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# INSURANCE & FINANCIAL MEETINGS MANAGEMENT

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## The Path to Sales Training Success

Follow These Signposts to Maximize Engagement  
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Head of Field Training  
Farmers Insurance  
Los Angeles, California

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Credit: Farmers Insurance

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## INSURANCE & FINANCIAL MEETINGS MANAGEMENT

THE EXECUTIVE SOURCE FOR PLANNING MEETINGS & INCENTIVES

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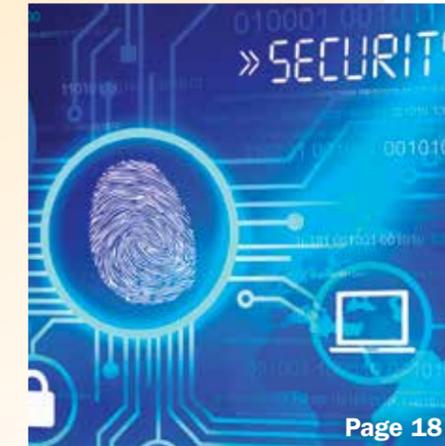
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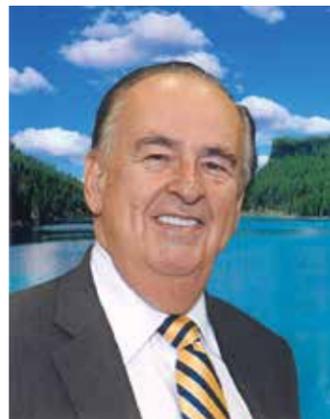
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# Publisher's Message

## Old School Is New Again

Communication expert Geoffrey Tumlin wonders if newly graduated job seekers have the communication skills necessary to pitch an idea, to build a consensus among group members, or to establish rapport with a client.

Tumlin, the author of *Stop Talking, Start Communicating: Counterintuitive Secrets to Success in Business and in Life* (McGraw-Hill, August 2013), offers



this intriguing idea: "A tech-centered view of communication encourages us to expect too much from our devices and too little from each other," he says. "We assume that hitting 'send' means we've communicated, when really, the other person may not have understood the message at all. Even with the most powerful connection and transmission devices in human history in the palm of our hands, communication doesn't happen until the other person understands."

Furthermore, Tumlin says the "old school" behavior of listening helps employees become much better communicators, which sure comes

in handy when staging meetings for effective sales training sessions.

In our cover story on page 22, "The Path to Sales Training Success — Follow These Signposts to Maximize Engagement," professionals such as Edie DePhillips and Dave Nystrom share their best practices.

DePhillips, vice president, sales advisory manager, event project management team at Wells Fargo Home Mortgage, is not a fan of lectures. "We believe it's hard to sit for hours listening to one person be a 'talking head' versus facilitating a group discussion, going out and taking five minutes for a table discussion, and doing a lot of interaction," she notes.

By the same token, the award-winning Farmers University's position is to "lecture only as a last resort," says Nystrom, head of field training for Farmers Insurance, who is pictured on our cover. Instead, they are proponents of the 60/20/8 formula: "Every 60 minutes all learning ends. Every 20 minutes you change topic, and every eight minutes you change what the attendees are actually doing. So for eight minutes, they're reading or talking about a case study, or they're putting the barriers up on a flip chart, or they're watching a video, or they're playing a game, etc. We try to vary the way they interact with the material six to 10 times within the session," says Nystrom.

Harvey Grotsky

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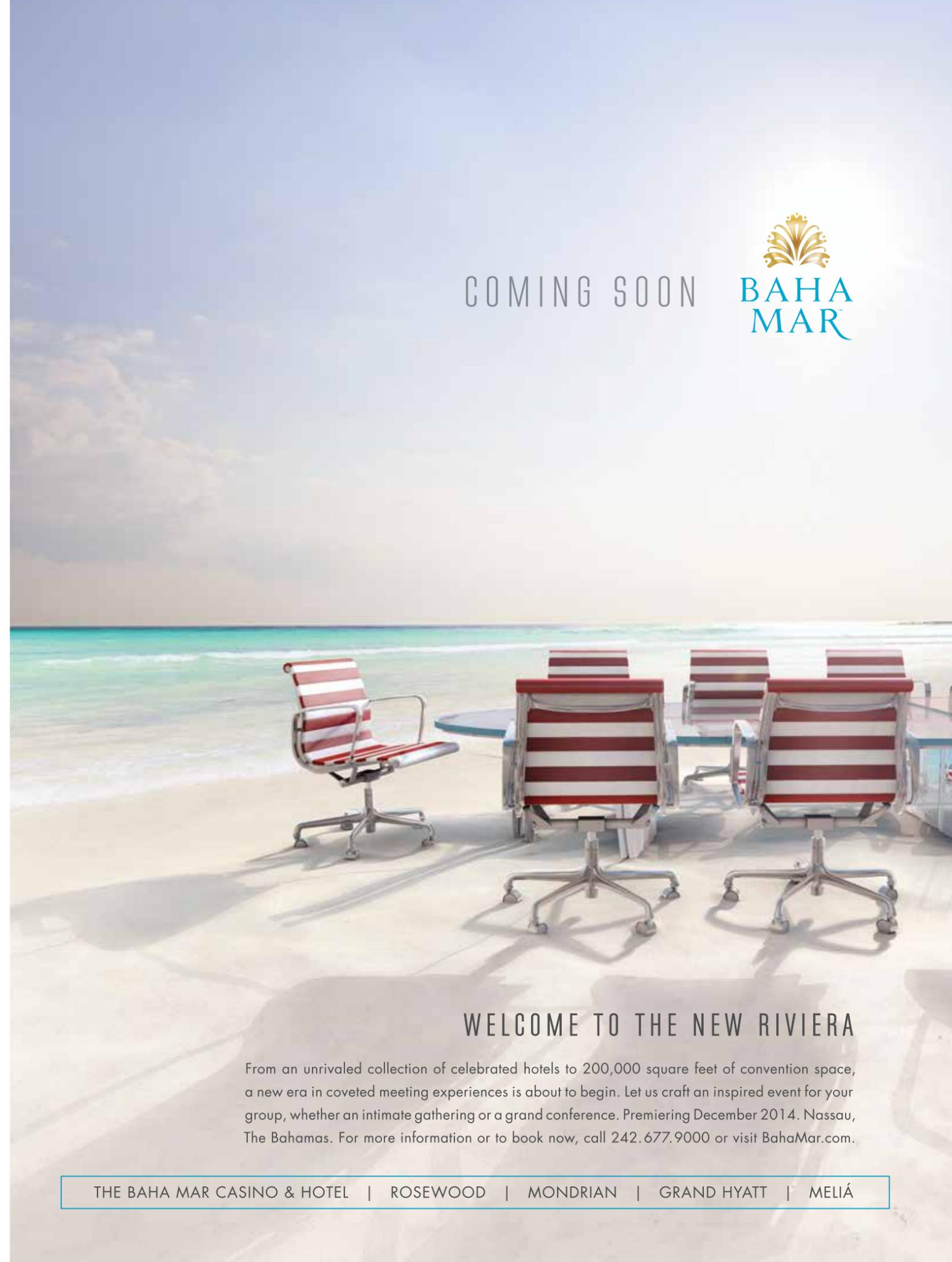
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WOOD

## Meet AC Formed to Expand Convention and Group Business in Atlantic City

ATLANTIC CITY, NJ — James Wood, the newly named chief executive officer of Meet AC, will begin building the convention, meeting and group market for Atlantic City, effective June 30, 2014. His appointment was announced by Meet AC Board Chairman Jeff Albrecht, general manager of the Sheraton Atlantic City Convention Center Hotel. Previously, the president

and CEO of the Louisville Convention & Visitors Bureau, Wood will lead the Meet AC sales effort to generate citywide and single-property bookings.

“The entire board was very impressed with Jim’s highly successful track record of accomplishments,” said Albrecht. “Everyone we spoke to about Jim reiterated his strong sales performance in every venture he took on. He is the perfect collaborator, strategist and leader to take meetings and conventions in Atlantic City to the next level.”

Meet AC, a private non-profit sales organization, which began operations on April 28, 2014, is funded by the Casino Reinvestment Development Authority (CRDA) and has an annual budget of \$8 million. Meet AC will work in collaboration with the CRDA, the Atlantic City Alliance and Global Spectrum, the newly selected management company of the Greater Atlantic City Convention Center and historic Boardwalk Hall. [www.meetinac.com](http://www.meetinac.com)

## Palmer House Hilton Completes \$215 Million Restoration



The lobby of the Palmer House Hilton.

