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# INSURANCE & FINANCIAL MEETINGS & MANAGEMENT

THE EXECUTIVE SOURCE FOR MEETINGS & INCENTIVES

## Contracts and the Flexibility Factor

Adapting Tactics to the Current Market

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## The Small Meetings Challenge

Find the Right Fit

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"Flexibility means everything today," says Michael Dominguez, Chief Sales Officer, MGM Resorts International.

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# INSURANCE & FINANCIAL MEETINGS MANAGEMENT

THE EXECUTIVE SOURCE FOR PLANNING MEETINGS & INCENTIVES

AUGUST 2017

Vol. 24 No. 4



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*A day of meetings ends with a  
glitzy evening in Monte Carlo.*

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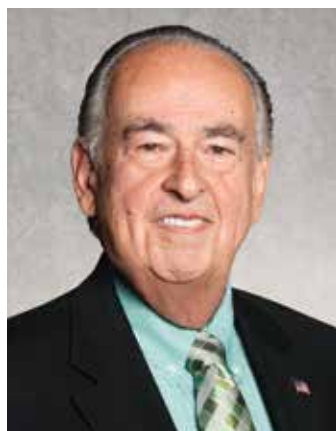


## Publisher's Message

### The Cure for Painful Negotiations

As many of us know all too well, our bodily aches and pains often can be blamed simply on tightness in muscles and ligaments. The cure — developing more flexibility — is simple, too, but does take hard work and determination to be successful.

Turns out that in today's seller's market, flexibility of a different sort can cure painful contract negotiations — a recognition of market realities that demand give-and-



take, compromise, adaptability, amenability. In "Contracts and the Flexibility Factor" on page 30, both sellers and buyers agree on that point. From the seller's side, Mike Dominguez, chief sales officer at MGM Resorts International and meetings industry influencer, who graces our cover, says, "Flexibility means everything today," stressing that the growth in hotel supply "is mostly limited-service hotels. It is not growth in hotels with a major amount of meeting space. ...Today we have demand that is increasing for a supply that is not increasing. And that means that costs are naturally going to rise. That is just the reality."

Mike Kovensky, DOSM at InterContinental Miami notes that date flexibility is an effective strategy. "What we're finding today is that more than 40 percent of meetings are not booked on what were the preferred original dates. That means that 40 percent of organizations and planners are now willing to be flexible in order to get the deal they need, but also satisfy the business needs of the hotel. And when both of those things are true, it's a win-win for both parties."

Neha Kowal, head of conference and events marketing at Guardian Life Insurance agrees. "I absolutely use flexibility as a negotiating tool. ...It's understood now that a meeting can be held at a different time if that opens up better options." But as a third-party planner, Cori Dossett, CMP, CEM, president of Conferences Designed, sometimes faces resistance from her more inflexible clients. "And that is very frustrating when part of my job as an independent planner is to get the best deal possible for my client."

Flexibility can be especially critical when planning small meetings and executive retreats. "Being flexible with dates, room night patterns and building relationships within the industry by being easy to work with are all things that will garner you a lower rate at some top-notch locations," says Jennifer Norsworthy Meyer, director of events for Louisiana Farm Bureau Insurance in "Small Meetings Challenge" on page 18.

And don't miss our "International Meetings" feature on page 24, which includes some surprising contract caveats every planner should know.

Harvey Grotsky

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## Caribe Hilton Debuts Revamped Meeting Spaces

SAN JUAN, PR — The Caribe Hilton in San Juan, Puerto Rico, recently debuted newly renovated meetings and event space. The hotel enlisted Hirsch Bender Associates (HBA) — an award-winning architectural and design firm known for creating and transforming spaces for today's leading hospitality venues — to infuse the resort's meeting space with a modern spirit by installing new carpets, applying fresh paint, and updating the corridors and artwork throughout all spaces.

The 65,000 sf of meeting space enables the resort to comfortably accommodate up to 3,000 guests within four ballrooms, an auditorium and 24 meeting rooms — many with views of the ocean and historic San Geronimo Fort, a 17th century fort found on the National Register of Historic Places.

"We were determined to rethink the overall guest experience here at Caribe Hilton to offer top-of-the-line venues for events, meetings and weddings, and the renovations to our banquet and meeting spaces did just that," said Pablo Torres, general manager, Caribe Hilton.

"The compelling new design now matches the exceptional service and hospitality that our experienced team members provide, and solidifies Caribe Hilton's place as one of the top choices for meetings and events in Puerto Rico." [www.caribehilton.com/gather](http://www.caribehilton.com/gather)

## IRF Report: Mitigating Risk in Meetings

WASHINGTON, DC — The Incentive Research Foundation has released the white paper "Mitigating Risk in Modern Meetings and Incentives," an analysis of critical findings reported in the 2016 Event Disruption Study. The white paper explores disruption mitigation strategies for meetings and incentives and provides insights on how partners prepare for and handle disruptions.



VAN DYKE

Meeting planners reported that disruptive incidents, happening with increasing frequency, include many weather-related phenomena, public enemy such as wars and terrorism, the business partner's mistakes and the client's lack of cooperation. Planners estimated they now spend up to 25 percent of their time planning for potential disruptions, and nearly 40 percent of the planners expect that their time and effort to plan for disruptions will increase somewhat in the next two years.

"The 2016 Event Disruption Study demonstrates that disruptions are a very real part of doing business in the meeting and incentives industry," said Melissa Van Dyke, IRF president. "With the white paper 'Mitigating Risk in Modern Meetings and Incentives,' we've highlighted the research and actionable insights that meeting planners and their partners can use to plan for and respond to disruptions."

Critical findings on risk mitigation measures focus on effective planning, lessons learned during disruptions and the importance of vendor trust and cooperation.

To view the white paper "Mitigating Risk in Modern Meetings and Incentives" visit [www.theirf.org/research/mitigating-risk-in-modern-meetings-and-incentives/2211/](http://www.theirf.org/research/mitigating-risk-in-modern-meetings-and-incentives/2211/). To view the 2016 Event Disruption Study, visit [www.theirf.org/research/2016-event-disruption-study/2134/](http://www.theirf.org/research/2016-event-disruption-study/2134/). (See related story, p. 12)

## MPI Returns as Strategic Partner, Education Provider at IMEX America 2017

DALLAS, TX — For the seventh consecutive year, Meeting Professionals International (MPI) will



VAN DEVENTER

deliver educational programming during IMEX America in Las Vegas this fall. The association will present the daily keynotes as well as power the Smart Monday program

on October 9, 2017. Also, the MPI Foundation will present its largest fundraising and networking event of the year — Rendezvous, the IMEX America Night.

Smart Monday powered by MPI will feature nearly 30 education sessions covering topics such as risk management, medical meetings, contracts, strategic communications and behavioral science. In addition, the association will offer education sessions in its booth facilitated by Jessie States, CMM, manager of professional development at MPI. Most of the sessions are aligned to CMP International Standards, and attendees can earn up to five clock hours.

"The feedback we have received on our educational program for IMEX America continues to be overwhelmingly positive year after year," said Paul Van Deventer, president and CEO of MPI. "If you have not attended our Smart Monday program before, I encourage you to join us as we will present a variety of timely and powerful education sessions designed for meeting professionals of all levels."

To learn more about MPI programming at IMEX America, visit [www.mpiweb.org/Events/imex-2017](http://www.mpiweb.org/Events/imex-2017).

For the full IMEX schedule, visit [portal.imexamerica.com/events](http://portal.imexamerica.com/events).

## Conrad Fort Lauderdale Beach Opens in September

FORT LAUDERDALE, FL — Conrad Fort Lauderdale Beach will debut in September as the second Conrad property to open in Florida. The 290-suite oceanfront resort along Fort Lauderdale's exclusive North Beach will offer four dining and bar experiences, a full-service spa, a fitness center with state-of-the-art equipment, abundant event space and an awe-inspiring, 20,000-sf ocean-facing pool deck.

The nautical décor reflected in the coastal suites complements the



Rendering of the new Conrad Fort Lauderdale Beach

balconies that overlook the Atlantic Ocean or Intracoastal Waterway, galley kitchens, 50-inch HDTVs and more.

With 10,000 sf of flexible meeting space and 10,000 sf of oceanfront outdoor space, Conrad Fort Lauderdale Beach can accommodate up to 500 attendees. Highlights include the 4,524-sf Ocean Ballroom, outdoor Ocean Terrace, 10 meeting rooms and event spaces, a private conference facility entrance, state-of-the-art technology and a dedicated meeting concierge. [www.conradfortlauderdale.com](http://www.conradfortlauderdale.com)

## Ritz-Carlton Launches New Luxury Yacht Experiences

LONDON, UK — The Ritz-Carlton Hotel Company, part of Marriott International Inc., is entering the luxury yachting and cruise sector. The first of three lavish cruising yachts in this series is scheduled to take to sea in the fourth quarter of 2019, and distinguishes Marriott International as the only provider of luxury accommodations both on land and at sea.

Itineraries are being developed with an intent to combine the lifestyle of The Ritz-Carlton's luxury resorts and the casual freedom of a yachting vacation. Calling at intimate and signature destinations alike, voyages will range from seven to 10 days. The first ship will cruise a wide variety of destinations depending on the season, including the Mediterranean, Northern Europe, the Caribbean and Latin America. Due to the intimate size of the vessel, the yacht will call at unique locations typically not accessible to large cruise ships, from Capri and Portofino to St. Barths and the old town of Cartagena. With a relaxed pace that includes both overnight and daytime ports of call, guests will be offered a uniquely curated destination experience.

The specially designed small-



The Ritz-Carlton Yacht Collection vessels are available for private charter.

capacity vessel will measure 190 meters, accommodate up to 298 passengers and feature 149 suites, each with its own private balcony. The yacht also will feature two 138-square-meter, lavish duplex penthouse suites, with modern craftsmanship and interior finishes jointly designed by The Ritz-Carlton and leading cruise ship design firm Tillberg Design of Sweden.

Throughout the journey, guests will indulge in a cruising style that is unparalleled in the ultra-luxury cruise and private yachting sectors. The Ritz-Carlton yachts will feature a restaurant by Sven Elverfeld of Aqua,

the three Michelin-starred restaurant at The Ritz-Carlton, Wolfsburg; a signature Ritz-Carlton Spa; and a Panorama Lounge and wine bar, offering a wide variety of onboard entertainment. Additionally, the yacht will offer one-of-a-kind curated destination journeys through collaborations with local chefs, musicians and artists, allowing guests to experience the locations in unique and experiential ways, both on board and ashore.

Reservations will open in May 2018. The ships of The Ritz-Carlton Yacht Collection also are available for private charter. [www.ritzcarlton.com/en/yachts](http://www.ritzcarlton.com/en/yachts).



## Hilton Secures Landmark Hotel at New York City's UN Plaza

NEW YORK — Hilton recently announced that ONE UN New York will join the Hilton network as Millennium Hilton New York One UN Plaza on August 30 as Hilton Hotels & Resorts' seventh local property.

The landmark hotel, situated alongside the United Nations headquarters, has long welcomed both leisure and business travelers, and the world's most esteemed leaders, diplomats and heads of state. It has completed a \$68 million phased renovation since 2012, which preserved the distinctive architecture and layout of the original Kevin Roche-designed building, while upgrading the hotel's 439 guest rooms and suites, meetings and event spaces, public areas and restaurant.

Millennium Hilton New York One UN



The Millennium Hilton New York One UN Plaza.

Plaza offers panoramic views across the Manhattan skyline to one side, with sweeping views of the East River to the other. Nearby are Grand Central Terminal, Empire State Building, Fifth Avenue, Times Square and the Broadway Theater district.

With approximately 7,500 sf of meeting space, the hotel offers six adaptable meeting, function and exhibit spaces with natural light and panoramic views of New York City, including the hotel's stunning ballroom, which can accommodate up to 300 guests. Each event space comes with dedicated audio-visual and production support, and the hotel has a specialized catering and events team on hand. The hotel is owned by Millennium Hotels and Resorts, and will be managed by Hilton. [www3.hilton.com](http://www3.hilton.com)

## Flamingo Las Vegas Completes \$6.5M Meeting Space Redesign

LAS VEGAS, NV — The Flamingo has reopened its newly renovated meeting space, offering a fresh, bright and modern look, along with an abundance of natural light from its windows. Each meeting room is named after a different Nevada city and features historic photos from the 1950s, creating a nostalgic feeling in the space.

The redesign includes updated walls, carpet, lighting fixtures and more. With Caesars Entertainment's Code GREEN initiatives in mind, all lighting has been converted to LED technology, which is expected to result in a 70 percent energy savings each year.

"The unveiling of our newly remodeled convention center is the first step of renovations at the Flamingo," says Sherri Pucci, general manager, Flamingo Las Vegas and The Linq Hotel & Casino. "The Flamingo features a rich history as the place where The Strip began."

In May of this year, Caesars Entertainment announced the launch of a \$90 million renovation of 1,270 rooms at Flamingo Las Vegas. The renovation is anticipated to begin in late August, with final completion of all rooms expected in the second quarter of 2018. The fully renovated rooms will feature unique, contemporary and retro-chic designs with accents that celebrate Flamingo's rich history.

Located in the heart of the Las Vegas Strip, Flamingo



Newly renovated ballroom.

