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# INSURANCE & FINANCIAL MEETINGS MANAGEMENT

THE EXECUTIVE SOURCE FOR PLANNING MEETINGS & INCENTIVES



## Put Your Game Face On

Gaming Resorts Are  
a Win-Win for Planners

Page 14

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## Do's and Don'ts of Event Planning

Pay Attention to Key Details to Ensure Success

Page 44



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# INSURANCE & FINANCIAL MEETINGS MANAGEMENT

THE EXECUTIVE SOURCE FOR PLANNING MEETINGS & INCENTIVES

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As more diverse generations enter the workforce, meeting planners must focus on infusing inclusion in every area. **PAGE 22**



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Think outside of the box to plan an event theme that inspires attendees and provokes a memorable experience. **PAGE 34**



Remembering key details and providing quality service results in long-lasting relationships between planners and suppliers. **PAGE 40**



# Publisher's Message

## Get in the Game

Gaming resorts are all over the world, but now they are becoming known for more than just their casinos. Expansive meeting spaces and other amenities are luring event planners to the properties, as well. Our cover story, "Put Your Game Face On" (Page 14), explains how the onsite entertainment factor is a bonus for group meetings. Destinations such as Atlantic City, Las Vegas and Biloxi,



Mississippi, are standouts. "The beautiful seasonal weather, plus our world-class dining and entertainment, all have major appeal to meeting planners," Jim Wood, president and CEO for Meet AC, says. Janice Jefferson, sales director for Visit Mississippi Gulf Coast, agrees. "This region, which comprises 12 unique coastal cities, provides planners with a perfect year-round destination that offers a plethora of unique experiences for groups of all sizes."

Diversification and inclusivity also play a huge role in meeting events. In "All For One and One For All" (Page 22), planners describe how they meet the needs of many different dynamics.

Recognizing attendees' needs can make for a more comprehensive program, they say. "Having diverse and inclusive meetings leads to better audience engagement, and, ultimately, to better ideas and results," says Darci Motta, CMP and senior conference manager at CSAA Insurance Group. "The more voices that can be heard and represented in the room, the better. Conversations become richer, new ideas are surfaced, and we get better insights into our customers, too."

For those planning smaller meetings, the groups may have fewer attendees, but the event can still be big. Turn to Page 28 and read about "The Little Things" that can make a huge difference. Brett Barrowman, vice president, conferences, meetings and travel with American Fidelity, brought his group to the Park Hyatt Aviara Resort, Golf Club & Spa in Carlsbad, California. Barrowman notes the resort has plenty of space, but he especially likes the availability of unique outdoor venues. "Overall," he says, "the meeting space is very workable for all sizes of groups."

Finally, learn all about the "Do's and Don'ts of Event Planning" on Page 44. Ensure a successful meeting by paying close attention to every detail — big or small. Planners suggest creating a checklist to avoid any mishaps. "Your event is really only as successful as all of the detailed planning that's put into it from beginning to end," says Jennifer Masek, administrative support specialist with Church Mutual Insurance Company. Words to the wise.

Harvey Grotsky

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## Hawks Cay Resort Reopens After \$50 Million Renovation

Duck Key, FL — Hawks Cay Resort, which has been closed for renovation since Hurricane Irma last year, reopened in August, unveiling a refreshed resort experience.

“We’re bringing back what guests loved about Hawks Cay with a fresh design in the main hotel and new experiences that will take the resort into a new era,” says Sheldon Suga, Hawks Cay Resort vice president, managing director.

The \$50 million renovation focused on the main hotel with a brand-new design of the lobby, 177 guest rooms and public areas. The main hotel’s new look celebrates its island sensibility with a coastal-inspired décor that is infused with a color palette of tropical hues and incorporates a range of natural seaside elements.

The introduction of two restaurant concepts will complement the resort’s new spirit, providing both fine-dining and fast-casual options. Sixty-one Prime, a contemporary addition to the culinary offerings, will feature a menu of prime steaks and signature seafood dishes, as well as a selection of seasonal specials. Hawks Cay Marketplace is a casual eatery serving a fresh menu of salads, sandwiches and pizzas.

Oasis Cay is a new “adults-only” area. An expansion of the Tranquility Pool, the larger space now includes a bar and grill that features its own menu of island-inspired bites and specialty drinks.

“We’ve focused on the physical changes of the main resort area, but we’ve also taken this opportunity to spend a lot of creative moments on the experiential programming for guests as well,” says Suga. “Our goal is to not only entertain guests, but create those special moments that often turn into the best memories.” [www.hawkscay.com](http://www.hawkscay.com)

## Canyon Ranch Names Jack Breisacher as Managing Director

Tucson, AZ — Canyon Ranch, the integrative wellness industry leader for nearly 40 years, has appointed



BREISACHER

Jack Breisacher as managing director for Canyon Ranch in Tucson, Arizona. Breisacher joins Canyon Ranch with more than 40 years of experience in the hospitality industry,

including the launch of the brand’s first international expansion in Kaplankaya, Turkey. He will be responsible for overseeing the resorts’ leadership, management, sales, marketing and operations.

Breisacher has spent much of his career managing upscale hotels, including Marriott International, Loews Hotels & Resorts, Stouffer + Renaissance Hotels & Resorts and Swissotel Hotels & Resorts. [www.canyonranch.com](http://www.canyonranch.com)

## U.S. Dominates in Top 100 Most Innovative Cities

MELBOURNE, AUSTRALIA — The 11th annual Innovation Cities Index recently published the ranking of the world’s 500 most innovative cities, with Tokyo at No. 1 and a majority of the top 100 comprised of U.S. cities. San Francisco-San Jose came in at No. 3, behind London.

The next top U.S. cities were New York (4), Los Angeles (5) and previous double-winner Boston (7).

“This year, innovation is likely to come from large cities as usual, but we found on a population-adjusted basis, many small cities are punching above their weight. It’s the year of big cities with physical networks and small cities with digital networks, going global,” says Christopher Hire, director of commercial data provider 2thinknow, which publishes the annual ranking.

Major U.S. cities that improved dramatically in the ranking included Chicago (11), Dallas-Fort Worth (13), Seattle (15), Houston (17), Austin (29), Denver (31) and Philadelphia (32) due to favorable trends and improved economic development.

Similar to Los Angeles, a series of Bay Area satellite cities such as San Diego (23), Portland (41), Oakland (up 12 places to 43 off a stronger economy), Sacramento (up 21 places to 59) and Santa-Ana-Anaheim (up 37 places) reinforced their destination attractiveness to tech companies priced out of the San Francisco Bay area in the analysis.

North American cities were represented in the Top 100 with 37 cities in the United States, five in Canada and Mexico City (73) being the new winner in Latin America.

The Innovation Cities Index has been published annually since 2007 by 2thinknow. All results are published on [www.innovation-cities.com/indexes](http://www.innovation-cities.com/indexes).

## Omni Launches Planner Loyalty Program

DALLAS — Omni Hotels & Resorts has launched its Omni Select Planner program for meeting planners,



SURETTE

offering immediately redeemable rewards and benefits. Meeting and event planners can now earn free nights, tier status and local experiences with every booking.

“We looked at our existing loyalty program, and industry programs overall, and found we had a real opportunity to recognize and thank our clients in a different way,” says Dan Surette, senior vice president of sales and marketing for Omni Hotels & Resorts. “Beyond a strong loyalty program that gives back to our valued planners, we know that genuine hospitality and service matters. Our planners can truly book with confidence as we are in it together.”

Select Planner is the newest way to earn in Omni’s Select Guest loyalty program. Members can earn award and tier credits immediately upon signing a group or catering booking, allowing the planner to earn free nights faster and offering an accelerated path to elite-level status. In addition to free room nights redeemable at any Omni hotel or resort, benefits include locally inspired welcome amenities and experiences, flexible check-in and checkouts, shoe shines and pressings, complimentary water, Wi-Fi and more. Additionally, members can track their rewards and manage their preferences in one user-friendly Select Guest account.

Planners earn one award credit per \$1,000 and one tier credit per \$10,000 booked. Twenty award credits can be redeemed for a free night at any of Omni’s luxury resorts and hotels across North America.

[www.omnihotels.com/selectplanner](http://www.omnihotels.com/selectplanner)

## Cheeca Lodge & Spa Unveils Updated Meetings and Events Spaces

ISLAMORADA, FL — Cheeca Lodge & Spa has unveiled a \$25 million property-wide renovation, including extensive updates to the meetings and events spaces. The hotel features 4,600 square feet of indoor meeting space and myriad scenic outdoor venues for special events. The traditional meetings and events spaces include:

The Bougainvillea Ballroom, featuring subtle West Indies-inspired décor and approximately 2,100 square feet of space, can accommodate a large-scale meeting or event. The biggest meeting space on property, its adjoining open-air courtyard becomes an added space, ideal for breakout sessions or cocktail receptions.

The Hibiscus Suite, most often used for smaller board meetings, also adjoins to an open-air courtyard. The Sunrise Ballroom and Oceanfront Terrace, Cheeca’s newest and most scenic space, is located on the Club Level of the Main Lodge. Suitable for both daytime meetings and evening events, it offers stunning views of the resort on one side and the Atlantic Ocean on the other.

The Chart Room and adjoining Terrace and Sundeck are Cheeca’s most exclusive space, often used for receptions, after-dinner entertainment and teambuilding events. [www.cheeca.com](http://www.cheeca.com)

## Savannah Marriott Riverfront Completes \$20 Million Redesign

SAVANNAH, GA — Savannah Marriott Riverfront has completed its full renovation, including guest rooms, atrium, meeting and event space and more. Adjacent to River Street, Savannah Marriott Riverfront is conveniently located in downtown Savannah, overlooking the historic riverfront. Owned and operated by Columbia Sussex Corporation, the hotel boasts more than 387 revamped guest rooms and common spaces, the Atrium Great Room Restaurant and Bar with floor-to-ceiling windows and modern lounge space, creative meeting spaces, a sensible lower lobby and more.

“The ideas behind the redesign were very much based on the characteristics of Savannah and Southern charm, mixed with hospitality and lure, to create a new sense of arrival and a keen sense of the Southern culture,” says Jody McIntyre, director of sales and marketing.

Keeping in mind that this destination is famous for its blend of history, artistry and Southern charm, events held at the Savannah Marriott Riverfront will be in the center of it all. Twenty versatile rooms totaling 40,000 square feet are perfectly suited for meetings and events, whether it’s for a group of 10 or 1,600 participants. All meeting spaces are refreshed with new carpet, an infusion of art, modern neutral-colored furniture and lighting.

Elsewhere at the hotel, guests can pamper themselves at Magnolia Spa or work out in the fully equipped, 24-hour fitness center. They can also dine at Blue, A Savannah Bistro, which offers a breakfast buffet or continental options such as fruit, yogurts, oatmeal and more, or unwind in the Atrium Great Room Bar with a cocktail and dinner.

[www.marriott.com/hotels/travel/savrf-savannah-marriott-riverfront/](http://www.marriott.com/hotels/travel/savrf-savannah-marriott-riverfront/)



# Meeting Trends

By Ron Shah



## The CFO's Guide to Small Meetings How to Wrestle This Large and Growing Spend Category

**E**mployee mobility is exploding. According to the U.S. Labor Bureau, more than 60 percent of the workforce will be working remotely by 2020. Regardless of which side you fall on in the debate between the merits of working remotely vs. working in the office, the modern employee is untethered from their desk like never before.

Technology allows employees to be productive from anywhere and perhaps more productive when outside of the office. Skillful managers recognize this, encourage it and harness this mobility to the advantage of the company. With proper forecasting, companies are able to leverage this

and provide a forum for discussion on the road. Executives have embraced small offsite locations for strategic planning, board discussions, recruiting and key relationship-building activities. Suffice it to say, small meetings are now the fastest-growing category in corporate travel.

The key issues facing CFOs around all this activity is that this spend is usually invisible and unmanaged. This group spend all too often doesn't go through the meetings or travel department, but rather is booked directly by employees. Thus, there's limited ability to contain and optimize costs, measure ROI and create programmatic improvements. As this trend continues, here are a couple of key considerations for CFOs as they develop a better handle on managing and accounting for these expenses.

### Optimize Visibility

Meetings and events are important to organizations of all kinds, but they are quite complex. It's nearly impossible to create broad arching policies around this spend. For small meetings, it's even more difficult since there are very few tools to help companies manage this spend.

Since it is typically high-powered executives (and their administrators) that are planning, booking and utilizing these events, subjecting them to the friction of a mandate-base policy has proven to be ineffective at most companies. These sales and marketing "star employees" are successful because they know when to bend the rules. They want to pick their own venues, decide the style of the event and not be forced to fulfill someone else's vision.

The simple way to ensure strong visibility of this spend is to encourage self-service tools that provide all the optionality that employees are looking for (e.g., a marketplace-based approach), while also layering some service and supervision on top of this tool. The challenge is that your traditional TMC or MMC has no business model to generate fees on an event of less than 10 guest rooms, often causing the traditional service provider model to fall apart. For CFOs, getting visibility into the spend is about the company owning the sourcing channel. Software providers may suggest you can solve the problem with great registration tools, but this has not proven to work with small meetings. If the registration

tool is not linked to a sourcing experience that actually adds value to the employee, it will not be adopted.

