

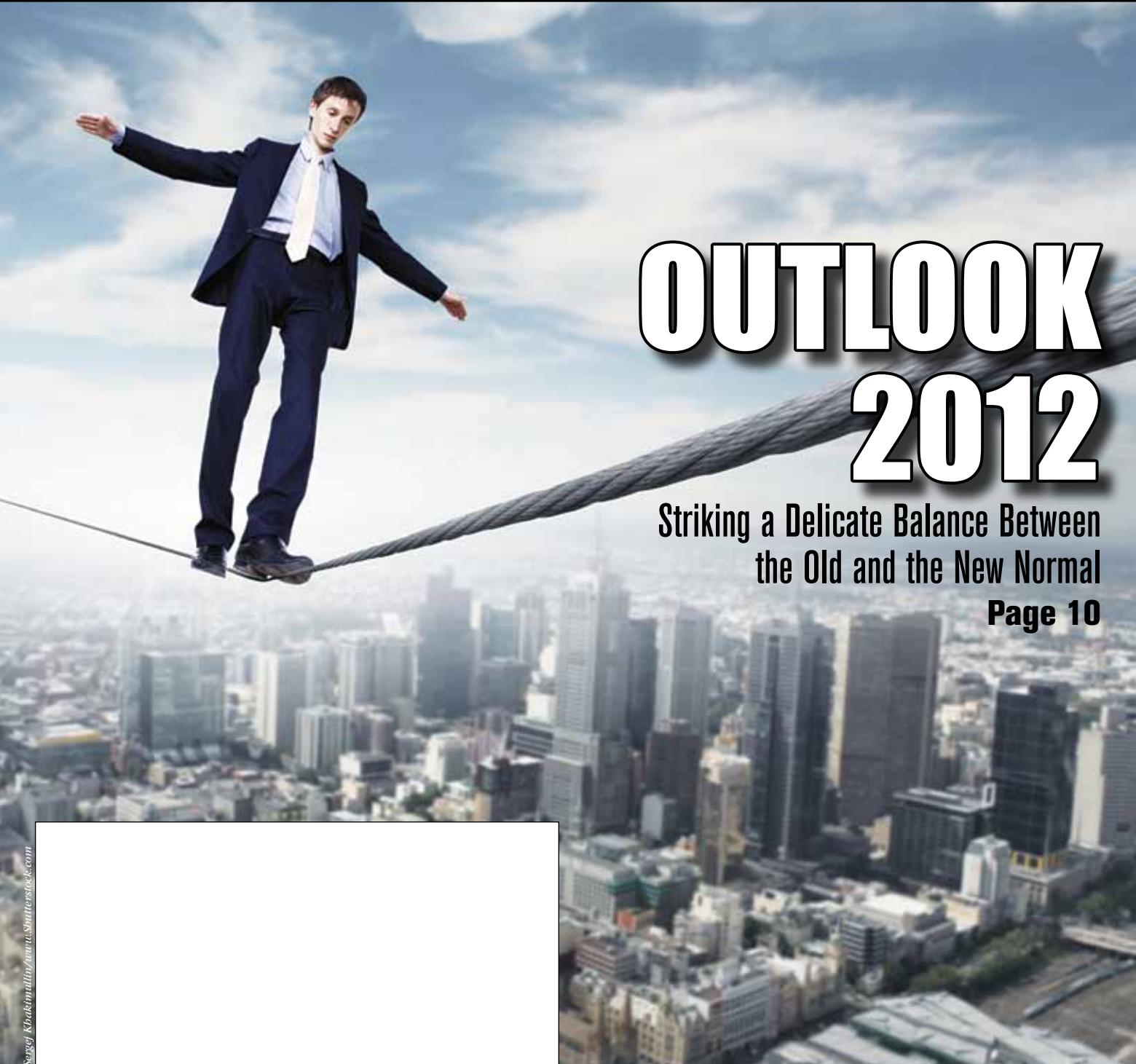
INSURANCE & FINANCIAL MEETINGS MANAGEMENT

THE EXECUTIVE SOURCE FOR PLANNING MEETINGS & INCENTIVES

OUTLOOK 2012

Striking a Delicate Balance Between
the Old and the New Normal

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Photo courtesy of La Costa Resort and Spa

At La Costa Resort and Spa, located in Carlsbad, CA, the award-winning Spa at La Costa recently introduced experiential packages especially designed for groups, such as "Rejuvenate & Repower."

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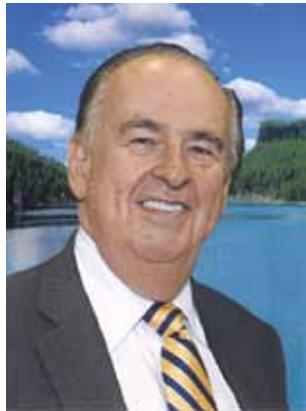
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Publisher's Message

The Balancing Act

Here we go again. The pendulum is swinging back. Costs are rising. Demand is increasing. As the overall business climate improves and the number of meetings, events and incentive programs continues spiraling upward, insurance and financial company meeting planners are beset with the ever-present "do more with less" imperative, even if they lost significant staff during the economic downturn.

In "Outlook 2012 — Striking a Delicate Balance Between the Old and the



New Normal," on page 10, we present trends, resources and suggestions that will help you manage the challenges of 2012 and beyond. For example, Steve Bova, CAE, the longtime Financial & Insurance Conference Planners executive director says planners "are just so darned busy. Whether it's travel, meetings, sending out emails, or projects they're engaged in, the volume of things planners have on their plates seems to be at an all-time high," says Bova.

This is encouraging, positive news but planners still must figure out how they will manage future business. Eldon Gale, director for meeting

and event management for Nationwide Insurance in Columbus, OH, and a member of the FICP board of directors, says, "If you can handle more with less, the more you're going to be asked to do just that," he says. "We were reticent about turning work away," he says about the last few years. "Now we're trying to maintain a delicate balance of managing our workload while maintaining the high quality standards we are known for."

On the other hand, doing more with less during the downturn and persevering through the AIG effect and subsequent perception problems resulted in learning how to thrive in the new normal: "We certainly took the opportunity to look to do things differently, like take multiple events and combine them into one meeting, for example," Gale notes. "But my company, and I'm sure others as well, realized that you still have to recognize the people who are doing the work, and that's what motivates the agents and brokers who sell our products.

"You take that carrot away and it has an impact," Gale says, "And the leadership of our company saw firsthand that it had a direct effect on performance, and they recognized that it does relate to profitability and has to be part of the company's program."

Harvey Grotsky

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The Wyndham Rio Mar Beach Resort & Spa, Rio Grande, Puerto Rico.

The Complete Meeting Package starts at \$55 per person per day for the months of April, June, September and November 2012. The \$55 rate includes: meeting room rental; continental breakfast; lunch; choice of morning coffee break or afternoon soda break; basic AV. Half day of tennis or golf can be applied to packages for an additional \$55 per person per day. Package does not include accommodations. 800-4-RIO-MAR, meetings@wyndhamriomar.com

InterContinental Hotels & Resorts.

The InterContinental Meetings package is offered in more than 20 hotels spanning the U.K. and continental Europe. The offer, valid for new requests booked and fulfilled by February 29, 2012, includes free Internet access for all attendees throughout the hotel and an upgrade of one standard coffee break to a customized "Insider Break." For details and a list of

participating hotels, visit www.intercontinental.com/meetingeurope-try.

Brazilian Court Hotel and Beach Club, Palm Beach, FL.

Meetings contracted by December 31, 2011 and held in 2011 and 2012 receive the following: room rates up to 30 percent off; two VIP suite upgrades; up to a 25 percent discount on facility fees and room rental; and wireless Internet access. 561-655-7740, www.thebraziliancourt.com

Sheraton Atlanta, Atlanta, GA.

Meetings actualized between now and June 30, 2012 are eligible for a "Secret Santa" gift, based on size and scope of the meeting booked. This gift can benefit the organization, meeting planner or a charity. Examples include shopping sprees in New York City, private jet charters, new cars, trips to Tahiti and more. "Secret Santa" groups must be contracted by December 31, 2011 to be eligible. 404-614-8240, www.sheratonatlantahotel.com/secret-santa

Industry News

The Broadmoor Announces Southlake Enhancement Project

COLORADO SPRINGS, CO — Constructed and opened with The Broadmoor in 1918, the two-story Southlake building is situated along the southeast curve of Cheyenne Lake between Broadmoor Main and the South Tower. The historic building's rooms and suites will be updated beginning in February 2012. The addition of balconies, a new entry foyer, lighting, carpeting and furnishings is slated for completion in early spring 2012. "Our history is one of our greatest assets," says Vice President of Marketing Dennis Lesko. "As we continue to be great stewards of what Spencer and Julie Penrose envisioned for The Broadmoor in 1918, we also know the expectations of our guests. This enhancement of Southlake is consistent with the look and feel of our grand resort while offering the amenities and services today's traveler has come to expect."

DoubleTree by Hilton to Debut in L.A. in Spring 2012

LOS ANGELES, CA — After an extensive, multi-phase hotel renovation program that is expected to begin in the coming weeks, the 430-room Kyoto Grand Hotel and Gardens in downtown Los Angeles will be rebranded the DoubleTree by Hilton Los Angeles Downtown in spring 2012. The hotel, which will be the largest hotel in the Hilton Worldwide portfolio serving the city's downtown district, will offer 15,000 sf of meeting and event space for up to 650 guests, a business center, a fitness center, and multiple food and beverage outlets. www.doubletree.com

Salamander Hotels & Resorts Launches Grand Golf Resorts of Florida Collection

ORLANDO, FL — Salamander Hotels & Resorts owner and CEO Sheila C. Johnson, recently announced the formation of the Grand Golf Resorts of Florida, a Salamander Collection. The new collection includes Innisbrook Resort near Tampa (owned and operated by Salamander since 2007), Reunion Wyndham Grand Resort in Orlando and Hammock Beach Resort in Palm Coast (both owned by Lubert-Adler L.P. — a real estate equity firm).

"Florida is the world's greatest year-round and most-accessible golf and vacation destination, and we are creating an experience unlike any other," said Johnson. "There are numerous synergies between the resorts, and their geographic locations make them natural partners."

