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# INSURANCE & FINANCIAL MEETINGS MANAGEMENT

THE EXECUTIVE SOURCE FOR PLANNING MEETINGS & INCENTIVES

## Incentives at Sea

Cruise Programs Are Popular,  
Proven Motivators  
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Silversea Cruises'  
Silver Cloud

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**Arizona**  
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**TODAY'S AGENDA**

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**INSURANCE & FINANCIAL  
MEETINGS MANAGEMENT**

THE EXECUTIVE SOURCE FOR PLANNING MEETINGS & INCENTIVES  
MAY/JUNE 2016 Vol. 23 No. 3



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# Publisher's Message

## The Power of the Sea

Mankind has always aspired to tame the power of the sea. From attempts to harness the energy of the ocean for our electricity needs to predicting hurricanes and other dangerous storms, the scientific community has a monumental task. The insurance and financial community has been successfully tapping into the power of the sea for decades to motivate, inspire and incentivize their sales teams via cruise programs.



An incentive at sea checks off many boxes that meeting planners need and attendees want. For instance, a cruise offers the opportunity to explore several ports during just one sailing — destinations that attendees may never get to experience otherwise.

In our cover story this month, "Incentives at Sea — Cruise Programs Are Popular, Proven Motivators," Brett Barrowman, vice president conference and travel management with American Fidelity in Oklahoma City, notes that with a cruise, attendees "get to see different places they might not be able to see on their own."

And Katie Reavis, event coordinator with the National Agents Alliance in Burlington, North Carolina, says attendees appreciate the variety: "We've gotten really good feedback with them being able to see four or five different ports on a trip versus just one destination."

The No. 1 concern for any incentive program is the budget, and that's where an incentive at sea also excels as most cruises and even desirable full-ship charters have a bottom-line number that is doable for all parties.

Here's another plus: Because security is top of mind these days, a cruise is especially safe as the cruise line can simply reposition the ship if the destination is suspect.

Who wouldn't want to be graciously rewarded as a winner by their company on a cruise program in a tropical setting, for example, on the luxurious Silversea Cruises' Silver Cloud, which graces our cover this month?

Motivating and rewarding attendees is a recurrent theme in all of our other enlightening features in this issue, and be sure to review the special Arizona Meeting & Incentive Travel Planner on page 38 for great ideas and tremendous values.

Harvey Grotsky

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## Hard Rock Hotel & Casino Tops Off Expanded Meetings and Convention Space



Hard Rock executives at the topping off ceremony.

LAS VEGAS, NV — Hard Rock Hotel & Casino Las Vegas held a topping-off ceremony to commemorate the plans to add nearly 18,000 sf of meetings and convention space by winter 2016.

Other highlights of the project include adding an additional 5,000 sf of back-of-house storage and office space; new exterior signage along Paradise Road; relocation of the fully functional Business Center and contiguous meeting space and event venues. Upon completion, Hard Rock Hotel will have nearly 110,000 sf of meetings and convention space and will be able to accommodate a larger segment of business guests. High-tech amenities include Wi-Fi, CAT5 cabling and a program to create customizable sound, light, mood and banquet packages for maximum impact.

[www.hardrockhotel.com/las-vegas-meetings](http://www.hardrockhotel.com/las-vegas-meetings)

## The Cloister at Sea Island Completes Expansion



The Lodge at Sea Island.

SEA ISLAND, GA — Sea Island, a Forbes Five Star resort on the coast of Georgia, announced the completion of a \$40 million expansion project at The Cloister that includes a new Garden Wing comprising 63 new guest rooms and a 5,000-sf ballroom. These new additions debut as Sea Island celebrates the 10th anniversary of the opening of the completely rebuilt Cloister in April 2006.