But, there is hope. There are emerging tools that help enterprise employees source meetings their way, while still enforcing the oversight and compliance that CFOs and spend managers require.

### The Truth About Existing Tools

CFOs may ask their travel or meeting managers about using existing tools, such as Cvent, to manage the small meeting category. The reality is that these platforms aren't tailored to small events. There are a couple of reasons for this.

Existing event platforms have been built around the needs of the meetings department. They haven't been built for widespread adoption by all the employees across the company. There are distinctly different use cases, product orientations and features.

In addition to the logistical challenges around the distribution of these tools, the approach is a mismatch. Existing platforms use RFPs as their model for obtaining and exchanging detailed information, contracting and paying for events. Small events are just not as complex, often last minute and require unique inventory types. Employees don't want to fill out long forms to get basic information.

### Agency Shortcomings

When considering existing TMC or MMC agents for small meetings, there are also some fundamental challenges. Agents are often using the same RFP-based platform and therefore facing the same limited inventory, poor response and lack of content described above.

Another key challenge is the lack of an appropriate business model to motivate the agency to take on more of this growing spend category. Of course, the agency will help with some small meetings in the interest of client service, but as this continues to grow, the agency will not be able to sustain itself in this category since agencies often rely on commissions and typically lack a commission structure for events of less than 10 guests. This leads to service fees on top of the event, which are often in excess of \$1,000 per small event.

This is not only extremely cost prohibitive, it's also not aligned with value given the lack of tools available to support small meetings efficiently.

### What's the Future?

The primary goal of small meeting programs should be



adoption. The only way to solve for adoption in today's environment is to minimize employee pain around sourcing and booking the right spaces for their needs. The registration needs for small events are fairly limited and easily solved through standard lightweight existing tools.

When it comes to sourcing and booking, you need a platform that will empower your employees with rich content and venue options, but that will also help manage, oversee and automate the rules. Meetings and events are complex and your employees will need support, care and guard rails to guide them toward success. Doing this on a cost-effective and scaling basis is key.

The bottom line? The future of small meetings for the enterprise involves a hybrid model between full-service and self-service.

**I&FMM**

***Ron Shah** is the founder and CEO of Bizly, a next generation platform for booking and managing small meetings and events that allows users to easily and efficiently select venues and book events while abiding by their corporate policies. Bizly provides access to curated, detailed content for hotel, restaurant and hospitality event space, with a seamless booking process and incredible in-meeting experience. Prior to launching Bizly, Shah was a venture capital professional for 15 years.*

*"You need a platform that will empower your employees with rich content and venue options."*

mobility to their advantage — reducing real estate costs, optimizing workspace and exploring remote employee talent pools to push new boundaries for the company.

But there are also specific business costs that come along with employee mobility, such as increased transportation, lodging and productivity expenses. But the more difficult to manage costs are related to the impact that employee mobility has on team culture building, client engagement and strategic planning. It's difficult to recruit and reinforce team culture when you're managing a sharp divide between office employees and remote employees.

The solution that most companies have embraced is increasing the number of small meetings and events taking place outside of the office. Team managers, vice presidents and HR professionals organize small gatherings for culture building, recruiting and training events.

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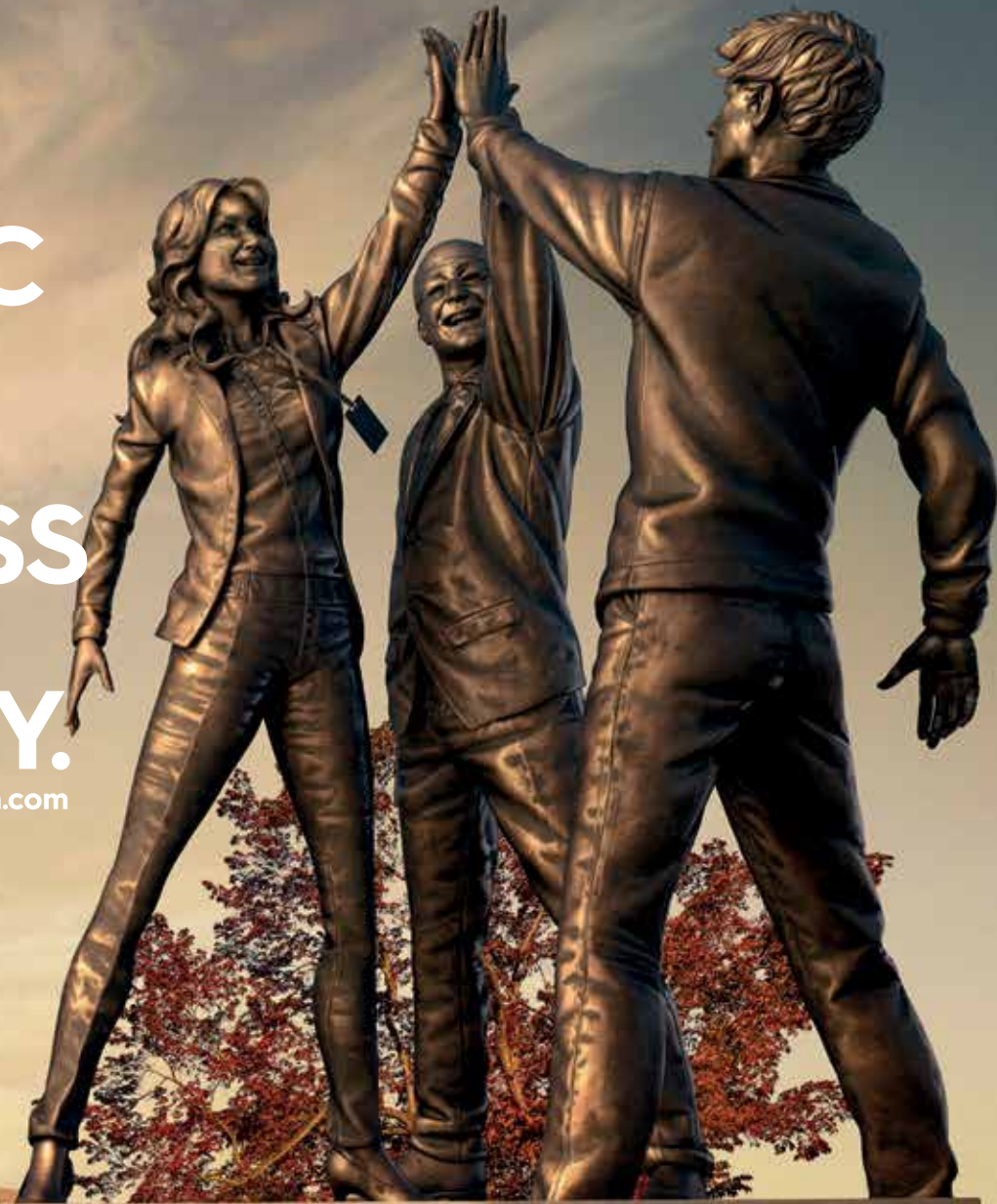


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By Mark Rowh

For a great meeting destination, it may be hard to beat a gaming resort. After all, many properties offer outstanding facilities, along with all the excitement that comes in a place where there's always something going on.

While each site provides its own unique features, casino resorts offer some common attributes that make them a good fit for successful meetings. Perhaps most distinctive is the availability of on-the-spot entertainment. During evenings or other times when they're not engaged in sessions, meeting participants can enjoy gaming, whether that means dabbling with a new experience or returning to a favorite activity.

Some resorts are also known for bringing in top-flight entertainment. While such factors are certainly secondary to the availability of the right meeting facilities and services, casino resorts

can be outstanding in those areas, too. And entertainment can be a plus both in boosting attendance and enhancing the experience of those who attend any given conference.

When it comes to gaming, one of the first locations that comes to mind is Atlantic City. Enjoying a long history as a

an attractive selection of casino properties with unique meeting space and amenities.

"The beautiful seasonal weather, plus our world-class dining and entertainment, all have major appeal to meeting planners," he says. "Atlantic City is now very bullish on the meetings market, and

*"While some of our attendees enjoy gaming, others do not. The (IP Casino Resort) has ample space and activities for everyone."*

**Jennifer Burroughs**, Regional Sales Secretary  
Shelter Insurance, Ridgeland, MS

popular destination, it offers a combined inventory of more than 17,000 rooms. Many of its casinos and hotels boast Atlantic Ocean water views, and the city's famous boardwalk, which covers five miles, is a top attraction.

Jim Wood, president and CEO for Meet AC, points out that the city has

we want your business."

Wood also cites the diversification of the destination and the flexibility that can be found, with multiple resources under one roof where people can meet, sleep, eat and network.

"Atlantic City can offer fantastic mid-week room rates and can certainly be

attractive to planners," he says, adding that as the city has modernized, attracting meetings is a major focus.

Wood points to recent developments with two properties as examples.

"The reinvestment and rebranding of both the Hard Rock Hotel & Casino Atlantic City and Ocean Resort Casino will benefit Atlantic City greatly both in terms from the 7,000 jobs that both properties have created, plus the significant eco-

*"This region, which comprises 12 unique coastal cities, provides planners with a perfect year-round destination that offers a plethora of unique experiences for groups of all sizes."*

**Janice Jefferson**, Sales Director  
Visit Mississippi Gulf Coast, Biloxi, MS

nomie impact the properties will have in our community as a whole," he says. "The opening of these two properties is further testament to solidifying Atlantic City's position as the No. 2 gaming market in America."

Hard Rock Hotel & Casino, which just opened in June, offers more than 2,000 rooms and more than 150,000 square feet of meeting and event space. It can readily accommodate large groups with facilities, including an arena that holds up to 7,000 people for general sessions or other events, and planners will like the variety of room choices for everything from breakouts to office functions.

Another outstanding property is Bally's Atlantic City, which offers 80,000 square feet of meeting space. The 28 meeting rooms are all situated on a single floor, with easy combination of space to adjust to group sizes and types of activities. Planners can choose from three ballrooms, including one overlooking the Atlantic City Boardwalk.

A hotel that hosts more than 600 meetings a year obviously has the facilities and staff to meet a variety of needs. That's the case with the Tropicana Atlantic City, which along with more than 2,000 guest rooms, has 122,000 square feet of space. Recent additions include an advanced gym facility, more guest rooms and the purchase of the former Chelsea Hotel, which is linked via a skyway bridge.

At the Borgata, which added enhancements totaling \$50 million two years ago, meeting needs are met by 70,000 square feet of function space. The hotel's 2,000 guest rooms all boast floor-to-ceiling windows for great views.

The sprawling Harrah's Atlantic City offers more than 2,500 rooms and suites in five towers. Meeting rooms accommodate groups from

guest rooms and suites in two hotel towers. More than 64,000 square feet of meeting space includes 24 meeting rooms, 14 with natural light and ocean views, four ballrooms and two theaters.

Also of interest to planners is the Atlantic City Convention Center. It provides more than 48,000 contiguous square feet of exhibit space, along with 45 meeting rooms featuring an additional 109,000 square feet of event space.

Atlantic City is just the start. Around the country, a variety of impressive properties offer both gaming opportunities and the space and services needed for successful meetings.

The Mississippi Gulf Coast is a prime example, according to Janice Jefferson, sales director for Visit Mississippi Gulf Coast in Biloxi.

"This region, which comprises 12 unique coastal cities, provides planners with a perfect year-round destination that offers a plethora of unique experiences for groups of all sizes," she says. She points to outdoor activities such as kayaking, boating, fishing and hiking, along with world-class gaming and other entertainment options to accompany the meeting experience.



*The indoor casino and outdoor activities make the Beau Rivage Resort & Casino in Biloxi, Mississippi, one of the top meeting hotels on the Gulf Coast.*







*Attendees try their luck at the slot machines after a day full of meetings.*

Credit: M Resort, Spa and Casino

the resort offering activities around the clock for those that enjoy late nights or early mornings.

"While some of our attendees enjoy gaming, others do not," Burroughs says. "The resort has ample space and activities for everyone."

She notes that her company holds conferences at different locations in its operating territory of Mississippi and Tennessee, but that Biloxi and the IP have been her favorites. She says the resort staff, as well as those

at the Biloxi Visitors Center and the Gulf Coast Visitors Center, have been helpful and welcoming.

"All our needs were met, and all questions satisfied," she says.

At Biloxi's Beau Rivage, event venues include a 17,000-square-foot ballroom with a capacity of 1,800, a 7,200-square-foot ballroom holding up to 750 people and another ballroom with 4,400 square feet of space. All three can be configured into smaller rooms of varying sizes.

For small- to mid-size groups, Hard

Rock Hotel & Casino Biloxi, with 479 guest rooms, offers a 13,000-square-foot facility with room for 800 guests, as well as smaller rooms decorated with rock 'n' roll memorabilia. Outdoor events can be held poolside.