The Salamander Collection offers 162 holes of golf designed by Jack Nicklaus, Arnold Palmer, Tom Watson and Larry Packard, and the world's only resort-based ANNIKA Academy, an innovative teaching facility designed and developed by Annika Sorenstam. www.grandgolfresorts.com, www.salamanderhotels.com



Annika Sorenstam (left) and Sheila C. Johnson high-five after Johnson attempts to chip onto a floating Salamander logo at the launch party of the Grand Golf Resorts of Florida - a Salamander Collection.

Royal Caribbean's Splendour of the Seas Announces Upgrades

MIAMI, FL — Splendour of the Seas, one of the oldest ships in Royal Caribbean's 22-ship line, is undergoing a revitalization during a five-week drydock in Spain. The 1,800-passenger ship will receive an extension to the bridge wings, five new dining venues, 124 new balconies, and technology and stateroom upgrades such as flat-panel televisions and ship-wide Wi-Fi. Routine maintenance also will be performed. The revitalization is part of Royal Caribbean's \$300 million Royal Advantage fleet-upgrade program, which has included enhancements this year to the Radiance of the Seas, Oasis of the Seas, Liberty of the Seas and Freedom of the Seas. www.royalcaribbeanincentives.com

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Global Business

By Terri Morrison



Smooth Sailing When Selling Around the World

At the end of your meeting in Munich, you are delighted that the German business person suggests you go to lunch! As you approach the elevator, you think of a funny story that he might enjoy. The elevator arrives, you follow him in, and then you do it. You start telling the joke...in the elevator! He looks at the floor, obviously uncomfortable, and because you're panicking...you speed through the story. Bad choice. Silence surrounds you.

In general, Germans do not tell jokes at work. But in an elevator, no one speaks. Ever. Your friendly, innocent repartee made you sound simple and embarrassing to be near.

Communications can be difficult at best. In global business dealings, especially in areas such as insurance and financial sales and marketing, errors due to miscommunications can be more serious, and the costs can escalate. Thus, it's important for professional meeting planners to understand and appreciate cultural and communication differences when planning global meetings, events and incentive programs.

Different Strokes for Different Folks

What happens when one culture's method of selling and negotiating is applied to different international business and social situations?

For example, in the U.S., insurance salespeople are often held to stringent deadlines for closing deals and hitting quotas. There is tremendous pressure to place prospects in warm, medium and hot queues...and the hot queue closes quarterly.

However, negotiating large contracts in the UAE (United Arab Emirates) or Saudi Arabia can take longer than a U.S. president's term in office. Figuring out why can be a puzzle. Which of

these answers is NOT a legitimate reason for a long close?

1. You may compete with family and friends of the prospect.
2. Arabic is a difficult language to translate.
3. The decision must go through a series of evaluations.

The incorrect answer is No. 2. While it might seem plausible, all languages are difficult to a non-speaker, therefore that is not the reason that your contract will take so long to close.

No. 1 is a valid answer. If there are family members who are also in the same business as you, your Saudi or Emirati prospect will be obligated to invite them into the proposal process as well. Therefore, your insurance or financial service or product must be superior, and you must be as trustworthy as any family member or friend that happens to be in the same industry.

No. 3 is also a valid reason. As Kim Willing, the director of international sales for a U.S. medical instrumentation firm described in *Kiss, Bow or Shake Hands: Sales and Marketing* (McGraw-Hill, 2011), the process of working with Saudis and the leaders of the five other members of the Cooperative Council for the Arab States of the Gulf (Bahrain, Kuwait, Qatar, Oman and the UAE) can be protracted:

The Council distributes a list of products they wish to purchase for their government hospitals, and you must then send a sample of every product for evaluation. Be incredibly tenacious, because their evaluations can take years. (In our case, we sent our products over for 10 years!) Consistency is vital because once they do award a contract, Council members are loyal. If they trust that you will be reliable, they will be, too.

Why Negotiations Go Awry

Obviously, there are many reasons why negotiations can go awry — and all of us have committed errors from time to time. Here's a good lesson to tuck away.

You are visiting a potential client in Latin America when your company's attorney calls. He is supposed to be inking a final contract with a huge new client of yours in Rio de Janeiro. Something has gone wrong, and your corporate counsel is angrily saying that this trip was a big waste of his time, and is blaming you for not closing the deal before he flew down from headquarters.

You immediately phone your erstwhile Brazilian client, apologize for the confusion, and say you will be on the next plane to Rio.

In Brazil, as in the majority of the world, it is important that the key players in a sale remain involved throughout the process. The larger the deal, the more important your relationship becomes as well, because in Brazil, many executives believe in the power of the individual to change policy for their friends. Personal contacts are how things get done, and if you are absent from the final portion of the close — the Brazilians may balk at signing the contract without you.

Did you know that it is against the law to disparage a competitor's product in Germany? As David Ricks points out in his book *Blunders in International Business* (John Wiley & Sons, 2006), Goodyear Tire made this mistake when it ran an ad that demonstrated a Goodyear tire cord breaking a steel chain (which was a German-made steel chain). The government halted the promotional campaign because the ad seemed to imply that the chain was inferior to the tire.

Every culture has its negotiating rituals, and

trying to control or change the process is futile. The United States is extremely direct, fast-paced and individualistic. (We make decisions and take actions on our own...often without even consulting all the parties involved.) Also, U.S. executives generally accept quantifiable data as evidence, while simultaneously tolerating a relatively high amount of risk. They make a leap of faith based on numbers. Other cultures accept feelings and

Every culture has its negotiating rituals, and trying to control or change the process is futile.

faith as evidence — they like to feel connected to and trust the people they work with. Those personal ties, reputations and belief systems will mean more during negotiations in most of Latin America, Asia and Africa than all the numbers you can crunch in Cleveland.

I&FMM

Terri Morrison is president of GTC and co-author of *Kiss, Bow or Shake Hands: Sales and Marketing*; *Kiss, Bow or Shake Hands: the Bestselling Guide to Doing Business in More Than Sixty Countries* and *Dun & Bradstreet's Guide to Doing Business Around the World*. Contact Morrison at 610-725-1040 or TerriMorrison@kissboworshakehands.com.

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Striking a Delicate Balance Between the Old and the New Normal

By Mike Bassett

The meetings industry may not have returned to the relatively free-spending days of the period preceding the "great recession," but a corner does seem to have been turned. The question, some observers ask, is whether that momentum can be sustained into 2012 and beyond.

"From my perspective, meetings are back — at least in my company," says Eldon Gale, director for meeting and event management for Nationwide Insurance in Columbus, OH, and a member of the board of di-

rectors of the Financial and Insurance Conference Planners (FICP).

The Budget Challenge

According to FICP Executive Director Steve Bova, CAE, anecdotal evidence collected at FICP's regional meetings during the late summer and early fall suggests that planners "are just so darned busy. Whether it's travel, meetings, sending out emails, or projects they're engaged in, the volume of things planners have on their plates seems to be at an all-time high,"

says Bova, who adds that while it's a positive sign that planners are busy, this increasing level of activity could have serious ramifications for planning staffs that have seen their budgets and staffing levels cut, particularly when trend forecasts suggest travel and hotel costs are going up next year.

For example, American Express Global Business Travel's annual Global Forecast projects air, hotel and ground costs will increase "conservatively" in 2012.

AMEX projects that short haul econ-

omy airfares will rise between 2 and 5 percent, while long haul economy fares are expected to climb between 0.5 and 3.5 percent. Short haul business fares are projected to increase between 5 and 7 percent, according to AMEX, while long haul business fares will climb between 3 and 5 percent.

Planners will see significant hotel rate increases in 2012.

AMEX projects rates for North American mid-range hotels will increase between 2.5 and 6.5 percent, while upper-range hotel rates will in-

crease between 1.5 and 5.5 percent. Internationally, higher increases are expected in the Asia-Pacific and Latin American regions.

TravelClick, a provider of hotel business process management solutions, has found that as of October 2011, occupancy rates for hotels in the top 25 North American markets through October 2012 have increased

same time period — based on reservations already on the books — are up by 4 percent.

"I think hotels are getting very itchy and anxious to start seeing their rates rise again," says Gale. "I've heard from a number of different national brands that hotel owners and management companies are saying that they really want to see those rates climb."

Bjorn Hanson, dean of New York University's Preston Robert Tisch Center for Tourism, Hospitality and Sports Management, says there is

some evidence supporting Gale's observations.

Hanson has issued a trends analysis report that finds hotel executives expect corporate contract rates to increase by a national average of 6–8 percent or more in 2012.

"From the point of view of the hotel industry, buyers have been getting a great deal for the last few years and should be expected to start paying what hotels think they should have been paying a few years ago," Hanson says. "So the hotels are playing a little bit of catch up."

One problem, though, Hanson says, is that there is a large disconnect between how much hotel executives expect rates to increase and the 3–5 percent increase buyers are planning for in 2012.

According to Hanson, buyers are looking at low occupancy rates — projected at around 60 percent in 2012 — and expect lower rate increases, while hotels see a healthy growth in demand and expect rates to increase accordingly. "Each side of the nego-



"Within the next two years it is really going to hold true that if you don't have a mobile app for your event, your attendees are going to ask why. And the question they'll ask is, 'Is your company behind the times?'"

Corbin Ball, CMP, CSP,

Corbin Ball Associates, Bellingham, WA

days before 2008," he says. "And even though we're ready to see that happen, I don't know if we're ready to pay the price for that just yet."

Bova points out that when planners start out with flat budgets and they expect costs to increase, "it presents even more of a challenge for our planners. What is that going to mean for other areas of meeting planning responsibilities?"

Staffing

Gale says that he continues to hear from FICP members that staffing levels will be a challenge in 2012. "Planners are seeing the numbers of meetings

much work as it could just to make sure he could keep it intact.

"We were reticent about turning work away," he says. "Now we're trying to maintain a delicate balance of managing our workload while maintaining the high quality standards we are known for."

Technology Trends

According to Steve Bova, one of FICP's goals going into 2012 is to emphasize the use of technology in not only making meetings more efficient, but in enabling members to better communicate with each other.