Las Vegas helped define The Strip, and as the city grows, it continues to represent the authentic Vegas experience. The resort, which celebrated its 70th anniversary in 2016, features more than 3,500 guest rooms and suites, and is home to a sprawling 15-acre pool and wildlife habitat complete with waterfalls, mature island vegetation and tropical wildlife; three distinctive pools; and several outdoor wedding gardens. [www.flamingolasvegas.com](http://www.flamingolasvegas.com)



1

## SnapShots



2



3



4



5



6

**1** Associated Luxury Hotels International (ALHI) held the 2017 ALHI Insurance & Financial Leadership Exchange (IFLE) July 26-28, 2017. The conference, hosted at Loews Atlanta Hotel, brought together 20 senior-level meeting professionals and incentive specialists from the insurance and financial industries with 20 hotel executives. The event was co-hosted by Delta Air Lines and Loews Atlanta Hotel. **2** Robin Elliot and Gail Martin of Next Level Performance are pictured with items they collected for the therapists at The Children's Specialized Hospital (CHS) of New Brunswick, New Jersey, who serve children with traumatic brain injury, severe autism and a variety of other illnesses. **3-6** The Incentive Research Foundation's (IRF) 24th Annual Education Invitational took place in June at the Grand Wailea, a Waldorf Astoria Resort, in Maui, Hawaii where a record-setting attendance of 600 sponsors, buyers, trustees, hosts, media and guests took part in IRF's adventurous Hawaiian activities as well as education, networking and CSR programs. This year's "Go the Distance" theme was evident in Hawaii's support of underwriting amazing evening events and IRF's robust education program. The next Invitational will take place May 29-June 1, 2018 at The Grand at Moon Palace Cancun in Mexico.





# 5th Annual HGA

**H**osts Global, a strategic partner for destination management services worldwide, hosted more than 240 clients and hospitality industry professionals for their fifth annual Hosts Global Forum. The invitation-only event occurred June 26–29

at the Sheraton New Orleans, where attendees participated in on-trend industry discussions, a volunteerism program, educational sessions, networking events, the Hosts Honors awards, which recognized DMC members for exceeding expectations, and memorable destination-specific activities, including a

Hero's Welcome event at the National WWII Museum.

"The Hosts Global Forum is our annual opportunity to bring together our 50-plus Destination Management Company members, clients and colleagues from around the globe," says Marty MacKay, DMCP, president of Hosts

# Global Forum Snapshots

Global Alliance. "Attendees travel to one of our key destinations for a firsthand experience while also participating in professional growth opportunities and one-on-one business meetings with our DMC members."

"Hosts' differentiator is our H Factor", says Jennifer Patino, DMCP, chief ex-

ecutive officer of Hosts Global, noting, "We shared our Hearts and Hospitality during the welcoming night event when all attendees participated in a volunteerism program" to benefit the local Audubon Nature Institute and One Heart NOLA.

The conference opened with the

Hosts & Heritage Festival, a nod to New Orleans' Jazz Fest, and closed with a progressive parade through Bourbon Street with stops at legendary venues. The unrivaled local knowledge and planning capabilities of Hosts New Orleans made the experience one all attendees will not soon forget. **I&FMM**





# Risk Management

By Todd Zint,  
CMP, CMM



## Dealing With Disruptions in Meetings & Incentives

As the hospitality community and event organizers continue to navigate the ever-changing global landscape of unpredictable disruptors, there has been an amazing display of resiliency and camaraderie among peer groups as they share best practices, successes and lessons learned.

I recently had the opportunity to moderate a panel at the Incentive Research Foundation Education Invitational, which featured the following seasoned event organizers across industry verticals:

- Michael Greto, director, global event marketing for Ciena Corporation.
- Annmarie Molinelli, vice president, sales strategy and planning, M&T Securities Inc.
- KOLEEN ROACH, director, meetings and conference management, Securian Financial Group.
- Sam Shelton, marketing manager, KCMA Corporation.

In talking to this experienced panel, two general categories of disruptors emerged that apply to event organizers and the hospitality community as a whole.

### Category #1: External Disruptors

The most common disruptors occur in external environment scenarios. A wide range of disruptors fall within this category, including extreme weather conditions, air carrier delays, legislative decisions, cyber challenges, travel warnings, virus outbreaks, protests and terrorism.

These disruptors have caused the industry to recognize the importance of developing comprehensive contingency plans that include contract liability reviews and duty of care for attendees. It's equally important to work with hotel and vendor partners who are committed to managing challenges as they arise and determining mutually agreed upon solutions.

### Category #2: Internal Disruptors

The second category of disruptors has presented the meeting and events industry with some new challenges. These internal disruptors can include **change management** scenarios, **legislative** decisions impacting event

design and **procurement** engagement. Let's take each of these one by one.

**Change management** is one of the most common internal disruptors occurring in the industry today. Top executives at corporate organizations are retiring and being replaced with new visionaries. These new leaders are increasingly engaging in customer and employee-centric initiatives and streamlining organizational efficiencies. Maintaining strong relationships with key executives is important for event organizers as they maneuver through new management ideologies. But it's equally important for these organizers to develop a strong strategic meeting management program delivering transparency throughout the entire event-planning cycle.

The supplier industry also is experiencing a paradigm shift when it comes to change management. Take the recent merger of Marriott and Starwood as an example. This new organization continues to be a disruptor as it communicates brand positioning and integrates its legacy infrastructures. Another example is the increase in destination management company (DMC) acquisitions and DMC consortiums in an effort to gain market share.

*Here are two actions you can take to effectively prepare for change management scenarios:*

- Become involved with meeting associations that align with your event organization and deliver relevant education, research, networking and sharing of change management within your organization. Meeting Professionals International (MPI), Financial & Insurance Conference Planners (FICP), the International Meeting Exchange (IMEX) and the Incentive Research Foundation (IRF) are all excellent associations providing online research, communities and live events to cultivate learning.
- Research and review articles, white papers, blogs and best-practice documents around Strategic Meetings Management Programs (SMMP). There are several sample documents online that provide a roadmap to begin a program including cloud-based solutions. The current **legislative** environment is another com-



IRF Education Invitational panel (left to right) Todd Zint, Michael Greto, Annmarie Molinelli, KOLEEN ROACH and Sam Shelton.

mon internal disruptor with new regulations impacting several vertical markets. Corporate organizations have created taskforce teams to interpret new rules and regulations and determine future changes related to event design at the strategic level. In the financial and insurance vertical, the Department of Labor rulings related to contests and incentives continue to be at the forefront of reshaping future solutions that comply with regulations.

*What can you do to navigate this legislative environment?*

- Identify the taskforce team within your company — commonly found in the sales group directly impacted by key legislative decisions — and request to be included in key findings and status updates. Although decisions are happening at the highest level, having a better understanding of rules and regulations will position you as a strategic partner rather than a logistics implementer.

Event organizers are experiencing a third internal disruptor from **procurement** initiatives as organizations seek to streamline efficiencies, manage expenses and maximize supplier relationships and preferred agreements. Over the past decade, there has been a paradigm shift as procurement teams consider the historical relationship value of suppliers rather than solely their pricing. The hospitality industry is in the business of selling exceptional event experiences, not widgets, and event planners and procurement teams must continue to evolve evaluation criteria to comply with their organizational procurement guidelines.

*Here are some suggested actions to help navigate the current procurement environment:*

- Develop standard preferred agreements satisfying your organization's vendor management policies. It is important to have a relationship with your legal and procurement teams including open communication about new contracting trends and vendor evaluation tools industry peers are using.
- Research and review articles, white papers, blogs and best-practice documents related to contracting and procurement issues.

There are major disruptors impacting the industry every day, and it's understood why the event organizer role continues to be included in the *Forbes* "Top 10 Most Stressful Jobs" in America list. Although the designation is likely to remain for years to come, the industry has elevated the profession by managing these disruptors through peer sharing, educational events, strong organizer-supplier relationships, compassion for unforeseen chal-

lenges and instituting all-encompassing strategic meetings management programs. **I&FMM**

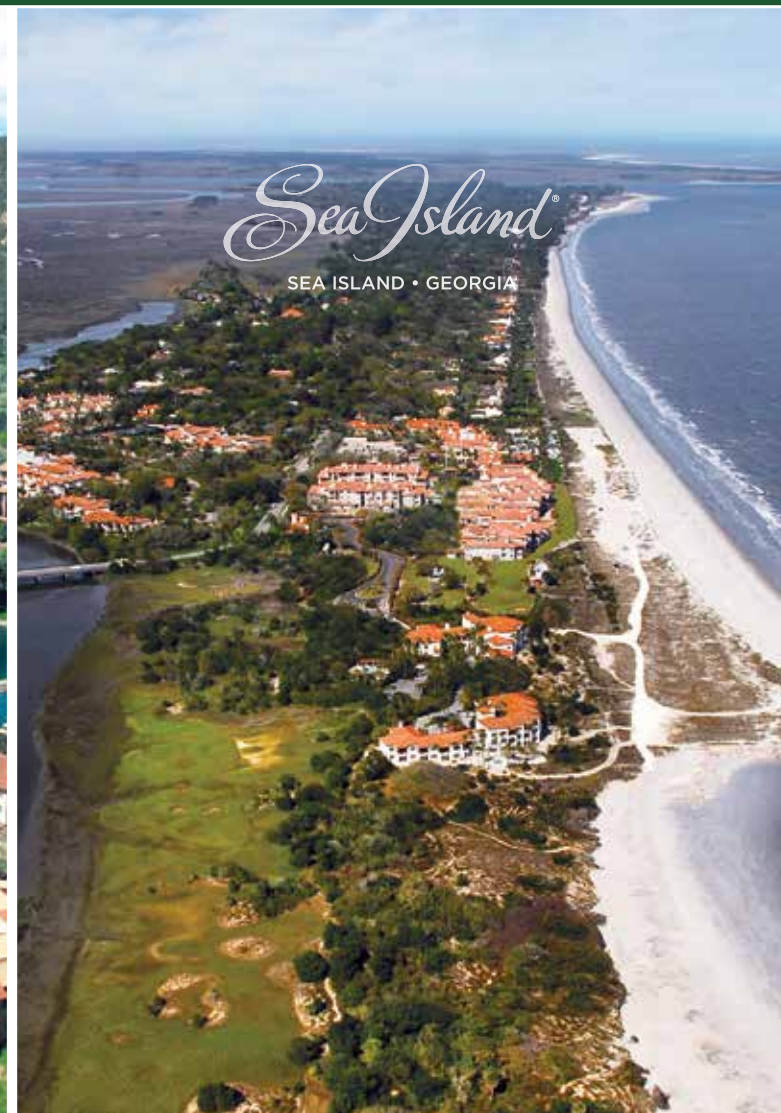
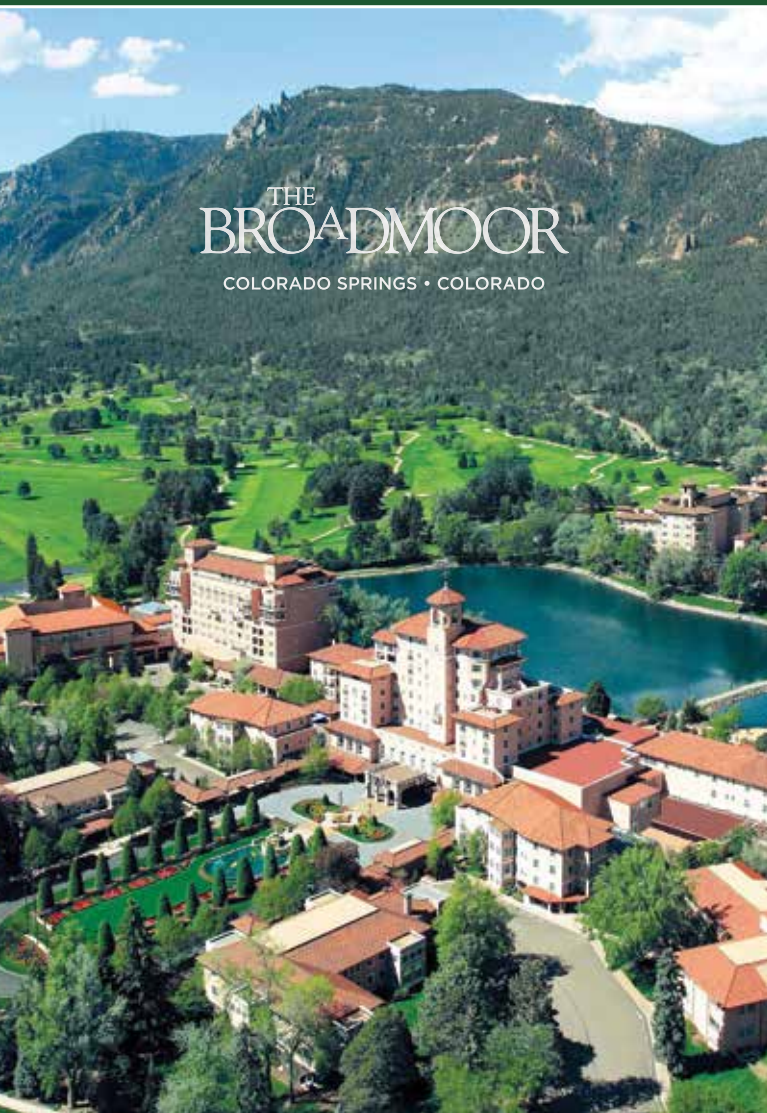
**Todd Zint, CMP, CMM**, has two decades of experience aligning meeting logistics with event goals and objectives, maximizing return on value. He currently serves as Director of Corporate Travel, Meetings and Events at Mutual of Omaha and is an active member in the Financial & Insurance Conference Planners association, serving as its chairman in 2011, and a trustee with the Incentive Research Foundation.