No doubt the king of gaming destinations is Las Vegas, which provides some truly outstanding options. For the sheer range of choices, it's hard to imagine any location more attractive to planners. With more than 146,000 hotel rooms, the city attracted more than 6.6 million convention delegates in 2017, according to the Las Vegas Convention and Visitors Authority. More than 21,000 conventions are held annually.

Always a popular choice is Caesars Palace, which bills itself as the best-known casino resort in the world. Planners can choose from facilities totaling 300,000 square feet. Among them are two huge, pillarless ballrooms that can each accommodate up to 5,500 guests. They can also be reconfigured into as many as 25 separate breakout rooms.

After a recent expansion at the Tropicana, its new conference facility can be divided into as many as 38 breakout rooms. The 100,000 square feet of facilities include a ballroom that can accommodate 2,700 guests and a variety of breakout rooms and other spaces.



*Harrah's Atlantic City offers meeting rooms that accommodate groups from 25 to 500 people.*

Credit: Courtesy of Caesars Entertainment

Shelter Insurance has held two recent annual conferences at the 32-story IP Casino Resort Spa, which offers 1,000-plus guest rooms, an attractive spa and plenty of gaming. Meeting space includes a ballroom that holds up to 1,310 guests, depending on the configuration. A second ballroom accommodates 24 to 300 guests, and other meeting rooms range from 575 to 19,000 square feet.

"The results were excellent," according to Jennifer Burroughs, a regional sales secretary who plans Shelter meetings attended by the company's top performing agents, a group of about 100.

"We had a wonderful private event atop the hotel in Restaurant 32 the first year and a private poolside event the second year," she says. "The staff was incredibly accommodating working through a rain shower to ensure our event was a success." The group also held a dinner and awards banquet each year in one of the ballrooms, with the food and service rated as outstanding.

Burroughs says the Gulf Coast is an ideal meeting location.

"Our group is permitted free time during the day, and the coast has a wide variety of activities available to suit everyone's taste," she says. "Many attendees took advantage of the beach activities, while others took fishing charters or sightseeing cruises."

Variety is also a strong point, with

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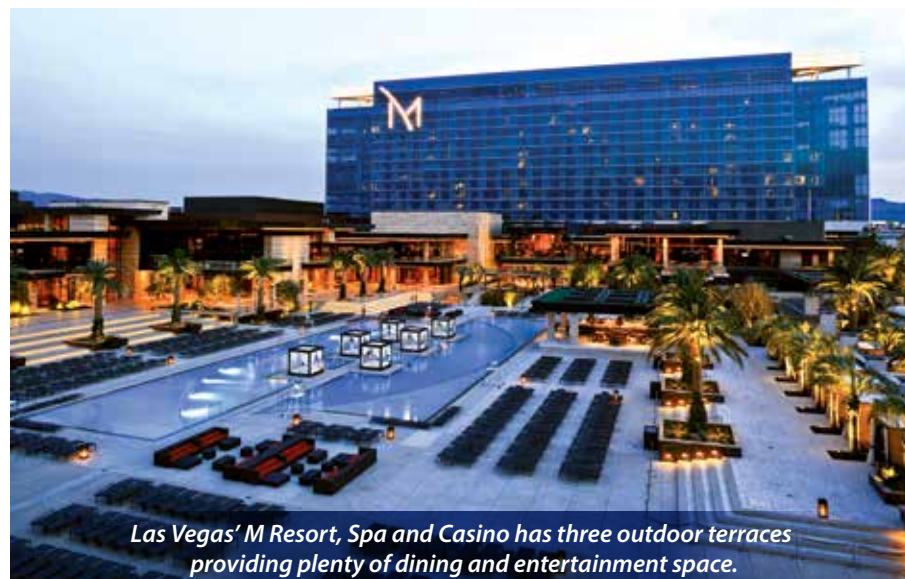
At Wynn Las Vegas, 200,000 square feet of customizable meeting space accommodates groups of all sizes. A 50,000-square-foot ballroom is divisible into nine sections, plus a wide range of other rooms offers a variety of configurations. Combined with its sister property, Encore, meeting options are plentiful, and attendees can enjoy top-flight Vegas entertainment.

Aria Resort and Casino, already a prime destination for conferences and events, expanded its property in February by opening an additional 200,000 square feet of flexible meeting space across four stories. All told, an impressive 500,000 square feet of meeting space is now available.

The Venetian boasts five huge expo halls ranging from 100,000 to 380,000 square feet. Other facilities include two large ballrooms, two junior ballrooms and several other meeting spaces of various configurations.

M Resort has more than 92,000 square feet of flexible space, including a pavilion and ballroom. The conference center features multiple meeting rooms that can be subdivided. Three outdoor terraces provide nearly 17,000 square feet of dining and entertainment space.

In Reno, top choices include Peppermill Resort Spa Casino, with 1,600-plus guest rooms. Meeting needs are



*Las Vegas' M Resort, Spa and Casino has three outdoor terraces providing plenty of dining and entertainment space.*

Credit: M Resort, Spa and Casino

addressed with 106,000 square feet of event space, including several ballrooms, penthouse suites and smaller meeting rooms.

The more than 200,000 square feet of meeting space in Reno's Grand Sierra Resort includes 45 rooms located in a separate wing of the resort, away from the lobby and casino area. The resort can accommodate groups from 10 to 4,000.

The Eldorado Resort Casino is ideal for smaller meetings. Its 12,000 square feet of meeting space includes a boardroom, one placed on the 25th floor with views of the Sierra Mountains.

Atlantis Reno's 50,000 square feet

of meeting space includes two 12,000-plus square feet ballrooms, substantial pre-function space, multiple breakout rooms and a new executive boardroom. The resort is also connected to the Reno-Sparks Convention Center with a glass-enclosed skybridge, providing an added 500,000 square feet of available event space.

And Nugget Casino Resort in Sparks, Nevada, has 110,000 square feet of meeting space, including an executive conference center. Facilities include two ballrooms, a trade show pavilion and 23 breakout rooms.

Planners interested in gaming resorts will find the nation's far southwest also offering a number of popular destinations. At Tucson's Casino Del Sol, operated by the Pascua Yaqui Tribe, a conference center features a 19,000-square-foot grand ballroom with room for 30 to 1,800 guests, along with banquet and reception halls for up to 2,000 guests. An 8,000-square-foot pre-function space encircles the area, and all told more than 100,000 square feet of indoor and outdoor meeting space is available.

Additions in progress at Casino Del Sol include a new 151-room hotel and RV park, along with a 9,600-square-foot expansion with added breakout meeting rooms to complement the existing convention facility.

Talking Stick Resort and Spa in Scottsdale has more than 100,000 square feet



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*One of the Southwest's most popular gaming resorts is Casino del Sol in Tucson, Arizona, with a conference center that holds up to 2,000 guests.*

Credit: Casino del Sol





Atlantis Paradise Island in The Bahamas is a well-known gaming resort with a huge meeting space for large groups.

Credit: Atlantis Paradise Island

of flexible meeting space, including a 25,000-square-foot ballroom that can be arranged in multiple sets. Its conference center offers 12 meeting rooms in flexible configurations. For speeches and large gatherings, a "showroom" accommodates 650 guests.

Another beautiful mountain location is offered by the Inn of the Mountain Gods in Mescalero, New Mexico. Sometimes referred to as an oasis in the sky, this resort casino is operated by the Mescalero Apache Tribe. Planners can take advantage of 40,000 square feet of meeting space. Fifteen individual meeting rooms, varying in square footage from 600 to 3,600, are configurable to accommodate groups of different sizes. The resort's convention center tops 29,000 square feet with more than 4,500 square feet of pre-function space.

In the northwestern corner of the country, Washington's Tulalip Resort Casino, operated by the Tulalip Tribes, has 370 guest rooms and 30,000 square feet of event space. Meeting facilities include a 15,000-square-foot ballroom, a 4,800-square-foot junior ballroom that's divisible into four equal-size meeting rooms and 6,000 square feet of pre-/post-function space. A 450-seat area with a stage is available for special presentations.

Also located in Washington, ilani offers a new 30,000-square-foot meeting

and entertainment center including a 22,400-square-foot ballroom that's divisible into six meeting rooms.

Back east, Connecticut's Mohegan Sun, which offers access to three distinct casinos, boasts 275,000 square feet of meeting spaces, including a new \$80 million expo and convention center. Among the resort's facilities are the 38,000-square-foot Uncas Ballroom with 23-foot ceilings, 14,000 square feet of pre-function space and a variety of individual meeting rooms.

At Foxwoods Resort Casino, also in Connecticut, an expansive 47,533-square-foot ballroom offering adaptable



**Jim Wood, President and CEO**  
Meet AC, Atlantic City, NJ

room divisions is complemented by a 15,000-square-foot ballroom with 10,000 square feet pre-function space and another covering 25,000 square feet that's divisible into five sections. Other meeting rooms are also available, and additional space can be accessed at the Mashantucket Pequot Museum, located next to the resort.

Brand new this summer is MGM Springfield Resort in Massachusetts, offering 42,500 square feet of meeting

space. These facilities will be leveraged by the large-scale convention capabilities of MassMutual Center, a multipurpose arena and convention center located in downtown Springfield.

In Maryland, MGM National Harbor, with its 234 guest rooms and 74 suites, specializes in smaller groups but also offers plenty of meeting space. Facilities include a 16,000-square-foot ballroom, three 1,800-square-foot meeting rooms and two boardrooms.

Farther south in Hollywood, Florida, the Seminole Hard Rock Hotel & Casino offers 120,000 square feet of meeting space. Planners can choose from 32 different room configurations, and there are several smaller rooms for breakouts or board meetings. An 8,000-square-foot event center seats 3,500 guests. Facilities include a 7,000-square-foot, poolside function area and a 38,000-square-foot exhibit hall divisible into 10 spaces.

Not far outside the continental U.S., The Bahamas also offer attractive gaming resorts. At Atlantis Paradise Island, a 50,000-square-foot ballroom is complemented by 40,000-plus square feet of pre-function space along with 30 meeting rooms.

At Baha Mar, planners can choose from three oceanfront hotels: the

Rosewood, the SLS and the Grand Hyatt. Among other options, Baha Mar's Performing Arts and Convention Center offers 200,000 square feet of state-of-the-art indoor and outdoor convention space for groups of all sizes.

Whether the location takes advantage of beachfront access, mountain views or city attractions, gaming resorts can be ideal meeting sites. They represent an option any meeting planner might well consider. **I&FMM**

***"The opening of these two properties (Hard Rock Hotel & Casino Atlantic City and Ocean Resort Casino) is further testament to solidifying Atlantic City's position as the No. 2 gaming market in America."***

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# All for One and One for All

## Diversity and Inclusivity in Meetings

By Maura Keller

**D**arci Motta, CMP and senior conference manager at CSAA Insurance Group, and board director of Meeting Professionals International, Northern California chapter, recognizes the vital role diversity and inclusivity plays in today's meetings arena. In fact, CSAA Insurance Group's focus on diversity is expanding beyond race, ethnicity and sexual orientation to encompass inclusion and belonging, and creating strategies to bring the best out of all people.

"We strive to create safe and inclusive environments where everyone feels valued and encouraged to share their truths and perspectives," Motta says.

The American melting pot gives our nation depth, character and diversity. With so many different kinds of people, how do meeting and event planners manage diversity and inclusivity within an event?

As the workforce becomes increasingly globalized and younger, more diverse generations enter the labor market, corporate meeting planners are looking for ways to make various meetings and events appeal to these diverse audiences.

As we know, the emphasis being placed on

diversity and multiculturalism in the meetings arena is much greater than it was even a decade ago. There is intense scrutiny on inclusiveness concerning factors such as race, sexuality, national origin, gender, religion and health.

Meetings have taken a dynamic approach the last few years and have made a push to take notice of when guests and attendees are unable to attend due to conflicts that may arise from religious, cultural, school or state/federal duties that would not normally appear on a planner's radar when planning a meeting.

Gregorio Palomino, CMM, CSEP, CWP and CEO at CRE8AD8, LLC, in San Antonio, Texas, says that recognizing your attendees' diversity can help develop a better, more comprehensive program. Whether it be food and beverage, their age group/generation, observances during the program such as religious services/worship time, the destination itself offering inclusion of the community or simply a break that coincides with the time children get out of school, it can greatly impact the program and provide positivity throughout, which, in turn, will fuel a beneficial learning environment for all.

"This not only helps with increasing guest and attendance numbers, but revenues and sponsorship dollars as well," says Palomino. "Most meeting planners should look heavily into the origin of their attendees and research these calendars — often found online — to determine the best possible solution of when the ideal attendance threshold and event date is desired."

"Having diverse and inclusive meetings leads to better audience engagement, and, ultimately, to better ideas and results," Motta says. "The more voices that can be heard and represented in the room, the better. Conversations become richer, new ideas are surfaced, and, we get better insights into our customers, too."

The largest change that Mazda Miles, CMM and chief event strategist at Perfection Events Inc., in Philadelphia, Pennsylvania, has seen in recent years is the understanding of the depth and breadth of diversity and inclusion with the meetings and events marketplace.

