost in the end. The industry has to realize that the cost of doing business ethically is a lot less than not. I say, forget the freebies and just give me the best value for my client.”

Dawson, who feels strongly that code enforcement is the

next step to professionalizing meeting planning, answered the following questions:

**IFMM:** *The Convention Industry Council expanded its code of ethics so that it includes an enforcement policy. What are your thoughts about this?*

**DAWSON:** My main thought is that having a code of ethics is great for the profession and making it enforceable is even better. Both meeting and incentive planners have often been viewed, to some degree, as non-professional positions because planners weren’t truly answerable to any professional organization. Now, they are.

**IFMM:** *Which of the nine points of the revised CIC code do you think are most relevant?*

**DAWSON:** I think the first two bullets pretty much spell it out: “Maintain exemplary standards of professional conduct at all times,” and “Actively model and encourage the integration of ethics into professional conduct at all times.” That may mean reporting violations you see or hear about. I get that

from clients all the time, where they say to me, “So-and-so asked me to ask you if we could get ‘extra miles’ for booking the XYZ hotel.” We can’t conduct business like that.

**IFMM:** *What particular scenario have you experienced that needed enforcement?*

**DAWSON:** A client we were working with said that they loved what we had proposed but decided to go with our competitor anyway because that competing agency said they could do what we proposed for less and that they would give some extra reward in the process. That competitor stole our creativity. We took the matter to Site but they were powerless and said that you cannot place a copyright on ideas. Well, not legally, but what is ethically correct? Now when clients approach me, I give them a rough outline of what we can do for them — but not the specifics unless they first buy a proprietary license. Then, they are free to do it themselves or hire us at which point we take the cost of the license off the bill.

**IFMM:** *I know you mentioned the possibility of planners reporting abuse, but how else can a code be policed, if at all?*

**DAWSON:** By both sides of the industry. Planners need to

understand that they are not being professional or ethical when they accept a free offer to take their buddies on a golfing trip to Hawaii because some resort wants their business. In the end, someone has to pay for it. Maybe the cost of that trip will eventually be passed on to an innocent planner who does decide to book the resort in question. As for policing the CIC policy, that might be left up to the CIC board. They know what’s going on, and they are the leaders in the industry. I’m sure they’ll do the right thing and set the standard.

**IFMM:** *Do you see this code as perhaps the final phase of all the revamping of the industry that has gone on in the past five years?*

**DAWSON:** If this is carried out all the way through with enforcement, yes. Look at what’s happened with the AIG mess, and also with banks incenting mortgage brokers to go out and get business from people who shouldn’t even be applying for mortgage loans. The brokers did it without asking questions to get the business. Their excuse was that’s what they were told to do. But, as a professional, you’re expected to ask questions when things don’t appear to be right. — **SJ**



***“Planners need to police themselves, and our destinations and hotel partners need to moderate these offerings by giving them only to qualified candidates.”***



**Dianne Davis**  
President  
TulNet  
Broken Arrow, OK

they were written up, maybe warned a couple of times and, if behavior didn't change, they were terminated,” she says. “If you have a clear vision and corporate leadership that buys into it, then the only challenge is to enforce it.”

Johnson admits that terminating someone in the corporate office who is in non-compliance with corporate policy is a lot easier than having the CIC blackball a CMP for non-compliance issues. “I'm not even sure who is going to take the high road on this,” she says, “but at least we're opening the dialogue and raising awareness, and we do so every time we have these sessions.”

### **The Supplier Side**

When asked how she thinks the supplier side of the industry might respond, Johnson says that she expects hotels won't want to alienate meeting planners altogether but, in time, will get the message that they are not conducting business as usual.

“What they are starting to do is to change the way they do things, and that's okay. For example, FAM trips are now becoming educational trips,” Johnson observes. “Whereas once these trips could become somewhat excessive in terms of wining and dining, now that is no longer the case. Instead, suppliers and vendors want to use meeting planners' time more wisely, gather us together, show us what we might be interested in, what we need to see, pick our brains a little and, maybe, treat us to dinner in the process. And that's okay but only if

there is genuine interest on the part of the participating planners to book a particular hotel or destination.”