CHICAGO, IL — Downtown Chicago’s historic Palmer House Hilton celebrated 143 years with the unveiling of its \$215 million renovation. The 1,641-room hotel has undergone an extensive restoration of its executive level, hospitality suites, meetings facilities, health club, business center and restaurants.

With more than 50 deluxe and hospitality suites in addition to the hotel’s penthouse, Palmer House Hilton’s Executive and Hospitality level accommodations feature Serenity Dreams plush-top mattresses, Peter Roth Artisan bath amenities, and exclusive VIP offerings such as private check-in, key-only access, complimentary breakfast and a dedicated concierge.

With more than 77 function rooms and 130,000 sf of event space, the Palmer House Hilton’s facilities offer a variety of options. From the famed Empire Room to the hotel’s Grand Ballroom and more intimate salon settings, the Palmer House Hilton ensures all spaces are outfitted with state-of-the-art technology.

Boasting new contemporary touches, Palmer House Hilton’s award-winning Lockwood Restaurant and Bar features farm-to-table offerings inspired by the hotel’s rooftop garden. [www.palmerhousehiltonhotel.com](http://www.palmerhousehiltonhotel.com)

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**1-7** Think it up. Live it up. Jazz it up. was the theme of the 2014 Financial & Insurance Conference Planners Education Forum held June 18–20 in New Orleans at the historic Ritz-Carlton, New Orleans. A record-breaking number of attendees — more than 200 participants of whom 74 were planners — enjoyed the event. Attendees experienced three days of unmatched education sessions and lively networking opportunities as well as activities that benefit local charities such as Junior Achievement. Jana Stern (**1**) of ING, the 2014 FICP chair, announced significant membership growth: 92 new planner members in 2014 (through May). Total membership stands at 698 planners from 218 financial and insurance companies. FICP’s app is now available to download at the Google and Apple app stores. FICP Executive Director Steve Bova, CAE, noted that FICP is offering five face-to-face events this year and next due to the great demand. The Summer Symposium is set for August 21–23 at the Omni King Edward in Toronto, and the Fall Symposium will be held September 7–9 at The Ritz-Carlton, Rancho Mirage. The Annual Conference will be held November 16–19 at the Hilton Waikoloa Village in Waikoloa, Hawaii.

# Presentations

By Mindy McReynolds



## How to Put Your Best Foot Forward to Produce a Successful Panel Presentation

A panel presentation can provide a meaningful way to share a variety of ideas on a topic and showcase your organization as a thought leader while demonstrating your breadth of talent and unique group culture. Because they involve a great deal of collaboration, they are also highly educational. Once you've selected the participants, and they've agreed to participate, the planning has just begun. Although tricky, keys to a successful panel presentation include early planning, scheduled rehearsals and fully identifying sound requirements and stage presence.

### Begin With a Plan

As is the case with any type of presentation, success begins with a thorough planning process. It is important to first discern if a panel discussion is a fit for your event, and if so, when it should occur within your meeting, conference or event. Don't fall into the trap of having a panel simply because you've always had one. Instead, evaluate if a panel format is the best way to present information to your audience on a particular topic or series of topics.

Panel discussions today are being used for both general and breakout sessions. They are a good way to get more speakers onstage within a given time allotment and enhance attendee engagement. Often they include a question and answer portion, which typically runs 45–60 minutes. Q&As with a moderator are popular because they are interactive and engaging, and ensure that the session covers ground that is of interest to the attendees.

Remember to answer these questions: How will the panel flow? Who is going to moderate the panel? What kind of mics are you going to use and where are they located? Should you have mic wranglers (people who deliver hand-held mics to the questioner)?

### Delving Into the Details

A good place to begin looking at specifics is with the panel's overall timing and flow. It is best to schedule the discussion immediately after a break as this creates a window of time for changing the set onstage. In any case, you

will need to consider the programmatic transition that will accommodate the panel. Key considerations include:

- **Stage Size:** Make sure the stage is large enough to accommodate the panel. If the panel is large, consider tiered seating on stage to accommodate the group.
- **Equipment:** Find out in advance if the venue provides stagehands and equipment. You may have to rent these items if they are not included as part of the event package.
- **Furniture:** Stage furniture is often an afterthought, which can result in high cost. If the hotel can't supply what you need, plan on building furniture rental into the budget. Most often, high-back stools with a foot rest or a standard chair with a back are all you need. End tables for notes and water, too.
- **Sound:** Audio requirements are a big consideration. Make sure you have enough channels and microphones for everyone on the panel plus a few extra. It's fairly acceptable for presenters to share handheld mics. A good rule is one handle for every two people.
- **Lighting:** When setting panel furniture, make sure to set the furniture in areas with good lighting on the stage. Pre-setting and "spiking" (marking) the stage ensures that placement is accurate.

### Delivery

With the equipment and staging planned, it is vital to outline the logistics and responsibilities of key personnel to ensure the panel is fluid. Presentation delivery includes more than just communicating your main message. As part of your planning phase, ask the following questions:

- **Who will perform the introduction?** Having a well-delivered introduction can kick things off on a positive note.
- **Who is the moderator?** Having someone who is experienced and comfortable can keep things flowing well.
- **Should you include videos?** This will require extra equipment and possibly a programmatic shift.
- **What are the control questions?** Questions planted

Production planning experts identify rehearsals as one of the most important keys to a successful event.

in the audience can get the discussion rolling when audience members are hesitant to participate. Having questions for which the speaker has prepared answers also helps the flow of the Q&A.

### • How does the speaker get on and off the stage?

The ideal scenario involves having a green room so that the speaker can enter and exit the stage from there. It enhances the professionalism of the presentation if the speaker doesn't come from the audience. (If the feel of the panel is smaller and more intimate, some speakers do prefer to come from the audience.)

Another key consideration is logistics or special needs for high-profile speakers. Also be sure to review any "speaker riders" in contracts. Speaker riders are a personalized list of requirements such as mic needs, stage equipment, food and beverages, and podium heights.

### Show Time

Even with the best of plans in place, it is vital to make time for a thorough rehearsal. After all, there's nothing like a dry run to call out those little points that have been forgotten. Production planning experts identify rehearsals as one of the most important keys to a successful event.

As the discussion is about to launch, be sure that your speakers are reminded of a few tips for success. To begin, remind your panel speakers to be aware of their body language while onstage. They should, for example, be engaged with what is going on even when they are not presenting. It is important that they make eye contact with the cameras and the audience. Also, remind speakers to wear comfortable attire. Comfort onstage can be different than comfort at floor level. Onstage considerations involve such issues as cords and other tripping hazards that can snag shoe heels, as well as the viewing angle that audience members will have from the floor. Remind them to be cognizant of potential wardrobe issues, such as trying to position yourself on a high stool in a long skirt. Further, each speaker should



Remember to stage a comprehensive dry run before going live. A rehearsal is a key step in producing an effective panel presentation.



have a dedicated back stage manager: one person to act as a single point of contact and have accountability for helping the presenter get what he or she needs and get where he or she needs to be.

### Final Thoughts

Open lines of communication with your production team are the real underpinnings of a successful panel discussion. The technical and timing hurdles associated with a panel are not large, but they can be diverse. Therefore, advanced planning, along with a coordinated effort among team members, will create the best flow for your event. Panel discussions can be a powerful way to share knowledge and information. Your organization is in the spotlight during these events, therefore, it's critical that you put your best foot forward while onstage.

I&FMM

**Mindy McReynolds**, a member of the metroConnections team since 2005, has expertise in events, production and speaker management. In her current role as director, production services, she is responsible for all stage production-related programs for metroConnections. With a degree from California State University, Northridge, she has more than 12 years of experience in the industry. McReynolds has held other positions at metroConnections including production coordinator, show manager and speaker manager. [www.metroconnections.com](http://www.metroconnections.com)

# Ahhh...

## Spa Resorts Deliver

By Gabi Logan

*The Spa at The Broadmoor, Colorado Springs, Colorado, provides luxury spa and wellness services amid stunning natural surroundings.*



Credit: The Broadmoor

In an increasingly regulated business world, finance and insurance company meeting professionals constantly walk the line between optics and appropriately rewarding and valuing employees with the destination events they plan. Golf resorts are often off the menu not only for perception reasons but also because the sport doesn't resonate with changing demographics, and planned leisure activities are increasingly cut from schedules as meetings become shorter and more business-focused.

### The New ROI on Luxury Retreats

Ever creative, pushing boundaries and creating new experiences for attendees, financial and insurance planners today are increasingly turning to spa resorts to kill two birds with one stone: a refined atmosphere mixed with ways for employees to restore and rejuvenate themselves to do their jobs better when they get home.