Just south of The Cloister Chapel and across a landscaped garden from the existing South Wing, the new Garden Wing reflects the signature Addison Mizner Mediterranean design seen throughout Sea Island. The new guest rooms average 560 sf, each uniquely designed, featuring lustrous wood furnishings, exposed beam ceilings, overstuffed chairs, plank oak hardwood floors, Carrara marble

## Caesars Entertainment Expands Responsible Meeting Initiatives

LAS VEGAS, NV — Caesars Entertainment Corporation announced that its Responsible Meetings group is expanding its service offerings with the release of a new “Meetings for Good” menu of community service opportunities at select properties. The new menu will promote stronger community engagement among Caesars-operated resorts, their meeting customers and local non-profit organizations. Participating non-profits include organizations dedicated to seniors, environmental sustainability, education, health & wellness, deployed soldiers and veterans. A meetings customer seeking an eco-friendly teambuilding experience, for example, could help Clean the World build hygiene kits for distribution to impoverished people to help reduce hygiene-related deaths.

[www.caesarsmeansbusiness.com](http://www.caesarsmeansbusiness.com)



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Credits: 1,2 Bill Massejart, courtesy of IACC; 3,4 SITE 5,6 Simon Williams

**1** IACC Americas reinvented its annual meeting with new learning formats and a theme of “Sharing Ideas That Matter.” Renamed IACC-Americas Connect, the event was held in New York City, April 19–20. IACC President Alex Cabañas (l), CEO of Benchmark Hospitality International, poses with the six chefs who competed for the Global Copper Skillet. **2** Cabañas and his father Burt Cabañas, chairman of Benchmark Hospitality International flank Wende Blumberg, general manager-task force at Wyndham Hotel Group, Orlando, and Roberta Butler, senior vice president, marketing, FM Global, at the IACC event. **3,4** At SITE Nite Europe 2016 in Frankfurt, a celebration took place to honor SITE Italy’s 25th Anniversary, complete with cutting of the cake by chapter members. And 400 attendees including 200 hosted buyers gathered for a night of networking at the award-winning Kameha Suite. **5,6** The first-ever Global Event Summit, a partnership among VisitScotland, the International Live Events Association (formerly the International Special Events Society) and the IMEX Group, began at Scotland’s world-famous Gleneagles Hotel & Resort with three days of high-level debate followed by visits to Scotland’s historic capital, Edinburgh, where highlights included a private event at Edinburgh Castle as well as dinner on board the Royal Yacht Britannia.



## Are 'Bleisure' Trips the Latest Employer Incentive?

**B**usiness travel was never designed to be fun. Very often you find yourself rushing to an airport, getting off in another city, jumping in a cab, going to a hotel, meeting in the hotel's conference room, jumping back in a cab, and the next thing you know you are sitting in the office. You may have just visited one of the most beautiful, culture-rich cities in the world and never even knew it.

But the times they are a changin'. Many people who need to travel on business are becoming "bleisure" travelers, a term used to define professionals who mix vacation — or leisure — time with business.

According to a BridgeStreet Global Hospitality report, 60 percent of travelers reported having taken bleisure trips, with 30 percent adding at least two additional days to their trip.

Respondents said they do this because it limits the stress associated with business travel, making them more relaxed when away from home. And sometimes, it's just to enjoy the city they are visiting.

On a business trip, Caroline Michaud, a PR executive for a hotel group, opted not to do the traditional first plane out after finishing a business meeting in London. Instead she took the last flight out so she would have time to visit the National Portrait Gallery and Buckingham Palace. "I'm always seeing how you can stretch the trip," she says. Even if it just means six extra hours in a city, she wants to do it. "You don't have to stay extra nights to get the real feel of a city," she says.

### Perk of the Job

As a travel management company, we are seeing increasing amounts of clients extending their trips, and bleisure is fast becoming a way of life for the business traveler. Many see extending their work trips as a perk of the job. We find that when a business trip is extended with family or friends, the burden of travel is lessened and can make employees more willing to travel in the first place. We also have clients advising us that bleisure trips can be advantageous to the company as a whole, with staff gaining better knowledge of a city and its culture as being good for business.

In a survey of international travelers published last year, 60 percent said they've taken bleisure trips, usually adding two vacation days to work-related travel. Nearly half of them did so on most occasions, and six out of 10 said they were more likely to take bleisure trips today than they were five years ago. "It makes the stress of business travel more bearable," says Stuart Bruce, a British public relations adviser whose work frequently takes him all over the world.