### **Abuses or Perks?**

Like Johnson, TulNet's Davis has worked on both sides of the fence, having formerly held management positions for various hotel groups and a CVB. Her war stories involve clients seeking freebies for their own personal vacations — even to the point where one meeting planner asked her for a free hotel room for his wife's shopping trip. “This kind of thing was not an unusual request,” Davis adds. “But, when he called asking if I would also send her a fruit basket with a bottle of wine at the hotel's expense, I was ruffled. And then when he asked if I would also include a card with his name on it so his wife would think it was from him, I had to draw a line.”

Now, as an independent meeting planner, Davis says she is constantly being offered FAM trips, gifts and favors. “I know many planners accept these offers thinking it's a perk of the job, but I do not agree with that line of reasoning. I would only accept a trip if I am strongly considering a particular destination or hotel. Planners need to police themselves, and our destinations and hotel partners need to moderate these offerings by giving them only to qualified candidates.”

Johnson tops that anecdote with a story about an event in South Korea. She was busy attending an offsite event when two of her staff members from the headquarters hotel called her and said she'd better hurry back as they were about to be charged for their own audio-visual equipment. “The salesperson explained that it was clearly stated in the addendum attached to this 30-page contract that any audio-visual equipment that was brought in from the outside would still be charged accordingly — even though we owned it,” she says. “I took it further with corporate and got the whole matter re-

solved but it was a battle. This type of thing needs to be more clearly defined and spelled out from the start.”

Johnson also cautions planners to think first before mixing business with friendship. She proposed an incentive program for a corporate planner who was a friend. “We customized the program for her group, we introduced her to all the vendors and suppliers involved including a disc jockey for an offsite event and so on. In the end, after outlining every aspect of the program and everyone that would be involved in producing the event, she turned us down and said she could do it herself,” Johnson admits, “I still can't get over it.”

### **Intellectual Property Theft**

Indeed, intellectual property theft is a significant problem in the industry. As TulNet's Davis says, “I recently heard a presentation from a speaker who clearly used someone else's content without a single citation. I ask you, when did this type of behavior become okay?”

To reduce this type of thievery, Robinson recommends that all meeting materials such as handouts and presentations be kept secure onsite, that all rooms are inspected following the session and materials should be destroyed or shipped back.

“It's important to always assume that all company materials are proprietary and never discard them in a public receptacle,” Robinson advises. He prefers electronic materials over paper as they can be emailed or downloaded.

Robinson says he has been generous about sharing his ROI methods and is disappointed when it is used by others without permission or attribution. “I often see, even today, despite copyrights on all of the material, my words being inserted into presentations, on websites and in webinars without any reference to my copyright,” he says.

So the question remains: Will questionable behavior be accepted as “business as usual” or will the CIC and other industry associations rein in abuses via their revised codes of conduct and enforcement? Only professional planners can provide the answer. **I&FMM**

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The Oklahoma City Convention & Visitors Bureau has named **Dennis Johnston** V.P. of sales. Prior to joining the bureau, he was the V.P. of sales at the Lexington (KY) CVB.

Park Hyatt Beaver Creek, CO, has named **Tom Puntel** as director of sales and marketing. He was director of sales and marketing at Hyatt Regency Denver Tech Center, Denver, CO.

Hilton Sandestin Beach Golf Resort & Spa, Destin, FL, has named **Elyse Graver** as regional sales manager based in Plano, TX, responsible for the Texas and West Coast territories. She most recently was an independent hotel contractor.

The Greater Miami Convention & Visitors Bureau has named **Kathy Semmes** as director of regional sales, Washington, DC. She was a senior account executive for Marriott representing the Renaissance Chicago and Eden Roc Renaissance Miami Beach.

PGA National Resort & Spa, Palm Beach Gardens, FL, has named **Jim Bishop**

as director of sales. He most recently served as regional director of sales for the Americas at the Maybourne Hotel Group.