Meeting technology consultant Corbin Ball, CMP, CSP, has released his top 12 meetings technology trends for 2012, many of which revolve around the use of mobile technology.

One of Ball's top 12 trends is a prediction that mobile technology will cross the "chasm from the early adopter to the early majority for events." Ball points out that while surveys have shown that more than 80 percent of meeting planners use smartphones and other mobile devices for their jobs, few of them are using mobile applications.

"This is about to change," Ball says. "Within the next two years, it is really going to hold true that if you don't have a mobile app for your event, your attendees are going to ask why. And the question they'll ask is, 'Is your company behind the times?'"

Other technology trends of interest in the near future, Ball says, include the use of near field communication (NFC) — which is a short-range wireless connectivity standard to en-

"Whether it's travel, meetings, sending out emails, or projects they're engaged in, the volume of things planners have on their plates seems to be at an all-time high."

**Steve Bova, CAE, Executive Director
FICP, Chicago, IL**



tiating table is not appreciating the other's perspective," Hanson notes.

"We've had it pretty good the last few years — even when we were doing fewer meetings with smaller budgets," observes Gale. "We were able to do it because we were getting great rates from hotels, and we were able to go to places we wouldn't have been able to go before on those kinds of budgets."

But Gale expects that's about to change. "People want an economic recovery that sees us go back to the

able communication between devices when they're joined together.

Ball says it is expected to become a widely used system for making payments by smartphone in the U.S. and that when it comes to meetings and events, it will simplify actions such as event ticketing, payments, exchanging business cards and picking up conference literature, exhibit brochures, course notes and other digital documents.

Ball also expects meeting and event organizers will start using indoor positioning systems to assist attendees in navigating their events and conferences. Standard global positioning systems are fairly inaccurate when used indoors, according to Ball, and companies such as Wyfarer and Sherpa-Solutions are producing technologies that can provide more precise positioning by tracking Wi-Fi-enabled smartphones.

"I think this has huge potential," Ball says. "You can very precisely position people indoors, and there are opportunities for things like networking, making it easier to navigate through an exhibit hall and collecting information for traffic flow analysis."

The New Show in Town

A new trade show made an appearance in October 2011 at the Las Vegas Sands Expo Convention Center, and by all accounts IMEX America was extremely successful. More than 2,000 hosted buyers and thousands of visiting attendees met up with more than 2,000 exhibitors from 147 countries. According to Carina Bauer, CEO, IMEX America, the day of education — Smart Monday — proved to be an excellent drawing card.

"The concept of Smart Monday, a day dedicated solely to education before the trade show started, was remarkably well-received, and we will definitely be looking to develop and refine the format and the content of Smart Monday in 2012," says Bauer. "Our strategic partnership with MPI, who are the show's premier education providers, also went down well, both

with the MPI membership and the broader meetings and events industry."

According to Bauer, incorporating MPI's MeetDifferent Day of Education and Innovation into the show, on top of offering daily Power Keynotes before the trade show started each day, allowed for an efficient use of meeting planners' time and was "a great return on investment." Bauer says that other initiatives, such as the

LearningCurve Zone on the show floor — were "short, sharp learning opportunities that didn't cut across valuable business and meeting time, and were widely praised."

According to IMEX, 52 percent of hosted buyers surveyed stated they were 'extremely likely' to attend IMEX America in 2012, and 77 percent would recommend attending to a colleague. Thirty-two percent of buyers said their



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"The education programs we develop with our various partners for IMEX America 2012 will meet the continuing professional development needs of the meetings industry as effectively and entertainingly as possible."

Carin Bauer, CEO
IMEX America, London, England



key objective in attending was to participate in the education program.

Bauer says that IMEX will be examining all of the feedback from the show closely to "ensure that the education programs we develop with our various partners for IMEX America 2012 will meet the continuing professional development needs of the meetings industry as effectively and entertainingly as possible."

The Future of Incentives

The term gamification has long received attention as a trend in the design of customer loyalty programs. But, according to the Incentive Research Foundation, companies are already adding gaming to their incentive program promotions, communications and training, and it won't be long until the implementation of gaming into employee recognition programs becomes mainstream.

Rajat Paharia is the founder and chief product officer of Bunchball, a company that works with clients to craft gamification strategies to engage customers and employees. According to Paharia, gamification is taking game dynamics — the things that game designers have used for years to motivate and incent player behavior by points, levels and badges, and applying them outside of the gaming world.

Now Bunchball has announced the release of an application for *Salesforce.com* called Nitro for Salesforce, which is a sales incentive program. "Sales managers for years have run things like president's clubs and contests, and it's usually completely ad hoc and opaque

so that no one can see how they're doing or how anyone else is doing until the end of the process," Paharia says. "So what if we took that process, automated it and made it real time?"

The application allows sales managers to reward their employees for things as varied as adding leads or accounts, or closing deals and meeting quotas. And just like traditional incentive programs, employees can earn points and redeem them for cash or experiential rewards such as travel.

The idea is to keep employees motivated, not only at the beginning and end of a program, but throughout the entire lifecycle of the program. "Loyalty



"But my company, and I'm sure others as well, realized that you still have to recognize the people who are doing the work, and that's what motivates the agents and brokers who sell our products."

Eldon Gale, Director, Meeting and Event Management, Nationwide Insurance, Columbus, OH

and incentive programs are basically games, just not very good ones," says Paharia, who adds that they should be able to motivate employees, not just at the beginning and end of programs, but in the middle of the program as well.

"There is a huge opportunity in this space. Loyalty and incentive programs haven't changed at all in the last 100 years," he says. "And part of that is that they are based on a very transactional model. Transactions were measurable, but there was all this other behavior that wasn't being

captured or tracked that now we can capture because all of this work is being done online. And it allows us to create much more interesting and compelling programs."

Important Lessons

Eldon Gale believes that one of the reasons meetings in the insurance and financial services sector will continue to

rebound into 2012 is that the industry finally is beyond the perception issue that has plagued it since the financial meltdown in 2008.

"I know at Nationwide we canceled a lot of meetings back in 2009 and 2010 for reasons that were not really related to budgets and costs," says Gale. "The thing that really hit our industry was the perception issue, and I think we've finally weathered that storm."

That said, Gale believes there were important lessons learned in the aftermath of the financial crisis of 2008. "We certainly took the opportunity to look to do things differently, like take multiple events and combine them

"But my company, and I'm sure others as well, realized that you still have to recognize the people who are doing the work, and that's what motivates the agents and brokers who sell our products."

Eldon Gale, Director, Meeting and Event Management, Nationwide Insurance, Columbus, OH

into one meeting, for example," he says. "But my company, and I'm sure others as well, realized that you still have to recognize the people who are doing the work, and that's what motivates the agents and brokers who sell our products.

"You take that carrot away and it has an impact," Gale says. "And the leadership of our company saw firsthand that it had a direct effect on performance, and they recognized that it does relate to profitability and has to be part of the company's program." **I&FMM**

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Vice President of Meetings,
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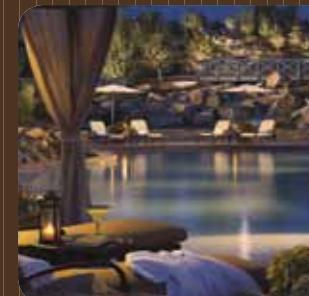
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The R.O.I. Challenge

Create Incentive Programs That Deliver Long-Term Benefits, Not Just 'Sugar Highs'

By Stella Johnson

Companies in search of third-party planners or consultants know they've come to the right source when they read Bob Dawson's email tagline: "Incentive ROI that makes bean counters smile." He knows of what he speaks, and then some, particularly when it comes to one of the hottest topics facing the incentive travel marketplace: the new ROI challenge.

A man with a Midas touch and an industry maverick of sorts, Bob Dawson, CITE, presented a session "Incentive ROI the Media & Your CFO Will Love!" at The Motivation Show last year. The session discussed how to determine true ROI amidst today's multifarious pressures and how to design a solid business case guaranteed to earn top management's stamp of approval. Now, more than ever, he claims, the industry is mandating that planners look at the larger picture and conjure new incentive programs with ROI that is long-term and beyond the obvious.

And Dawson should know, when you consider that right after graduation from Northeastern University he spent 10 years in commercial banking before pursuing his own entrepreneurial interests — interests that included ownership of a travel agency and an incentive travel group. Currently, Dawson is managing director of Roseville, CA-based i-Myth, an online membership portal that provides education on performance management. Dawson also is founder of The Business Group, which was established nearly 20 years ago.

We asked Dawson, James Dittman and Jennifer Vecchi to weigh in on new ROI challenges.

**Bob Dawson, CITE,
Managing Director, i-Myth**

I&FMM *What's the new thinking on incentive programs and ROI?*

Dawson The days of singularly thinking about increasing the bottom line are long gone. Part of the new ROI game plan is to look at how successful you've been in maintaining the continuity of the program. For instance, with travel programs, if you promise that all hotel rooms will have ocean views at such-and-such a resort, well, that means if the average size person stands in the middle of his or her room, he or she is going to see a full ocean view. Not that one person will have a full ocean view but another will only have half a view; and still another gets to see the ocean

In addition, having C-level management involved and educated in the process is an added benefit, an ROI byproduct in creating incentive programs that are designed to create long-term benefits, not just sugar highs.



Dawson

"The incentive budget should be a percentage of the incremental net profit gains. Typically I use 40 percent, meaning if the objectives are met, the company receives a 60 percent net incremental bottom-line result."

from their balcony if they can stretch their necks so far to the left.

So, the new ROI is not all about sales. Sure, incremental increases are important, but only with changed habits and behaviors. That will dictate where the company will be five years from now. You have to look at particular financial statement categories and ask, "Is there a group of employees responsible for that figure? How can we change their behavior to increase that figure? What will it take to engage, excite and motivate?" Targeted employees have to feel they have a shot. And, once successful, they have to still feel motivated about the next program.

Again, this is not about creating a short-term sugar high but rather a sustainable approach to changing the key indicators for a business. Also, we're not running a lottery here. Qualifiers are not winners, they are earners; whether it is cash, merchandise or travel.