"When we first began to turn our attention to the importance of diverse and inclusive meetings, the definition and understanding was somewhat narrow — referring only to race/ethnicity and gender. And, the implementation was somewhat limited.

"At this time, I am grateful to see that we



**Mazda Miles, CMM**  
Chief Event Strategist  
Perfection Events Inc.  
Philadelphia, PA

*// I see that we, as an industry, are working to be thoughtful about infusing inclusion through every area of the meetings. //*



have moved to emphasize that we must be inclusive on so many more fronts — race, ethnicity, religion, age, sexual orientation, disability or impairment,” Miles says. “Additionally, I see that we, as an industry, are working to be thoughtful about infusing inclusion through every area of the meetings instead of in acute scenarios such as one representative person on a panel.”

It makes perfect sense to Miles and other meeting planners that attention is being put on having meetings be diverse and inclusive in order to have meaningful interactions and gain truly impactful insight.

“Otherwise, we are only seeing a portion of the picture, and that presents a risk to our outcomes and return on investment in such meetings,” Miles says. “Although it is the right thing to do to focus on diversity and inclusion, it is also the wise thing to do. It just makes good business sense.”

#### Where to Begin

So, how do the best multicultural meeting and event planners create experiences that make targeted attendees feel welcome and included? Among some of the most common

practices include evaluating how a meeting or event fits in demographics of attendees, crafting an appropriate message, ensuring that you give attendees proper access to the event, while demonstrating support for targeted groups throughout the planning process.

Motta suggests that meeting and event planners do the following in order to make a meeting as diverse and inclusive as possible:

When identifying speakers, have a rich and diverse speaker lineup. Engaging conferences, like TedX, Nantucket Project and C2, are great examples of how to infuse diversity into your speaker lineup and your engagement practices.

Find diverse ways for audiences to engage in meetings with interactive tools, such as throw-able microphones and mobile polling software. Engage attendees in different ways, and, often, in ways they prefer.

“Throwable microphones make Q&A more fun, interactive and less intimidating, so there are more voices in the room,” Motta says. “Interactive voting software also allows you to crowd source Q&A content from attendees, introducing more diverse voices into the meeting.”

Include diversity in foods and beverages.

In addition to addressing potential allergens, planners should look to fulfill the needs of a diverse culture perspective, as well. At CSAA Insurance Group, their menu options have become more international and include options the organization wouldn’t have offered even five years ago.

Create the right environment. You can’t plan a diverse and inclusive event if you don’t design it that way. This might seem simple, but removing barriers and bringing attendees closer together can help make a meeting feel more inclusive. Motta suggests removing the “front” and “back” of the room.

“At a recent milestone anniversary banquet, we transitioned the space to be in-the-round to eliminate the front and back,” Motta says. “With only two rows of tables around a center stage, everyone had a first- or second-row seat.” For meetings, CSAA Insurance introduced alternative seating options allowing attendees to choose how and from where they want to engage. A standing counter at the rear of the room? A residential chair toward the front? A pod with colleagues? They have options. Holding “walking meetings” and including “wellness moments” at an event gives people a break from sitting for too long and shows consideration for attendees’ personal choices and comfort.

“Environment design can speak volumes, especially when creating inclusiveness,” Motta says.

Miles always like to suggest that planners think of diversity and inclusion holistically. Think about every way attendees will interact with each other and how to make ALL of those experiences inclusive — from inception to execution. There are the most obvious things, like making sure speakers and panelists are diverse, but there are also less obvious things, like how you ask about gender during the online registration process.

“Every time a meeting planner touches an attendee, they should think about how to be inclusive,” Miles says.

In her efforts to make meetings and events diverse and inclusive, Miles has done things like designated prayer rooms, selected and crafted culturally diverse menus and, most recently, her firm worked with a venue to institute an inclusive restroom policy.

The following message was posted in the restrooms: “All are welcome to use the restroom that best matches their identity or that feels safest and most comfortable to them.”

Please help hold a safe space for everyone by not challenging or questioning others’ restroom choices.”

“This was a strategic decision due to the makeup of the audience, but we pushed ourselves to find a solution that would end up providing a safe environment for everyone involved,” Miles says.

Palomino and his team have helped clients develop programs and agendas to include all walks of life and human interaction. They’ve built inclusion groups based off postal codes, they’ve offered accommodation requests to better suit the attendee’s observed religious or cultural needs, and they often, if not most the time, make sure the menu planning has something everyone can experience.

“Our speakers, staff and sign language professionals also add to the mix of ways we make our programs inclusive,” Palomino says. “Talking with all vendors to ask their opinions and advice on how they will independently operate to observe these requests is important, too.”

In this time of ensuring that everyone feels welcomed, companies and organizations have added substantial costs to their bottom line budget to operate not only a perfect program, but one that is well-balanced. It has proven itself to increase numbers — both financially and in attendance.

“In an industry with financial and insurance professionals, which is one of the most diverse when compared to most others, it is more important that your organization lead the way,” Palomino says. “Unfortunately, most meetings/programs put on by the insurance and financial sector have been known to be somewhat boring. Making your program more inclusive and diverse is one way to elevate, engage and inspire. A diverse and inclusive program is only a part of the solution. It must mesh well with every other moving part from the time the guest leaves their doorstep to the time they return.”

#### Mistakes to Avoid

The most common mistake meeting professionals make is to assume that there is no cultural difference in attendees from varying backgrounds. Rather than taking the time to understand, embrace and leverage diversity within the meeting and event experience, some planners decide to simply ignore possible differences among attendees.

When multicultural diversity is ignored, meetings and event planners risk attendees’



**Gregorio Palomino,**  
CMM, CSEP, CWP  
CEO  
CRE8AD8, LLC  
San Antonio, TX

*“Most meeting planners should look heavily into the origin of their attendees and research these calendars — often found online — to determine the best possible solution of when the ideal attendance threshold and event date is desired.”*



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disenfranchisement and disengagement. That's why it's important that meeting planners understand the importance of working with individuals of diverse backgrounds to gain perspectives and insights they would be blind to otherwise.

Meeting planners must make everyone comfortable with providing these insights through diversity planning groups. And they must model multiculturalism to team members by embracing their diverse perspectives, recognizing them for the impact they have on the event planning process and respecting them as valuable members of the team.

One of the most important things to do when looking to increase diversity and inclusion is to be collaborative. Consider getting feedback from others regarding your ideas, and ask them for their thoughts on how to make your meeting more diverse/inclusive.

"When we go from what's in 'our mind' and assume it is the only or correct approach, we can miss so much and do more harm than good with assumptions," Miles says. "It is perfectly fine to be clear that you don't expect one person to be the voice of all 'their people,' but let them know you value their feedback and would love their thoughts on ways to expand the diversity and inclusion of your meeting."

In Palomino's attempts to make sure a program — or the focus of the program — is more diverse and inclusive, he has sometimes felt he "overdid it" in the form of media, communication — and tried to please everyone to the furthest extent.

"We do aim to please, but we're human," Palomino says. "In one scenario, we really tried to make the program so inclusive, we designed 18 different sets of materials in 18 different languages, including the photo shoots, demographic and ways it was presented. The marketing was amazing, but it was overkill. It didn't quite hit the note we were hoping for on one program. We anticipated about a 35 percent spike in attendance, it was more like 15 percent. In our eyes, we missed the mark on that one."

Palomino also had a financial client that was centered on investors from four main countries: China, Sweden, Argentina and Brazil.

"As much as we attempted to make the menus all-inclusive, it was a lesson we learned that making one meal instead of several options was best for the program. It went over well — and so did the budget, but at least the client has kept us on board."

### Looking Ahead

The future is bright for diversity. We are becoming a more diverse nation, so it is easier than ever to incorporate diversity and inclusivity within the meetings and events arena.

However, as Palomino says, the future of these types of meetings is like Bitcoin — it's new, cool and everyone wants to be a part of it — but not everyone knows how to plan for it.

With the younger generation taking over the companies and organizations their parents and grandparents started, they come with new ideas and motives for driving it to the next level.

"Over the next five to 10 years, companies and organizations will change, mostly for the better. But, unfortunately, those who don't get on board with these changes — whether company or employee — will suffer and be left behind in a dust of the 'unknown and unwilling to change' group," Palomino says. "Designing your inclusive program for everyone will come at a cost, but so will the increase in your bottom line."

Motta says the emphasis on having diverse and inclusive meetings will continue to grow as audiences become more diverse and people get savvier about inclusive opportunities and the idea of belonging.

As our world and industry matures, Miles expects that the emphasis on diversity and inclusion will grow, as well. She hopes to see individuals and organizations continue to be thoughtful and become even more strategic in their approach.

"I can imagine that at some point, as companies see the business impact and ROI of diversity and inclusion, they will incentivize employees for their efforts, as well as tie attainment with performance goals," Miles says. "There is a direct relation between diversity and inclusion with engagement and profitability, so I think that organizations will start to build strategies around assuring attainment of diverse and inclusive objectives."

"Social media and event tech will provide planners better tools to engage audiences in new and different ways," Motta says. "And, as younger generations continue to make their voices heard — whether as professional speakers or through mediums such as TedX and YouTube — access to more diverse voices will grow. Our audiences are changing, and their needs and desires are changing along with them. We can't do things as we've always done and be successful."

I&FMM



**Darci Motta, CMP**  
Senior Conference Manager  
CSAA Insurance Group  
Oakland, CA

*// We strive to create safe and inclusive environments where everyone feels valued and encouraged to share their truths and perspectives. //*

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Cloud Camp is attractive to small groups because it sits on Cheyenne Mountain, high above The Broadmoor (left), offering spectacular views.

Credit: The Broadmoor

# The Little Things

## Just Because Your Meeting is Small Doesn't Mean Your Ideas Should Be

By Christine Loomis

Not all meetings are created equal. There are many variables that make one destination, one hotel or even one specific venue right for a particular group.

Small meetings, for example, may have very different parameters and requirements than their larger counterparts. High-powered C-suite executives should not feel like small fish in a big pond, lost among larger groups with a massive room block and, perhaps, bigger spend. VIPs and executives may require a level of security and privacy for their meetings that mid-management sales teams don't need.

Planners have many things to consider. Is there a boardroom available that precisely accommodates 10 or 12 rather than 30 or 40? If a ballroom is not the right fit, are there appropriate

onsite or nearby restaurants that feature private dining space? Is there a club level at the hotel for VIPs or executives? What level of airport transport service is available?

It's not just a matter of big hotel vs. small hotel, although the size of a property can come into play. Typically, it's more about whether the hotel, large or small, has the appropriate meeting space, service level, restaurants and layout to truly meet the needs and requirements of a small group.

### COLORADO

When Nancy Montgomery, senior manager, event marketing, with CoBank looks for a destination and property for the company's multiple meetings each year, the choice is frequently The Broadmoor in Colorado Springs,

Colorado. Some meetings are as small as 15 people.

The location offers easy access and reliable summertime weather, among other things.

"Only an hour from Denver by car, and with a number of direct and connecting flights, Colorado Springs is fairly easy to get to and yet you feel a world away from the city," Montgomery says.

"Being in the Colorado mountains is both an enticement and reward for our attendees. The Broadmoor offers a unique combination of resort and mountain settings, nestled right at the base of the peaks. Additionally, in summertime, the climate is absolutely perfect — sunny skies, warm in the day and cool in the night — so we know we are most likely going to be able to hold

our events outdoors. This is a definite benefit since it is often difficult to find a location that will not be too hot or humid in the summer."

Montgomery encourages other groups to make the resort's outdoor spaces part of their summer programs. "They should utilize the outdoors as much as possible. It's what draws people to the meeting and will make the meeting a standout against other locations. There is something simply exhilarating about being in the Colorado mountains in the summer."

The area also offers multiple choices for spouse activities and programs. "We usually have at least one spouse program in the area each year," Montgomery says. "We have utilized lovely historic facilities such as Glen Eyrie, Miramont Castle, Red Stone and Bri-

arhurst Manor Estate, and we have also been to stunning outdoor locations including the Royal Gorge, Cheyenne Mountain Zoo, Seven Falls, Garden of the Gods and the Pikes Peak Cog Railway (currently closed)."

The Broadmoor itself has its own powerful assets. "The Broadmoor is a beautiful, five-star resort that has a historic, timeless feel and yet has every modern amenity, updated rooms and is pristinely maintained," Montgomery says. "And the staff is amazing. Everyone is friendly and helpful. As a planner, I am always

amazed at how much easier it is to hold a meeting at The Broadmoor than anywhere else. And I leave feeling pampered, which, trust me, is not how I usually feel at the end of a meeting. My attendees and management also leave feeling relaxed, pampered and happy. This combination is unbeatable."

Montgomery calls the conference services manager she works with at The Broadmoor the best in the business. "He anticipates our needs and makes recommendations for changes to the current year's program based on last year's. There is no problem we have encountered for which he has not figured out a solution. The entire meeting, banquet and conference concierge teams are outstanding in every way. Their focus on the details equals, or maybe exceeds, my own. I guess this is why it's so easy to meet there."