Change management is one of the most common internal disruptors occurring in the industry today.



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### ***Meeting Space— Flexibility***

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### ***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.





## Update and Energize Those Long, Monotonous Sales Meetings

**E**nvision the typical insurance and financial industry sales meeting: suits, ties, pie charts and PowerPoint presentations. While that's how we have generally perceived sales meetings in the past, tomorrow's sales meeting will be very different.

The sales meeting of the future won't take place in a stale conference room, where attendees passively watch lengthy speeches and often monotonous presentations. And that's a change for the better.

### Interaction Powers the Sales Meeting

Financial and insurance industry sales professionals — especially millennials and Generation Z — relate best to quick, digestible forms of information. When it comes to training, educating and motivating, a long-winded speech from the CEO inevitably will lose the attention of audience members. An interactive experience with two-way dialogue will have much greater impact and ROI.

It is key to keep in mind that salespeople are inherently competitive. To capitalize on this quality, the sales meeting of the future will put emphasis on training through gamification. By turning training into a collaborative and competitive experience, attendees will hear your message loud and clear and will be more likely to remember it for years to come. That instills stronger motivation to work even harder and edge out the competition.

Keynotes and general sessions can be a great place to share actionable, real-life information and tactics with participants, but, to do so, you need to keep them on the edge of their seats.

To keep your audience riveted, consider changing the format to a newscast approach:

- Put the agenda in a dynamic, side-screen ticker, similar to the scrolling bar at the bottom of news programs.
- Give the content all the spark and vigor of a cable news broadcast. Offer rapid-fire commentary instead of drawn-out speeches wherever possible.

- Emphasize dynamic video presentations, panel discussions, interviews and interactive Q&A sessions.
- Have supporting content available for attendees to download at their leisure.
- Energize the general session experience by featuring several smaller assemblies with more personalized content.

### Technology to Allure and Automate

If bringing your event up to speed with the latest technologies feels overwhelming, focus on gradual yet impactful changes to make the most improvement. Consider honing in on one specific element of the event's technology and refreshing it every year.

**Livestreaming** is fast becoming a way of including a broader audience for sales meetings while cutting costs. Offering keynote streams and virtual access to the session will engage onsite attendees who are located in different areas of the event complex. It also gives offsite salespeople the ability to test-drive the event, ultimately boosting attendance in future years.

**Biometrics** also will play a major role in future sales meeting technology and emotion-recognition technology will revolutionize event feedback. Soon, devices akin to fitness trackers will transmit information directly to event organizers, indicating levels of engagement. Until then, you can give presenters a gauge and attendees a voice with live polling and Q&A, using apps to leverage available technology.

**Social media platforms** are now an essential tool for sales networking and message amplification. That said, sales meetings often deal with confidential information. So how can event organizers weave social media into closed-door meetings?

First, create specific guidelines for what is and isn't

appropriate to share. Outline guidelines in as much detail as possible — and even go so far as to bar social media from certain sessions — to reduce the risk of sensitive information leaking out.

Also consider generating content that is ready-made for people to share. This will make it easy for participants in the meeting to share messages that leadership wants to instill.

### Location, Location: Take Your Meeting Offsite

Offsite excursions and entertainment provide the team an opportunity to experience the culture and destination. And it's even more impactful if you weave in the meeting's mission with the offsite adventure.

The goal when planning offsite activities is to connect teams and objectives in a way that truly moves the needle. One way to fulfill this vision is to work with local organizations in need of volunteers. Community involvement and volunteering can redefine "teamwork" and make the event significantly more meaningful.

Never underestimate the importance of key stakeholder buy-in during these offsite activities. When your salespeople see your CEO sweating to build a playground, this action speaks louder than any words.

### Drive Event Engagement Into the Future

At ITA Group, we believe in implementing our strategies in our own organization as well as our clients' companies. A case in point: We wanted to revamp our annual fall conference into an interactive, immersive experience. With 34 percent salesforce growth in the past year and aggressive sales goals, we wanted to maximize motivation in our new team members, as well as keep long-time employees engaged and competitive.

Here are some of the strategies we deployed to "future" our meeting:

- **Brand immersion:** We created an audio-visual environment that turned an ordinary hotel ballroom into a rock concert stage, complete with lighting, music and more.
- **Data tracking:** The event's app encouraged Q&A sessions, polling opportunities and quizzes, allowing participants to drive the discussion while giving speakers near-instant feedback. We also harvested

real-time data by issuing branded RFID bracelets to participants.

- **Livestreaming:** To reach employees who couldn't make the trip, we offered a livestream of the meeting. Constant social media updates via Twitter, Facebook and Salesforce Chatter helped remote team members gain the same inspiration and motivation as those in attendance.

When we analyzed the results of our new approach to the annual sales meeting, we found 260 percent more session engagement than the previous event — with 100 percent of sales team members reporting that they left the conference feeling enthusiastic.

Using these strategies to update and energize sales meetings not only will engage attendees, it will demonstrate will-

The sales meeting of the future won't take place in a stale conference room. ...That's a change for the better.

ingness to push the envelope. And that will impress your clients and participants in a memorable way. By bringing your sales meeting planning into the future now, it will motivate and ultimately spur profits for years to come. **I&FMM**

*Jill Anonson has more than 20 years of experience in strategic events, incentive travel and sales strategy, and currently serves as the Events Solution Manager at ITA Group, headquartered in West Des Moines, Iowa. In that role, Jill is responsible for market definition, competitive research, business plan development and more while creating strategies and solutions that help ITA Group thrive. The company, which creates and manages incentives, events and recognition programs that align and motivate people, has operations in every region of the United States and award solutions for more than 75 countries globally. Learn more at [www.itagroup.com](http://www.itagroup.com).*



**T**he size of a meeting is not necessarily directly proportional to the difficulties planners are likely to experience. Planning a small meeting or executive retreat for 50 to 200 attendees can be as challenging as a conference for thousands.

As with meetings of any size, choosing the right location for small meetings may be the most important consideration.

"When it comes to small meetings or executive retreats, I typically look for small-to-midsized hotels where the size of the group maximizes all the space that the hotel has," says Jennifer Norsworthy Meyer, director of events for Louisiana Farm Bureau Insurance. "This way you ensure that your group has the undivided attention of the hotel staff." She says she's had some bad experiences with customer service in larger convention-sized hotels with smaller groups.

#### Luxury on a Budget

Meyer also looks for ways to do luxury locations on a budget.

"Typically, people in the insurance and financial management sectors are used to first-class accommodations and locations," she says. "Being flexible with dates, room night patterns and building relationships within the industry by being easy to work with are all things that will garner you a lower rate at some top-notch locations."

Her organization holds a summer-long promotion through which its insurance agents can qualify to win an incentive trip in late September each year. The recognition event, held Monday through Thursday, includes a welcome reception on Monday night and a Ryder Cup-format golf tournament on Tuesday.

At the 2016 meeting, held at Caribe Resort in Orange Beach, Alabama, activities for the 120 participants also included a progressive dinner to raise money for the family of a team member who was going through a difficult time.

"We got together about six different cooking teams, and they cooked

all kinds of delicious Louisiana dishes for our group on Tuesday evening," Meyer recalls. "Attendees walked from condo to condo sampling the fare, and we raised about \$12,000 in a matter of hours." Other popular activities included shopping and floating in the lazy river at the Caribe, and one group rented a party barge.

"This group typically loves water amenities, and easy access to bars and restaurants," she says. The Caribe Or-

ange Beach has all of that right at your fingertips." Another selling point was the resort's condo setup.

"This group has a lot of camaraderie, and so being able to host people in their condos for breakfast, lunch and dinner was a big hit," Meyer says.

Meeting the expectations of attendees should take priority, according to Lisa Burton, CMP, senior vice president for Meeting Expectations, a meeting management company headquartered

# Small Meetings Challenge

## Finding a Great Fit Is No Small Task

By Mark Rowh

The Newport Boardroom at The Resort at Pelican Hill in Newport Beach, California.

***"Being flexible with dates, room night patterns and building relationships within the industry by being easy to work with are all things that will garner you a lower rate at some top-notch locations."***

**Jennifer Meyer**  
Director of Events  
Louisiana Farm Bureau Insurance  
Boise, ID

in Atlanta with offices in Washington DC, Chicago and Denver.

"Top executives have experienced a lot," she says. "So small corporate meetings and executive retreats need to offer unique, high-end experiences, often personalized to the individual attendee, to be truly memorable."

She says that when planning such a meeting or retreat, a common challenge is providing sufficient content while dealing with a short time frame.

"If it's a corporate team and teambuilding is an objective, then that can be accomplished through an immersive hands-on experience — but without the 'kitsch' usually associated with teambuilding." Examples include sailing, skeet shooting or deep-sea fishing. Or if philanthropy

is in alignment with corporate objectives, then teambuilding may be accomplished through raising money or performing a hands-on community-building project.

"If it's a customer event, it is important to have properly planned interactions between the executives and customers, also highly personalized, and ensure the executives have been thoroughly educated about the individuals in attendance," Burton says.

#### Does the Site Fit the Objectives?

Planners in any industry first need to consider the goals and objectives of the meeting or retreat they are planning and look for a facility that meets those needs, says Bethany Burnett, CMP, director of sales and sparkle at Bavarian Inn Lodge & Conference Center in Frankenmuth, Michigan.

"Do they need a quiet, secluded location for intense strategizing or are they trying to facilitate teambuilding among the group? Are they going to have to collaborate remotely with individuals? If so, then they need to find a facility that has extensive audio-visual capabilities. The priority is a venue that supports their objectives," she says.

Jim Adkins, founder and CEO of Strategic Financial Associates in Bethesda, Maryland, who includes planning meetings among his duties, says privacy is a primary consideration.

"We always try to look for a private, self-enclosed setting," he says. "Hotels or resorts with meeting rooms work well. It may be nice to add something non-business related, such as a light outdoor activity."

He notes that according to some recent surveys, up to 61 percent of Fortune 500 CEOs have no social presence.

"Keeping this in mind, it may be a good idea to allow people to relax and unwind during your meeting and

Credit: The Resort at Pelican Hill



to take a break from technology, while also getting important things done,” Adkins says. He prefers to hold breakfast or lunch meetings, but commences with the business at hand “only after people finish eating and the wait staff has stopped moving.” He adds that alcohol is never served until all the business and any outdoor activities are finished for the day.

Adkins says that his firm’s Maryland, northern Virginia and Washington, DC, locations enjoy access to a variety of wineries and microbreweries. “It’s nice to partner with local vendors to make it a memorable event,” he says.

According to Marcia Skillman, owner of Destination Services of Santa Fe, one advantage for planners of smaller meetings is that there may be more flexibility in dealing with the unexpected. She recalls arranging a dinner that included music from a guitar and drum duo specializing in Latin jazz, and they played throughout the night. But at some point the musicians played an acoustic version of a John Denver song and some of the listeners, who hailed from outside the U.S., asked if they knew any more American folk songs.

“The next thing I know, the guitar player has the ukulele out and they are singing folk tunes, along with about half of the group, all singing along and

**“Small corporate meetings and executive retreats need to offer unique, high-end experiences, often personalized to the individual attendee, to be truly memorable.”**

**Lisa Burton, CMP**  
Senior V.P.  
Meeting Expectations  
Atlanta, GA

cheering,” she says. “It was not something I would ever have booked, and it happened so organically, it was a very special night.”

Kecia Brooks, education specialist for Vizo Financial Corporate Credit Union in Greensboro, North Carolina, says in planning smaller meetings she prefers locations where everything can be done at one property.

“Trying to organize transportation for an offsite event presents a whole different set of challenges,” she says. “I prefer to be able to use various areas of a resort so the attendees feel like they are going to different places.”

She also finds it helpful to find a “home” for events and says she always tries to use that hotel when in the area. A favorite



**Jim Adkins**  
Founder, CEO  
Strategic Financial Associates  
Bethesda, MD

**“We always try to look for a private, self-enclosed setting. ...It may be nice to add something non-business related, such as a light outdoor activity.”**

venue is The Ballantyne Hotel in Charlotte, North Carolina.

“When planning an event at Ballantyne, we utilize the entire property and our attendees love it,” she says.

She adds that in this location, one factor to consider is the possibility of hurricanes

“You can’t plan for things like that but in a way, you can,” she says. “Call your contact, work with them in advance to plan options, and listen to them. They know their property better than you do and they will have great suggestions.”

Thomas Mitchell, CEO of Global Intermix, a translation and interpreting firm based in Los Angeles that serves the financial sector among others, sees value in the time he spends planning meetings for his organization.

“It may be strange that a CEO plans meetings and retreats, but I recognize the incredible value in effective gatherings of our team,” he says. “Structuring a successful retreat is something that I take great pride in.”