I&FMM *There is a lot of talk about educating top management in the process. Any comments?*

mud on a budget figure. They need to learn that they can't limit the company to a \$1 million incentive campaign when you need to go higher. I say, quadruple the incentive budget if necessary. The incentive budget should be a percentage of the incremental net profit gains. Typically I use 40 percent, meaning if the objectives are met, the company receives a 60 percent net incremental bottom-line result. Not sure many other investment opportunities out there can claim that!

Add to that, successful incentive marketing campaigns can help save jobs, too, and serve a company as its own stimulus program (*see case study on page 18*).

I&FMM *Does the incentive travel industry have an image problem and, if so, is skillfully conducting incentive programs that are more dignified, perhaps, part of the new ROI plan?*

Dawson Yes. Go to any networking event and tell people you're in the incentive travel business. See the response you get. You'll spend the next two hours explaining that you're not the guy from AIG, and what you actually do within your chosen field. I never tell people I'm in the incentive industry, because that's not really what I do. Instead, I say that I'm in the business of creating a positive behavior change for a prescribed outcome to the company and the individual. We structure a program that meets an objective and shows a difference in outcome in ways that are measurable. The focus is always to change a behavior and to go from this to that for a desired incremental outcome. Nothing wrong with that.

Historically, CEOs get stuck in the

Dawson CEOs have to step up to the plate as a matter of principle. They have to look at incentive programs as tools for driving the targeted outcome, and then they have to ask how is the ROI going to affect the whole corporate food chain. If they just look at sales, as an objective, they may be creating more of an issue than they think. An increase in sales triggers several other financial impacts that need to be considered.

Despite the tough economy, as a nation, we always need to improve the way we distribute goods and services. Companies will create a solid business plan to present to lenders because, even in a downturn economy, people are still buying "stuff," and there is still a lot of opportunity to grow and expand, and money to be made. If that business plan does not reflect how an incremental increase in business (sales) will generate enough cash to repay the loan, chances of approval are slim. Incentive programs can have a major impact on generat-

ing incremental operating profit, cash flow and sales — that you can take to the bank.

James B. Dittman, President, Dittman Incentive Marketing

If nothing else good comes out of the economic downturn, at least the longheld business practice of using sales incentives to effect robust revenue has endured and been validated, notes James B. Dittman, president of Dittman Incentive Marketing, located in New Brunswick, NJ.

"Just as you can't cut your way to prosperity," Dittman says, "you can't maximize your incentive program ROI by cutting costs, at least not without eroding your own success in the future."

For the sake of the insurance and financial sectors, we engaged Dittman in a little more discourse on the subject of the new ROI challenges ahead.

I&FMM *What should planners be thinking in terms of the new ROI facing the industry?*



If you have done it right, the cost of the program will only be about 25 percent of the incremental gross profit, thereby creating a powerful case for the power of the sales incentive."

Dittman Think of ROI in terms of ROO — Return on Objective. Aside from numbers, if your objective was to get your salespeople to spend more time selling full line, not just the more popular products, is that actually happening? Are they continuing to do so? Or, are you trying to get your people more engaged on an everyday basis? If you are succeeding, your turnover rate is likely dropping, and that's certainly a cost-effective outcome. Most importantly, conduct attitudinal surveys to measure levels of engagement, job satisfaction and other perceptions that are critical to the program's overall success.

I&FMM *How do you sell clients on the necessity of incentive programs to drive sales?*

Dittman By pointing to the studies done by the Site Foundation, People Performance Forum, Enterprise Engagement Alliance and others that prove double-digit increases attributable to sales incentive programs. Further, if a person needs to have it

proven, it means they are not conducting any sales incentive programs at this time. When that's the case, it creates the condition for a classic test that will, inevitably, prove the value of corporate incentive programs. The classic test is:

- Start by asking client to project gross sales over the next full quarter.
- Ask them how much more they believe they could realistically achieve if everyone were truly engaged and motivated. That becomes the objective.
- Then build an incentive program for that quarter that focuses on individual effort and reward.

At the end of the program, look at the sales for the period with the incentive program, as compared to what was projected without it.

Calculate the gross profit on those incremental sales and compare it to the cost of running the incentive (awards, communications, etc.). If you have done it right, the cost of the program will

only be about 25 percent of the incremental gross profit, thereby creating a powerful case for the power of the sales incentive.

I&FMM *Can you provide a successful client scenario that illustrates your principles?*

Dittman Yes, a software company that sells through value-added resellers, companies that distribute a producer's product but add value to that product, most often by integrating it into a larger system. They wanted to target a program at the sales consultants in the reseller organizations, something they had never tried before. We created a "rules structure" using our Great Escapes Individual Travel product that produced a no-risk, self-liquidating program.

Great Escapes is a tiered structure of 10 custom travel awards at each of 10 levels (from \$500 to \$10,000) delivered with white-glove service and promoted with a powerful set of electronic communications. Each sales consultant was given a target

Case Study: Incentive Program As Corporate Stimulus

According to Bob Dawson, CITE, founder of The Business Group and managing director of i-Myth, an online membership portal that provides education on performance management, one of the primary ways meeting and incentive planners, as well as C-level executives, can expect to see incentive programs expand their return on investment is in their ability to retain jobs. Dawson describes the following scenario, which involved a regional distribution company that had 75 employees and 12 outside salespeople, all of whom provided more than 100 product SKUs to approximately 250 retail store locations, each with an average of seven employees. "Like most companies," Dawson says, "the depressed economy was causing several issues to surface within this environment." He specifies the issues, which included:

- Retail traffic was down an average of 20 percent.
- Sales at the retail level were 8 percent below same time in 2007.
- Distributor cash flow was tight, invoices were out on average 46 days from an average collection period of 35 days in previous years.
- Distributor had inventory issues due to outdated equipment that prevented "Just In Time" inventory status, whereby retailers maintain just enough inventory to meet customer needs.
- Key customer complaints increased about lack of inventory to sell "when we need it most."

"One of the results from all of the above was that the distributor was considering a work force reduction to free up capital to make enhancements to equipment in hopes of maintaining loyal customer base," Dawson explains.

The Business Group designed an incentive program to drive additional sales of inventory that had proven market demand. Each retailer that signed up for this program waived any price discounts for case orders, and so on, which had been a practice in the past. In place of those discounts, they received what I call an 'incentive plan in a box.' That 'box' was essentially a fully funded incentive plan, including coverage for all costs associated with reward redemption, that they would now be able to offer directly to their employees in their (the retail company)

name. The incentive program inclusions were funded by the distributor who, in turn, received co-op funding from his manufacturers, and everybody wins!

"Retail store owners were provided with an incentive travel reward for achieving objectives for sales, invoice terms and number of employees that achieved their objectives for in-store sales; while retail store employees were provided with merchandise incentives for achievement of their individual and overall store sales objectives," Dawson explains.

"The entire incentive plan, along with a projection of the key financial metrics for the distributor, as measured against industry standards, was presented in conjunction with a loan request to the company's bank. The loan proceeds were approved with funds committed for capital improvements funded by an SBA Guaranteed Loan (100 percent, no risk to the bank) and an increase in the distributor line of credit (not SBA) that allowed for increments to be disbursed based on achievement of agreed upon financial metrics." After just seven months, the following results were recorded:

- Of the 250 customers, 127 signed up to be a part of this program.
- Incremental sales to this group of retailers increased by 12 percent during that time; sales to non-incentive retailers were down 3 percent during the same time period.
- Accounts receivable for the incentive group of retailers has averaged 37 days; accounts receivable for the non-incentive group has averaged 48 days over the same time period.
- There were no layoffs at the distributor company.
- Net profit for the distributor increased by 2 percent.
- The bank line of credit has been paid down by 20 percent from the original borrowing and no additional funds have been drawn (the full line was never used).

"The travel program was a win-win situation for all stakeholders," Dawson says. It was hosted at a small resort property that was all too happy to see this type of business, and Dawson was told several times by the client how this type of incentive design helped to get them through a tough season — and saved jobs that would otherwise have been cut. In fact, the company had to add two part timers to the staff.

— SJ

and an opportunity to earn his or her own Great Escape. The goal was to sell five units more than target and earn a Level One reward. Ten units over target earns Level Two, and so on with no limit.

Since each five-unit increase generated more profit for the company than the cost of the award itself, there was no need to limit the amount that people could earn. And since there was no up-front cost for the program, there was absolutely no risk.

The program produced a 27 percent increase in sales.

**Jennifer Vecchi, CRP,
Manager, Incentives &
Recognition Programs, Atlas
Meetings & Incentives**

"The economy may be down, but companies need to have some kind of incentive program in place, now more than ever," says Jennifer Vecchi, CRP, manager, incentives and recognition programs at Atlas Meetings & Incentives, a division of Atlas Travel International, located in Milford, MA. "Right now, too many corporations across the country are thinking the opposite way. They're saying 'this is no time to promote an incentive program, not when we just reduced our staff by 30 percent.' Or, 'this is no time to take our best people away from the office when they could be working.' And, that's understandable. But, the truth is that this is exactly the time when you need to take that kind of assertiveness to 'incentivize' the corporate salesforce."

The reality is that business may be down, companies have had to downsize, and morale may be particularly low if there has been a layoff, but employees aren't being rewarded like they used to be — and that hurts business. "That's how I explain the real value of incentive programs to our clients," she explains.

Still, for companies not quite ready to go the traditional route of grand journeys across the globe, Vecchi explains that Atlas, which also maintains a group incentive department, is at



Vecchi

**"Keeping employees
motivated during times
of uncertainty is the best
way to position a company
for economic recovery."**

least one step ahead of the competition with a new strategy, one that is two-tiered and designed to "stretch incentive dollars" as far as they can go while producing a measurable return on investment.

The operative word here is "individual." Essentially, Atlas' Tier One programs are individual incentive programs centered on travel and valued at thousands of dollars per qualifying participant. Aptly named "Great Escape Awards," they range from \$1,000 to \$10,000; while Atlas' Tier Two program allows for a variety of options to consider from smaller travel awards, such as "Great Getaway" weekends for less than \$1,000, and gift card awards, such as "Big Splurges" awards ranging from \$250 to \$500. They are less costly and even provide the opportunity for qualifying individuals to receive gift cards that represent local merchants and national retailers, to be used according to their own specific needs and interests.