She has equally high praise for the catering staff and chef. "Catering is excellent, and the chef is willing to customize. I especially love the Taste of The Broadmoor heavy hors d'oeuvres menu with which you can offer meeting attendees a sampling of The Broadmoor's various restaurant fare in a banquet setting. The décor that accompanies this menu is great, too."

Because the property is quite spread out, Montgomery notes that some attendees, depending on which rooms you are using, might have to walk a ways to the meeting venues.

"However," she says, "the hotel offers complimentary shuttle service all around the property."

That includes to the wilderness properties, The Broadmoor's spectacular venues away from the main resort, which are especially attractive to small groups on their own or within a larger group. CoBank made use of Cloud Camp, which sits on Cheyenne Mountain high above the main hotel. It's an airy venue with incomparable views and

**"If you are looking for a hotel that offers a 'back-in-time,' serene feel with lots of interesting history, La Playa is your place."**

**Victoria Rabadi**  
Marketing Specialist  
East Coast-based insurance group  
Albany, NY



highly personalized service for intimate gatherings.

"If you want a truly amazing experience for a smaller group," Montgomery says, "utilize the wilderness properties. We held an executive retreat at Cloud Camp, and it was truly a once-in-a-lifetime experience for everyone involved and really created a sense of team and common memories for that group."

There was also golf, something else The Broadmoor is well-known for. "We always have a couple of golf outings in conjunction with our meeting. The East Course is a big draw for serious golfers, which is another enticement to attend our meetings. The golf staff is very helpful, and everything always goes off without a hitch."

While Montgomery doesn't arrange spa time for the attendees, she says that a number of the attendees' guests take advantage of the resort's highly rated spa while attendees are in session. "The spa facilities at The Broadmoor are really warm and relaxing. I love the relaxation room that looks out over the golf course, as well as the locker room facilities that include sauna, hot pools, etc. It all embodies The Broadmoor's ambience of quiet calm and its 'let us take care of you' feeling."

With no challenges or issues to work around, Montgomery's only words for others considering The Broadmoor are, "Your attendees will thank you for selecting The Broadmoor, and they will ask you to keep returning there. You will agree with them."

## UTAH

Another secluded mountain setting is Westgate Park City Resort & Spa, which sits at the base of Canyons Village at Park City, Utah, where exceptional skiing is the draw for a winter meeting.

Mark Armstrong, vice president and financial advisor with Morgan Stanley, worked on the annual ski gathering of 56 attendees from a San Diego-based financial organization. The resort is located at the



**Nancy Montgomery**  
Senior Manager, Event Marketing  
CoBank  
Greenwood Village, CO

first ski area you come to in Park City, which Armstrong notes is convenient.

"The location at the Canyons ski resort and the ski in/ski out capabilities for my group were the primary reasons I choose this property. Additionally, there is easy access from Salt Lake City via numerous shuttles, which makes the destination attractive as well," he adds.

***"If you want a truly amazing experience for a smaller group, utilize the wilderness properties. We held an executive retreat at Cloud Camp and it was truly a once-in-a-lifetime experience for everyone involved."***

And then there's the ski storage valet service, which Armstrong calls "very well run, giving guests a hands-free walking experience to the lifts."

Rooms, food and pricing were attractive, too. "The rooms are very complete with kitchens and sofa beds, as well as comfortable large beds. The Burger Bar was a great place to meet before and after skiing and offers good value for the food you get."

And, he adds, "one of the best steak restaurants in Park City is right on premise and has an area that fits a small group. There are also multiple pools so guests can get away from crowds or children if they want, and room prices are reasonable."

One thing Armstrong says planners should be aware of is that "all of the rooms are suites and that there are not many with two-bed options."

The group did not hold any formal meetings or events in town, but Armstrong says that "eight to 10 of the participants did venture out to enjoy the High West distillery facilities, including the dining experience it offers nightly."

Within the resort, the group used one meeting space for the welcome reception. "It was very comfortable, conveniently located and provided great food and beverage service. They put up nice room divider screens to help

decorate the space. The resort has very adequate banquet rooms and meeting rooms to handle most needs of small or large groups," Armstrong says.

A highlight of the trip was the final dinner. "We held a farewell dinner offsite up on the mountain at the Lookout Cabin. The private party for dinner included a sleigh ride. It was a fantastic evening with great food and views of the city down below. I highly recommend it."

Although the resort is large, Armstrong says it's divided on many levels, "so that you never notice a whole lot of people." Those same divisions can be a challenge, however.

"Due to the fact that there are three different buildings that make up the hotel, and there are several half levels to the layout, navigation can be confusing at first. I simply explained that to everyone in the group and informed them of where to find maps."

As for staff, Armstrong says, "Director of Sales Jim Goslin was great to work with, along with the accounting department's Andy Dew. And Group Sales Manager Tanya Gaines did a great job helping me put together my catering orders for my reception."

Armstrong's tip for planners is to "clue people in on the key floor levels they need to access in order to get to ski lifts and restaurants. Encourage them to explore the hotel to become familiar with the layout."

## CALIFORNIA

Victoria Rabadi, marketing specialist with an East Coast-based insurance group in Albany, New York, chose intimate La Playa Carmel for the company's All Hands Meeting last year with 60 in attendance.

"One of our larger offices is located in Carmel-by-the-Sea, California. We have a few larger offices around the



*Attendees will enjoy the beautiful scenery while eating breakfast on the terrace of the La Playa Carmel in California.*

country where we could hold our All Hands Meeting, but, let's face it, none beat Carmel."

The meeting was the company's second All Hands Meeting at La Playa and this December will be the third.

The group has also held smaller events at La Playa.

***"We held a farewell dinner offsite up on the mountain at the Lookout Cabin ... including a sleigh ride. It was a fantastic evening with great food and views of (Park City) down below. I highly recommend it."***

"La Playa can accommodate our full group, is per-



**Mark Armstrong**  
Vice President and Financial Advisor  
Morgan Stanley  
San Diego, CA

fectly located and is a beautiful property," Rabadi says. "And the amenities are plentiful."

She notes that all staff are courteous and responsive but points to the sales and catering managers in particular. "They're extremely experienced and helpful with regard to all the planning and execution of events. Tracy Hunter, our senior sales manager, is amazing! I know I can always count on Tracy for anything I need during our events. She is much more than a sales

manager. Once the contract is signed, she stays close to her events and is immediately available and responsive, if need be. Tracy is one of the reasons we keep coming back."

And then there's Adrienne Kar, catering and conference services manager. "She takes care of all the details which makes me look good," Rabadi says.

The hotel delivers what's needed on all fronts. "I love the around-town, evening shuttle. The breakfast buffet is to die for, beautifully set up with a wonderful selection of delicious food, and the view from the outside terrace is breathtaking. And who doesn't love an afternoon wine tasting? No one! The grounds are simply gorgeous and perfectly maintained."

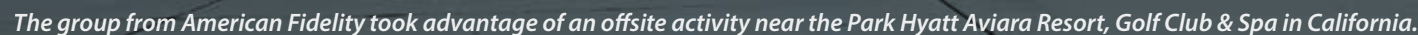
The two-day conferences portion of the event was held in La Playa's Pacific Room. "The room is large with ocean views. The staff were on time, efficient, flexible and friendly. They took care of everything. I just showed up and everything was where it was supposed to be and looked professional. They took care of our A/V needs, the catering was perfectly timed and received many raves, and, as I said, the staff is exceptional."

In addition to the conference time within the hotel, the group also had a dinner in town. "We had one of our dinners at Bistro Beaujolais located in the Carmel Plaza," she says. "We had full, private access to the restaurant and, therefore, didn't have to worry about the noise factor during the karaoke portion of our event."



*The Westgate Park City Resort & Spa's ski in/ski out capabilities and appropriately sized boardrooms make it appealing for a small group's meeting.*





"There are no elevators, and there is no onsite restaurant, though the bar offers a small nighttime menu. The location is about one-and-a-half hours from the San Jose airport, which has more available flights than the Monterey airport, but then a shuttle or



***The  
Park Hyatt  
Aviara Resort,  
Golf Club & Spa "is  
a great location —  
close enough to San  
Diego for offsites,  
yet far enough away  
to get a true resort  
experience without  
the commotion."***

Barrowman says the reasons to choose Park Hyatt are many, including location, airlift, ease of access, cost, quality of lodging and access to golf, activities and venues in San Diego. He points to the clean and welcoming property and grounds and the exceptional F&B. "It's a great location," he adds, "close enough to San Diego

In the end, Barrowman says there were no problems in executing his events, and the resort checked all the right boxes in terms of "total cost evaluation, flexibility, accessibility, marketability and affordability. The only downside? We hated to go back to reality!" **I&FMM**



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# Creative Thinking

*A corporate event theme reflected Hollywood at the Oscars and was held at Los Angeles' Dolby Theater.*

One of a planner's most creative and, yes, challenging chores is themes — conceiving an effective, innovative and entertaining meeting topic — again and again and again.

Guided by such parameters as goals, budgets, demographics and destinations, the lengthy and detailed procedure is demanding and sometimes overwhelming. But it need not be.

Armed with the following input from in-the-know players of some of the nation's top DMCs, the future for theme-plotting planners can be simple. So relax, enjoy the process and find inspiration in the words of Albert Einstein: "Creativity is intelligence having fun."

When selecting a meeting theme, Nicole Marsh, CMP, DMCP, partner of Imprint Events Group, a DMC Network Company, Denver, Orlando and

## The Ins and Outs of Planning a Meeting With a Theme

By Cynthia Dial

Las Vegas, follows a trio of paths. "The theme must be representative of the company's culture," she says citing creative themes for creative clients, traditional themes for traditional cli-

ents, etc. "The theme should provoke an emotion or action."

This translates to going with a theme that inspires attendees and serves as a call to action that's clear during the meeting and lives on after it's over. "The theme should be the cohesive thread throughout the meeting." From the general session to breakouts to activities, each should be an interconnected part of the overall program.

How do Marsh and her team start the process? "We begin by evaluating if the client has any overarching company goals for the year that should be a continued focus within the theme. If no such direction exists, we turn to the meeting's

destination for inspiration. What's the vibe of the destination? What's unique about it culturally? Historically, what's significant? If we can't bring guests to must-go tourist spots, how do we bring the best of the destination to the meeting? Generally, though, we're always paying attention to the latest trends, major cultural events and what else is being produced throughout our industry to spark additional innovative ideas for our clients."

Likewise, metroConnections, a Minneapolis DMC, has a basic three-step process when seeking a theme, says Madelyn Ann Arthur, event sales manager: 1) Meet with the client to go over event logistics and goals, 2) discuss group demographics and 3) dive into conference themes the client should take into consideration, as well as the group's past themes.

With the belief that meeting themes typically fall into several basic categories, Arthur is specific. Creative themes encourage attendees to think outside the box and be innovative. Morale-based themes motivate attendees to do bigger and better things, and competitive themes focus on the client's competitor.

Along the lines of categorical themes, Casee Safford, senior creative design manager, Ultimate Ventures, Addison, Texas, pays heed to the "where" factor: where you are (destination-oriented), where you are going (motivational) and where you've been (nostalgic).

Called the "resident theme queen" by Ultimate Ventures' director of marketing Val Lenington, CMP, DMCP, Safford has a variety of successful meeting themes under her imaginative belt.

Among them is the award-winning theme, Simplicity Meets Style, a Globe of Excellence Awards dinner held this past June for 80 top hotel executives at the W Hotel Dallas. Inspired by the image of swimming in an abstract koi pond, here's how it played out. All guests stood on a crimson carpet in the foyer waiting to enter the event when curtains were drawn back to reveal that the red carpet on which they

were standing was actually attached to the 50-foot train of a dress worn by an elegant model — a true living red carpet entrance. A combination of blue and gold lighting was used throughout the space to give the illusion of light shimmering on water. Much of the décor was custom-built, including the rotating Japanese silk lanterns, koi fish graphics on chair backs and arranged branches and lily pads on framed displays further tying the theme together.

During Ultimate Ventures' Camp WannaHavaFunna teambuilding event, another award winner, 170 executive chefs of a large restaurant chain were paired with 25 teens to produce 100 backpacks filled with 4,000 school supplies for Texas' Collin County Boys & Girls Club. The ballroom setting was decorated with canoe props, Adirondack chairs, tree stump stools, a "flickering" campfire and activities including a crabwalk dash, campfire stories, archery and a marshmallow cabin showdown.

Situated in the middle of downtown Dallas was Industrial Chic, an event for 200 insurance

company attendees held in the historical Sixth Floor Museum (the former Texas School Book Depository overlooking Dealey Plaza from which



***"The theme must be representative of the company's culture. It should provoke an emotion or action."***

Nicole Marsh, CMP, DMCP  
Partner  
Imprint Events Group  
Denver, CO

Lee Harvey Oswald shot President John F. Kennedy).

When quizzed about any project's commencement, Safford is specific. "We start by looking through design books, magazines and websites to spark our imaginations. We try to imagine the big picture of what the room will look like and then work our way backward to fill in the smallest details."