In the same way that farm-to-table

cuisine, green meetings and indoor-outdoor events have been in vogue for long enough now to be more than a trend, meetings and events with active, health-conscious elements are both a hit with attendees and create positive brand perception. It's a new type of luxury, and one that has clear ROI. What better place to tie all these elements together than a hotel or resort dedicated to a healthful lifestyle? According to the 2014 Spafinder Wellness 365 Trends Report, "Last year we explored how, after a century of hotel experiences synonymous with bacchanalian excess, more properties were on a new health kick and branding and re-branding around wellness. But the most powerful trends, such as 'healthful hotels,' are more than passing news and become mega trends because they fulfill profound human needs. Report after report reveals how runaway corporate health care costs are devouring corporate profits. More businesses (and their road

warriors) are demanding healthier business travel and meetings, a key galvanizer of the healthy hotel trend. Because everyone, everywhere, now more than ever, needs travel that restores."

While the terms "healthful" and "wellness," particularly in a hospitality context, typically denote exercise and diet or spa cuisine, health-conscious hotels today are embracing the pampering and restorative aspects of wellness in ways that create a perfect environment for high-end meetings and incentive trips where attendees have the option to pick the best spa resort elements for themselves.

The 2014 Spafinder report predicts a rise in destination spas or wellness retreats that provide immersive wellness programs ideal for an incentive, if not a pick-me-up in breaks during a long meeting. "This trend is about new growth in, and new directions for, those unique properties where the serious business of intensive fitness, healthy food and other mind-



Credit: Aon Affinity



Credit: Loews Portofino Bay Hotel

*Terry Maniscola recently held the Aon Affinity annual leadership meeting at Loews Portofino Bay in Orlando whose Mandara Spa offers massage and more.*

body programming typically gets mixed with serious pleasure — and warm support," it says.

"In 2014 (and beyond), we will see more all-new destination spa properties, like the just-opened Vana in India's Himalayan foothills," it continues. "We'll see revered brands go on an expansion march, whether Miraval from the U.S. or Lanserhof from Austria. We'll see more headline-grabbing, hit-all-angles, big wellness 'campus-palaces,' but we'll see even more smaller wellness retreats at more (affordable) price points, and usually with more targeted angles: whether no-nonsense weight-loss boot camps or rustic yoga retreats."

### What Draws Planners to Spa Resorts Today?

The amenities and atmosphere that come with spa resorts seem to be bigger draws for meeting planners than the spa services themselves, which only a portion of attendees take advantage of. Terry Maniscola, vice president of shared services with London, England-based Aon Affinity says, "To be honest with you, what our group does within Aon are higher-end hotels, and they all have spas attached to them. We don't look specifically for spa places, because we don't specifically use the spa as our meetings are more business than pleasure. Over the years it has changed. I used to book time for ladies to go to the spa, but now it's more of an individual option during free time.

"We also don't typically include golf, and haven't for the last 15 years. In the 27 years I've been here, I've seen it become strictly business. We talk budgets and how to reach our goals when our leaders get together three or four times a year, and we have travelers from all over the world fly in when they can. They go all day from 7:30 in the morning to 5 o'clock in the evening, and the last day they meet until noon and then

people are free to fly home. We give them free time when they come in and before they go home, but this is a long meeting."

Maniscola recently held her annual leadership meeting at the Loews Portofino Bay Hotel at Universal Orlando Resort, a waterfront replica of the Italian coastal town of the same name. With a breezy ocean vibe that runs from the décor of the light-filled hotel rooms through the 42,000

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Nikki Dobrman enjoyed the discounted spa services at Chateau on the Lake Resort in Branson at the Community Bankers Association of Kansas convention.

sf of meeting space to the East-meets-West spa, the Loews Portofino Bay feels a world away from Orlando's top attractions.

Its Mandara Spa, a zen-centric, Asian-inspired brand, combines exotic elements such as Balinese flower body polish, seaweed wraps, hot stone massage and coconut milk baths with the latest high-tech spa facelift, enzyme peels and cellulite therapies to create a spa menu that has something for any event attendee, no matter their wellness needs.

Sandy Sinclair, payroll coordinator for St. Louis, Missouri-based The Daniel and Henry Co. and director of the Midwest Regional Payroll Conference, agrees that some of the best perks of spa resorts can be tangential, less directly related to the spa itself than parts of the spa resort experience. "We're drawn to spa resorts for our meetings due to a number of reasons," she says. "Firstly, they tend to have a very luxurious atmosphere,



Credit: Community Bankers Association of Kansas

which is very calming and makes the conference feel like a nice getaway in addition to the learning opportunities we provide, and secondly, these types of locations usually have over-the-top customer service."

Customer service at spa resorts today goes far beyond typical concierge services with a host of highly trained health specialists in areas that benefit even those who aren't typical spa enthusiasts. One of the newest trends is a sleep concierge who works with attendees not only to select the best pillow and mattress for their needs — a health practice increasingly common in up-market hotels — but also to perform a sleep assessment and receive recommendations based on the latest sleep science on how the individual can sleep better not only at the hotel, but also at home.

Yvonna Hansen, vice president of Topeka, Kansas-based Community Bankers of Kansas and organizer of its events, relies on spa resorts for their varied amenities. "We most recently chose Chateau on the Lake Resort, Spa & Convention Center for our annual convention and trade show. Because it's our annual event, we're looking for that family atmosphere with an upscale location, and Chateau on the

*The courtyard of the Spa Chateau at the Chateau on the Lake Resort, Spa & Convention Center in Branson, Missouri.*

Credit: Chateau on the Lake Resort

Lake was great because it had the spa and access to the lake and marina. The resort gave us a 10 percent discount for spa services and a good 25 percent of attendees took advantage of them."

Located in Branson, Missouri, Chateau on the Lake's 14,000-sf spa incorporates both local resources and traditional European practices into its spa offerings. Upon entering, the experience begins with a crystal chandelier in the 30-foot spa lobby, setting the scene for a day of luxurious pampering ideally wrapped up in the outdoor Roman-style baths overlooking the lake. Frequent spa-goers may enjoy the lakeview yoga studio, but the barber spa, offering haircuts, scalp massage and other

services for men, makes spa-going an attractive experience for

**"We have had requests to include the spa element, and every year that we have an event out of state, which is every other year, a spa resort is something I look for."**



**Yvonna Hansen**  
Vice President  
Community Bankers of Kansas  
Topeka, KS

both sexes. The spa has 10 treatment rooms, so it's best to allow attendees to schedule their own time as the space is limited.

### Spa-ing's Significance

Does the increase in spa usage among finance and insurance companies mean men are choosing the spa over golf? Planners don't report seeing a clear trend here, because their spa retreats signify an equally if not more important shift: the growing foothold of women in these industries.

On both the 2012 and 2014 Forbes 30 Under 30 in Finance lists, women have held an increasing foothold, including a special feature in the 2012 list

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\*Greens fees additional. ^Additional cost. Sandals® is a registered trademark. Unique Vacations, Inc. is the affiliate of the worldwide representative of Sandals Resorts.

on Jennifer Fan, 29-year-old founder of Arbalet Capital. Previous lists of this ilk barely, if at all, mentioned women. In the 2010 Catalyst Census: Fortune 500 Women Executive Officers and Top Earners, women held 14.4 percent of Executive Officer positions at Fortune 500 companies and 7.6 percent of top earner positions, whereas in the 2013 Catalyst Census: Fortune 500 Women Executive Officers and Top Earners, which counts the number of women in upper management in Fortune 500 companies, women were 17.6 percent of executive officers in the finance and insurance industries, a significant increase from Fortune 500 companies overall.

"A good 25 percent of attendees took advantage of the spa during our event at Chateau on the Lake, but with our group, the spa-goers are still primarily female," says Hansen. "We have had requests to include the spa element, and every year that we have an event out of state, which is every other year, a spa resort is something



I look for." Though golf is still part of Hansen's events, she says, "we're branching out and trying to add another event like the fishing tournament we did this year."

Sinclair agrees that the spa is the way to go for female attendees, who make up the majority of her group. "Our meeting planners have never focused on golf," she says. "We have a large percentage of female conference attendees, so the spa atmosphere has been prevalent with us, and it's primarily women using the spa, primarily taking advantage of the spa treatments."

## New and Noteworthy

California, long a leader domestically for health-conscious culture and green meetings, is home to two recently unveiled resort spas leading the pack in creating a destination spa experience that excels whether in the bedrooms, meeting rooms or spa treatment spaces.