"At Atlas, we don't believe in cash awards. End of day, they just get absorbed into the household funds and

quickly lose their luster. When award amounts are just added to paychecks, they are subject to payroll taxes and when distributed regularly, people become dependent on them, and the award loses all credibility as a revenue tool," Vecchi added. "We offer other creative avenues instead."

According to Vecchi, one of her largest clients is a New England-based insurance company that is faring very well with Atlas' Tier One program. The emphasis is on individual incentive travel and awards as the best way to bridge the economic downturn. What she stresses is this:

Tier One — Travel Awards:

"With an individual incentive trip award with a cash value of \$3,000 for example, 'winners' can book the trip of their choice at his or her convenience, working with a travel professional who will design a trip that best fits the winner's style of travel," Vecchi explains. "The plus for them is that, if they want to go to a more costly destination that would cost perhaps \$5,000, they can either add the difference or let the travel award amounts accrue (something like a travel savings account). They don't come with an expiration date. The plus for the company is that not all the key people are away at the same time as with traditional group incentive trips."

Tier Two — Merchandise Awards:

"Gift cards can come from any retailer or e-tailer that issues gift cards and used at the winner's convenience," Vecchi says. "Again, if it were cash tacked on to a paycheck, it would be absorbed into the household checking account and forgotten about. With a gift card from Home Depot, they can get that new deck or, with an award from Best Buy, that new digital camera they've been wanting. It's their choice and more personal than everyone winning the same thing."

Vecchi concludes, "Keeping employees motivated during times of uncertainty is the best way to position a company for economic recovery."

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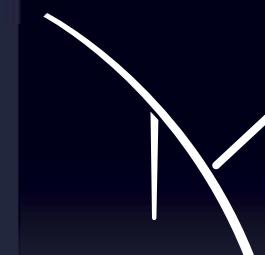
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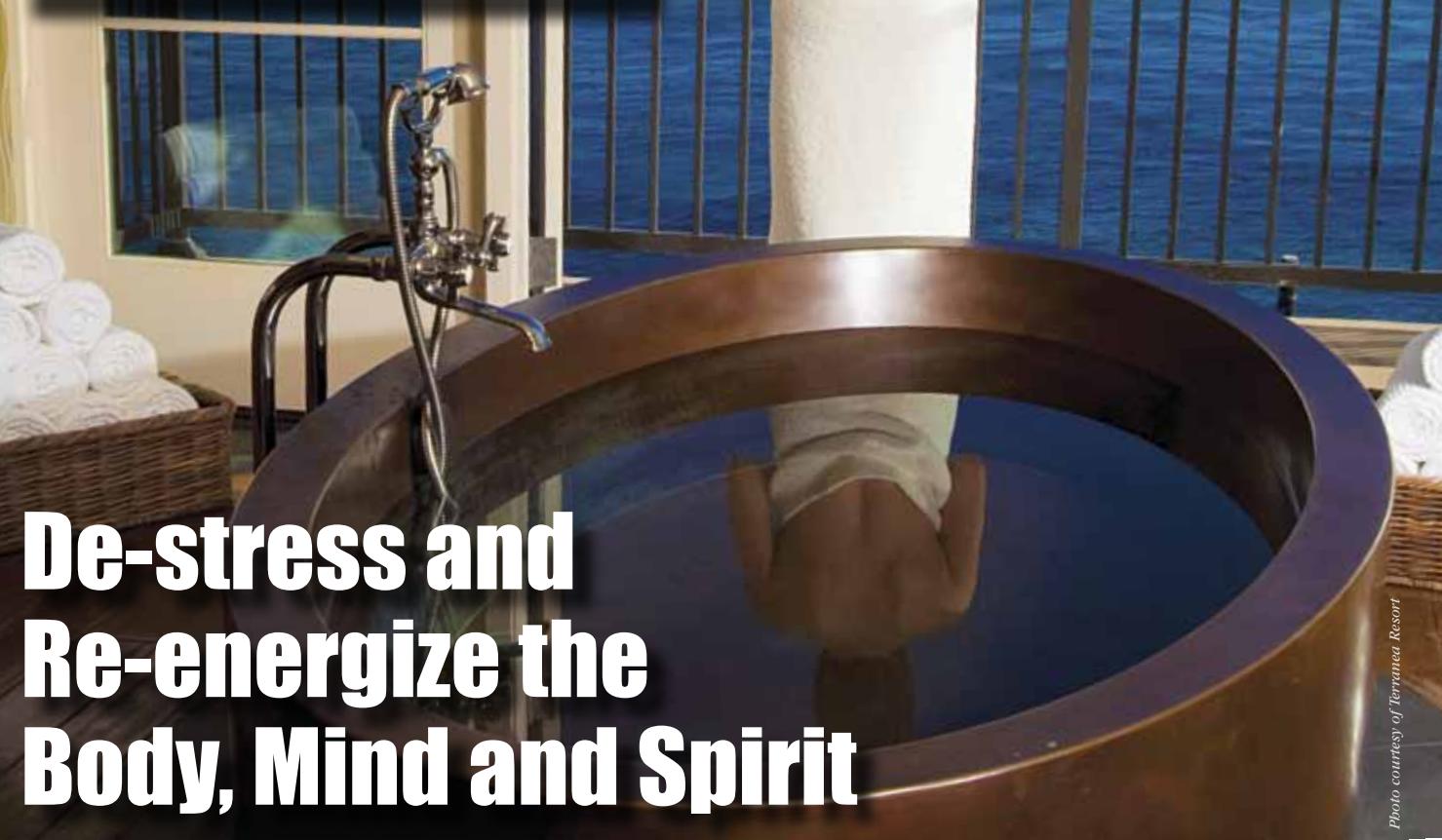
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Holistic Meeting Retreats

By Diana Rowe



De-stress and Re-energize the Body, Mind and Spirit

Jumpstarting a healthy attitude was first on the agenda when 500 attendees gathered on the first morning of their national sales meeting on The Meadows — the sprawling oceanfront event lawn at Terranea Resort.

According to Ron Sandvig, Terranea's vice president of sales, "After the company president wel-

comed everyone to the meeting, he instructed the group to take out their BlackBerrys, lift them to the gorgeous blue sky and shut them off. He told the group that for this meeting they needed to disconnect to reconnect, and that's how he set the stage for a conference built on wellness as an individual and a company."

Just 20 miles from Los Angeles International Airport, Terranea is an oceanfront 582-room hotel boasting 135,000 sf of indoor and outdoor meeting and event space. Resort amenities include The Links at Terranea, a nine-hole, par-3 golf course; The Spa at Terranea, a 50,000-sf world-class spa including a fitness and well-

ness center and yoga studio; three unique swimming pools; seven oceanview dining venues; and luxury retail boutiques.

With 102 scenic coastal acres, Terranea Resort is an ideal retreat for fitness-minded attendees. Event planners can take advantage of the resort's dramatic outdoor vistas and arrange interactive and healthful outdoor-driven programs, including scenic bluff-top hikes.

The Health Care Challenge

Why all the fuss over incorporating wellness at meetings, events and incentives? One reason, says Alan Kleinfeld, MTA, CMP, CMM and chief advisor of CMM Advisors, a Charleston, SC-based third-party management company, is the health care reform bill, which issued a challenge to the financial and insurance industry — corporate-wide wellness. Kleinfeld says, "Meeting planners can answer that challenge by incor-

porating wellness programs and a healthy attitude within their incentive meetings and corporate retreats."

Another fairly obvious reason planners need to consider wellness in their programs is stress, espe-

"We're learning the importance of reducing stress, and one of those ways is having holistic experiences at our meetings."



Alan Kleinfeld, MTA, CMP, CMM,
Chief Advisor
CMM Advisors, Charleston, SC

cially job-related stress. In a 2010 study published in *The Journal of Occupational and Environmental Medicine*, job-related stress is linked with multiple health problems from

heart disease to obesity. In the report, lead author Diana Fernandez, M.D., M.P.H., Ph.D., an epidemiologist at the URMC Department of Community and Preventive Medicine, says, "In a poor economy, companies should take care of the people who survive layoffs and end up staying in stressful jobs. It is important to focus on strengthening wellness programs to provide good nutrition, ways to deal with job demands, and more opportunities for physical activity that are built into the regular workday without penalty."

Another reason is that wellness is big business and getting bigger every year. The yearly worldwide wellness industry will soon cross the \$2 trillion mark, according to Spas and the Global Wellness Market, a major study conducted by SRI and released this summer.

Building the Right Wellness Component

Spas are going beyond traditional pampering to incorporating preventive programs, ranging from nutritional guidance to fitness, so your holistic meeting doesn't have to be all about spa treatments. Planners can now create low-profile incentive or meeting-intensive programs by combining inspirational destinations with healthful options.

Begin by asking the right questions. What is the objective of the meeting? Are you working with a new team? A corporate restructuring? Those types of questions and answers help resorts build the right wellness-focused program for your corporate culture. Consider the following program ideas for holistic meeting retreats.

Canyon Ranch SpaClub The Venetian and The Palazzo Las Vegas, NV

In addition to the Canyon Ranch SpaClub's two fitness centers, 40-foot indoor rock wall, daily fitness classes, Kinesis training, nutrition and personal training, they recently introduced Canyon Ranch Healthy Feet.

Canyon Ranch Healthy Feet is an important component in their overall approach toward head-to-toe wellness. If your feet feel good, you can enjoy life more and stay active every



Photo courtesy of Canyon Ranch SpaClub

Kinesis resistance training, which focuses on balance, flexibility and stability, is a new activity offered at the Venetian/Palazzo's 134,000-sf Canyon Ranch SpaClub.

day, which is essential to staying fit and healthy. The Canyon Ranch Healthy Feet center offers expert gait analysis and a choice of seven advanced services designed to renew feet and legs.

In addition, wellness programs/services that can be adapted to the meeting process include these options:

- 40-foot rock-climbing wall for teambuilding.