Taylor Hutchison, director of sales, Hosts DC, Hosts Global Alliance, Washington, D.C., ap-



*A model wore a red gown with a 50-foot train, which became the red carpet that attendees walked on to enter The Globe of Excellence Awards dinner last June.*



## Laissez Les Bon Temps Rouler

### Let Your Meetings' Good Times Roll in New Orleans

Like the real estate community, "location, location, location" is key to the planner of a perfectly-themed meeting. Along those lines, what location could be a brighter beacon of authentically unique entertainment than New Orleans?

"Since our city is known for its music, spicy food and Mardi Gras, most of our themes are centered around these three areas," says Carling Dinkler, CEO and founder of Custom Conventions, a New Orleans DMC. Add to the mix the city's adjacent location to the Mississippi River, and the result is an endless supply of made-exclusively-in-the-south options.

A DMC that has worked with such clients as Capital One Bank, Whitney Bank and Tulane Graduate School, Dinkler describes

the product of his company's new tour division, NOLA deTours, as one that goes behind the scenes where the internet has not gone. "It's fun, it's cool, and it's not the old tired city tour."



Nothing is tired about incorporating a Jazz funeral into a theme designed to bury the competition or a Mission: Possible-themed conference where everyone is initially assigned an agent's name and the "mission" to be solved becomes a through-the-streets-of-New Orleans teambuilder.

Of trends, Dinker says, "I do see less interest in Bourbon Street and more interest in the hip joints on Frenchman, Marigny and Bywater." — CD

proaches the theme-search process with an around-the-table meeting. "We typically sit down for a 'think tank'-style consultation with the meeting's stakeholders. We dig in with them on the 'how' and 'why' of the meeting. What message, what feeling, would we like to resonate before, during and after? From there, we are able to design a themed experience for all attendees."

The Hosts DC pro says that some of the most important factors in the development of themes come from the

evolution of not only the company but the specific meeting, its attendees and the destination itself.

"The destination is paramount in determining a theme since you want to include the cultural environment of the destination when planning the overall theme of the events," says Dabney Bixel, president/CEO, Bixel & Company, Los Angeles. Reflective of her DMC's Southern California locale, Bixel has produced many corporate events at the Dolby Theatre, the home of the Academy Awards. "What could be more authentic than to hold your awards event in the home of the Oscars? Hollywood is the only destination where this can be achieved." Along those lines, one popular team-building activity is Make a Movie on the backlot of a Hollywood Studio or dine-arounds incorporating some of the area's multitude of celebrity chefs.

Continuing the destination-inspired philosophy, Bixel names Beverly Hills, an area renowned for its glitz and glamour, where she has staged events in its mansions (many

to which Bixel & Company has exclusive access), as well as on Rodeo Drive.

"The destination is often the focal point for the decided theme," says Amanda Tutor, project manager for Texas-based CE DMC. "Here in San Antonio, a favorite theme is Viva Fiesta!" A tradition and celebration of the city's rich cultural history, she suggests that it can be more interesting to twist and mold this theme to new derivatives. One exclusive-to-Texas activity is armadillo racing. Tutor explains, "Imagine 30 adults surrounding a miniature race track cheering on their favorite armadillo (an odd-looking Southwestern mammal the size of a possum and noted for its leathery armor shell) until he rolls into a ball." Tutor's conclusion is that anything that engages the guests enhances the event.

With a location in Colorado, Marsh says it's easy to work the DMC's mountain-surrounded terrain into a local meeting's execution, including rock-climbing teambuilding activities. However, she issues a warning. "It is important to mix it up and provide variety in your theming. If you always choose a destination-driven theme, it may become hokey year after year.



Dabney Bixel  
President/CEO  
Bixel & Company  
Los Angeles, CA

**"The destination is paramount in determining a theme since you want to include the cultural environment of the destination when planning the overall theme of the events."**



A favorite theme in San Antonio is Viva Fiesta!

Intersperse general motivation and call-to-action themes to continually inspire attendees."

Expounding on the destination factor and her company's location in the

nation's capital, Hutchison says, "Fortunately for our team, D.C. offers powerful themes, such as leadership, change and history, just because of what the city stands for." Being in Washington, D.C., serves up the possibility of producing events in the most significant museums, monuments, memorials and buildings in the country's history. This on-location perk extends to F&B, giving the option to pull inspiration from many aspects of the past to amplify the menu. "A President's Circle meeting, for example, may have a menu designed around past U.S. presidents' favorite foods, the menu of a Future Leaders meeting might include new culinary techniques and an event for Innovators and Influencers could feature culinary experiences still under development, such as 3-D food printing."

Bixel says, "Often times, we will copy a menu from the Academy Awards if we are producing an awards show."



**"We start by looking through design books, magazines and websites to spark our imaginations. We try to imagine the big picture of what the room will look like and then work our way backward to fill in the smallest details."**

Casee Safford  
Senior Creative Design Manager  
Ultimate Ventures  
Addison, TX

Continuing in the thematic F&B vein, she mentions that when taking groups to the Ronald Reagan and Richard Nixon Presidential Libraries, the DMC frequently replicates famous White House menus used during those eras.

Arthur sometimes extends themed F&B to breakout sessions, as she did

## Name That Theme!

"With such an emphasis on interactive experiences, not just sitting and listening to speakers but audience involvement and experiential engagement, themes play a larger role than ever before to inspire and engage audiences," says Nicole Marsh with Imprint Events Group. To illustrate creative solutions, here are three samples of this DMC's themed meetings:

**Ignite!** — created to inspire and energize approximately 3,000 attendees of a three-day conference — is organized for continuing education on products and services, viewing new company products and, most importantly, for collaboration and networking with fellow agents and corporate staff. The biggest impact comes "via dynamic educational sessions where we utilize flame animations, a multitude of fire effects and even incorporate both flame throwers and Co2 cannons, requiring three fire department officials onsite at all times." Marsh's assessment: Onstage entertainment — flame throwers, Cirque du Soleil-style acts using fire elements and singers boasting songs relating to fire and flame — energize the team to become an "ignited" sales force.

The theme, **Passport to Success**, a message-oriented take on a general travel theme, can be incorporated regardless of destination. Travel-oriented details for the DMC's Colorado client include registration built to look like airport check-in counters, vintage

luggage and globes serving as table centerpieces and an animated client's logo with a small airplane landing (an icon used in all meeting materials).

Selected for a corporate client moving its headquarters is a **Hometown** theme. As part of the program, the DMC incorporates more the 40 volunteer activities to serve the company's new community, reinforcing the notion that they will treat their soon-to-be workplace as their "hometown."

"Work on a storyboard and make magic happen," advises Emily Becher, a colleague of CE DMC's Amanda Tutor. "From there, it's a process of continuously editing until everything comes together."

Along the lines of magic and Becher's DMC, here are details for the NCAA Men's Final Four Championship event held in San Antonio. Its objective was to have a fun theme appropriate for top-level executives, network sponsors and their families. The result: an interactive arcade venue buyout for 2,500, tying into a Southwest sports vibe. Challenges include heavy security presence and the network's requirement for precise detail on every branding element — from napkins to ping pong tables — ensuring the correct color and spacing for the brand. Becher's final verdict: "Kids and 'big kids' enjoy playing games and eating delicious food, all in preparation of the main course — the Final Four Championship!" — CD



## More Tips from the Top

**Dabney Bixel, Bixel & Company** — “Keep it simple and not complex so the guests will grasp the concept. Also, don’t be afraid to try something different and out of the comfort zone of the attendee ... they will thank you.”

**Regina Key, Destination Concepts inc.** — “Attendees crave the unexpected and are inundated with information 24/7 so it’s important to develop a theme that breaks through the noise.”

**Nicole Marsh, Imprint Events Group** — “I believe that themes have become shorter and punchier with a tendency for one-word themes, due to social media. This makes the ability to tag and reference on the various platforms much easier than the longer and more traditional phrases previously used.”

**Casee Safford, Ultimate Ventures** — “Sometimes planners think too much and paint themselves into a creative corner by trying to get too ‘themey.’ Consider the overall takeaway you want guests to have after your event and work backward from there. Maybe simpler is better!” —CD

to complement a baseball theme with the incorporation of peanuts in the shell, popcorn and a variety of other ballpark snacks into food breaks.

Pushing the envelope in the F&B arena, Marsh describes “the craziest thing” her DMC has incorporated into a theme via F&B. “During a conference themed Limitless!, we had a Fear Factor food station designed to push attendees out of their comfort zone and try out-of-the-norm foods, such as frog legs, Rocky Mountain oysters and chocolate-covered insect desserts.”

Creative director Regina Key with Destination Concepts inc., San Diego, believes F&B is a great way to tie into a theme — from the use of suspended buffets for a Balance event to styling a meal’s entrée to resemble a work of art for an Art of Partnership theme. Recently asked to introduce augmented reality into a financial client’s Farm-to-Fork theme, Key shares her DMC’s solution: “To combine those two very different elements, DCi suggested the creation of a QR code at each interactive food station that guests could scan to both download the recipe and learn where the food was sourced.”

Like F&B, some clients pursue a different twist on a destination, says Key, citing her experience with a financial client planning a California program in Orange County but seeking a departure from the beach. The directive was to showcase the area’s agriculture, so DCi took attendees to a local farm for cooking classes, incorporated citrus trees into the gala’s tablescapes (a

creative challenge as they were out of season) and gave gifts of local gourmet food items.

With respect to the destination, Safford says, “Your destination shouldn’t limit you but guide you as to what themes would excite guests. You want guests to experience your home and what you see and love about your city.” She illustrates with an example of a

**“Themes are focusing more on what’s currently happening in the world. Themes also focus more on innovation and what the company’s members can accomplish together.”**

**Madelyn Ann Arthur**

Event Sales Manager  
metroConnections  
Minneapolis, MN

Lone Star state event for a client who didn’t want a western theme. Instead, Ultimate Ventures devised an Oktoberfest theme, incorporating longhorns and local beers.

The theme can no longer be one dimensional and used only in print and the general marketing of the conference, explains Marsh. “It needs to be seen, felt, heard and truly embraced in all facets of the meeting — from the traditional marketing elements to the overall agenda, branding, speaker topics, ancillary special events, takeaways

and more.” With that said, she notes there is a fine line between precise execution and going overboard. Her advice: “Don’t cross it.”

“Overall, themes are integrating more experiential elements,” says Arthur of today’s world of themes. “Themes are focusing more on what’s currently happening in the world. Themes also focus more on innovation and what the company’s members can accomplish together. And, as of late, themes have highlighted the importance of diversity.”

Of trends, Key expects meeting themes to continue to appeal to a larger scope of demographics, saying, “Today’s workforce is multi-generational, so a key component of a successful meeting is to develop a theme that is identifiable and hits home with a range of ages.” She adds that themes have become more subtle and creative. “Long gone are the days of predictable themes, such as ‘Ride the Wave of Success’ for a meeting on the coast. Custom is the new standard, and a key way to appeal to savvy attendees is to craft a theme to appear as if it was created for them.”

Hutchison’s bottom line: “Think of your theme as something different; think of it as an atmosphere. What do you want or need guests to feel? Thinking of an atmosphere, I believe, opens opportunities for a more abstract delivery vs. a very literal translation. It allows the positive takeaways to be continuously reinforced long after the meeting is over.” —I&FMM

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## Strategies For Successful Supplier Partnerships

### Planners Appreciate Continuous Outstanding Service

By Patrick Simms

There are many instances of short-term partnerships with suppliers that qualify as a success. A firm running an incentive trip, for example, may partner with a DMC at the destination, receive great service and never work with that supplier again — only because the firm never happened to repeat that destination. But the most salient examples of successful relationships with suppliers are those where the client receives great service over many meetings, i.e., the long-term partnership. In that scenario, the supplier is demonstrating a deeper understanding of the client's corporate culture, values and general demographics, which are the common denominator across all its programs. Conversely, the client is

continually learning more about how the supplier works and is able to both refine the service through constructive feedback and achieve a higher level of confidence with each program.

Planners certainly appreciate the distinctive advantages of a longstanding supplier partnership. "It goes both ways; they get to know you, and you get to know them. You get to know their work ethic and establish a great rapport, a level of trust," says Wayne M. Robinson, CMP, CMM, assistant vice president at FM Global and incoming chair of FICP. Robinson's supplier partners range from hotel chains to hotel representation firms to DMCs, and some partnerships have been in place for more than 20 years.

Katrina Kent, director, The Event Group at TD Ameritrade, cites a 10-year partnership with an event logistics company and a five-year relationship with a production agency. These suppliers can "anticipate our needs, and that's something that takes a while to learn," says Kent. "It's really about knowing the right questions to ask coming to a project; they're able to prepare in a way that they wouldn't be able to otherwise because there is a history and a common language. We don't have to spend energy onboarding them every single time."

Lisa Ramsay, CMP, assistant vice president, event and meeting management at Protective Life Insurance Co., cites an impressive 30-plus-year relationship with an incentive house out of Dal-

las, Texas. "Because we've been doing business with them for so long, they've formed long-lasting not only business relationships but also friendships with our producers," Ramsay explains. "They know the special needs of one couple over a different couple. For example, we have one couple that's somewhat elderly, and they know we have to put them in a special type of room. They know that the president and CEO's wife has a severe gluten allergy. When you travel with a partner for 30 years, it just gives you an extra level of service."