Winner of the 2013 *Condé Nast Traveler Readers' Choice Awards*, the **Bacara Resort & Spa** in Santa Barbara, California, features a 42,000-sf oceanfront spa that offers traditional Eastern and Western spa treatments along with several special California twists, such as the Gaviota herbal therapy, based on herbs from the Gaviota coastal region where the resort is located, and the sea breeze rooftop massage, incorporating natural ocean sounds, sights and smells into the healing experience.

Treatments, such as the citrus avocado polish, lavender lift, orange honey peel and rooftop self-applied mud bar all bring elements of the sur-



*At the Blue Harbor Resort & Spa, Sheboygan, Wisconsin, guests choose their favorite scent for the blissful massage to follow at Reflections Spa.*



*The inviting pool at the award-winning Spa Bacara at the Bacara Resort & Spa, Santa Barbara, California.*

rounding Santa Barbara countryside into the spa.

Beyond the traditional wellness spaces, the garden paths and hiking trails offer opportunities for attendees to head out together on a group wellness activity. With 36 treatment rooms, the spa is large enough to book out for a few hours to accommodate all attendees of smaller groups in a set time block.

Named as one of the most popular meeting resorts by Cvent, Bacara's more than 70,000 sf of function space includes the high-tech Executive Conference and Technology Center, which offers planners a variety of indoor-outdoor spaces, including a 211-seat screening room, 11,300-sf ballroom and breakout rooms equipped with the latest audio-visual conferencing technology.

Associated Luxury Hotels International has also recently added the resort to its portfolio. "The new Bacara Resort & Spa is special," said Associated Luxury Hotels International CEO David Gabri in a statement. "It features an extraordinary oceanfront setting, wonderful meeting and event space, and first-class facilities and service all the way, and we are very proud to add the resort into the ALHI portfolio. Planners considering a meeting or program in California should definitely speak with their ALHI Global Sales professional about this incredible resort, and consider it in their rotations."

Meanwhile, in Dana Point California, **The Laguna Cliffs Marriott Resort**

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Post spa treatments at the Red Lane Spa, attendees can relax and enjoy the inviting pool at Sandals Emerald Bay, Great Exuma, Bahamas.

and Spa is taking its new spa in an eco-luxury direction with “greenovation.” For its redesign, the spa has incorporated repurposed and upcycled elements such as reclaimed wood art installations and mosaic glass lighting sconces to create a holistic health environment that brings the outdoors into the spa in a way designed to make guests feel connected to nature yet pampered at the same time. The “Do Organic, Be Organic, and Live Organic” program offers guests an option to have a completely natural experience from treatments to cuisine.

*“Over the years it has changed. I used to book time for ladies to go to the spa, but now it’s more of an individual option during free time.”*



**Terry Maniscola**  
Vice President, Shared Services  
Aon Affinity  
Hatboro, PA

Reflections Spa at **Blue Harbor Resort and Spa**, Sheboygan, Wisconsin was voted one of the best boutique spas in the state by *Milwaukee Magazine*. The spa menu includes a variety of services from manicures and pedicures to body wraps, facials and massage. Attendees will retreat into

peaceful tranquility, and dissolve their stress away under the care of skilled professional staff trained in the latest spa therapies.

The Spa, designed with earth-tone colors, offers a quiet retreat with soft music, aromatherapy candles and a feng shui balanced atmosphere including five luxurious treatment rooms, and a manicure/pedicure room.

The Red Lane Spa at **Sandals Emerald Bay**, Great Exuma, Bahamas, combines classic European rituals with a Caribbean flair. New services include Raindrop Dreams, a 90-minute treatment, which harnesses the healing power of aromatherapy and is followed by a full-body and foot massage. Also, the Red Lane Signature West Indian is a relaxing treatment combining muscle stretching, compression and manipulating techniques.

**M Resort Spa Casino** in Henderson, Nevada, features Spa Mio — a 23,000-sf world-class spa with 16 treatment rooms, sauna, steam and jacuzzi wet areas, full-service salon and barbershop, luxury locker rooms and state-of-the-art fitness center.

Before or after a visit to Spa Mio, attendees with extra time can find more options for relaxation at the M Resort’s more than 100,000 sf of pool and entertainment space. The main pool area features two heated, infinity-edge pools and two large jacuzzis surrounded by fire torches. The inti-

mate DayDream Pool features cabanas, daybeds, lounging areas, an ice-railed bar, disc jockey booth, hot tub, and an infinity-edge pool and spa.

**The Spa at Pelican Hill** in Newport Coast was recently voted “No. 1 Spa in California” by *Condé Nast Traveler* magazine and a Forbes Five Star recipient for the fifth consecutive year since it opened in 2008. Attendees also may visit **The Spa at Island Hotel** in Newport Beach, a five-diamond property near Fashion Island, which features nine treatment rooms as well as separate male and female locker rooms. Each spa option is a member of the **Irvine Company Resorts** family.

### Final Thoughts

SRI International’s 2013 Global Wellness Tourism Economy report



A visit to Spa Mio can be followed by a dip in the pool at the DayDream pool club at the M Resort Spa Casino in Las Vegas.

found that wellness tourism already captures 14 percent of global tourism expenditures to the tune of \$439 billion. And while that’s largely due to the leisure market, group business is building as perceptions shift: As it grows harder to justify pampering for the sake of pampering, planners are turning to spa resorts more for their restorative environments and amenities than expressly for their luxury. Tying the more sumptuous elements of destination meetings into a healthful living initiative is a win-win for planners looking for meaningful ways to reward attendees without a big spend or perception of excess. **I&FMM**

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# Calculated



## Assure Personal Safety and Data Security With a Solid Crisis Management Plan

By Karen Brost

As the Italian philosopher Machiavelli once said, “Never was anything great achieved without danger.” While he may have been referring to Renaissance politics, the same could be said for planning a meeting. That danger can come in many forms that not only can affect the safety and security of your at-

# Risks

tendees, but it also can put your company’s private data and proprietary information at risk. The best way to minimize that risk is to develop an effective risk management plan and then, even more important, make sure that it’s implemented.

Brian Avery, president of Event Safety & Security Services LLC in Maitland, Florida, has been in the business for 25 years, both as an event safety and security consultant and as an expert witness in injury cases. He finds that many companies don’t have a risk management plan in place. “But,” he says, “accidents can and do happen.

trips over a cord that’s in the middle of the aisle at a meeting or an event, the odds are they’re going to be embarrassed, shake it off and walk away. If you’ve got that same situation with an 80-year-old in a walker, they could fracture a hip and wind up hospitalized and near death.”

### Quiz the Venue

One strategy he recommends is for planners to have a discussion with the management of the hotel or venue where their meeting or event will be held. “Ask them what safety policies and procedures they have and to share them with you. Ask the management, especially when you’re in a foreign country, ‘What’s your emergency exit procedure? What do you do in the event of a fire here? What is your 911 system? Is it the same as ours? How do you contact it?’ At some of these larger properties, when you think you should be calling 911, you’re actually doing a disservice because the property is so big that when the fire department arrives, they don’t know where you’re at. You need to follow a procedure about how you call security at

*“I know that we take notice in the industry of these very large catastrophic accidents. ...But it’s the minor stuff that we’re not paying attention to that’s actually costing us a small fortune.”*



**Brian Avery, President**  
Event Safety & Security Services, Maitland, FL

The more frequently that you’re exposed to something, the higher the probability is that you’re going to have an incident occur as a result of that exposure.

“It’s just luck of the draw, so to speak,” he continues. “If you have a hazard and you don’t identify it and you don’t deal with it, it’s just a matter of time before someone is going to be exposed and injured by it. Whether it’s severe or not, that’s the unknown. If you’ve got a young person that

your property so they can pinpoint your location and bring fire and EMS to you in a timely manner, especially in these large convention centers and large hotels.”

Avery also recommends that planners check for potential safety hazards during their site inspection and bring any concerns to the attention of management to be addressed before agreeing to hold the event there. An Event Site Planning Checklist created by the International Special Events

Society ([www.ises.com](http://www.ises.com)) headquartered in Chicago includes items to evaluate such as entrances and exits, fencing and barriers, emergency evacuation exit routes, emergency vehicle access, disability entry and exit routes, locations of the main power, water and gas controls; trip hazards and the accessibility of first aid facilities. The list also includes verifying legal certification for tenting and other temporary structures, the availability of an indoor-outdoor public address system, fire extinguishers and secure storage for hazardous and dangerous materials.

### The Big Slip-Up

Avery says that slip, trip and fall incidents account for nearly 70 percent of safety issues that occur at events. “You need to be observant. Make sure you don’t have any trip hazards. Make sure you’re picking up after yourself.” He advised that move-in and move-out times for an event can be especially hazardous. “Regardless of whether the show is open or not, everything always needs to be kept tidy, because there’s that one instance when someone is walking through and they trip, and the next thing you know you’ve got a claim on your hands.