Corporate wellness is an emerging theme most often executed at the office in the form of onsite fitness centers or health clinics. However, according to Kleinfeld, the offsite meeting is the perfect opportunity to improve the personal experience of attendees.

"Our society is more conscious of being healthy and the damage that stress causes," says Kleinfeld. "We're learning the importance of reducing stress, and one of those ways is having holistic experiences at our meetings."

Holistic meetings are not exactly the spa programs of old, where attendees spend the entire day being pampered in the spa. Incorporating a wellness or holistic approach during a conference addresses the physical, emotional/mental and spiritual aspects of an individual and encourages self-care and



Jill Turner, President
Jill Turner Events, Cary, NC

In addition, Kleinfeld suggests using aromatherapy in a ballroom to help influence the mood of attendees. Hotel brands, such as Starwood Hotels and Resorts, pump stimulating scents into their lobbies and offer

prevention education. Including the holistic often taps into other cultures and their therapeutic remedies, such as the healing powers of aromatherapy. Also, it encompasses outdoor programs such as fitness regimes and yoga or tai chi.

"Business will be done here, and this setting effectively removes the attendees from behind their desks and takes down barriers. We're all so busy interfacing with technology instead of each other that this face-time is highly productive."

with the destination. "There's a big difference in the mood of attendees when arriving at Hawaii versus New Jersey in January. Site selection is key in creating the right mood for attendees. We want them to walk into the

guests the option of having various scents in their rooms.

Create the Right Mood

When Kleinfeld was instructed to incorporate a holistic element into an insurance client's meeting, he began

hotel and immediately feel a sense of relaxation. Using a natural element, like the ocean, is the first step toward stress-free meeting."

Imagine your attendees arriving at their hotel weary from the journey, as a smiling greeter adorns them with an authentic Hawaiian lei, says Jill Turner, president and owner of Jill Turner Events in Cary, NC. A fresh-squeezed tropical beverage is offered as they enter the open-air lobby and then the pool where fresh saltwater breezes and glimpses of the Pacific Ocean revive them. With alohas and hugs, the attendees are escorted to their rooms, with a quick stop at the koi pond.

"It's official — everyone has taken a deep breath and relaxed," says Turner about the annual conference she coordinates for 350–400 insurance brokers and executives. The meeting is held annually on the Big Island of Hawaii at Mauna Lani Bay Hotel & Bungalows.

Amid mountains, the sea, black lava and lush greens on the sunny Kohala Coast, the Mauna Lani Bay Hotel & Bungalows offers attendees a mind/body experience from the moment they enter the lobby.

The Mauna Lani boasts more than 18,000 sf of meeting space, including the Hale Hoaloha Pavilion, but this event is more than ballrooms and presentations.

"Yes, business will be done here," says Turner, "and this setting effectively removes the attendees from behind their desks and takes down barriers. We're all so busy interfacing with technology instead of each other that this face-time is highly productive. Everyone will be wearing slippers — that's Hawaiian for flip-flops. It's meeting intensive, yet the holistic and wellness thread runs through the entire program, and the spirit of aloha resonates with the attendees."

Aloha is more than just a greeting in the Hawaiian culture. Aloha



The Mauna Lani spa resembles a Hawaiian village with grass-thatched houses for treatments, two natural lava saunas, a meditation pavilion and a Watsu pool.

means mutual regard and affection, and extends warmth in caring with no obligation in return. Aloha is the starting point for developing real re-

- FIT Breaks (instructor comes to your meeting room; 15 minutes of dancing, stretching, cardio, etc.).
- Lectures on maximizing metabolism, optimum living and more.
- Pilates studio and cycling studio; cardio and weight rooms.

Ritz-Carlton, Dallas Dallas, TX

From mini-tutorials on the Texas Two-Step to Pilates in the boardroom, the Ritz-Carlton, Dallas offers "Playground," an interactive option for groups of eight or more that integrates recess-length movement workshops (10–20 minute experiences) into the meeting schedule.

For example, a program might start with breakfast, followed by a morning session and then a 15-minute break that includes chair massages for attendees. An afternoon session in the ballroom with lunch might be followed by a

A 10-minute yoga session is an ideal corporate meeting break to rev up the afternoon sessions.



Photo courtesy of Ritz-Carlton, Dallas

- 10-minute pick-me-up activity such as yoga, a hip-hop class or the Texas Two-Step.

La Costa Resort and Spa Carlsbad, CA

The newly renovated La Costa Resort and Spa, Carlsbad, CA, is a destination for the mind, body + sport. A new partnership with Premier Fitness Camp, a five-star fitness boot camp, debuted recently. The camp offers adult fitness programs for immediate and lasting weight loss by teaching and implementing sustainable lifestyle choices at La Costa.

Also new to The Spa at La Costa, guests will find a curious stone path winding through the fragrant herb gardens in the Spa Courtyard. Common in China, reflexology paths consist of smooth cobblestones or beach stones embedded in concrete, laid in specific patterns to provide stimulation to the feet. Walking along these stones provides gentle, yet deep-working therapy, stimulates pressure points in the feet that correspond to all major body organs and areas; encourages vital energy and blood flow throughout the body; relieves stress; improves balance; and enhances physical and mental well-being.

Providing all these benefits of reflexology, a walking bath affords all the additional health benefits of the fresh outdoor air, beauty of nature and control over the amount



One of only a few reflexology paths in the U.S., this one at The Spa at La Costa stimulates pressure points in the feet, which improves energy, relieves stress, improves balance and more.

and intensity of stimulation. A reflexology expert consulted on the selection and placement of stones — coastal and local stones of different shapes, sizes and textures — to provide a powerful and authentic experience for spa guests. The Spa at La Costa has introduced experiential packages especially designed for groups: Multiple private courtyard areas serve as the ideal venues to plan breakout sessions, and La Costa has created a turnkey group package called "Rejuvenate & Repower."

The Broadmoor Colorado Springs, CO

The Spa at The Broadmoor, Colorado Springs, CO, has incorporated fitness into several group programs to give attendees an opportunity to take a break and enjoy the mountain air. Examples include hikes through the mountains, biking around the property, fun runs and 5Ks. They also have coordinated marathons for groups, which creates excitement, a little competitive edge and a great tool to get everyone moving. The iconic resort added a fitness component to its spa menu and now guests can book this package along with their spa day to complete their health and wellness experience from head to toe.

In addition, the three-hour Triple Threat package is a great way to increase fitness goals. It starts with a fitness evaluation, followed by a fitness jumpstart, which includes the attendee's exact metabolic rate and a 12-month meal program designed to achieve goal weight. The third



New group fitness programs at The Broadmoor are often followed by a soothing treatment at the spa.

Photo courtesy of The Broadmoor

lationships, according to Turner. The relaxed atmosphere allows the executives to become better acquainted on a more personal level.

The Mauna Lani spa resembles a Hawaiian village with grass-thatched houses for treatments, two natural lava saunas, a meditation pavilion and a Watsu pool. Treatments include traditional Hawaiian therapies, bath body treatments and massage therapy, such as the Watsu, a shiatsu massage performed in 96-degree water. It's a rare treatment of stretches, massage and gentle pulling to make the spine more supple. The resort also offers a long list of complimentary activities including hula lessons, historic tours of petroglyphs, educational fish- and turtle-feeding tours, and much more.

Turner regularly incorporates the cultural options in her meetings. "Our attendees and their spouses often take advantage of the free classes on Hawaiian weaving, lei making and ukulele lessons. It's really fun

and another opportunity for them to connect with old friends and make new ones. The onsite historian is also available for storytelling, and we've incorporated him into our events. He's culturally entertaining and even plays the ukulele.

"The mind and body experience may occur at the spa," says Turner, "but it's also in the essence of the staff. We've known the staff for more than 20 years, and we all consider and treat each other as family. I can count on every staff member from housekeeping to management to truly care that my group has a great experience."

Turner notes that the self-contained layout of the Mauna Lani and its meeting space facilitates networking. General sessions and educational programs fill the mornings, and there also are private events in the evening.

But for the most part, the afternoons are free for attendees.

Turner says that the biggest challenge facing planners is selling the



Photo courtesy of Grand Wailea

Spa Grande's 20-hands duo massage, created to mark the 20th anniversary of Maui's Grand Wailea, is the ultimate journey to peace and relaxation.

idea that corporate wellness programs have successful results and a return on investment, but she feels that the pendulum may be finally swinging the other way, and studies back her up.

"Holistic meetings are about doing business in an inspiring and relaxing atmosphere," Turner explains. "The setting, the feeling, the time taken to enjoy an experience and your co-workers — when you put the numbers together, the bottom line is that inspiring settings are motivating and business will get done."

We Need Face-to-Face and Experiential

Sue Carey, DMCP, vice president of PRA Destination Management, Palm Springs (CA), says the insurance and financial industry recognizes that they need to energize their troops after the fallout from the AIG effect and the poor economy. Holistic meetings provide the tools to turn this around, she notes.

The old formula of spending money on adding various activities at a destination, from jeep tours to sightseeing, isn't experiential enough to bring back the corporate connection,

according to Carey. "It's not enough for attendees to say, 'Hey, we had a good time. Now, let's go home and sell more products.' We need to provide a setting away from the world of technology that incubates us in our cubicles. We need a setting that connects us together intimately with our co-workers and our employers. Holistic meetings provide that connection as they address the individual."

Some call holistic meetings newly labeled spa meetings, but Carey says holistic meetings are much more than just a day at the spa.

For example, a corporate client of Carey's began a program several years back with the goal of adding an activity that burned some calories and jumpstarted the group's creative juices. The event started as a 10K charity run to get them out of the ballroom and incorporate some exercise, but not all participated. So the event has evolved into multiple physical challenges, such as walk-a-thons, bike

runs, yoga classes, boot camp exercises and nutritional classes.

"The message to the attendees is that we need to regenerate the energy level of their company," says Carey. "In order to do that, we need to change how we live as an individual in order to live a healthier life, both at home and at work. Why not jumpstart that healthy attitude by giving the attendees the necessary tools during a meeting?"