With regard to long-standing hotel chain partnerships, the advantage is not only in terms of service, but also help in navigating the seller's market. A close connection to a national sales rep can make that individual "your advocate, especially in markets where rates have risen and concessions are a lot harder

aware of new opportunities within their property portfolio that may be a fit with the client's future programs. "Whether you're on a webinar with them or an insurance [planners] forum, I think they very much keep you in the loop on what's the latest and greatest out there for their group of hotels," Ramsay says.

Whatever the nature of the supplier partner, a long-term relationship will typically have certain distinguishing features. One is robust communication. "We're not always going to agree on everything, but we sit down and talk through every single aspect of an upcoming program," Ramsay says. "We do it on the site inspection, we do it after we get back" from the meeting.

Another is honesty and straightforwardness, particularly when it comes to discussing things that didn't go well. Similarity in the cultures of the respec-

is, a lack of complacency. "We challenge our partners to continually reinvent themselves. Along with challenging ourselves, we challenge them, as well," Kent says. "We want to make sure that our partners are pushing us forward. I think that the key is that neither party takes the relationship for granted, as it can all change on a dime."

In Robinson's considerable experience, suppliers are generally not taking long-time client relationships for granted and do seek to regularly deliver the best service they can. "Because of the level of competition right now, even established suppliers in our industry have pretty much revamped and upgraded their services and technology offerings," he says. "For example, imagine the level of competition between Florida DMCs. There are more of them, and they have to really go outside of the box to find



"They **get to know you**, and you get to know them. You get to know their work ethic and **establish a great rapport**, a level of trust."

**Wayne M. Robinson, CMP, CMM**

Assistant Vice President at FM Global, Incoming Chair of FICP, Johnston, RI

to come by," Robinson observes. "That being said, we are well aware that with changing markets, mergers and acquisitions, there are going to be changes in account management — but it provides an opportunity for growth on both the planner and account rep side."

Ramsay, whose firm has worked extensively with the Four Seasons, Ritz-Carlton and Fairmont brands, can contact her national reps and say, "I'm booking something six months out or four months out. Can you help me get into a certain property?" I think that's where those long-standing relationships come into play," she explains. Moreover, these reps stay in touch with the planner and regularly make them

tive companies also helps. For example, a client whose attendees are primarily millennials does well to partner with an event company that has at least some staff members who understand the kinds of activities and experiences that demographic typically looks for (perhaps because they are millennials themselves). "It's nearly impossible to have a long-term vendor or supplier partnership without that personal piece. We have to have complementary cultures," Kent affirms, "although that's not saying that every partner that we work with is just like us."

A fourth characteristic of long-term partnerships is an ongoing commitment to quality and improvement, that

venues or services or activities that will make them stand apart. So I think that complacency has really gone out the window right now, because the competition is so stiff. If it hasn't, it would be very difficult to compete."

Indeed, Kent cites a case of a long-term partnership that did not evolve as her team expected. "The business was put out to bid, and the incumbent was superseded by a new partner. We had to make that change."

Thanks to reliable vendor relationships, many firms are not often in the position of having to vet and hire new suppliers often, and may only do so because of internal requirements to send out RFIs and RFPs every three to five



years. Insurance and financial firms are “risk averse by nature,” says Robinson, and that constrains their willingness to venture out and try new suppliers when there are already reliable options. In addition, “we’re in a better economy, and there’s a level of comfort in that my hand’s not pressed on the fire to look to save money and risk a long-term relationship. Instead, I go to my established vendor and ask for a better rate or better concessions, or ask them what opportunities do I have to save money or upgrade the experience so I can satisfy our internal organizations that are looking at the bottom line or want to offer something new and different” he adds.

However, Kent does find value in having “exploratory conversations” with vendors that appear promising. “We do many of those every year. It’s helpful,

a supplier that’s pressing for business every time you talk to them.”

The transparency and honesty that characterizes a successful partnership begins at the familiarization stage, where the supplier must own up to any limitations of what they can deliver. Those qualities are also important at the RFP stage, particularly with regard to clarity on costs. “Whenever I’m asking for a proposal, if we don’t receive a line item budget when we get that proposal back from them — if I just have a per person price or an overall program price — that makes me wonder,” says Ramsay. “I want a line item budget so I can see every single thing they’re pricing out.”

Also lacking in transparency is the vendor who under-charges in order to get the business and then raises rates to market value later on in the relationship.

must have worked with the insurance or financial segment in particular. That specific experience may not be needed if the supplier is a ground transportation company, for example, but it does come into play for DMCs and third-party event companies. For Ramsay, it’s helpful if that third party “knows many of the ins and outs and likes and dislikes with insurance or financial companies. My two colleagues and I are members of FICP, and we really try to source and buy from other FICP members, because anyone that’s in that organization is very familiar with how insurance and financial institutions work,” she explains.

While Kent agrees that experience with that segment is helpful, “it’s more important to see what the experience is that they’ve been delivering, not necessarily that it has been for a financial



“They’re able to prepare in a way that they wouldn’t be able to otherwise because there is a **history and a common language.**”

**Katrina Kent**

Director, The Event Group at TD Ameritrade, Jersey City, NJ

but it’s really important to set the expectation ahead of time with the supplier that this is just an exploratory conversation, potentially a building block of what could be a relationship, but not a guarantee by any means that there is any business up for bid,” she explains. “We look for suppliers that are willing to do that and want to showcase what they can bring, who want to share case studies and so on. That’s going to put them in my mind the next time that I have business that does open up, instead of a supplier who’s calling me every two months asking if anything is ready to RFP. There is this extended getting-to-know-you period where you can really assess capabilities and the fit, and it’s hard to do that when you have

“If you come in far lower than you can sustain, that’s not going to work,” says Kent. “I feel like many times suppliers undercut in order to get into the relationship, and then a year or two later, they want to substantially increase their pricing. That’s not an authentic transparent partnership.”

In the initial stages, then, a supplier must be patient with the familiarization process and fully transparent regarding their rate needs and structure. But these qualities are clearly insufficient to land the account if they lack the kind of experience the client desires. While an insurance or financial firm will clearly prefer or even require experience with corporate meetings, planners differ somewhat on whether the supplier

or insurance company,” she says. “So for us, it’s not a deal-breaker if someone doesn’t have a financial services client, as long as they’re really able to show that they deliver on the kind of program needs that we’re talking about.”

The references that a supplier provides should be to clients with similar program needs. As Robinson describes, a supplier may say, “Hey, I want you to call a random planner to talk about his or her association meeting. I’m not going to do it, because that’s a completely different type of meeting from an insurance or financial incentive or business meeting in most cases. I learned that the hard way, because I would take references and pick the phone up and call these people [who said the supplier] did

“When you travel with a partner **for 30 years**, it just gives you an **extra level of service.**”



**Lisa Ramsay, CMP**

AVP, event and meeting management, Protective Life Insurance Co., Birmingham, AL

a phenomenal job. But when I look behind the curtain in some cases, [that client] spent 40 percent of what we spend on a meeting, and it was a completely different level of expectation.”

A key ingredient in ensuring that suppliers continue to live up to expectations is the post-event review process. “We will sit down and do a recap of what we thought went well, what we can improve on, what we may want to change or tweak for the next time,” says Ramsay. That includes sharing the results of agent surveys with the hotelier.

For long-term partners, Kent’s team also conducts annual and quarterly performance reviews, and the feedback goes both ways. “We welcome any suggestions or lessons learned on their side to help us on future programs. Many times some of the best ideas are coming from those suppliers in a post-con situation,” she says. The program-to-program improvements that result from post-event reviews are often fairly minor, and arguably, they should be minor. If there is too much room for improvement, the vendor may not have been the best choice initially. According to Robinson, a good planner’s vendor choices should be 90 percent on target, thanks to a careful vetting process that includes reliable references. “Do your homework!”

Assuming that the supplier continues to deliver meeting after meeting, eventually a rate increase will be justified. At that point, both parties must be reasonable in order to preserve the relationship. Kent has seen that her long-term suppliers are very conservative

when it comes to increases, which typically occur approximately every three years. “They’re looking at the business from a holistic standpoint, not so much program to program,” she points out. It also helps when the vendor can provide an explanation for the increase, so that the planner can, in turn, explain the rise in cost to upper management.

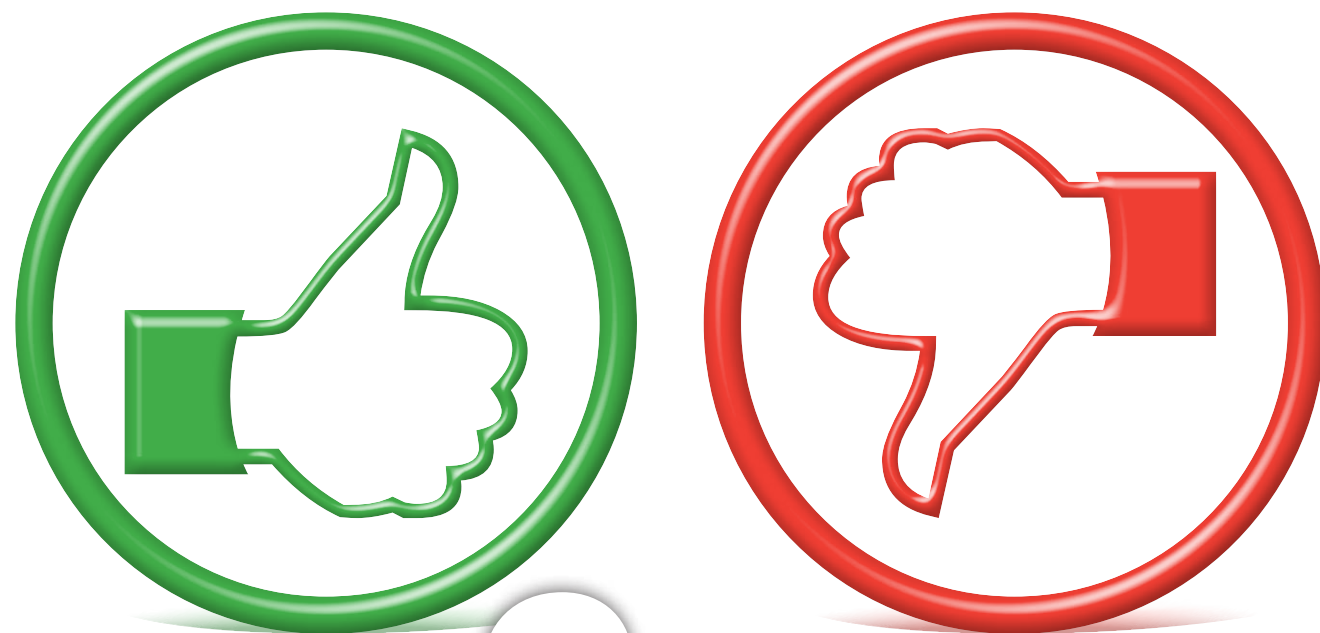
As Ramsay relates, “I find that our hotel partners are very transparent with that; they’ll say food cost is up 5 percent [for example]. So that just helps us on our end when we’re doing our budgeting for an event and [explaining] that pricing to our bosses.” And if the vendor is not immediately forthcoming, a planner can certainly ask for justification, especially if the rate increase is more than expected. “If it’s five years [into the partnership], I don’t expect to get the same rates,” says Robinson. “But if I included them in an RFP two or three years ago, I don’t expect a 20 percent increase. If this is a trusted strategic partner, someone that I have developed a history with, I have a tendency to say, ‘Just be honest with me and tell me why the rates are 20 percent more,’ whether it be my floral or linens, my activities, rentals, etc. I do realize there are additional costs on the backend but don’t just drop it into the proposal without an explanation. Therein lies the value of the relationship.”

Getting the most out of a supplier partnership can go beyond receiving a great product or service at a fair rate. Added value can come from the vendor’s own relationships in the industry, whether that means a referral to another supplier (usually a non-competitor)

or an idea from their work with another client. “Part of what’s really great about working with suppliers is that they can cross-pollinate ideas that work across their entire client portfolio to benefit each client,” says Kent. “We even have a production partner who helps us and another client leverage each other’s buy. The other client is in the home goods business, and they will work with us because our shows are relatively in the same time period. So if you’ve got another client that has a show within a certain number of weeks of ours and they’re using that type of curved LED screens, and you can get us both a deal, then why wouldn’t we consider that? It’s a great idea.”

Thus, planners do well to encourage their suppliers to leverage their industry connections. And if the project requires the supplier to partner with other vendors for the same client, it is best to clarify the nature of that collaboration at the outset. The logistics and creative/production agencies that work with Kent’s team also work with each other, and do so seamlessly. “We have two different logistics companies working on different pieces of a single project, and they were able to effectively partner together to meet what we needed to have done for the incentive program,” she relates. “So while they may be competitors, they really have to be open to fulfilling the client’s needs at the end of the day.” Along with communication, transparency, cultural compatibility and lack of complacency, “works well with others” must be added to the list of ideal supplier qualities in that scenario. **I&FMM**





# DO's & DON'Ts of Event Planning

Paying attention to key details can ensure  
your meeting (*and career*) is a success.