He says that business retreats are an especially effective way to strengthen teams, engage employees and acknowledge their hard work and dedication to the company.

#### The Best Fit for Attendees

“As such, selecting the best place for your business retreat should stem from the interests and personalities of your employees,” he says.

Sometimes a meeting location is not really a location. That’s the case with cruises such as those to the Galapagos Islands offered by Celebrity Cruises. It’s certainly not your standard business meeting to encounter giant tortoises while learning about eco-tourism activities. And similar arguments can be made for other destinations.

“Cruising is a win-win for small meetings and executive retreats,” says Lisa Vogt, Celebrity’s associate vice president, corporate incentives and charter sales. She points out that a cruise provides attendees with scenery that changes daily and offers unique experiences, while still meeting function space and Wi-Fi demands.

## Going Small at Sea

“Participants will find the beauty, comfort and the tranquility they need to focus on the business at hand in a place that will foster camaraderie and exceed their ROI,” she says. “It’s a one-of-a-kind retreat.”

Vogt notes that since many attendees are looking for interactive travel experiences, planners should look for fresh and exciting trip possibilities, something that combines both work and play. That goal can be met with a cruise that takes business programs to exceptional places while providing luxurious accommodations and cuisine as well as engaging activities.



A Celebrity Cruises Galapagos shore excursion.

“We just received positive feedback from an FICP planner whose company took their top executives on an 11-night western Mediterranean cruise retreat,” she says. “Participants gave high ratings for the ability to network, conduct their meetings and relax all in one place.”

To make the most of the cruise approach, Vogt advises planners to avoid overfilling the agenda.

“Select an itinerary that gives your attendees and executives time to unwind and bond with one another,” she says. “Having that down time stimulates different perspectives and creates closer connections among team members.” —MR

He notes that for his employees, that means getting out of the city, unplugging and enjoying the outdoors. A favorite spot for the firm’s twice yearly, three-day retreat is Enchantment Resort in Sedona, Arizona. Participants enjoy what Mitchell describes as the perfect balance of structure and freedom, including yoga and hiking activities, a jeep tour, spa vouchers and time simply to rest and read.

“We offer a variety of different activities, and based on everyone’s interests they can partake in whichever activities interest them most,” he says. “This breaks down our team into smaller groups and allows for more intimate conversation and opportunity to build stronger relationships.” He notes that it’s one thing to know someone well in the office, but to connect through a common interest and activity strengthens those relationships that then carry over to working on a team.

“We always end the retreat with a sunset dinner in the red rocks in which everyone shares something new they

learned over the past three days,” Mitchell says. “Getting out of the office and into nature is refreshing and inspiring for our team.”

#### More Small Meeting Sites

A great example of an attractive location for retreats or smaller meetings is the Villas of Grand Cypress. The 1,500-acre Orlando resort offers both suites and villas with up to four bedrooms. For meetings of 240 or fewer, a recently renovated, Mediterranean-style executive meeting center offers four separate meeting rooms totaling 7,200 sf of event space. The facility can be divided into eight self-contained, soundproof meeting and banquet rooms. Surrounding an open atrium, the meeting rooms overlook a scenic garden terrace.

Meetings of 10 people or fewer can be held in villas with space up to 2,700 sf, where living rooms, dining rooms or patio decks offer alternative meeting spots. Recreational options include Jack Nicklaus Signature-designed golf courses.

The Resort at Pelican Hill in Newport Coast, California, frequently hosts smaller meetings. Settings at the 504-acre resort include oceanview boardrooms and private dining rooms as well as cabanas and villas. A ballroom that can be divided into three smaller sections offers a combined 4,560 sf of space and accommodates up to 520 for receptions or 600 in theater format. Four meeting rooms range in size from 880 to 1,326 sf. For outdoor events, several terraces and lawn areas can handle from 50 to 750 people. Attractions include a large

**“Selecting the best place for your business retreat should stem from the interests and personality of your employees.”**

**Thomas Mitchell**  
CEO  
Global Intermix  
Los Angeles, CA



The Lodge at Sea Island is one of four lodging options at the five-star Georgia resort.



Mary Cline, regional director of catering sales, East Coast, for Wolfgang Puck Catering, offers these insights for planners in the insurance or financial sectors.

"Both markets (insurance and financial groups) are savvy diners, therefore seek out high-end, creative food and beverage. They are comprised of members that conduct and attend many standard, straightforward office and boardroom meetings; therefore, it's important to find venues that eliminate a 'bored' room and offer creative outlets.

"Be sure to provide amenities and access to beverages and snacks throughout the



Credit: Wolfgang Puck Catering

*The Georgia Aquarium provided an anything-but-bored room for a creative dining experience by Wolfgang Puck Catering.*

## A Caterer's Perspective

day, and facilitate attendees' ability to check in on their ongoing business while away from their regular day.

"Don't cut food and beverage services — it's quite often the first thing that is scaled back when budget constraints come

into play, but the basics facilitate mental acuity (access to healthful grab-and-go beverages and snacks). And bringing groups together for a shared meal creates a sense of community and the type of group-think that smaller meetings and executive retreats are striving for in their results."

— MR

circular pool and two highly rated golf courses. Along with activities ranging from pasta-making lessons to wellness classes, guests enjoy easy access to bike tours, harbor cruises and beach walks.

Located in Northeast Florida's Atlantic Beach, One Ocean Resort & Spa offers more than 10,500 sf of meeting space that easily accommodates smaller meetings. Facilities include multiple indoor meeting rooms as well as 1,635 sf of outdoor meeting space.

A 1,696-sf ballroom is complemented by a 3,800-sf ballroom with a capacity of 294 to 550 depending on the function and setup. Eight breakout rooms also are available. Services of interest to meeting planners include team-building activities, professional photographers and VIP spa packages.

The Lodge at Sea Island is one of four attractive experiences available at the famous Georgia location. The Lodge features five meeting rooms, a wine cellar with permanent dining table and, for outdoor events, a screened-in veranda, covered veranda and lawn. Indoor meeting spaces, ranging from 416 sf to

1,440 sf, accommodate 12–30 people in conference mode or 30–150 for receptions. The outdoor venues, sized from 500 sf to 4,080 sf, handle groups from 30 to 200. The Lodge is complemented by the Cloister at Sea Island, the Inn at Sea Island, the Broadfield sporting club and lodge, Sea Island Cottages, and a wealth of activities and attractions including five miles of private



**Kecia Brooks**  
Education Specialist  
Vizo Financial Corporate Credit Union  
Greensboro, NC

beach, a dozen dining options, a spa, beach club, tennis and squash centers, yacht club, shooting school and three championship golf courses.

At Salamander Resort in Middleburg, Virginia, guests enjoy a historic

setting in the state's horse-and-wine country. The 340-acre resort features a 4,500-sf, three-section ballroom, foyer, terrace and meeting rooms accommodating 24 to 233 participants in classroom format and 30 to 450 for receptions. Outdoor choices include an equestrian center, stone barn and large lawn with room for 330 for banquets or 450 for receptions. For retreats and other business meetings, teambuilding functions include opportunities to connect and communicate with horses and experience the challenge of a zip-lining tour.

Small-to-mid-sized groups are the norm at the Lodge & Club at Ponte Vedra Beach, which occupies 10 acres on Florida's northeast Atlantic coast. Emulating the surroundings of a seaside European village, the resort offers more than 13,000 sf of meeting and banquet space. Seven meeting rooms, most featuring ocean views, accommodate 10 to 150 people. Along with 66 guest rooms and suites, guests enjoy an oceanfront pool and a 4,000-sf fitness center. They also have access to the resort's sister property, Ponte Vedra Inn & Club, which offers two 18-hole golf courses, 15 tennis courts and a 30,000-sf spa.

I&FMM

*Rather than travel to an offsite event, "I prefer to be able to use various areas of a resort so the attendees feel like they are going to different places."*

# COASTAL COLLECTION



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NEWPORT BEACH



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IRVINE





The Castle Group planned this glitzy evening at the famous Hotel de Paris in Monte Carlo featuring live entertainment.

# International Meetings

From Culture and Customs to Contracts and Compliance, There's a World of Concerns to Consider

By Maura Keller

**P**lanning an overseas meeting or event is part art, part science and a lot of hard work. In a world without boundaries, financial and insurance companies must contend with a complex set of issues to make an international meeting or event go smoothly.

## Key Questions

Keri McIntosh, senior vice president of The Castle Group, a full-service meeting planning agency with headquarters in Boston, Massachusetts, says the first question planners need to ask is: Can this location accommodate and service the meeting objectives effectively? It is important to understand the infrastructure of the destination. Also, are the accommodations and service level similar to what the group is used to or what you are expecting? How reliable is the technology and what is the cost? Is the currency exchange favorable? Is Eng-

lish widely spoken? How many international flights are offered per day? How close is the airport to your selected hotel? How many vehicles and what sizes are available from your transportation part-



**Keri McIntosh**, Senior Vice President  
The Castle Group, Boston, MA

ner? How safe is the destination for U.S. travelers?

"Another key is to understand the

demographics of your audience," McIntosh says. "For example, what is the size of the group? Are they frequent international travelers or novice travelers? Do any attendees require visas for entry? Are they arriving from predominantly one location (i.e. headquarters

**"Not factoring contingencies for international risk into your contracts is also a mistake. ...It is important to be as specific as possible and try to make the terms measurable."**

in New York) or are they traveling to the program from all over the world?" The larger the group and more var-

## Global Do's and Taboos



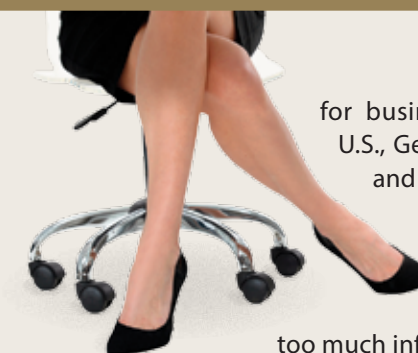
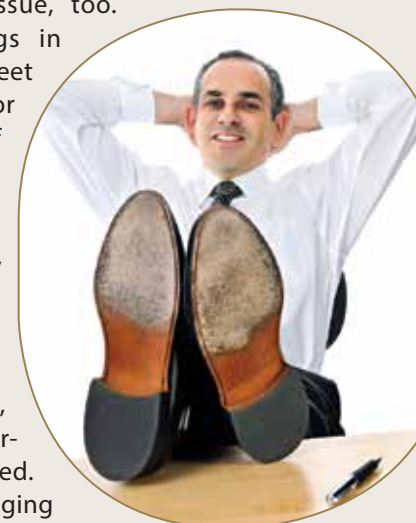
When traveling abroad, there are international meeting protocol do's and taboos. According to Gloria Petersen, founder of Global Protocol Inc., one of the most common mistakes people who travel abroad for meetings make is the disregard for local body language, posture, facial expressions and gestures. Some are appropriate in one country but offensive in another.

For example, the OK sign gesture (making a circle with the thumb and index finger) is common in the U.S. but extremely offensive in Brazil.

Feet can be an issue, too.

"Don't cross your legs in Japan, or point your feet at someone in China, or show the bottom of your feet in the Arab world if you want to get a relationship going and business done," Petersen says.

In most of Asia, the Middle East, Latin America, Italy and Africa, silence to process information is highly valued. That can prove challenging



for business people from the U.S., Germany, Britain, Canada and Scandinavian countries who tend to talk more than listen and fill the silence gap — often giving away too much information.

"Punctuality also is very important in some countries like Singapore and Switzerland, and so arriving late even by a few minutes can get things started off on the wrong foot," says Doug Bruhnke, CEO and founder of Global Chamber, a firm that helps companies grow more effectively across cities, between countries and globally. "Conduct a country-specific meeting briefing beforehand, and be careful not to over-generalize."

Also conduct a short role-play session. Let travelers know where a specific cultural difference lies and offer tips on how to adapt. "It's important to show discipline and demonstrate respect for cultural differences," Bruhnke says. "This may range from the initial greeting to include a handshake or bow plus business card exchange, all the way through conducting the meeting, leaving the room and following up in ways that are comfortable for each culture." — MK





ied the participants in terms of demographics, the more complex the planning becomes. Also, understanding the demographics is key to establishing an effective communications plan with the audience. Those who have never traveled internationally may need some additional handholding.

Other key questions to ask include: What is the custom for “gift-giving” and what gifts could cause offense? How

ners in Europe. Also, planners need to learn what type of food service is typical: Finger or fork buffet? Russian service? Plated? Also, place settings tend to be more formal in Europe with many different knives and forks and glassware. The same knife is never used for more than one course.”

Mazda Miles, CMM, president of Perfection

**“Negotiating contracts outside of the U.S. is very different, and again, some things we take for granted may not be included outside of the U.S.”**

**Linda Nelson, CMP, President and CEO  
To Plan Ahead LLC, Mills River, NC**



do you greet someone: bow, shake hands or with the European two-sided kiss? Certain hand gestures also can be construed as offensive in other countries, and meeting planners need to learn about the hierarchical standings and formalities in the chosen locale. In Germany, for example, it is considered bad manners to address someone by the first name, and it is imperative that you address them by their title: doctor, mister, your excellency.

Events, stresses that the prevailing culture and customs inform the entire process as well as the outcome of an international meeting and event.

“If a planner embraces this, they can plan and execute beautifully as well as give attendees a wonderful experience in an international destination,” Miles says.