Final Thoughts

Wellness continues as a focal point within our nation, from nutrition labels to health care plans. Everyday more companies recognize that employee wellness is critical to their corporate well-being. Whether mini-encounters or full-day therapeutic programs, incorporating holistic wellness components into the meeting or incentive gives planners the opportunity to offer experiences that attendees can learn from, take home and live by.

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component is a personal training session to determine which exercise program is the perfect fit for body type and strength levels.

The Spa & Salon at Bay Hill Arnold Palmer's Bay Hill Club & Lodge Orlando, FL

In the serene world of The Salon and Spa at Bay Hill, attendees will be treated to the finest in treatments for body and skin care, hair care and conditioning programs in the fitness facility. Luxurious treatments detoxify the body and restore a fresh glow to the skin. Attendees can energize with an invigorating salt scrub or refresh with a Sea Mud Wrap or the famous Brown Sugar and Honey Wrap. Post treatment, a refreshing Vichy shower allows the stress to float away.

Because many attendees partake of rigorous golf programs at Bay Hill, the spa has devised personal stretching/training sessions that are designed to create more flexibility in the muscles used in the golf swing. The loss of flexibility — especially as golfers age — changes the swing path as well as the ability to complete the swing. Maintaining good flexibility will show in the scorecard. Also, Deep Tissue Massages are customized for the golfers to focus on specific muscles and address neck, arm, shoulder and back areas that are stiff and sore.

Omni Hotels & Resorts Irving, TX

Omni Hotels & Resorts is pumping up their wellness and fitness options. Guests enrolled in Omni Hotels & Resorts' complimentary Select Guest loyalty program who have achieved Platinum and Black level status now have access to several unique wellness amenities. On their profiles, guests can specify a fitness interest — from a spinning class, yoga, boot camp or Pilates — and they will receive a fitness plan in their key packet with local, handpicked exercise studio locations and times.

Healthful eating also became easier. Additions to the morning beverage service include Greek yogurt and fresh fruit. Healthful welcome amenities include gluten-free snacks such as seasoned nuts from various regions of the country as well as fresh fruit; complimentary bottled water is already a benefit of the loyalty program.

Platinum and Black Select Guest members can choose from a "pillow bar" complete with buckwheat, Swedish memory or hypo-allergenic options. White noise machines and sleep kits are also available.

Omni also offers a variety of other health and wellness options, from running maps for each local destination to trans fat-free menus, state-of-the-art fitness facilities, Get Fit Kits and Get Fit Rooms with treadmills. Omni also updated its "Art of Breakfast" menu earlier this year to create a highly popular gluten-free station with muffins, cereals and other options. — DR

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An advertisement for Greensboro, North Carolina. It features a large image of a sandwich with the text "THE MIDDLE IS THE BEST PART." overlaid. Surrounding the sandwich are various travel and tourism statistics. To the left is a map showing Greensboro's location relative to Washington D.C., Atlanta, and the Atlantic Ocean. The text includes:

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Hybrid Meetings

There's an Art to Successfully Blending Face-to-Face With Virtual

By George Seli

A big future is predicted for hybrid meetings, one in which nearly all face-to-face events will have some virtual component. But it's taken a few years for this "happy marriage" of mediums to arrive. They have been seen as mutually exclusive options: Will a meeting be carried out in person or virtually? They have even been seen as competing: Will the virtual event "cannibalize" — hurt the attendance of — the physical one?

These days, "virtual vs. face-to-face has largely gone away, and people are recognizing there are distinct purposes for each kind of event," observes Malcolm Lotzof, CEO of Chicago-based INXPO, a major virtual event solution provider. And when those purposes are merged, what results is an event that offers both the higher quality networking and venue experience of face-to-face along with the expanded distri-

bution of content afforded by virtual technology. Indeed, it's hard to see why an insurance or financial firm wouldn't adopt this two-pronged strategy for many of its events. Thus, hybrid is set to become a meeting industry "standard," says Lotzof, with face-to-face events being routinely extended into virtual space, in different ways.

Naturally, some companies will reach that future more quickly than

others. And in fact, it may be best for a meetings department to pace itself when introducing a virtual component to a long-running physical event. For an event that previously had no virtual accompaniment, webcasting all sessions, offering real-time Q&A between presenters and remote attendees, fully integrating social media and so forth can be too much to begin with — both from the perspective of the attendees and the planners(s).

"The attendees will be thrilled if they can just watch a virtual presentation with good content, send some questions and be done, versus trying to get everything that's possible into the event the first time," says Lotzof. Instead, one may target a particular audience with more selective virtual content, get feedback on their experience, and expand from there. "They'll be impressed by the basic stuff and then you build on it."

Getting Your Feet Wet

TD Ameritrade is an example of a company that is going hybrid step by step. "We're just getting our feet wet with hybrid events and virtual technology," says Lauren Berkowitz, CMP, senior manager with the New York firm's Event Group. For its most recent national conferences, TD Ameritrade has made limited though successful use of webcasting, Twitter and mobile apps. The idea was to



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"We're targeting middle-aged independent businessmen, registered investment advisors who have their own firms, who are not necessarily up to speed on the latest technology."



Lauren Berkowitz, CMP
Senior Manager – The Event Group
TD Ameritrade
New York, NY

"foster deeper program involvement" and reach the "next level of overall attendee engagement," Berkowitz explains. Only one session is webcast, with the target audience being "a small prospective client segment," about 200 nationally.

The Twitter stream had an event-specific hashtag, and attendees' tweets about conference issues were broadcast on large monitors in the registration and exhibit areas. Specific breakouts, namely those that had reached capacity, were also broadcast into the exhibit hall for attendees to view. "It drove traffic into the exhibit hall and was extremely well received, because people could listen to the session at their leisure," says Berkowitz.

The mobile conference app was developed to promote agenda con-

tent, speakers and sponsors, and had a survey component for real-time response tracking." Overall it received average usage, particularly due to the survey component being underutilized, she notes. "We're targeting middle-aged independent businessmen, registered investment advisors who have their own firms, who are not necessarily up to speed on the latest technology," Berkowitz says. "So I think this

market segment is really just getting accustomed to the latest and greatest technology as we start to advance some of our product offerings through technology."

Keeping It User-Friendly

Especially for less tech-savvy demographics, it's important to keep virtual tools as user-friendly as possible. INXPO has been creating virtual event platforms since 2004, "and one thing we realized is, unlike any kind of application that you sell to a company where they're going to train 100–300 people on how to use it, we'll have an event where 5,000 strangers arrive, and they have 20 seconds to get comfortable and fa-

miliar with the tool, otherwise you lose them," says Lotzof. "So first of all the platform is browser-based, there's no download that's required. And we do a test when people arrive to make sure their pop-up blockers and all those kinds of things are in order so they're not frustrated when they get in."

The user interface is also very intuitive in that it reflects the physical spaces of the face-to-face event. "So if it's a sales kickoff meeting then maybe it's going to have the feel of a hotel with a lobby and a conference center," Lotzof says. "If it's a trade show, it's going to have the feel of a convention center — we'll have the virtual space for a show floor, booths and so on."

But capturing the "feel" of these spaces need not involve graphically depicting them. "That's nice for the first two minutes but we really are at a point where the content is what counts, and we have to make the content front-and-center with more video and more traditional Facebook-style pages, which is what everybody is familiar with today," Lotzof maintains. "It's got to be attractive and have nice branding, but we don't really need to have the little booth images anymore." A directory

with the company logo works just fine, he says.

Virtual Presentation Strategy

Another aspect to user-friendliness is keeping virtual presentations to 15–20 minutes, with the idea that viewing a presentation on one's computer for an extended period is perhaps less impressionable than being in a live audience. But live audiences have limited attention spans as well, and physical presentations can also be limited to 15–20 minutes so that they can be captured virtually without editing.

"That's part of hybrid meeting planning," says Lotzof, "adjusting the face-to-face to blend in with the hybrid." There's something to be said for offering the *full* physical presentation virtually, whether through live broadcast or at least a comprehensive recording available on-demand. "I am a strong believer that presenting them live is the best way to get the best presentation. Any event needs to be memorable if you really want to get the best out of it and get people back again. And memorable events happen when memorable moments happen. And memorable moments usually come from the unpredictable, the spontaneous. You get that at a physical event when somebody makes a comment on a stage that maybe they shouldn't have made and it leads to a whole series of new discussions," Lotzof explains. "When you prerecord stuff you tend to edit out the stuff that's not perfect and the memorable moments. We're very focused with our clients on recording as much as possible live and then broadcasting it live. But if you missed it, it's on demand later on, but with all the nuances and spontaneity left in. So even the attendees that go back and watch it later on get a feel that it's live."

Now Playing at...

Farmers Insurance Group certainly emphasized live broadcasts for its annual sales kickoff event, which

"went hybrid" for the first time this year. "We wanted to do a blend of satellite broadcast in the cities combined with webcast to the more remote areas where our salesforce is located," says Ross Miller, director of agency communications. "We had a total of about 105 locations that were going to view this hybrid broadcast in one form or another. Approximately 55 of those locations were in urban areas, and we determined that we were going to place them in movie theaters. It worked out perfectly that in all the urban areas where we knew we wanted to conduct meetings, there was a theater there that would work for that purpose."

Farmers' production company worked through a third-party vendor that could shoot satellite to particular movie theaters. The production company counseled Farmers to do "what we already knew instinctively: Keep the sessions brief, entertaining, humorous and light, and show that the officers have personality and are real people," Miller relates. "If they're having a good time doing it then people will have a good time watching it." A Farmers leader local to each satellite city opened the meeting, doing a "briefing" to set the stage while a countdown was going on. "The theater screen showed a combination of a countdown clock and also footage of what was happening on the stage in Los Angeles," says Miller. Agents located in more remote district offices experienced the event through webstreaming.

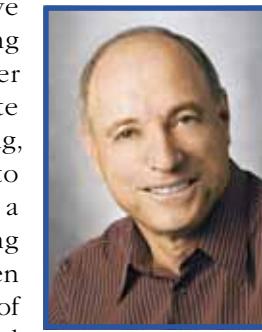
Overall, the company increased participation in the kickoff by going the hybrid route, Miller reports. Prior to that initiative, the kickoff had essentially been a "roadshow" where a group of top executives would meet with the salesforce at various locations throughout the country over several weeks. "In a salesforce of 50,000, we were lucky to touch

maybe 7,000 on the roadshow," says Miller. "And now we touched close to 12,000." Tellingly, a post-event poll revealed that 85 percent of respondents "heard from executives they've never heard from or seen before."