“I know that we take notice in the industry of these very large catastrophic accidents that we have, like the Indiana State Fair (stage collapse) or when a major fire breaks out at a hotel and kills

people. But it’s the minor stuff that we’re not paying attention to that’s actually costing us a small fortune, in my opinion,” he adds, citing spills at food and beverage stations or improperly installed rigging as other examples. “Even something as simple as a power cord can cause a problem. (People say) ‘Well, I taped it down,’ but anything over a ¼-inch elevation change in a walkway is a trip hazard.”

### Vendor Insurance

Avery says that another area where companies put themselves at risk is

## Industry Resources

Brian Avery, president, Event Safety & Security Services LLC, recommends that planners take advantage of the many resources that are available to them for developing a risk management plan.

For example, PCMA recently released an Emergency Action Plan Template that can be customized to meet a company's needs.

At FICP's annual conference in Hawaii last November, Tyra Hilliard, Ph.D., JD, CMP, associate professor, restaurant, hotel & meeting management, University of Alabama, presented a session titled "Risk Management: Five Things You Can Do Right Now to Protect Your Attendees, Your Meeting and Your Organization."

The Site International Foundation is another resource. The organization recently published a white paper titled "Risk Assessment/Management for Incentive Events." It identifies the following risks as being among those incentive planners may encounter during a program:

- Weather and natural disasters
- Government or labor unrest
- Transportation disruption
- Medical emergencies
- Currency fluctuation
- Acts of terrorism

As part of a plan for mitigating potential risk, the white paper recommends enlisting the aid of the following information sources:

- Government travel advisories
- Destination experts such as DMCs, hotels and tourism offices
- Insurance companies
- Airlines
- The company's own legal department
- Private security companies
- Financial advisors

— KB

when they fail to verify that the third-party vendors they're hiring have sufficient insurance. "When the big fish is putting on the event, and they hook in 30 outside vendors and they're not checking everybody for insurance, maybe one of the 30 causes an incident on your floor, and they don't have a policy. Who is going to take the blame for it? The company that has the event. This is where people are getting burned hard. This is where I see high-dollar judgments coming in."

### Protect the Execs

Stephen Barth, professor of hospitality law at the University of Houston and founder of *HospitalityLawyer.com*, says that another area planners need to focus on is executive protection.

"(It's about) getting people to the meeting, not all on one plane, not all in one car, not all on one bus, because you constantly have to think about business continuity. Let's say the entire executive team is going to share a town car or they're going to share

a limousine, which a lot of people like to do. That's one of the poorest choices you can make when you've got your entire intellectual property and the business continuity team in one place. So getting them there and back (separately) is something that I see overlooked a lot. It really risks the business continuity."

### Information Security

Barth continues, "The other thing that I see more and more today is how do you keep the content of your meetings private? When you think about risk management, you can't just think about people, you've got to think about your data and your intellectual property, your IT."

Caleb Merriman, chief information security officer for BlueCross BlueShield of Tennessee in Chattanooga, agrees, "We are often lulled into a false sense of security at conferences and meetings. Since they are often off-site, they frequently lack the security controls that we enjoy when working

from the office. The best way to protect sensitive data is to avoid bringing it to company meetings and events unless it is absolutely necessary. If you must bring sensitive information, do it on company-owned encrypted assets."

"Typically, hotels are places of public accommodation, so anybody can walk in," Barth cautions. "Your competitors are going to know when your meetings are, so you really have to take pretty significant steps to ensure that the only people that get into the meeting are the people that are supposed to be there. I see that very loosely done in meetings. Somebody has to control the badges. Somebody has to control entrance into the meeting rooms themselves."

He adds that it's also important to verify the security of data connections because financials and other sensitive data may be presented in PowerPoint presentations. "Is the Wi-Fi secure? When you tap into that hotel's Wi-Fi, is it possible to hack into it? And then the other thing that you want to make

sure of is that you have restrictions on video and audio recording in the room itself." Barth advises that these restrictions also should apply to employees. "If you get an employee that knows they're going to be leaving, sometimes they might want to walk off with the information from the meeting."

### PwC's Info Security Survey

The accounting and consulting firm PricewaterhouseCoopers (PwC) recently released its key findings from

***"When you think about risk management, you can't just think about people, you've got to think about your data and your intellectual property, your IT."***

**Stephen Barth, Professor of Hospitality Law, University of Houston  
Founder, *HospitalityLawyer.com*, Houston, TX**

"The Global State of Information Security Survey 2014." The report is titled "Defending Yesterday," a reference to the fact that most organizations are focused on defending against security threats identified in the past, even as "their adversaries look to exploit the vulnerabilities of tomorrow."

The study, which PwC conducted with CIO and CSO magazines, received more than 9,600 responses from executives around the world who answered more than 40 questions related to privacy and information security safeguards. The report found that security incidents have increased, as has the cost of these security breaches. In addition, the report states that "smartphones, tablets and the 'bring your own device' trend have elevated security risks. Yet efforts to implement mobile security programs do not show significant gains over last year, and continue to trail the proliferating use of mobile devices." The survey found that in the U.S., 17 percent of the companies surveyed do not allow non-corporate-supplied devices to be used in the workplace or to have network access.

### Looked Good on Paper...

But the threats aren't only electronic. "Avoid printed materials since they can be left behind and picked up by outsiders," Merriman recommends. "Avoid whiteboards and butcher paper, since information can be left behind or seen by others. Be cautious about projecting sensitive information when it can be viewed by others outside of the meeting room. Also," he adds, "prohibit hotel staff or



want to have in the contract who's going to provide security, and what the level of security provided by the conference center, the meeting venue or the convention center will be. My experience with convention centers is they have very little security, and so if you want security, you have to install it. You've got to pay for it. I would ask these questions: 'Is there a closed circuit television system on the property? Is it monitored, and, if so, how often?' When I say monitored, I mean watched every minute. Also, does it offer total coverage of the property? You just need to know that you have another set of eyes. You want to always talk about the entrances and exits. How are those monitored? Are they locked? When are they opened? How do you restrict access? (You need to consider) things like that."

### Learning From Others' Experiences

Avery says that during the planning process, it can also help to reach out to individuals who have held similar events to get their perspective about any problems they incurred during their event and to learn about any concerns they may have had post event. Learning from the challenges

other service personnel from entering the room if sensitive information will be discussed. Ensure that everyone in the meeting room has a need to know. And remember that the elevators and restrooms are filled with people who don't need to know your company's sensitive information."



**Caleb Merriman, Chief Information Security Officer  
BlueCross BlueShield of Tennessee, Knoxville, TN**

***"Avoid printed materials...whiteboards and butcher paper, since information can be left behind or seen by others."***

on who else can host a meeting at the same time you're having a meeting." He says that this will help eliminate the risk of having your competitors within close proximity while your event is going on.

### Venue Security

Barth also stresses the need to monitor the physical security of the meeting at the venue. "You always

others have faced can help planners avoid having the same problems.

### Planning Pays Off

To paraphrase Mr. Machiavelli, great things can be accomplished in spite of the dangers that exist, and that includes meetings. It just takes building an awareness of the risks involved, and then creating and implementing an effective plan to mitigate them. **I&FMM**

# The Path to Sales Training Success



## Follow These Signposts to Maximize Engagement

By Patrick Simms

**I**nteractive” has been a buzzword in the meetings and events industry for many years, and with good reason: It ties in to another important buzzword, “engagement.” Attendees want to interact with their peers and with presenters, with products at product launches and exhibits, with local cultures on incentive trips, and so on. Planners who facilitate these interactions can expect a more engaged group of attendees who then will better absorb the business at hand — especially critical for action-oriented salespeople, who, if allowed to fall asleep at the wheel, will never arrive at the intended destination. Here are some signposts planners can follow to keep training sessions from running off the road.

### Offsite Venue Checklist

Companies without the benefit of specially designed onsite training facilities often do need to make recourse to hotels or conference centers for sales training, and a variety of site-choice criteria come into play, such as:

✓ **Easy accessibility.** This is especially desirable for properties that will host a training event, since arduous air and ground transportation can detract from attendees’ ability or disposition to concentrate. As Lisa Ramsay, CMP, director of meetings, Protective Life Insurance Company, notes, “We try to keep the programs as regional as we can just for logistical ease on the instructor and the attendees.”

✓ **Destination appeal.** When agents are paying their own way, this factor can be important. “We find that not only does your content have to be motivating to get them to come, but the destination can also be a draw,” says Barb Orvis, senior meetings and events planner for ING. “We try not to be in a place that’s going to be overly distracting, but also where we’re going to get attendance.”