For example, planners need to consider whether their desired food and beverage choices are available in the country hosting the meeting. Some countries are red meat and pork-heavy, while others are grain and vegetable-heavy. Some

### Culture and Customs

For Linda Nelson, CMP, president and CEO of To Plan Ahead, cultural considerations are of obvious foremost importance.

“It’s important to have a good knowledge and understanding of the culture and customs of the destination country,” Nelson says. “The things we take for granted in the U.S. may not be available elsewhere. For instance, what are the smoking laws and alcohol laws? What time is dinner typically served? In some countries it may be as late as 10 p.m., or lunch may be the main meal of the day.

“In the U.S., if a person finishes his/her meal before others at the table, the waitperson very often will take their plate away while others are still eating — this is considered bad man-



**Mazda Miles, CMM, President  
Perfection Events, Philadelphia, PA**

countries are known for their beer, while others are known for their wine. When choosing menus, always consider the locale, make a special request if necessary, but be understanding if they are unable to provide what has been requested. Try to find a way to celebrate and incorporate the best of the locale and provide attendees with a superb experience.

### Vendors and Suppliers

When planning a program internationally, McIntosh generally relies a great deal on global vendors and suppliers. These may include destination management companies (DMC) and global hotel sales representatives. The Castle Group also uses the Cvent supplier network to source locations.

“We vet our suppliers by seeking referrals from industry colleagues, asking local convention and/or travel bureaus and soliciting feedback from the suppliers’ past clients,” McIntosh says.

She also relies heavily on local industry partners for destination expertise, insider tips and local relationships. For example, these partners can suggest safe areas for dining/entertaining, the best transportation options and favorable rates. DMC partners can conduct due diligence on all local vendors, such as tour operators, to ensure appropriate business licensing, necessary insurance requirements and proper safety training.

Convention and tourism bureaus also can be great resources as well as the national and local hotel sales reps for the destination. The U.S. Department of State travel website ([www.travel.state.gov](http://www.travel.state.gov)) is the go-to resource for travel alerts and warnings. The U.S. embassy in a given country can

**“I remember planning a meeting in Spain and finding out onsite that house phones were not standard in the hotel meeting rooms. That was a costly and inconvenient mistake.”**

be a great resource for planning and prioritizing your group in that destination.

“One critical element to the success of an international meeting is having professional and highly experienced travel staff onsite,” says Michelle McSpadden, CMM, who specializes in strategic meeting planning, incentive travel and live event design. McSpadden, a principal at Overflow Storytelling Lab,

a firm dedicated to accelerating idea adoption, adds, “While it may be tempting to bring colleagues or volunteers as staff so they can experience the destination, it’s often not the correct business decision and can be a wreck onsite. Contract top-level travel staff with firsthand destination experience — and contract them early.”

### Contracts

When it comes to the financial aspects of planning meetings abroad, make sure that the venue contract is negotiated in English and U.S. currency, and that everything is very specific, leaving no room for misinterpretation.

“Negotiating contracts outside of the U.S. is very different, and again, some things we take for granted may not be included outside of the U.S.,” Nelson says.

“For instance, we typically don’t pay for room rental if we are booking a meeting at a hotel where we are booking a sufficient number of sleeping rooms. This practice is typically not the case in Europe and, in fact, they will often charge rental on the prefunction space if it’s being utilized for registration.”

Make sure that the contract in-

cludes a clause whereby no meeting space can be re-allocated without prior, written permission from the meeting professional.

Also be aware of language and terminology differences. For instance, in the U.S., we refer to “cell” phones, in England they are called “mobiles,” and in Germany they are referred to as “handies.” Also check each country’s tax laws. Many often apply VAT (value added tax), however, with the right planning and paperwork, this tax can be reimbursed.

Crime is another risk factor, so do your homework. It is vital to consult with an experienced insurance provider before making any firm commitments to ensure adequate coverage for public, product and medical liabilities as well as cancellation or postponement of the meeting. And be sure to ask the hotel/venue for a copy of their emergency



**Michelle McSpadden, CMM, Principal  
Overflow Storytelling Lab, Lenexa, KS**

**“One critical element to the success of an international meeting is having professional and highly experienced travel staff onsite.”**

plan in case of fire, weather or terrorist activities.

“Not factoring contingencies for international risk into your contracts is also a mistake,” McIntosh says. “Most contracts have a force majeure clause that absolves parties of liability and/or allows for cancellation due to acts of God, forces of nature or terrorism. However, arguing a cancellation on the terms of force majeure is only straightforward if the incident is expressly covered under the clause and in the location that the program is being hosted. In order to avoid dispute, it is important to be as specific as possible and try to make the terms measurable.”

For example, for a contract McIntosh worked on for a Mexico trip where the Zika virus was a threat, her company stated that if the situation rose to a CDC alert Level 3, this would be cause for cancellation under force majeure.

### Airlift

Rigel Bitterman, vice president at

## Checking the Basics

It pays to double-check meeting planning basics and any costs planners might take for granted in the U.S. but which predictably can be quite different overseas.

- **Site inspections.** Planners should do this in person if possible or at a minimum, via videoconferencing.
- **Contracting.** It’s advisable to work with a sourcing professional rather than trying to tackle the first international hotel contract solo. Specifically identify every space, service and detail that the group will need prior to contracting (and consider how to respond if the DMC requests to book the hotel space and guest rooms).
- **Function space.** Understand specifics including meeting room sizes, ceiling heights, columns, access, furniture and sizes, room rental fees, setup day fees, technology, Wi-Fi access, etc.
- **Guest rooms.** Understand guest room size, access, amenities, services available, room service (or not), restaurant hours, local transportation access, television news access/languages, etc.
- **Health insurance.** If necessary, suggest travelers explore their health insurance coverage to ensure it’s applicable where they are traveling; and if not, to explore a short-term policy valid during the travel period.
- **Travel insurance.** Inform travelers of the need and options for travel insurance in the event of trip interruption and/or cancellation.

— MK



## Resources

Local destination management companies and tourism bureaus in the region a planner is choosing to hold a meeting can be invaluable for providing information about the local holidays, hotels, transportation, etc. Here are more sources:

- U.S. Department of State (U.S. Passports & International Travel), [www.travel.state.gov](http://www.travel.state.gov)
- *Kiss, Bow, or Shake Hands: The Bestselling Guide to Doing Business in More Than 60 Countries* by Terri Morrison and Wayne A. Conaway (Adams Media, 2006)
- The Events Industry Council, [www.eventscouncil.org](http://www.eventscouncil.org)
- Meeting Professionals International, [www.mpiweb.org](http://www.mpiweb.org)

Luxpality, a meeting and event planning firm, says it is imperative to check airlift options in every city where attendees will be coming in from — this especially pertains to VIPs and speakers. Luxpality recently planned a massive financial summit in Zurich for one of their top clients. Fortunately Bitterman's business partner, Patrick Burkhardt, is from Switzerland, speaks fluent Swiss-German and was intimately familiar with what needed to be done both here in the U.S. and in Switzerland in order to make this meeting a success for the client.

"Oftentimes, attendance for an international meeting is substantially lower than anticipated due to lack of convenient flight options for attendees," Bitterman says. "It doesn't matter if the flights are being paid for by the company — attendees will be deterred if the location isn't easy, such as direct flights at convenient times, for them to get to."

### Common Mistakes

The biggest mistake Miles has seen meeting planners make is being too direct with their international counterparts.

"Planners are used to calling the shots, so they may default to assigning tasks for international colleagues to follow suit. However, when planning international meetings, planners must be much more thoughtful," Miles says. "Planners have to take the time to connect with the local team early on in the

process to set and manage expectations and to understand what they expect of the planner, too."

One common mistake planners make is assuming that everything that comes "standard" in the U.S. is standard in the country where a meeting is being planned.

"I remember planning a meeting in Spain and finding out onsite that house phones were not standard in the hotel meeting rooms," Miles says. "That was a costly and inconvenient mistake that yielded five days of running around the hotel to notify staff of my needs, and al-



**Rigel Bitterman**, Vice President  
Luxpality, San Diego, CA

ternatively using my mobile phone to make calls and send texts for every single request. Needless to say, for the Hong Kong meeting the following month, we rented two-way radios."

McIntosh says planners may not factor in a contingency for currency fluctuation, and they may assume audio-visual equipment will be compatible with U.S. equipment. Other missteps include not filling out the proper paperwork for customs or not allowing enough time or money for shipping.

Says Nelson, "If you anticipate shipping extensive materials and/or products to the meeting destination, then

it's a huge mistake not to hire a shipping/forwarding company who will take charge and ensure everything goes through customs without issue."

Failure to do this can result in materials being impounded or held up for several days to clear customs. It is especially important to provide this information to potential exhibitors who could be shipping large amounts of materials and booths.

### Partners and Compliance

To help make international meeting and event planning a smooth process, experts stress the importance of having a strong DMC partner. At Luxpality, Bitterman relies heavily on their DMC division to provide not only knowledge and resources overseas, but also boots on the ground in the locations where they plan international meetings.

"The value of being able to tap into the expertise of locals when dealing with the logistics of transportation, planning offsite events or even making restaurant recommendations is off the charts," Bitterman says.

Finally, it's imperative to help attendees realize that they too have a personal, vested interest in remaining

compliant with the rules and regulations of the country where the meeting is being held.

"Meeting planners don't want to suck all the fun out of the international meeting, but the reality is that in both the financial and insurance sectors, there is a fair amount of regulatory red tape, and it varies country to country," Bitterman says. "Making attendees aware of what the rules are is not enough — they should also be made aware of what the repercussions of falling out of compliance are both for their company and for them personally."

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# Contracts and the Flexibility Factor

## Success Depends on How Well Planners Adapt Negotiating Tactics to the Current Market

By John Buchanan



When it comes to contract negotiation, many planners can feel out of their element, particularly considering that hotel sales executives often have more training and experience as negotiators — and more leverage in a seller's market. That means that planners must understand broad principles that are always market driven. And ultimately, in any given year, the dynamics of negotiation are driven by the proverbial pendulum that swings back and forth between a seller's market and a buyer's market.

Cori Dossett, CMP, CEM, president of Dallas-based independent meeting planning company Conferences Designed, believes that the seller's market of the last few years has begun to shift toward a buyer's market. "Based on some of my recent experiences," she says, "I feel like we as planners are starting to have a little more of a leg up. I wouldn't say it's a buyer's market. But I do feel like we're on more equal ground than we were over the last several years."

In particular, Dossett finds that the "That's our best offer, take it or leave it" stance that major hotels in top destinations adopted over the last several years has begun to subside. In general, she says, hotels are more flexible in terms of overall negotiating tactics.

Mike Kovensky, director of sales and marketing at the InterContinental Miami, stresses a countervailing factor that currently drives negotiations in the hottest destinations — such as Miami. Demand is back to pre-recession levels,

and in Miami, it is higher than ever before. That means that for much of the year, a planner has to pay to play. And if the hotel cannot meet its minimal bottom-line business needs, it will walk away from the potential meeting. "It's simply a business decision," Kovensky says.

Another factor driving the market is the notoriously shortened booking window, he adds. "From a planner's perspective, if they have a set desire to be in a particular city or hotel on particular dates, by booking more short-term they are likely diminishing their options in terms of availability, in terms of their budget," he says. "On the other hand, if the hotel has availability, then the short-term booking can be a home run for both sides. But there is often going to be one of those distinctions or the other driving the negotiation."

### Room Rates

Room rates are not as much of a factor as they once were, Kovensky says. "In today's mar-



**Michael Dominguez**  
Chief Sales Officer  
MGM Resorts International  
Las Vegas, NV

**Flexibility means everything today. ...We have demand that is increasing for a supply that is not increasing. And that means that costs are naturally going to rise. That is just the reality.**





Cori Dossett, CMP, CEM  
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Dallas, TX

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ket, I think the old adage ‘You get what you pay for’ comes into play,” he says. “When a planner has narrowed down his or her choices to two or three potential options in a destination, the decision is not just going to be about rates. It’s about location, the layout of the hotel, the meeting space and the level of service. There are more factors in play than just rates. And sometimes, the property with the best rate is not the best property for the meeting. And planners today understand that.”

Neha Kowal, head of conference and events marketing at Guardian Life Insurance in New York, concurs with that assessment. “Room rate is important,” Kowal says. “But I don’t want to get a really cheap room rate and then be nicked and dined on everything else, like internet costs or service charges.”

Like Dossett, Kowal sees room rates, in general, softening now. “Part of that, I think, is because as planners we’re no longer strapped down, so we have to say, ‘I have this huge event coming up in three years and I need to book it now,’” she says. “My group, in general, has been through the ringer over the last two years. We had to relocate six programs in a matter of six or seven months. And although it wasn’t easy, it was doable. Before that, we always thought you had to plan way in advance and send out a hundred RFPs and all that stuff. And that’s not the case anymore. We have a lot more flexibility and leverage now.”

And, planners and hoteliers agree that flexibility on the part of the planner is the No. 1 key to negotiating success.