Maintaining Consistent Messaging

Besides expanded reach, the hybrid strategy accrued other benefits. With the roadshow, "we were seeing our executives pulled out of production for a tremendous period of time. Two, it was costly, and three, it resulted in inconsistent messaging across our salesforce," Miller explains. "The event was being forced into a 'divide and conquer' approach where we sent groups of executives to the east, to the north, and so on. So everybody was getting whatever

"Memorable moments usually come from the unpredictable, the spontaneous. You get that at a physical event when somebody makes a comment on a stage that maybe they shouldn't have made and it leads to a whole series of new discussions."



Malcolm Lotzof
CEO
INXPO
Chicago, IL

the bias was in the message. The information was getting out there, but not as uniformly as we'd like."

The satellite and Web broadcasts, on the other hand, resulted in a centralization of the messaging source. And going hybrid itself illustrated a key message to the salesforce. "Right now we're asking them to evolve their agencies into hybrid agencies, meaning that they need to

Screen captures courtesy of INXPO

It is critical that virtual event platforms be user-friendly, intuitive and have the look and feel of the physical event, according to Malcolm Lotzof, CEO of INXPO. "If it's a sales kickoff meeting then maybe it's going to have the feel of a hotel with a lobby and a conference center," he says.

learn to become a good blend of a community-based professional and an Internet-based professional, to combine the Web with the personal touch," Miller adds.

Footage from the physical event in Los Angeles was also subsequently made available through Farmers' own social media network created through Jive, a company that offers

"In a salesforce of 50,000, we were lucky to touch maybe 7,000 on the roadshow. And now (with webstreaming) we touched close to 12,000."



Ross Miller

Director of Agency Communications
Farmers Insurance Group
Los Angeles, CA

enterprise communication and collaboration software. "We broke the event into segments by speaker, and agents were able to go back and have their staff watch the same messaging," Miller says. This basically enabled meetings after the meeting, with agents asking questions after watching the video segments and "we assigned our business units to respond to them," he says.

Live interactivity, however, was not offered due to the time constraints Farmers had set for the event, "but we will be doing it in the future." It's one of the many ancillary features that can be built into the virtual side of a hybrid event, resulting in a very rich experience for remote participants. "We can include one-on-one chat, group chat, video chat, polling, blogging and more," says Lotzof. "All the Web 2.0 tools can be integrated into the environment." For example, a videotream of the presentation can appear in the middle of the screen, and down the right-hand side there

may be a chatroom, live Q&A session and/or Twitter stream. Also on the screen may be a keyword search tool whereby users can find materials, presenters, sponsors and each other for networking purposes.

Real-Time Virtual Q&A

But the piecemeal introduction of the virtual side that Lotzof advocates calls for some participant feedback prior to launching a "full throttle" platform with a slew of features. The No. 2 recommendation from Farmers agents after the event was exactly what the company had considered implementing: virtual Q&A in real time. The No. 1 recommendation was to stream the content direct to their offices instead of the theaters for "even more convenience," Miller relates.

"Quarterly we will most likely do exactly what they're recommending. We will do a brief, maybe 45-minute segment on one particular portion of the business and stream it to their offices. And then annually we will do a huge event like we did in January where we do an entire company spread and we pull them into theaters and district offices."

The most important feedback, however, was on the overall success of the broadcast: Farmers' survey showed that 83 percent "felt the broadcast was an effective way of hearing from the leadership team regarding new updates, plans, products and initiatives"; 80 percent "said it was a good investment of their time"; and 86 percent "reported that overall they were pleased with the broadcast." Miller concludes, "So I think from this point forward we can probably take some risks and see how things go and how far we can take it."

Virtual Meeting ROI

Assessing ROI for the virtual component can go far beyond a survey,

of course. In many respects, measurement is easier than for a physical event, as participants' behavior in the virtual space can be thoroughly monitored and quantified. "We track everything," says Lotzof. "We know where people go, what documents they read, what their interests are. They identify those interests when they register, but then by watching where they go we find out what their actual interests are." As far as quantification, a "rate engine" awards points to participants based on whether they logged in at the right time, how many presentations they visited, how long they stayed in each virtual environment, how many questions they asked, and so forth.

Creating Buzz for Live Events

If attendees enjoy their virtual experience, their interest may be piqued to attend physically the next time around, thus adding to the virtual event's ROI. Essentially, the virtual can act as a marketing vehicle for the physical, alleviating the worry of cannibalization. INXPO has found that "35 percent of the people that go to the virtual event who have never been to a physical event indicated they would now look at going to the physical event," says Lotzof. Many participants are unfamiliar with the content offered at the physical event, he argues, and by being exposed to great virtual content, they may well want to experience it in person.

But even if they stay on the virtual side, they'll remain strongly engaged. Content, in other words, is the real value proposition for both sides of the hybrid meeting. "Most companies that put their resources into the content get the right experience," says Lotzof. "Consider a talk show like 'Late Night with David Letterman' or the Super Bowl. You might have 90,000 people at the Super Bowl and 90 million watching it. It's a great hybrid event. And we've just got to figure out how to get the content that engrossing and captivating."

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The Founders Inn and Spa, Virginia Beach, VA, has named **Dwayne King** as senior sales manager. He was group sales manager at Ocean Place Resort, Long Branch, NJ.

Lakeway Resort and Spa, Austin, TX, has named **Jack G. Bickart** as director of sales and marketing. He most recently served as chief sales officer at Horseshoe Bay Resort, Horseshoe Bay, TX.

Dan Shaughnessy was named director of sales and marketing for the Anaheim Marriott, Anaheim, CA. He was director of sales and marketing at the Renaissance Hollywood Hotel & Spa, Hollywood, CA.

The Westin Peachtree Plaza, Atlanta, GA, has named **Michael Fletcher** as director of sales and marketing. Most recently, he was director of hotel sales for the Atlanta Marriott Marquis.

The Austin Convention and Visitors Bureau, Austin, TX, has named **Steve Genovesi** as senior vice president, sales. He was vice president of sales and marketing for the Chattanooga (TN) Convention & Visitors Bureau.

PGA National Resort & Spa, Palm Beach Gardens, FL, has named **Anne Mahon-Bomser** as director of Northeast sales. She was senior sales manager, regional sales, Mandarin Hotel Group, New York, NY.

Team San Jose, San Jose, CA, has named **Troy Karnoff** as director of Midwest sales in the Chicago office. He was director of Midwest region hotel sales for LA INC., the Los Angeles Convention and Visitors Bureau. **Kathryn Morgan** was named senior national sales manager for the Eastern and mid-Atlantic regions in the Washington, DC, office. She was senior sales manager for The Omni Shoreham Hotel, Washington, DC.

Grand Hyatt New York, New York City, has named **Eamon O'Brien** as director of sales. He was associate director of sales for the Hyatt Regency in Chicago.

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Loews Portofino Bay Hotel at Universal Orlando	407-224-6229	www.uomeetingsandevents.com	Kathy Cattoor	meetings@universalarlondo.com
Long Beach Convention & Visitors Bureau	800-452-7829	www.visitlongbeach.com	Iris Himert	irish@longbeachcvb.org
M Resort Spa and Casino	866-551-1540	www.themresort.com	Drew Varga	hotelsales@themresort.com
Marina Inn at Grande Dunes	843-913-9472	www.marainnatingrandedunes.com/ifmm	Group Sales	marinainngroupsales@grande-dunes.com
MGM Grand Las Vegas	800-929-1112	www.mgmgrand.com	Ruth Leis	hotelsalesleads@lv.mgmgrand.com
Ocean Reef Club	800-843-2730	www.oceanreef.com	Richard Weinstein	ORCSales@oceanreef.com
Omni Hotels & Resorts	972-871-5623	www.omnihotels.com	Mark Wykes	mwykes@omnihotels.com
Omni Orlando Resort at ChampionsGate	407-238-6526	www.omnihotels.com/findahotel/orlando-championsgate/meetingfacilities.aspx	Group Sales	mcocha.leads@omnihotels.com
Palm Beach County Convention & Visitors Bureau	561-329-3753	www.palmbeachfl.com	Donna Del Gallo	dgallo@palmbeachfl.com
Pointe Hilton Resorts	602-870-8188	www.pointehilton.com	Staci Valentino	PHXSP-salesadm@hilton.com
Ponte Vedra Inn & Club	800-234-7842	www.pontevdra.com	Tony Fitzjohn	sales@pvresorts.com
Reunion Resort & Club	407-396-3183	www.reunionresort.com	Linda Scott	lscott@reunionresort.com
Rosen Centre Hotel	407-996-9840	www.rosencentre.com	Todd Frappier	tfrappier@rosencentre.com
Rosen Plaza Hotel	407-996-9700	www.rosenplaza.com	Victoria Hall	sales@rosenplaza.com
Rosen Shingle Creek	407-996-9939	www.rosenshinglecreek.com	Leslie Menichini	sales@rosenhotels.com
Royal Caribbean International	800 762-0458	www.royalcaribbeanincentives.com	Lori Cassidy	royalmeetingsandincentives@rccl.com
Santa Fe Convention & Visitors Bureau	505-955-6210	www.santafe.org	Mary Pat Kloenne	mpkloenne@santafenm.gov
The Shores Resort & Spa	386-322-7262	www.shoresresort.com	Group Sales	salesadmin@shoresresort.com
South Point Hotel, Casino & Spa	702-797-8050	www.southpointcasino.com	Maureen Robinson	sales@southpointcasino.com
Switzerland Convention & Incentive Bureau	212-757-5944 ext. 237	www.myswitzerland.com/meetings	Caroline Pidroni	scib.usa@switzerland.com
Talking Stick Resort	480-850-7777	www.talkingstickresort.com	Group Sales	sales@talkingstickresort.com
Tulalip Resort Casino	360-716-6500	www.tulalipresort.com	Troy Longwith	<a href="mailto:sales@tul



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