✓ **Multiple breakout rooms.** The trend toward interactive training often calls for this feature. Edie DePhillips, V.P., sales advisory manager, event project management team, for Wells Fargo Home Mortgage, says, “We do tend to have quite a few breakouts, as we think getting into smaller groups is a good way to get people interacting and provides some variety from a large general session.”

✓ **Outdoor venues.** These are useful for a breath of fresh air between intense sessions, or even a little training outside of the conference room for a change of scene. — PS

Typically very energetic, salespeople are not likely to be engaged by a speech or lecture for long, and that’s a problem if the content is sales techniques that are directly relevant to the company’s bottom line. “We believe it’s hard to sit for hours listening to one person be a ‘talking head,’ versus facilitating a group discussion, going out and taking five minutes for a table discussion, and doing a lot of interaction,” remarks Edie DePhillips, vice president, sales advisory manager, event project management team, at Wells Fargo Home Mortgage in Des Moines, Iowa.

Other major firms share that philosophy. When delivering a sales training session, it is arguable that one should “lecture only as a last resort,” to quote one of the underlying principles observed at Agoura Hills, California-based University of Farmers.

A variety of other activities regularly supplant lecturing at the award-winning university, explains Dave Nystrom, head of field training.

“We subscribe to a 60/20/8 formula,” he says. “Every 60 minutes all learning ends. Every 20 minutes you change topic, and every eight minutes you change what the attendees are actually doing. So for eight minutes, they’re reading or talking about a case study, or they’re putting the barriers up on a flip chart, or they’re watching a video, or they’re playing a game, etc. We try to vary the way they interact with the material six to 10 times within the session.”

Lecture as a Last Resort

The 60/20/8 Formula

***“We believe it’s hard to sit for hours listening to one person be a ‘talking head,’ versus facilitating a group discussion, going out and taking five minutes for a table discussion, and doing a lot of interaction.”***



**Edie DePhillips**  
V.P. Sales Advisory Manager  
Event Project Management Team  
Wells Fargo Home Mortgage, Des Moines, IA

Attendees also absorb sales concepts better if they arrive at them via specific sales situations, before considering the application of the ideas to their jobs or the background theory. “Traditionally, training has been theory first, application second and experience third,” Nystrom says. “We flip it around: We let them *experience* it right upfront, then we talk about the *application*, and then give the *theory* behind it. It’s what we call the EAT approach. So we start by presenting the situation and asking, what do you do? What do you have to do differently? They usually figure it out for themselves.”

**The EAT Approach**

While the emphasis on interactive sales training has not obviated traditional speakers within many training programs, it has tended to limit the span of time that participants play the role of listeners. “After a speaker’s done, we would typically move on to the next speaker. This year, we tried following each speaker up with about 10–15 minutes of open discussion,” notes

Barb Orvis, senior meetings and events planner with St. Cloud, Minnesota-based ING. “Then the audience can share perhaps how they might have implemented what the speaker talked about. Sometimes I think we put great speakers in front of people, but then (the attendees) don’t get a chance to immediately talk with their peers around the table. They might have to wait two to three hours, and some have already checked out; (the topic) is in the back of their mind.”

**Open Discussion**

With this discussion component in mind, Orvis has the seating set up in crescent rounds instead of classroom or theater-style. Birmingham, Alabama-based Protective Life Insurance Company uses the same arrangement for its sales group role-playing sessions, informally called “war rooms.” “We try to get them down to smaller numbers, groups of 10 to 12, and sometimes we’ll set it up like an office so they can really get a lot out of the role-playing,” says Lisa Ramsay, CMP, director of meetings. “When you set it up in an environment like that, it’s not so sterile; (attendees) are less restricted, and more casual and open. It helps the learning process.”

**War Rooms**

**Networking**

Socializing outside of the meeting room also helps to facilitate interactive learning, and establishes useful connections among salespeople from disparate regions. “Each evening we usually do some kind of cocktail reception and a dinner. The networking is important because sometimes if (a participant) gets home and has a question about a part of the business, they have a contact they can call,” Orvis says.

The value of face-to-face networking is a major reason why ING has not replaced more of its sales training meetings with virtual learning, she adds. Nonetheless, it’s important to keep the meetings short (most programs require only two hotel nights), since “we don’t want to take them out of the office for too long, which takes time away from them selling in the field.” The individual sessions last about an hour and 50 minutes,

**Shorter Meetings**



***“We subscribe to a 60/20/8 formula. Every 60 minutes all learning ends. Every 20 minutes you change topic, and every eight minutes you change what the attendees are actually doing.”***

**Dave Nystrom**  
Head of Field Training  
Farmers Insurance  
Los Angeles, CA

and Orvis has found it effective to end the last session no later than 4:30 p.m. “Anything later, and even getting to that point, you start to notice a drop off in attendance; it’s an overload of content,” she explains. The point should be borne in mind even for training programs with required attendance.

**Pacing**

There are other practical ways in which planners can help to ensure the trainees maintain focus, for example by allowing them enough time to recuperate from their flight. “If we are going to start the program on the day that they fly in, we’ll maybe kick off with a lunch and try not to make that afternoon so intense, but rather the next morning once everyone’s had a good night’s sleep,” Ramsay relates.

Avoiding F&B that induces lethargy is also sensible. “Nowadays people are concentrating on getting a lot of protein, and we provide healthy snacks like fruits, yogurt and nuts,” she adds. At the University of Farmers, trainees have access to a snack room that is adjacent to the classroom. “One of the things about adult learning is that when you’re thirsty, you’re thirsty, not when break is being done,” Nystrom says. “So we let them get what they need any time they want it. (Fixed break times) are a challenge with using hotels for training, generally speaking.”

**On-Demand F&B**

There are other features of the Farmers training environment that can be difficult to replicate at hotels. “The typical hotel room has a front and a back, but we use the whole room with projections in four places. So no matter where you’re sitting you can see (the presentation). And every person here has a \$400 ergonomic chair. Before we built the university we used hotels, and part of our contract was that they had to buy such chairs. They were willing to do that,” he says.

**Ergonomics**

A good post-event survey will include various questions about the site choice, given that trainers want to deliver content in an ideal physical environment. A less-than-ideal site may adversely impact participants’ reaction to the learning event, which is Level One of the “Kirkpatrick’s Four-Level Evaluation Model,” a learning and training evaluation methodology. At the University of Farmers, Level Two of the model — how much participants learned due to the training — is sometimes determined via pre- and post-tests to ascertain the learning increase, Nystrom notes. (A high average score on the post-test alone does not necessarily mean a learning increase, as participants might have achieved that score without having taken the course.)

**Training Evaluation**

Nystrom also identifies a Level Zero, which is the number of participants in the session. ING has begun using RFID technology to capture this metric, which is significant when attendance is not mandatory. “We use it at some of our larger meetings to know who’s attending which breakout sessions, and that sometimes tells us whether our attendance is dropping off later in the day and we can adjust our schedules in that regard,” Orvis explains. “And if we’re offering one particular topic over two

***“The networking is important because sometimes if (a participant) gets home and has a question about a part of the business, they have a contact they can call.”***



**Barb Orvis**  
Senior Meetings & Events Planner  
ING  
St. Cloud, MN

**Attendance Measurement**

days, and each day we see high numbers in those sessions, that tells us there's a high interest and we follow up in the coming months with snippets or webinars for people who couldn't attend."

## Business Results

After the Level Three measurement — behavior change as a result of the learning — business results are measured in Level Four, which is the ultimate ROI. "If we see a sales increase of the products they've been trained on, we equate that to the success of the meeting," Orvis says. DePhillips puts the point more generally: "Our litmus test is whether we are moving forward, whether the business is moving in the right direction. You should also be able to see if what you taught or the message you shared becomes part of the (corporate) culture."

Wells Fargo's training initiative for its salesforce of more than 9,000 home mortgage consultants is a multipronged approach that includes face-to-face, online and self-guided training. "The mortgage industry, as much as we're trying to make it an easier industry to operate in, still is a complicated business," says DePhillips. "So we need to look at the type of training we need to deliver and determine what's the best

way. We may do a combination; for example, we may roll out an initial high-level training to get people accustomed to the topic, goals and lingo, and then go in deeper with hands-on computer training if it's tech-based or skill-building with role-playing, which obviously needs to be face-to-face."

*"We try to get them down to smaller numbers, groups of 10 to 12, and sometimes we'll set it up like an office so they can really get a lot out of the role-playing."*



**Lisa Ramsay, CMP**  
Director of Meetings  
Protective Life Insurance Company  
Birmingham, AL

but you can't learn how to swing a golf club just by reading it. Or you can play Tiger Woods golf on a computer, but it's not the same as playing golf on a course." Accordingly, while some topics are only available via a certain medium of instruction, others come with recommendations as to the best medium to choose.