By Derek Reveron

Planners wage a never-ending battle against Murphy's Law, which says that what can go wrong probably will. That's why it's rare that events proceed completely flawless from beginning to end.

Events typically can survive minor slip-ups, some of which attendees may not even notice. But big blunders can ruin an event or make attendees so unhappy, they complain to the event stakeholder. The resulting damage to a planner's reputation and career can be long-lasting.





Some mishaps, such as a keynote speaker becoming ill onsite and registration systems malfunctioning, can occur even when a planner does everything right.

Other slip-ups are self-imposed. For example, a planner fails to get measurements of hallways leading from the

only as successful as all of the detailed planning that's put into it from beginning to end. You have to realize that things are still going to happen onsite, and your event planning is never really over until your event is over."

***"Your event is really only as successful as all of the detailed planning that's put into it from beginning to end."***

Jennifer Masek

Administrative Support Specialist  
Church Mutual Insurance Company, Merrill, WI



loading dock so set pieces that just arrived won't fit and can't be unloaded.

### Don't Do It All

One of the most common mistakes that planners — especially solo practitioners and those who are inexperienced — make is doing everything single-handedly. Juggle too many balls without help and eventually one will drop and lead to disaster or burnout.

Some planners try doing it all before changing their approach. "I've learned over time that you are definitely more likely to make mistakes in the planning process when you try to do everything yourself," says Jennifer Masek, administrative support specialist, Church Mutual Insurance Company, Merrill, Wisconsin.

"There are so many pieces that all have to come together when planning an event," says Masek. "You have travel dining, meeting details, hotel stays — just to name a few. Things are so much easier when you have help along the way. You're only one person, and things work out so much better when you're not stressing, trying to handle every detail."

Masek also observes that failing to follow-up relentlessly after a meeting starts is one of the most common things that planners fail to do.

"I'd say one of the biggest mistakes made onsite is not following up on details," says Masek. "Your event is really

### Focus on Details

Hiring and working with detailed-oriented, hands-on people improves the chances that everything is done to ensure that nothing goes awry. If partners such as suppliers, DMC employees and hotel staffers aren't detailed-driven, then the chances of mistakes increase, Masek says.

She offers an example: "In a recent event, our event manager was definitely not detail-oriented," says Masek. "Prior to our dinner one evening, I noticed that all of the signage directing our guests

to the event was wrong. Chances are our guests still would have made it to dinner, but what would it have looked like had our event name been wrong on all of the signage?"

Masek double-checked the signage and changed it. "Because we're always planning ahead, I went down to the dinner area well in advance of any of our guests and was able to find the mistakes," says Masek. "After contacting the hotel event manager and letting him know the signage was all wrong, the problem was fixed (before) any of our guests arrived for dinner."

Events can be ruined by what planners do wrong or don't do at all. That's why it's best to create a thorough checklist for each event and keep in mind the following list of "do's and don'ts" to avoid blunders.

### Don'ts

#### Don't skip the meeting plan.

"This is a far more common event management mistake than most event planners imagine," according to the International Institute of Event Management (IIEM) website. "Lack of an agreed-upon plan increases the risk that tasks related to the event will fall through the cracks, that the event will have last-minute issues, fall short on budget and ultimately miss a major objective."

According to the IIEM, "A well-defined and agreed-upon event plan helps planners tackle every task efficiently and raises the appropriate level of awareness of all the activities involved in the execution of an event."

**Don't skip the site visit.** Virtual "walkthroughs" via 3-D event management tools are becoming popular. But a site visit is the best way to ensure a venue can deliver everything it promises, says Sheila Cleary, second vice president, recognition and conferences at National Life Group, in Montpelier, Vermont.

According to Cleary, "If you do not visit the location of your program prior to execution, you can make the mistake of assuming the hotel has shared current information about recent changes in areas such as staffing, managers, renovations, new ownership or taxes that will impact the outcome of your meeting."

**Don't overlook other events.** Find out what other groups will overlap with yours in a property or venue. Will the groups be sharing common areas? Will the groups have adjacent meeting spaces for simultaneous events?

### Setup Time is Key

**Don't skimp on setup time.** Plan setups in advance and have enough people to complete the tasks in time. Communicate with vendors and hotel staff to provide accurate setup times. Otherwise, programs can start late and mistakes can occur. Finishing a set up as attendees enter a room appears unprofessional, annoys guests and stresses out planners.

**Don't misunderstand event requirements.** For example, suppose the event stakeholder or client doesn't want a significant space between the stage and the audience.

There is no discussion about what the exact distance should be. The stakeholder is unhappy after arriving onsite and feels the distance between the stage and attendees is too great because it creates a disconnect between the two.

**Don't wait too long before making a weather call.** "No one likes to bring an event indoors when you are in an amazingly beautiful destination," says Cleary. "However, there is a lot of pressure. When the call is too early, you pull the event inside, and then it turns out to be spectacular weather. Or you wait too long, and bad weather ruins everything. My opinion is that no one knows the destination better than your hospitality partners. Get their input."

**Don't underestimate event size.** Too many attendees can overcrowd venues and cause the event to run out of food and materials. Confirm the number of attendees as early as possible and provide constant updates to proper-

ties and vendors. Consider venues that offer options for various group sizes and vendors who are flexible right up until they receive the final attendee list.

**Don't choose the wrong venue.** "A venue might sound really amazing, but does it reflect the corporate culture?" asks Karen Shackman, president, Shackman Associates, a New York City-based DMC. "Making an assumption that a venue can accommodate any last-minute changes or electrical requirements should be avoided. Consider the demographics of attendees, including age, gender and position in the company to determine whether the venue should have amenities, such as reality booths and Wi-Fi activation stations."

**Don't come across as negative.** Following months of planning, it's some-

times easy to get an attitude if programs are off schedule and food and beverage orders are incorrect. Remain cool. Word can easily spread throughout the meeting about an outburst and sour a planner's reputation.

### Do's

**Do perform an event risk assessment.** "Set time aside with your event team to brainstorm what could happen to derail the event, cause a budget overrun or to prevent you from delivering the expected results," according to the IIEM. "Then figure out ways you can mitigate those risks. This exercise doesn't take long, and it's enormously helpful in understanding the weak links before planning gets underway."



Sheila Cleary, Second Vice President, Recognition and Conferences, National Life Group, Montpelier, VT

**Do think like an attendee.** "Getting attendee feedback prior to planning will pay off in a big way," says Shackman. "We are finding some of the most successful meetings we have helped manage were the result of a collaborative effort throughout the company to find exactly what kind of

Don't  
skip the  
meeting  
plan.

***"If you do not visit the location of your program prior to execution, you can make the mistake of assuming the hotel has shared current information about recent changes in areas ... that will impact the outcome of your meeting."***

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takeaway attendees expect for programs, including entertainment, receptions, offsite activities, food and beverage and spouse/partner programs."

**Do organize load-in times and schedules.** Suppose the loading dock in a venue has space for only one vendor to offload at a time, but three show up within minutes of each other? And they have limited time to unload because they must make other deliveries. A thorough site survey can prevent such a problem.

**Do ensure that all staff members, vendors, hotel staff and volunteers have a detailed event timeline.** If they don't, the event will not run smoothly.

**Do provide final payments, event details, guest counts and other important information to vendors in a timely manner.** This helps vendors function in a satisfied and efficient way.

#### Go Green

**Do be eco-friendly when possible.** Green events are increasingly popular among attendees, especially millennials. There is no shortage of hotels and meeting venues with "green" certifications that recycle and re-use supplies and energy.

**Do track and verify change orders.** "Failure to keep a track of the smallest change can mean an out-of-control budget or an impossible timeline," according to the IIEM. "Following a formal 'change tracking process' is a simple but extremely effective way to keep changes documented, communicated and under control."

In addition, according to the IIEM, "The individual requesting the change (e.g., additional seating capacity or change in food service) needs to explain the specific changes, and the event manager needs to determine how that request will impact the budget, timeline and communicate it to all other stakeholders involved. Inspect each function room well in advance to ensure that the setup includes change orders."

**Do bring a hard-copy of key contracts and agreements.** Mobile devices and laptops can be lost, damaged or stolen.

**Do communicate effectively.** Failing to provide ongoing timely and accurate information to the planning team, suppliers, venues, hotels and volunteers can spell disaster. Let everyone know what to do and when to do it.

#### Think Traffic

**Do anticipate possible traffic snafus.** Double-check during the weeks before the event to make sure there is sufficient transportation. Have backup transportation plans. A bus, van or limo could break down or not arrive for various reasons.

Such problems can ruin a function or an entire event. "Getting your attendees stuck in rush hour or other traffic on the way to an event or after-hours cocktail party will be remembered as a major meeting set-back and, in some cases, will alter an entire day's schedule," says Shackman.

Maintaining good relationships with DMCs and city officials can help resolve unexpected transportation conflicts that arise from local on-meeting events.

"Utilize technology and DMC partners that can help avoid problems like this, especially if there are other major events in town during the meeting," says Shackman. "We work closely with city officials to anticipate these potential conflicts. If a meeting group does not have access to those relationships, it can become a big problem."

Shackman was able to resolve a transportation problem with the help of New York City officials.

"We recently had to completely alter transportation for attendees of a financial meeting at the last minute after learning from city officials that it would be conflicted by an ongoing New York City event," says Shackman. "It avoided an hour delay. That is something that could have compromised a major business event for our clients."

**Do use dependable and reputable suppliers.** Seek suppliers that have experiences with the type of event you are planning. Ask for references and proof of liability insurance.

**Lastly, start planning early.** It's the best way to get the dates, hotel, venues and entertainment desired.

Planners want events to give attendees positive long-term memories, but that's difficult to accomplish if a mistake sends everything into a tailspin.

That's why planners must resist the temptation to enjoy a sense of accomplishment and relief once a meeting starts. Instead, keep in mind what to do — and not do — during the event to prevent mistakes.

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Garden  
Inn

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trü  
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HOMEWOOD  
SUITES  
BY HILTON

HOME2  
SUITES  
BY HILTON

Hilton  
Grand Vacations

Hilton  
HONORS





DOYLE



HINFHEY



VOSS



CHAMBERS



DE VINCENTIS

Montage Laguna Beach has announced the appointment of **Anne Marie Doyle** as director of sales and marketing. Doyle was previously the director of sales and marketing at The Ritz-Carlton Bacara, Santa Barbara.

Teneo Hospitality Group, the premier global representation firm, has appointed **Susan Hinfey** as director of sales, western U.S. Hinfey has more than 20 years of sales experience with luxury hotels.

Bellagio has appointed **Amanda Voss** as the resort's new vice president of sales. Voss most recently served as vice president of sales for Park MGM.

**Ben Chambers** and **Chris De Vincentis**

were named group sales managers at Sea Pines Resort. Chambers is joining the team as senior sales manager. He was previously associate director of sales at the Hilton Head Marriott Resort & Spa. De Vincentis was previously sales manager at The Westin Hilton Head.

**Eileen S. Cole** was named director of sales and marketing for Eaglewood Resort & Spa, a Benchmark Resorts & Hotels property in Itasca, Illinois. She was most recently vice president of sales and marketing for The Bricton Group of Mt. Prospect, Illinois.

The Resort at Pelican Hill in Newport Beach, California, has announced the appointments of **Jean Schulte** as director of incentive sales and **Simaan**

**Hawa** as director of sales. Schulte most recently served in global sales roles for Montage International. Hawa returns to Pelican Hill after serving as director of sales for Southern California's Monarch Beach Resort.

BENCHMARK has appointed **Jon Conching** director of sales and marketing for Turtle Bay Resort. Most recently, he held the position of director of sales and marketing for the Hyatt Regency Waikiki Beach Resort & Spa.

Noble House Hotels & Resorts, Ltd., has appointed **Andrew Ladd** as director of sales for Kona Kai Resort & Spa in San Diego, California. Ladd has more than 15 years of hospitality and sales experience. **I&FMM**



COLE



SCHULTE



HAWA



CONCHING



LADD

## AN **ALL-NEW** PERSPECTIVE ON MEETINGS AND EVENTS



All-New Walt Disney World Dolphin Lobby

The Walt Disney World Dolphin lobby has undergone a \$12 million re-design, the final stage of a \$150 million renovation project, the largest makeover in the resort's history. It has completely transformed into a sleek, contemporary space featuring new food and beverage options and offer an inviting area for guests to relax or network. A recipient of the prestigious Meetings & Conventions Hall of Fame Award, the Walt Disney World Swan and Dolphin is a nationally respected and recognized leader in the convention resort arena. The resort offers more than 331,000 sq. ft. of meeting space, 86 meeting rooms, and 2,270 guest rooms and suites which feature the Westin Heavenly® Bed. Attendees can also relax in the luxurious Mandara Spa, indulge in one of our 17 world-class restaurants and lounges or enjoy our unique Disney Differences.



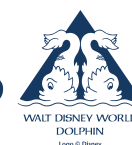
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