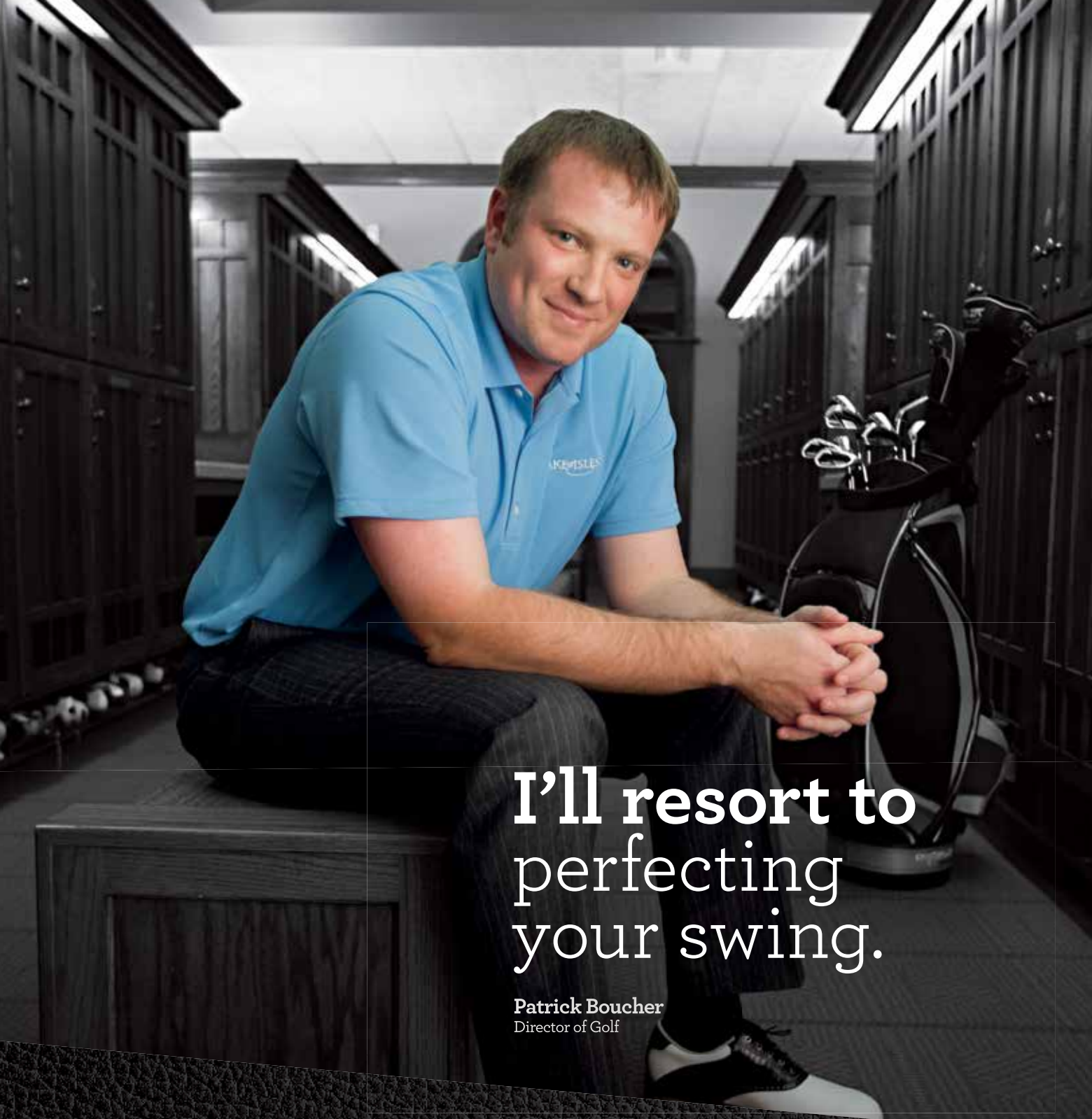
The Hyatt Regency Santa Clara, Santa Clara, CA, has named **Melissa Price Belluomini** as director of sales and marketing. She most recently served as director of sales at Oakland (CA) Marriott City Center and Oakland Convention Center.

The Lodge and Spa at Callaway Gardens, Pine Mountain, GA, has named **Josh Baker** as sales manager. He was government sales manager for the Sheraton Atlanta Hotel. **I&FMM**

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