## Site Selection

Most recently, Farmers is trying to also provide more flexibility in training sites. "For some of our major curricula, they have to come here to attend them, and many programs are 2½ days. It means time away from the office and travel expenses for our audience, these agents and independent contractors," says Nystrom. "So one of the things we're exploring is called Bring the U to You, which means we'll have to start using hotels. We're just piloting it now to see what level of interest we get."

The overarching objective is to create sales-training programs that fit learners' needs on multiple levels including:

- **Topic**
- **Medium** (face-to-face, virtual)

## A Blended Approach

Flexibility in the training medium is also key at the University of Farmers. "Our ultimate goal is to let the learner learn it the way they want to learn it; some prefer online, some in a classroom, some by experience: 'Give me five things I can go do to experience it,'" says Nystrom. "So if the topic justifies it, we try to have it available any way the learner wants.

Some topics are better suited (to a particular medium). If it's 100 percent knowledge based, you wouldn't ever do that in a classroom, or if it's 100 percent skill based, you're better off doing that in a classroom. For example, you can learn the rules of golf by reading them,

## Flexible Learning

## The Best Fit

- **Instructional approach** (often emphasizing interactivity)
- **Scheduling** (program dates and duration, session lengths)
- **Logistics** (destination choice, facility choice)

When a good fit is achieved, trainers often find that the programs effectively promote themselves, since agents are looking for well-targeted, convenient education.

## Map a Path to Success

"One of the great things about Wells Fargo culture is development," says DePhillips. "We really want people to succeed, and in order to do that we offer these opportunities, and our team members take advantage of it. They know the value of (the programs), and they can see the outcomes in how they have bettered themselves, and so we really don't have to promote. We tell them it's out there, and we provide a pretty clear path as to training: 'Here are the steps and the different classes that will help you be successful.' We have a great internal website as well as team members dedicated to L&D that help them find the classes, get to the classes and then execute on what they learned."

The highly skilled and educated agents that "graduate" from these programs are directly responsible for satisfied customers. "We want our customers to succeed," she adds, "and in order to do that we need to be on top of our game, with the best-trained agents who can share the latest information with our customers so they can ultimately be successful in their home ownership."

And finding happy customers at the end of the road is on everyone's roadmap to success.

*I&FMM*

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# The Big Easy Makes a Big Comeback

By Derek Reveron

# New Orleans

The good times roll as the grand marshal and jazz band lead a "second line" parade.

Credit: Riverview Photography, Linda Reineke

**B**uoyed by the popularity of meeting in New Orleans, Louisiana is thriving as a destination. The Big Easy has made a big comeback from the double whammy of Hurricane Katrina and a lackluster economy.

As New Orleans approaches its tricentennial in 2018, the city is more excited than ever about its future. "We are possibly among the top three most unique cities in this hemisphere but certainly in the United States," opines Bonnie Boyd, CMP, DMCP, president of New Orleans-based BBC Destination Management. "I've been doing this for 30 years, and it has always been a city that people want to come to."

The city's special challenges in recent years have contributed to its continuing resurgence. "A lot of it has to do with the experience of the last nine years," says Boyd. "There has been a big push in corporate give-back and bio-tourism programs. They have brought a lot of people who have seen how great the city is. A lot of them return with a faith-based group or other group to volunteer. Some have even moved here."

## New Orleans

New Orleans is as big a draw as ever for all types of meetings and incentives including those held by financial firms and insurance companies. "New Orleans is pretty popular across the board with most kinds of businesses," says Maria W. Evangelista, travel specialist for JMJ Travel Services in the New Orleans suburb of Metairie. "In some other cities, it's difficult to get to the main attractions. If you stay in one area, it's a hassle to get to the popular places. But here, you have great restaurants, museums, bars, jazz — everything you want right here."

That's one reason why an accounting corporation held a three-day meeting in New Orleans earlier this year. About 200 accountants in one division of the company met at Harrah's New Orleans Hotel and Casino for educational and training sessions.

The accounting firm's meeting planner only booked one company activity because the group preferred to explore New Orleans on their own, including a trip to the Fair Grounds Race Course to watch the horse races. "Other than that, they were pretty much on their own. They loved that because in New Orleans, they could walk almost anywhere they wanted to go. Everything is so accessible. There's the world-class dining, the historical area and there's always Bourbon Street."



An aerialist pours cocktails for attendees during a reception at the popular venue Generations Hall.

tion process. The accounting firm "enjoyed the hotel restaurants, and they were in the casino at night," says the planner. "The hotel is located on the edge of the French Quarter, and they were able to get to the restaurants they wanted that are well-known."

Visitors to New Orleans are known for extending their stays, and that's what many of the accounting firm's attendees did. Some people arrived a few days early while others stayed a few days after the event. Although the meeting was scheduled for three days, attendees averaged a five-day stay, says the planner. It was the group's first meeting in New Orleans, and they plan to come back again.

## Gearing Up for Growth

The accounting company's attendees are among a growing number of visitors to New Orleans. The city welcomed 9.2 million visitors in 2013, up from 9 million in 2012, ac-

The planner selected Harrah's mostly for the "unbelievable" value. "The group came in over the weekend of the Sugar Bowl game, but we were fortunate enough to get them shoulder season rates, which was very unusual. It was a lot of work. I worked with Harrah's East Coast division, and they booked me an unbelievable rate. No other hotel could touch it. I guess Harrah's really wanted their business," the planner notes.

In addition, the location of the hotel and its amenities were factors in the selec-

Attendees pose with a friendly gator at a swamp party also known as a "Cajun Fais Do Do."



Credit: Riverview Photography, Linda Reineke

*“There has been a big push in corporate give-back and bio-tourism programs. They have brought a lot of people who have seen how great the city is. A lot of them return ...to volunteer.”*

**Bonnie Boyd, CMP, DMCP**  
President  
BBC Destination Management  
New Orleans, LA



space, a 4,660-sf junior ballroom, a 3,420-sf rooftop terrace, a 5,700-sf executive club lounge and a 980-sf indoor balcony. The MCCNO now has 1.1 million sf of exhibit space, 140 meeting rooms and the 4,000-seat New Orleans Theatre.

In addition to complete wireless coverage of public spaces, meeting rooms, the New Orleans Theater, The Great Hall and a pre-function area, the center is capable of supporting thousands of concurrently connected mobile devices.

Major projects will be funded partly by a new Tourism Support assessment. In February, the members of the Greater New Orleans Hotel and Lodging Association voted to pass the assessment of 1.75 percent of the daily room charge, effective April 1, 2014. The assessment was passed to “fund the vital sales, marketing, promotion, incentives, visitor management and special event activities that keep New

Orleans’ cultural economy vibrant and put the city on a more level playing field with its competitor cities,” according to a statement by the New Orleans CVB.

Orleans is undertaking major development projects over the next five years that will make the city even more attractive to planners: The Louis Armstrong New Orleans International Airport will undergo an \$826 million expansion; a new Convention Center District Development Project — which includes a new headquarters hotel, park, entertainment, cultural venues and more — will launch along the city’s riverfront; and the New Orleans Ernest N. Morial Convention Center (MCCNO) will continue with improvements.

The MCCNO’s most recent renovation project reconfigured existing spaces into the 60,300-sf, column-free Great Hall. The project also added 25,400 sf of multiuse, prefunction



*The Sugar Mill, located directly across from the convention center near the Mississippi River, can accommodate more than 3,000 attendees for large corporate events.*

### Rich in Entertainment and Cuisine

Excitement is New Orleans’ calling card. The city is incredibly rich in

entertainment, cuisine, architecture, hotel variety and more. That’s what attracted a financial firm to hold a six-day incentive for 1,500 employees in New Orleans in May at the Hyatt Regency New Orleans.

About 400 winners arrived two days before the rest of the group. The elite group enjoyed a first-class variety of New Orleans experiences. “We did a surprise Mardi Gras-style parade,” says the planner. “We had the group gather in the meeting space in front of the hotel, where a band led them down to the street where the rest of the musical and parade elements were. They included high school marching bands, a brass band, revelers and stilt walkers.” The parade continued for about four blocks to Champions Square near the Mercedes-Benz Superdome.

The group also held a Cajun-themed party at the Sugar Mill in New Orleans, a venue that specializes in large corporate hospitality events. Attendees enjoyed Cajun cuisine, zydeco music and sipped on drinks served in mason jars. They also learned a Cajun dance called the choo-choo. Swamp animals were on display, including alligators up to four-feet long that attendees could hold and pose with for photographs.