“Flexibility means everything today,” says Las Vegas-based Michael Dominguez, chief sales officer at MGM Resorts International. “One of the things I stress that is not stressed enough, in my opinion, is that we continue to read that supply in the hotel industry is growing. But if you really look at it, that new supply is mostly limited-service hotels. It is not growth in hotels with a major amount of meeting space. So that means that another factor that is driving the market, just as it drives all markets, is supply and demand. And today, we have demand that is increasing for a supply that is not increasing. And that means that costs are naturally going to rise. That is just the reality.”

Given that reality, Kovensky agrees that flexibility, in terms of dates, is a meeting planner’s best friend. In fact, he says, it has prompted a major trend. “What we’re finding today is that more than 40 percent of meetings are not

booked on what were the preferred original dates,” he says. “That means that 40 percent of organizations and planners are now willing to be flexible in order to get the deal they need, but also satisfy the business needs of the hotel. And when both of those things are true, it’s a win-win for both parties.”

Kowal agrees that flexibility is essential to successful negotiation. “I absolutely use flexibility as a negotiating tool,” she says. “As planners, we’re not as tied in anymore to the requirement that a particular meeting has to be in March every year because it’s been in March in the past. It’s understood now that a meeting can be held at a different time if that opens up better options, whether that’s a better rate or a better experience because of the time of year.”

Dossett also agrees that flexibility is essential. But as an independent planner, she is often frustrated by clients who surrender such negotiating leverage because they insist that because the meeting has previously been held during the third week of May, it must be held during that week every year. And that is very frustrating when part of my job as an independent planner is to get the best possible deal for my client, and get everything they want done on the budget they have available,” Dossett says. “And on that score, I fail more often than I succeed, which makes it even more frustrating.”

### Food and Beverage

The need for flexibility also extends to F&B, Dominguez says. A planner must realize that on the one hand, he or she might not get what is stipulated in initial negotiations, but will get a perfectly acceptable and successful meeting for the budget available. But that often means instead of filet mignon and premium wines, you get chicken and a less expensive wine. “And there are specific issues related to F&B that a hotel cannot ignore,” he says. “For example, a planner needs to understand that because of labor issues and a production slowdown in Mexico, the price of avocados has gone through the roof. So if you want guacamole, you’re going to have to be willing to pay for it.”

Over the years, Dossett has developed an F&B negotiating strategy that she says consistently yields bottom-line benefits for her clients. “Let’s say my minimum is \$50,000,” she says. “I go in and say, ‘I can order more food with that \$50,000 if you’ll let me do X, Y and Z. For example, your breakfast buffet is \$50 a person, and it offers a multitude of options that we don’t

need. So if can you simplify it and offer one or two hot items instead of four hot items, and you can drop the price to \$40 per person, I can feed more people for the same amount of money. And in general, I find hotels very receptive to that, for anything other than dinner, because from a P&L perspective, it’s the same for them, but better for me and my group.”

However, Dominguez and Kovensky stress, food costs are rising sharply and planners must understand the effect costs have on pricing.

### Cancellation and Attrition

In a market now driven by high demand and rising operational costs for hotels, cancellation and attrition clauses become a significant point of negotiation at least 99 percent of the time, Kovensky says. The reason: They cut to the heart of the hotel’s business model, with no room for error in terms of the property’s fiscal health. The cancellation of a major meeting, or its failure in terms of attendance, without strong fiscal protections in place, Kovensky notes, deals a major blow to the hotel’s bottom line for the quarter if not the entire year.

The inherent conflict, he says, lies in the fact that planners also must work hard to limit the financial exposure of their companies in the event of cancellation or unexpectedly low attendance. “And the way we handle that, from our side, is to do a very careful examination of the history of the meeting and the current trends in terms of things like pickup. And then we’ll base our dialogue on that knowledge.”

Cancellation and attrition have always been sensitive issues, and they always will be, Dossett says. And she has seen no change in either direction over the last year. Hotels still drive a hard bargain. “And from a business point of view, I understand that they have to do that,” Dossett says. “But sometimes there is good news. For example, I recently did a meeting for 250 attendees, and we ended up in an attrition situation, which had never happened before with this meeting. We got a \$20,000 attrition bill at the end. And the hotel waived the attrition charge because we agreed to bring back the meeting for two more years.”

From the seller’s side, both Kovensky and Dominguez agree that the easiest way for planners to render cancellation and attrition non-toxic is to use future meetings as leverage.

### The Role of Procurement

If there is an issue that unites hoteliers and meeting planners in frustration, it is the ever-increasing role of procurement departments in buying decisions and contract negotiations.

“As hoteliers, we don’t often deal with procurement departments directly,” Kovensky says. “We deal with them indirectly, via the planner or the meeting host. But involvement by procurement departments does tend to lengthen the negotiation and contracting process. And the reality is that for most major meetings held by large companies, the involvement of procurement is just a fact of life today. It’s the reality we have to deal with.”

An important factor Kovensky says, is that in the end, negotiations must be based on the business objective of the company holding the meeting and not just costs. “The key for me is open dialogue and negotiation that is conducted in good faith by both sides,” Kovensky says. “And if both sides understand and respect the needs of the other side, there is going to be a good outcome for both sides.”

Dominguez also believes that the role of procurement departments is having a major impact on meeting negotiations today, often without procurement managers understanding how buying hotel rooms and F&B for a meeting is different from buying paper clips or office furniture.

“My wish would be that we had more access to procurement departments to explain our business to them,” Dominguez says. “What I have found in doing educational sessions with procurement people is that there is often a disconnect because they treat our business like they were considering a box of copy paper.



Neha Kowal  
Head of Conference and  
Events Marketing  
Guardian Life Insurance  
New York, NY

**“I absolutely use flexibility as a negotiating tool. ...It’s understood now that a meeting can be held at a different time if that opens up better options, whether that’s a better rate or a better experience because of the time of year.”**







**Mike Kovensky**  
Director of Sales & Marketing  
InterContinental Miami  
Miami, FL

***“The key for me is open dialogue and negotiation that is conducted in good faith by both sides. And if both sides understand and respect the needs of the other side, there is going to be a good outcome for both sides.”***

They think in terms of how much they can reduce their costs annually by reducing the cost of each box of copy paper. But that does not work in our industry. The point I always make is that if they run out of copy paper, they can always go get more very easily. If I run out of room inventory, I’m done. There is no opportunity for me to go get more. And that is the side of our business that procurement departments need to be educated about. Hotel rooms and ancillary services like F&B are completely different from anything else they purchase.”

The good news, he says, is that he sees procurement managers making the effort to learn more about how meeting services are budgeted, priced and purchased. “But it’s an educational process that needs to continue, because it helps both buyers and sellers.”

#### Wish Lists

In order to facilitate more productive and satisfying negotiations, both planners and hoteliers have their ideas about what could lead to more success and less frustration.

“Instead of going around and around in negotiations, I’d much rather that a hotel or vendor be upfront with me and say, ‘This is what it’s going to cost for me to give you what you want,’” Kowal says. “And I also want them to ask and understand what is most important to me and then to ask how we can make it work. Because of that, I am not fond at all of hotels or vendors who just say, ‘This is our standard contract. Take it or leave it.’ We’re a 157-year-old company. There is no company more conservative than we are. And even we never say, ‘This is our standard contract. Take it or leave it.’”

One particularly irksome issue for Kowal is

the fact that many hotels still charge a separate fee for Wi-Fi services. “That is a major sticking point for me in every single negotiation we do with hotels,” she says. “My position is I’ll pay an extra \$2 a night per room, or a little more for food and beverage, but I don’t want to see a \$20,000 or \$30,000 charge for Wi-Fi services. Today, that is a basic business need, and my feeling is that hotel partners have to figure out a way to give us that very basic service at no charge. I just cannot understand why so many hotels want to make it so hard for me to have internet for my attendees.”

She rejects the justification from hotels that they are simply passing along the costs of providing the service. “I don’t buy that argument,” Kowal says. “Air conditioning is expensive to provide. Phone service is expensive to provide. As far as I’m concerned, Wi-Fi is a basic service that they need to supply because it’s the way of the business world now. And I want it everywhere, including in sleeping rooms.”

Such an issue reinforces a broad point from Kovensky — that open dialogue and mutual transparency, from the start, are always required for negotiating success. “Oftentimes, we might not get an opportunity to discuss a particular issue in the initial proposal process,” he says. “And I think that many times, if we had that chance to have more dialogue earlier in the process, we could better position ourselves to meet the customer’s objectives and the customer would have a better chance of getting what they want from us. And that dialogue has to take place with mutual respect. So from my perspective, the single most important factor in the entire process is as much dialogue and transparency as possible, as early as possible.” **I&FMM**



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# Gaming Resorts

## Betting on Meetings With More Business-Focused Spaces and Services

By Patrick Simms

Optics remain a concern for many insurance and financial companies when it comes to offsite meetings: Will stakeholders perceive a given meeting location as being more associated with entertainment and recreation than business? If so, the site is generally best avoided for highly visible meetings that are not reward programs. Gaming resorts, and the destinations where they are clustered, may well fall under that perception. But insofar as the hoteliers don't want to lose out on meetings business from insurance and financial firms, they are not leaving perception up to chance. Many have been working diligently for years to demonstrate their commitment to servicing all kinds of meetings, even those that are "strictly business."

### New Meeting Facilities

Several recent investments by properties in the gaming hubs of Las Vegas, Atlantic City and southeastern Connect-

icut show a laser focus on meetings. The MGM Grand in Las Vegas, for example, launched its Conference Center expansion this June. The \$130 million project will add 250,000 sf, bringing the total square footage of the MGM Grand Conference Center to 850,000. Groups will have at their disposal a new 49,000-sf ballroom, 32,000-sf ballroom, 5,500-sf outdoor courtyard for private events, 22,000 sf of additional Stay Well Meetings space, as well as new smaller ballrooms and breakout rooms when the project is complete at the end of 2018.

Meanwhile, Aria Resort & Casino, also an MGM Resorts property, is expanding its LEED Gold-certified convention center, adding 200,000 sf by February. In the venerable gaming destination of Atlantic City, the Borgata Hotel Casino & Spa unveiled its 18,000-sf Central Conference Center this Janu-

ary. The \$11 million facility comprises two stories of customizable event space including five meeting rooms, a boardroom and a 6,500-sf clear-span ballroom on the upper level. Among the tech highlights are high-definition digital projection TV and internet sys-



*"Through every stage of the event process, the Mohegan Sun staff is consistently professional, friendly, knowledgeable and resourceful in helping us deliver our conference."*

**Christine M. Strickland**  
Vice President, Training and Development  
Infinex Financial Group  
Meriden, CT



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At Mohegan Sun in Uncasville, Connecticut, the future for meetings is bright with the construction of the new 240,000-sf Sun Expo Center set to open next summer. Located in proximity to Mohegan Sun's newest hotel, Earth Tower, the Expo Center will offer a 21,412-sf ballroom, 131,000 sf of exhibit space, 18 meeting rooms ranging from 360 sf to 675 sf, and a 1,263-sf boardroom with 230 sf of prefunction space and its own 3,600-sf outdoor terrace.

### Professional Service

Gaming resorts show their devotion to the meetings market not only by opening these new facilities, however. They are also demonstrating it via quality of service to planners and attendees. Mohegan Sun's service to Meriden,

the PSAV team always react with a can-do attitude, and the changes happen in a way that doesn't disrupt the event," she explains, providing an example. "Last year, I asked them to move a set-up for a panel presentation including barstools, sound equipment and video cameras to a different breakout room. They literally had less than 10 minutes to make the change and pulled it off without any issues."

### Downsizing in Dover

Such meetings proficiency is not only found at gaming resorts of the size and scope of Mohegan Sun, MGM Grand or Borgata. In Dover, Delaware, the AAA Four Diamond Dover Downs Hotel & Casino offers 500 guest rooms complemented by 40,000 sf of function space that includes the 18,000-sf Rollins Center, and multiple meeting and breakout rooms.

Lewisburg, Pennsylvania-based M&T Bank brought its "Town Hall" meeting for the first time to Dover Downs this past May, and Jeanne Reed, secretary and meeting planner, found the property offered ideal service and spaces for the 105 attendees. The group met in the Diamond Rooms, which are on a different floor than the main casino area, eliminating distractions from casino traffic, Reed says. And the staff was on the ball. "When people checked in they had everything reserved, so that went very smoothly," says Reed. In addition, the CSM "met me when I arrived to make sure everything was set up the way I wanted it. When she gave me the contract, she had everything spelled out, even how the tables were to be set up and the centerpieces." Dover Downs is a draw for local groups looking for well-appointed meeting rooms, luxury and some casino excitement; the M&T Bank attendees, for example, hailed from both Delaware and Pennsylvania.

### Broadening Reach Beyond the Beach

Harrah's Atlantic City is an example of an East Coast gaming property that

aims for major meetings business on a national scale. That became especially evident in 2015 with the debut of the Harrah's Atlantic City Waterfront Conference Center, a 100,000-sf meeting space expansion comprised of two 50,000-sf ballrooms that can be configured 200 different ways.

Hosted by both Caesars Entertainment and Meet AC, the MPI 2016 World Education Congress delegates were able to experience that versatility, as well as the multitude of amenities at the 2,590-room Harrah's Atlantic City. From the 25,000-sf pool at the center of a 90-foot glass dome, to the award-winning Elizabeth Arden Red Door spa, to the Waterfront Shops, to a casino with more than 3,800 slot machines, Harrah's is a classic example of a casino hotel that is more aptly described as a "destination resort."

Another example is Tropicana Atlantic City, which is opening The Chelsea Tower at Tropicana Atlantic City this month. In July, Tropicana Entertainment Inc. acquired The Chelsea Hotel, located directly across Morris Avenue from Tropicana Atlantic City, and will integrate the 20-story oceanfront hotel into the Tropicana's existing operations. Featuring approximately 330 hotel rooms, The Chelsea Tower adds to the Tropicana's 2,078 rooms. Groups have 122,000 sf of meeting space at their disposal, as well as a slew of retail, dining, entertainment, and spa experiences at The Quarter. New at the hotel this summer is Escape AC, a murder-mystery room that is suitable for corporate teambuilding.

Resorts Casino Hotel, a Mohegan Sun Property is also adding to its recreational amenities with 22 new slot machines. It's really just the icing on the cake after major upgrades at this property. Since 2012, Resorts has completed more than \$100 million in renovations, including the 480 guest rooms in its Ocean Tower last year. In August 2015, Resorts debuted its \$4.7 million Convention Center, adding 12,000 sf of meeting space and bringing the total meeting space to 64,000 sf.

Planners tend to appreciate a se-



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**Mack Stallings, CPCU**  
Vice President, Operations  
MS Farm Bureau Casualty Insurance Co.  
Jackson, MS

Connecticut-based Infinex Financial Group's National Sales Conference is just one example. "We're planning our fourth consecutive event at Mohegan Sun. Through every stage of the event process, the Mohegan Sun staff is consistently professional, friendly, knowledgeable and resourceful in helping us deliver our conference," notes Christine M. Strickland, vice president, training and development. The three-day conference brings in approximately 400 attendees, and like most events, it sometimes experiences last-minute changes, Strickland says. "The Mohegan Sun convention services team and



questered collection of meeting rooms at properties in tourist hubs such as Atlantic City, and Bally's Atlantic City delivers with 80,000 sf of meeting space across 28 rooms — all on one floor. The 1,760-room hotel also offers an intriguing event venue in the 450-seat Legends in Concert Theater, available to groups. During their free time, participants can avail themselves of The Pier Shops at Caesars and The Walk, both in proximity.

#### Mississippi Gulf Go-To

Beau Rivage in Biloxi, Mississippi,

ences are a combination of business and personal time, so the various things they've got on the personal side have been attractive."

When it's time for business, the Beau Rivage offers the necessary seclusion in its meetings area. "The meeting rooms are on a floor by themselves, and you have a large atrium outside of the meeting rooms. So you don't have any foot traffic or interruptions from any non-attendees of the meeting," Stallings says. The resort accommodates the company's meetings, which range from 50 to 300 attendees, with 50,000 sf of

sion of the French Lick Springs Hotel's Meeting and Event Center opened that brought the total meeting space to more than 165,000 sf.

Kevin Wallace, CIC CPCU AU, senior marketing representative with United Fire Group, part of Cedar Rapids, Iowa-based United Fire & Casualty Company, has partnered with the French Lick Springs Hotel for several agents' advisory meetings with prior employers. He observes that when the new meeting rooms were added, "French Lick did it right. The meeting rooms are all secluded from high-traffic areas, yet very easy to get to. They are filled with the state-of-the-art equipment, and the staff knows how to work with all presenters to get any issues worked out."

Among the amenities, Wallace highlights the swimming pool area, which "is very unique with its indoor/outside facility. It is particularly a nice place for a spouse to hang out while meetings are going on and a great place to relax as a couple afterwards." He also lauds the golf courses: With the Pete Dye Course, Donald Ross Course, Valley Links Course and Sultan's Run, it's as much a golf resort as a gaming resort. "The terrain around the area makes the game a challenge with a fantastic scenery that makes you feel as if the real world is a million miles away from you," Wallace describes.

Comprising both the 443-room French Lick Springs Hotel and 243-room West Baden Springs Hotel, French Lick Resort is certainly an oasis for meetings in the Midwest.

#### Ever-Evolving Vegas

Steve Wynn currently is working with developers to create an "escape" atmosphere in Las Vegas with the Paradise Park project. The \$1.5 billion first phase is scheduled to break ground by early 2018, and will ultimately feature a lagoon for water sports, white-sand beaches, a meetings facility and new lodging space. Paradise Park, along with new luxury retail at Wynn Plaza opening in early 2018, will complement and further diversify Wynn Las Vegas and Encore Las Vegas. The resorts of-

fer a combined 4,750 guest rooms and 290,000 sf of function space.

Also expanding its retail offerings is the Hard Rock Hotel & Casino Las Vegas, which recently partnered with the largest travel retailer in North America, Hudson Group, to introduce six new shops totaling 14,500 sf. Goods include high-end watches, timepieces and jewelry, travel essentials, electronics, wine, spirits and apparel. On the meetings front, the hotel added nearly 18,000 sf of function space last December, bringing the total function space to nearly 110,000 sf. The 1,506-room property's high-tech package for meetings is exceptional, including Wi-Fi, CAT5 cabling and a program to create customizable AV for special events.

The newest meetings facility at the 390-room M Resort Spa Casino Las Vegas is the 25,000-sf M Pavilion, an open, pillarless space accommodating up to 2,300 guests. Overall, the M Resort offers more than 92,000 sf of function space, including a 17,400-sf ballroom



M Resort Spa Casino's main pool deck is an inviting space for networking.

and the Villaggio Del Sole venue, which includes a built-in stage with an event capacity of 6,000. That's complemented by a wealth of "R&R" venues, such as two over-5,000-sf infinity-edge pools and a 23,000-sf spa.

Caesars Entertainment has not only invested in its meetings product in At-

lantic City with Harrah's Waterfront Conference Center — in Las Vegas, the company will be offering groups an updated hospitality experience at The Strip's most storied property, the Flamingo Las Vegas. The hotel just announced the completion of a \$6.5 million meeting space renovation, which began in April 2017.



Encore Las Vegas' 60,000 sf of meeting space includes the Puccini Boardroom.

rivals many of the resorts in Atlantic City and Las Vegas in terms of free-time amenities. Here, attendees can partake of so much beyond the 85,000-sf casino, including top-tier entertainment at its 1,550-seat theater, upscale retailers, the nearby Fallen Oak golf course, a spa and tropical pool. A cruise out on the Gulf is yet another option.

The 1,740-room Beau Rivage is "located in an area that's away from everything else so you get the quaintness and not a lot of disruption," describes Mack Stallings, CPCU, vice president, operations with MS Farm Bureau Casualty Insurance Company. "Our confer-

function space, including the 17,000-sf Magnolia Ballroom. Stallings adds that "We have always received numerous compliments from our attendees as to the quality of the food. That's not always easy when serving a large number of people at the same time."

#### Midwest Gaming & Golf Oasis

Both the Beau Rivage and French Lick Resort in Indiana reopened in 2006 after extensive renovations. The latter, a historic property dating from 1901, became a gaming resort with the debut of the French Lick Casino in 2006. In January 2015, a \$20 million, 58,000-sf expan-



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*“French Lick did it right. The meeting rooms are all secluded from high-traffic areas, yet very easy to get to. They are filled with state-of-the-art equipment, and the staff knows how to work with all presenters to get any issues worked out.”*

Kevin Wallace, CIC, CPCU, AU  
Senior Marketing Representative  
United Fire Group  
Indianapolis, IN



A \$90 million renovation of 1,270 guest rooms begins this month, with completion scheduled for the second quarter of 2018. Caesars describes the new look as “unique, contemporary and retro-chic designs with accents that celebrate Flamingo’s rich history.” The 70-year-old hotel offers more than 3,500 guest rooms and a 73,000-sf Corporate Convention Center and Executive Conference Center.

Last year, Caesars Entertainment upgraded more than 4,800 rooms at four of its Las Vegas resorts: Caesars Palace, Planet Hollywood Resort & Casino, Paris Las Vegas and Harrah’s Las Vegas.

#### Renovations in Reno

In nearby Reno, Nevada, Eldorado Resorts Inc. also is making a sizable investment in its properties. Eldorado Reno, Silver Legacy and Circus Circus Reno, three connected properties that span eight city blocks in the downtown, are receiving \$50 million in enhancements. In addition to the renovation of more than 4,100 guest rooms, each of the three resorts will introduce new restaurants, nightlife venues and a new full-service spa.

Also making news in Reno is the Grand Sierra Resort and Casino, which installed the Grand Stadium earlier this year. The video gaming experience includes baccarat, blackjack, craps and roulette with six 65-inch monitors and

30 seats. The 1,900-room property offers more than 200,000 sf of meeting space.

A similarly sized gaming resort in the city is the 1,635-room Peppermill Reno, with 106,000 sf of meeting space that includes a 62,000-sf convention center, 12,000-sf Naples Ballroom, 10,000-sf Capri Ballroom and a 4,000-sf Executive Boardroom ideal for smaller insurance and financial groups.

#### More Options Out West

While Nevada certainly is home to the “capital” of the casino industry in the West, planners also can find notable gaming resorts in Arizona, New Mexico and even Washington.

In Scottsdale, Arizona, the 496-room Talking Stick Resort offers more than 100,000 sf of flexible meeting space, including a 25,000-sf Grand Ballroom and a Conference Center with up to 12 meeting rooms. The resort is surrounded by recreational venues, such as the 36-hole

From January 2016 through this spring, Tulalip Resort Casino, in Tulalip, Washington, completed a \$15 million renovation that included a redesign of 360 guest rooms to pay homage to the rich history and culture of the Tulalip Tribes. The resort offers 30,000 sf of meeting space, including a 15,000-sf ballroom.

#### Gaming in Paradise

For a Caribbean gaming experience, few resorts can match Atlantis, Paradise Island, home to the world’s largest open-air marine habitat. The resort completed a \$1 billion expansion in 2007, adding The Cove Atlantis, a luxurious 600-room resort within the resort; Dolphin Cay, a 14-acre dolphin habitat and education center; the 63-acre Aquaventure; and the 30,000-sf Mandara Spa. And similar to the many gaming resorts in the States that have significantly invested in their meetings product, Atlantis added approximately 100,000 sf of new function space. The Conference Center alone fea-



*A toes-in-the-sand event setup at Atlantis, Paradise Island in The Bahamas.*

Credit: Atlantis, Paradise Island

Talking Stick Golf Club, OdySea Aquarium and Topgolf at Riverwalk.

In Mescalero, New Mexico, the Inn of the Mountain Gods is now, like Talking Stick, a AAA Four Diamond property — the only property in southern New Mexico to earn the designation. The Inn of the Mountain Gods offers groups 40,000 sf of meeting space and an updated lodging experience, having completed a \$2.4 million renovation of its 273 guest rooms in June 2015.

tures the 50,000-sf Imperial Ballroom, 30 breakout rooms and three boardrooms, and is perfect for insurance and financial groups intent on doing business while in paradise.

While casinos and robust meeting facilities are common denominators at all of these resorts, they each offer a unique character rooted in environments as diverse as the Mississippi Gulf Coast, the Las Vegas Strip, the Sonoran Desert and the Caribbean islands.

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*This view from the JW Marriott Marco Island Beach Resort & Spa displays some of the reasons Florida is popular with meeting and event planners.*

Credit: Jeff Herron

# Florida's Diverse Destinations Deliver a Different Experience Every Time

By John Buchanan

**Y**ear after year, Florida ranks as one of the top statewide meetings destinations in the country. And there is one simple reason for its unparalleled popularity.

"Florida always draws," says Jamie Pepper, senior vice president of meetings and coordination at Opal Financial Group in New York City. She has been using Florida destinations regularly since 2010 and already has hosted four third-party, voluntary-attendance meetings this year in Naples, Boca Raton, Tampa and Miami. "It draws for us because at the time of year we do these meetings, people want to be in warm destinations. And because of that, over the last couple of years, when we've

done meetings in Palm Beach and Miami, we've drawn more attendees and needed more hotel room nights than we contracted for. That means that they exceed our expectations and are very successful. So that makes Florida a destination we like to return to."

Joe Fijol, DMCP, the Fort Lauderdale-based partner of statewide destination management company 360 Destination Group Florida, notes that another key selling point of the Sunshine State is its extraordinary diversity in terms of local destinations. "It's like a continent unto itself, with six or seven distinct countries located within it," he says. "They're each a unique destination with unique benefits and value for

meetings. That means a company can come multiple times over the years and have entirely different experiences. For example, if you use Orlando one year and Miami the next, you're enjoying two completely different kinds of major destinations. And the same is true of Amelia Island versus Naples or Fort Lauderdale versus Tampa. But they're all in Florida."

Another important feature that makes Florida perennially popular with meeting planners is that it's so easy to access, says Paget Kirkland, owner and president of independent meeting planning and destination management company Kirkland Events and Destination Services in Lake Worth, Florida. "We

have three major airports, in Miami, Fort Lauderdale and Orlando that can get people to Florida very efficiently from all over the U.S. and across the world."

Fijol agrees that the ease and efficiency of access the state's airports create play major roles in Florida's prominence as a destination. "Our air-lift dominates a lot of decision-making in the meeting industry today," he says.

## Value Proposition and Range of Options

Yet another reason for Florida's historical dominance as a statewide destination has been its extraordinary range of options and price points for hotel rooms, even during the high-demand winter season.