On another night, the group enjoyed karaoke at Club XLIV, a posh private lounge near the Superdome. Club XLIV pays homage to the New Orleans Saints’ victory in Super Bowl XLIV. The club features built-in amenities including modern furnishings, illuminated bars, specialty lighting and audio-video.

The entire incentive group of 1,500 attendees enjoyed a laidback evening at Mardi Gras World, a working warehouse where Mardi Gras floats are made. Artisans were on hand to answer attendees’ questions.

Mardi Gras World is conveniently located next to the New Orleans



*A rendering of the Convention Center District Development Project that will revitalize the New Orleans Ernest N. Morial Convention Center Corridor along the city’s riverfront and (r) the new entrance to the center.*

Ernest N. Morial Convention Center, near the historic French Quarter. They also arrange street parades from the hotel to get the party started.

Afterwards, the group relaxed at a dock along the river, viewed Mardi Gras floats, rode go-karts and dined on New Orleans-style fare from food trucks. Later in the evening, a band played rock and soul music as palm readers and caricaturists entertained attendees.

### Noteworthy Hotels

New Orleans boasts one of the best collections of meeting hotels in the nation. The city offers approximately 40,000 hotel rooms, and many hotels are within walking distance of the French Quarter. Here’s a sampling.

**The Hyatt Regency New Orleans** finished a \$2 million makeover of its Bywater Pool Deck & Bar, which features flat-screen TVs and a menu of feasting grilled and fresh foods. In addition, the lobby now features four new computers that guests can use for 15 minutes for free. The property offers 1,193 guest rooms and 200,000 sf of flexible meeting space including 70 meeting and banquet rooms.

**Loews New Orleans Hotel** celebrated its 10-year anniversary earlier this year and, as part of a new service by all Loews properties, began offering free wireless in public spaces and guest rooms. The hotel, located just outside the French Quarter, of-

fers 285 oversized guest rooms and 17,000 sf of function space with floor-to-ceiling windows.

The 346-room AAA Four Diamond **Omni Royal Orleans Hotel** has completed a \$15 million renovation, which includes revitalized meeting rooms with new carpeting, furniture and window treatments. The project also included refreshing the guest rooms and public spaces, which now feature custom furniture, improved lighting and 24 wrought-iron balconies. The hotel, which is located in the heart of the French Quarter, boasts 14,000 sf of flexible function space including the 5,284-sf Grand Salon and 17 meeting rooms.

The 1,100-room **Sheraton New Orleans** completed a \$50 million makeover, which includes a spacious lobby featuring works by late Louisiana artist George Rodrigue. The hotel’s 105,000 sf of meeting space, including a 28,000-sf ballroom, has been renovated. The hotel increase the bandwidth of its network, and offers free Wi-Fi and free wired high-speed Internet.

**The Roosevelt New Orleans, a Waldorf Astoria Hotel**, is celebrating its 120th anniversary. Last fall, the hotel recaptured its classic past by re-opening its Fountain Lounge, which features a raw bar, live entertainment, creative cocktails and a wide selec-



tion of wines. The property offers 504 guest rooms, including 125 suites, and more than 60,000 sf of event space including three grand ballrooms and 23 meeting rooms.

**Hotel Monteleone**, a four-star luxury property, was named one of the Best Hotels in the USA for 2013 by *U.S. News & World Report*. The property, located in the French Quarter, offers 600 guest rooms including 55 luxury suites and literary author suites, and 24,000 sf of meeting space including the 6,236-sf La Nouvelle Orleans Ballroom.

The **Hilton New Orleans Riverside**, located in the central business district, has 1,622 guest rooms and 130,000 sf of meeting space with French-influenced designs. Guests can enjoy a 90,000-sf full-service health and fitness spa.

**The New Orleans Marriott**, located in the French Quarter, has 1,329 guest rooms and 80,000 sf of meeting space including 49 meeting rooms. The 41-story hotel features views of the Mississippi River and the city’s skyline along with the award-winning 5 Fifty 5 Restaurant.

**The Hyatt Place New Orleans/**



Credit: The National WWII Museum



Credit: The National WWII Museum

*The National WWII Museum in New Orleans was set up to accommodate small meetings, large receptions, seated dinners, as well as corporate events.*

among the several riverfront gaming properties. Hotels include the region's newest gaming destination, Jimmy Buffet's Margaritaville Resort Casino, which opened last summer. Other properties include the Eldorado Shreveport Resort & Casino, Sam's Town Hotel & Gambling Hall, DiamondJacks Casino & Resort, Boomtown Casino Hotel and Harrah's Louisiana Downs. In addition, the Horseshoe Bossier City Hotel and Casino recently opened its new \$3.5 million tropical swimming pool.

**Convention Center** in the Arts District near the French Quarter, offers 170 guest rooms, three meeting spaces and complimentary wireless and Internet in public spaces and guest rooms.

Shreveport-Bossier City is a popular destination for many small and mid-sized companies based within Louisiana. The Horseshoe, a Caesars Entertainment property with 606 suites, is among the properties of choice for many insurance companies within the state.

### Shreveport-Bossier City

The region markets itself as "Louisiana's Other Side" due to its location in Northwest Louisiana along the Red River, which is less than 15 minutes from the Texas border. Shreveport-Bossier City features gaming, great restaurants, live music and year-round festivals, such as the Mudbug Madness Festival, one of Louisiana's largest and most popular Cajun festivals featuring entertainment, events, food and fun.

The area offers more than 10,000 hotel rooms, many of them located

and the Horseshoe is very easy to work with. They are usually way ahead of me when I need something. We plan to continue meeting there." In addition to hotels, meeting space includes the 350,000-sf state-of-the-art Shreveport Convention Center and the 24,000-sf Bossier Civic Center. Shopping is available at The Outlets at Louisiana Boardwalk. Unique meeting venues include the IMAX theater and Space Planetarium at Sci-Port: Louisiana's Science Center, and Gardens of the American Rose Center's Klima Hall.

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### Baton Rouge

Louisiana's capital, located only 80 miles from New Orleans, is a distinctive and colorful city that touts itself as ideal for meetings of up to 2,000 people because of its affordability and accessibility. As with other areas of Louisiana, Baton Rouge's Creole and French heritage offer planners several options for experiencing local culture.

Baton Rouge features several historical places that also are available for special events. For example, Louisiana's Old State Capitol, a Gothic structure and National Historic Landmark, is a 160-year-old property with displays featuring former controversial governor Huey P. Long, who was assassinated in 1935. The Old Governor's Mansion is a museum that includes memorabilia from nine Louisiana governors.

### Final Thoughts

Planners seeking a European-like experience in the continental United States need look no further than the greater New Orleans area.

The Big Easy is the nation's most European of cities because of its singular cultural, architectural, linguistic and gastronomic mix. In addition, most planners agree that few other cities offer such a good time. As one meeting planner once put it, "If you don't have a good time in New Orleans, it's your own fault." **I&FMM**

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Hyatt Regency Tysons Corner Center, Tysons Corner, Virginia, has named **Ray Messina** as director of sales, marketing and catering. He was director of sales and marketing at the Hyatt Regency Reston, Reston, Virginia.

Visit Baltimore has named **Kat Bryer** as sales manager, responsible for the Northeast region. She was senior sales manager at the Hyatt Regency Baltimore. **Christie Buckley** was promoted to national sales manager for the Southeast region. She was senior V.P. of convention sales and services.

**Christopher Levine** was appointed as director of sales and marketing at Hyatt Regency Chesapeake Bay Golf Resort,

Spa & Marina, Cambridge, Maryland. He was director of sales and marketing at Hyatt Regency Sarasota, Florida.

La Quinta Resort & Club and PGA West, a Waldorf Astoria Resort, has named **Timothy Rutland** as executive director of sales and marketing. He was director of sales and marketing at Stein Erikson Lodge Deer Valley, Utah.

The Walt Disney World Swan and Dolphin Hotel, Orlando, Florida, has named **Nick Anderson** as group sales account director, responsible for the New York and New Jersey markets. He was senior account executive at The Cosmopolitan of Las Vegas.

Meet Puerto Rico has appointed **Gabriela Ong** as national sales manager for the Northeast region, based in New York. She was sales manager at the InterContinental New York Barclay.

Mandarin Oriental, Atlanta has named **Kerry Dyer** as director of sales and marketing. She was director of travel industry sales for the Four Seasons Hotels and Resorts corporate office based in Atlanta.

**Suzanne Shogren** was named area director of sales and marketing for The Willard InterContinental, Washington, DC. She was most recently regional director of sales and marketing for PM Hospitality Strategies Inc. **I&FMM**

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