"One of the reasons for the excellent value proposition in Florida is the fact that you have so many hotels and resorts across the state," Fijol says. "And many of them choose different times of the year to get very aggressive about their rates. For example, one of the best times to get a great deal in Florida is during the summer months. And if you go then, you get the pick of the litter when it comes to restaurants or offsite venues or activities because demand is low."

Fijol also points out that there is often a big difference in room rates be-

tween two different destinations during the same dates. "For example," he says, "even though both offer the beach and great weather, there's often a significant difference between the costs of Miami and Orlando, or Miami and Fort Lauderdale, or Naples and Amelia Island."

As a planner who is conscious of budgets, as all planners must be, Pepper notes that "Florida is not cheap, especially if you're using destinations like Miami or Boca Raton. But you get what you pay for. And depending on what other destination in the state you're looking at, there is something for every budget."

Fijol also stresses that the state has a destination and hotel for virtually any meeting budget. "And the quality of our infrastructure," he says, "means that the state offers exceptional value across a wide range of budgets and price points."

## Palm Beach — the Gold Standard of Destinations

Although red-hot major destinations Orlando and Miami generate much of the meeting industry press coverage, time-honored Palm Beach, north of Fort Lauderdale, is the gold standard of Florida destinations, says Kirkland. Of the 300 Florida meeting and incentive programs she planned last year or for which she served as

DMC, 200 were held in greater Palm Beach. And 70 were housed at her go-to hotel, Eau Palm Beach Resort & Spa, the former Ritz-Carlton now operated by private owners.

"Palm Beach is a sophisticated and exclusive destination," Kirkland says. "And Eau Palm Beach Resort & Spa is now the go-to property. It's the place in Palm Beach to host a meeting."

One of the reasons for the hotel's burgeoning popularity is its private ownership. "The good thing about that is that you don't have a corporate hierarchy and all the red tape that comes with that to deal with," she says. "That means as a planner, you have a lot of freedom to create and execute a vision for the event, without anyone saying, 'Oh, we have a policy that prevents you from doing that.' At the Eau, the staff takes a lot of pride in what they do, and they really make the effort to make sure you can do everything you envision for the meeting. They do whatever it takes to make it happen. The owners, who bought the hotel about three years ago, are 'yes' people. And because of that, the property has gotten a lot of attention and notoriety lately."

She cites a particular example of the service attitude that sets Eau Palm Beach part from major brand corporate hotels. "The resort has a world-renowned spa she says. "And in the spa, there's a wonderful area that is perfect for a private dinner or other event for board-level or other VIP attendees, like senior management. So I had a client who had seen a Moroccan-themed party that we did, and she had loved it. She said, 'I want to do that kind of event, but I want to do it in the spa.' This was for a group of 80 people, which meant it would be a bit of a tight fit.

"When the client came in to see the space, we realized that there was a small water area, like a relaxation pool, that took up space we needed. So the client asked that they just drain the pool and make that space usable. At a major brand corporate hotel, they would have said, 'Oh, I don't know if we can do that. We'll have to check with corporate and get approval.' So maybe it would have



Credit: Eau Palm Beach Resort & Spa

*Since changing to private ownership, Eau Palm Beach Resort & Spa has become a go-to property for some meeting planners who say it offers flexibility in planning unique events.*



***"Miami is now a meeting destination with global appeal. ...The thing about Miami I find most exciting is the creative energy the city has and the many ways you can incorporate that into a corporate meeting or incentive program."***

Sarah Sebastian, Owner and Creative Director  
Rose Gold Collective, Miami, FL



happened and maybe it wouldn't have. At the Eau, they just said, 'Let's call engineering and make sure we can make it work.' And engineering said 'No problem,' so we immediately got permission to do it. At a corporate property, they would have probably not even tried to make it happen. They'd just have tried to talk us into doing the event in a ballroom."

Kirkland also has high praise for room product at Eau Palm Beach. "All of the sleeping rooms were recently re-designed by acclaimed designer Jonathan Adler," she says. "And they call it 'Santorini meets Palm Beach.' And that's a very good description of it. The color schemes are the bright, beautiful yellows and blues you'd expect from that description. The rooms are just gorgeous. They represent something new and fresh. It's amazing room product. And when you walk in the door, you see the ocean. It's like you've walked into someone's waterfront Palm Beach mansion, where they've gone to Europe and collected all of these interesting decorations, like vases or a shell."

Eau Palm Beach also delivers exceptional food and beverage services, Kirkland says. "And Breeze, one of their outdoor restaurants, has recently been renovated. It's right on the ocean, and it serves very creative 'Floribbean' cuisine that is based on the various cultures that represent South Florida, like the Caribbean. That means there's a lot of fresh seafood. And their F&B staff can do anything you can imagine. For example, we did a surf-and-turf dinner on a patio overlooking the beach, and it was amazing event."

In addition to its exclusive mansions, Palm Beach also offers some of the most unique and impressive offsite venues in the country. The historic Henry F. Flagler Museum and the Brazilian Court Palm Beach can host elegant receptions or dinner meetings.

#### Other Exclusive Enclaves

This year, Pepper has used Naples, located in Southwest Florida on the Gulf of Mexico, and Boca Raton, located north of Fort Lauderdale and south of Palm Beach, for highly successful meetings.

The two-night Naples meeting, for 100 attendees, was hosted at Naples Grande Beach Resort. "It's a beautiful, five-star hotel," Pepper says. "So you know you're going to get amazing service there." Pepper's attendees also ap-

land, New York.

"We got rained out this year, but the meeting we did in Boca Raton last year corresponded with the polo season," Pepper says. "We always try to offer an interesting and unique activity as a draw for attendees, and the opportunity to do a polo-related event gave us that. The event we did last year, at the International Polo Club in Wellington, was really great. People loved it."

Why polo? "Our CEO had been talking about polo for years, even though he'd never actually played it," Pepper says. "And from a meeting perspective, it's just something different to do that is very much associated with the Palm Beach lifestyle. Before they got there, 99 percent of our attendees probably had very little idea of what polo is. So we gave out 'Polo 101' instructions

***"You can come (to Florida) multiple times over the years and have entirely different experiences. For example, if you use Orlando one year and Miami the next, you're enjoying two completely different kinds of major destinations."***

Joe Fijol, CEO and Managing Partner  
360 Destination Group Florida, Fort Lauderdale, FL



preciated the exclusivity and laidback elegance of Naples.

Fijol also points out the area now boasts a new five-star hotel, the JW Marriott Marco Island Beach Resort, as well as a pair of time-tested and popular Ritz-Carlton hotels in Naples.

"And the Naples area has what are arguably the best beaches in the state," Fijol says. It offers an exceptional level

and information so they could understand who was playing and what was going on. And people loved it. It was a great networking opportunity. And the weather was absolutely beautiful."

#### Orlando — No. 1 for Meetings

Despite the popularity of classic destinations such as tony Palm Beach, and trendy Miami, Orlando rules the

of sophistication as a result of its stature as the No. 1 retirement spot for former Fortune 500 CEOs.

Pepper's Boca Raton meeting, held in late April for 140 attendees, was hosted at the Boca Raton Resort & Club, a Waldorf Astoria Resort in Naples.

The destination also lent itself to an activity unique to tony destinations such as Palm Beach and the Hamptons on Long Is-



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roost as the most popular meeting destination in Florida. In fact, Cvent has cited it, more than once in recent years, as the No. 1 meeting destination in the entire U.S.

Traditionally known for large meetings and major conventions, the city is now gaining new popularity among incentive planners because of the opening of new luxury properties such as The Ritz-Carlton Orlando, Grande Lakes, the Waldorf Astoria Orlando, and more recently Four Seasons Resort at Walt Disney World Orlando, opened in 2014, Fijol says.

"The addition of those five-star hotels means that more insurance and financial services companies are now looking at Orlando as the destination for high-end incentive programs," he says. "And like Miami, Orlando is a destination that continues to evolve and become more exciting."

The city's meeting infrastructure also continues to evolve, with the spectacular I-Drive 360 complex along International Drive, the new Mango's dining and entertainment venue, and the expanded and sensational Disney Springs dining, shopping and entertainment complex formerly known as Downtown Disney.

Universal Orlando Resort also has

they think they know Orlando and that it's not right for them. But there is so much going on there that is new and exciting that it's time for them to take a fresh look. It's just a great destination for meetings and incentive programs."

#### Miami — Sun and Sizzle

Over the last couple of years, Miami has become one of the hottest meeting destinations in the country. "It is the destination in Florida now," Fijol says. "It's new, it's different, it's exciting, and it's culturally diverse. Everybody wants to go to Miami, because it has so much to offer, whether that's South Beach or the restaurant scene, or exciting new neighborhoods like the Wynwood art and dining district, the Miami Design District north of downtown, the Adrienne Arsht Center for the Performing

tion with global appeal," Sebastian says. "It has grown tremendously over the last couple of years, with a long list of new hotels opening. And the diversity of its neighborhoods and the constant emergence of cool new neighborhoods like Edgewater means that there are always unique new restaurants and activities. The thing about Miami I find most exciting is the creative energy the city has and the many ways you can incorporate that into a corporate meeting or incentive program. For example, there are many very distinctive kinds of local talent, foods and activities that can be used to make a meeting very distinctive and very 'Miami.'"

Among the most acclaimed and celebrated new hotels is the Forbes Five Star Faena Miami Beach Hotel, created by Argentinean hotelier and developer Alan Faena, who also has developed the Faena Arts District that surrounds the hotel. The hotel epitomizes the glamour of Old Hollywood. It was designed by "The Great Gatsby" director Baz Luhrmann and his costume designer wife, but also incorporates modern art and world-class sophistication and luxury. "It represents glamour at

its finest," Sebastian says.

Both Sebastian and Fijol also single out for praise the new Miami Beach Edition. It is the flagship outpost of a fast-growing new global "lifestyle" hotel brand created by legendary boutique hotelier Ian Schrager in partnership with Marriott. It features two restaurants from acclaimed chef Jean-Georges Vongerichten. **I&FMM**



**"We have three major airports, in Miami, Fort Lauderdale and Orlando that can get people to Florida very efficiently from all over the U.S. and across the world."**

Paget Kirkland, Kirkland Events and Destination Services, Lake Worth, FL

**"We always try to offer an interesting and unique activity as a draw for attendees, and the opportunity to do a polo-related event gave us that. The event we did last year, at the International Polo Club in Wellington, was really great. People loved it."**

Jamie Pepper, S.V.P. Meetings & Coordination  
Opal Financial Group, New York, NY



debuted a pair of new properties, the Loews Cabana Bay Beach Resort and Loews Sapphire Falls Resort, as well as a new water park, Volcano Bay.

Noting that some planners still resist serious consideration of Orlando because of its stereotypical association with Mickey Mouse and family vacationers, Fijol says, "There are planners who do not look at Orlando because

Arts or the new Perez Art Museum. It's just an incredible destination now."

Sarah Sebastian, owner and creative director of Miami-based statewide destination management company Rose Gold Collective, agrees that Miami is now the most talked about destination in Florida. It's home to 90 percent of Rose Gold Collective's events.

"Miami is now a meeting destina-



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STEFFENS

**Paul Steffens** was promoted to associate director of group sales at Eau Palm Beach Resort & Spa in Palm Beach, Florida. He was sales manager at the resort.

**Jay Marsella** was named director of sales and marketing for Sawgrass Marriott Golf Resort & Spa in Ponte Vedra Beach, Florida. Previously, he served as the opening director of sales and marketing at the Houston Marriott Marquis.

Chateau on the Lake Resort, Spa & Convention Center in Branson, Missouri, has named **Gayla Welsh** as corporate sales manager and **Jessica Wrenfrow** as event sales manager. Welsh was director of group sales for The Lodge at Old



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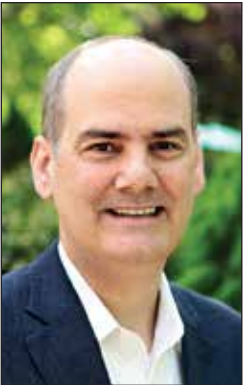
Kinderhook in Camdenton, Missouri. Wrenfrow was hospitality services instructor at Arkansas State University-Newport in Jonesboro, Arkansas.

The Walt Disney World Swan and Dolphin Resort in Lake Buena Vista, Florida, has named **Beth Campion** as group account director for the Northeast and mid-Atlantic regions. She was director of national accounts at The Diplomat Beach Resort in Hollywood, Florida.

The Westin La Paloma Resort in Tucson, Arizona, has named **Cerelle Gooding** as director of sales and marketing. She was director of sales at The Four Seasons Hualalai on the Big Island of Hawaii.



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SURETTE

The Westin Cape Coral Resort at Marina Village in Cape Coral, Florida, has appointed **Kristen Goodnow** as group sales manager. She was senior sales manager at Sanibel Harbour Marriott Resort & Spa in Fort Myers, Florida.

**Daniel Surette** was named vice president of sales for Omni Hotels & Resorts. He was the vice president of North America sales and field marketing for Starwood Hotels & Resorts Worldwide.

**Kevin Rosa** was named director of sales and marketing for Villas of Grand Cypress in Orlando, Florida. He was director of sales and marketing for Loews Don Cesar Hotel, St. Petersburg, Florida. **I&FMM**



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