According to the BridgeStreet survey, bleisure travelers are almost evenly split between male and female, with most falling into the 45- to 54-year-old age group. More important, the second largest group was 25- to 35-year-olds, representing millennials. This always-on, app-connected generation is more apt to deploy a business-mixed-with-pleasure mindset. Tuned in to technology, they get comfortable in unfamiliar

surroundings by using apps and social media to navigate, make connections and choose restaurants.

Regardless of age, bleisure travel continues to grow: 60 percent of BridgeStreet respondents were more likely to take a bleisure trip now than they were five years ago, and 94 percent state they do so to gain cultural experiences and to explore the cities they travel to on business. Additionally, almost 55 percent of bleisure travelers bring family members with them, while about 29 percent said they haven't yet, but would like to or are planning to.

### How to Manage Bleisure Travel

With all this in mind, it's evident that bleisure travel is very much becoming part of the business travel world, but how is it managed? We're still finding that many corporate travel policies don't allow for gray areas such as bleisure. The biggest questions are — who pays for the extra nights' hotel accommodation and the flights home?

This all goes back to having a clear and concise travel policy and making sure it covers bleisure activity, otherwise extending business trips for bleisure would have to be decided by management on a case by case basis, and you run into the danger of a staff member feeling slighted that their bleisure trip isn't paid for while another staff member's is paid for.

But, as a business, what do you need to consider?

First of all, if your staff is on business they would have to fly home anyway, so we would always advise that travel policies state the flights home are paid for by the business, as long as there is no substantial increase in price. The accommodation costs are usually the main issue, however we find these are usually negated by less expensive "off peak" weekend flights, for instance business flights on a busy Friday night usually come at a premium, whereas on a Sunday afternoon these flights are less expensive, and most businesses are happy to offset this cost on the extra nights' hotel accommodation cost.

Each company has its own policy for adding on personal time. "It's one of these gray areas," said Greeley Koch, executive director at the Association of Corporate Travel Executives, in a recent interview in *The New York Times*. "It really comes down to the culture of the company." Some companies tend to discourage adding on vacation days. Others encourage it, if only to help employees overcome jet lag and be more effective while they work on the road.

Taking it a step further, some companies even use the business-trip extension as a recruiting tool. Corporations are "absolutely fighting for talent in high-growth industries,"

said Nick Vournakis of Carlson Wagonlit in the article, and a flexible travel policy can be used as a way to "attract and retain employees."

### Duty of Care

But the practice does carry risks for companies, which are increasingly responsible for the safety of their employees whether they are working or at leisure on a business trip. It's an area of law called duty of care. As Adam Anolik, a lawyer who handles corporate travel, told *The New York Times*, "Many courts have been extending the employer's duty of care further and further."

Employers are advised, for example, to warn business travelers of any known dangers in the immediate vicinity of their business travel in case those dangers are encountered on leisure or tacked-on time. In addition, some countries have adopted stringent employer duty-of-care legislation or case law

Bleisure travel is very much becoming part of the business travel world.

precedents that generally apply to that company's employees traveling in other countries. That being said, it is important to work with a travel management company that knows not only the rules governing travel in each country, but where the "hot spots" are that should be avoided should an employee decide to extend his business trip.

All indications are that bleisure will continue to be a corporate buzzword, particularly as business travelers start to skew younger and younger. But no matter the age of the business traveler, more and more will be looking to roll some pleasure into the workload, which means businesses have to not only adapt to this trend but also turn it to their advantage when recruiting new workers and attempting to retain current ones.

**I&FMM**

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## FICP Mock Trial Drives Home Real-World Messages

The Financial & Insurance Conference Planners (FICP) 2015 Annual Conference was held last fall at the beautiful Atlantis, Paradise Island, Bahamas. Among the many thought-provoking and outstanding educational presentations was a unique interactive “Mock Trial” that featured two different hypothetical court cases.

In this innovative session, audience members played the role of the jury for both trials, each lasting about 45 minutes long. The judge, attorneys and witnesses were played convincingly (if not tongue-in-cheek) by FICP conference attendees, who embraced their opportunity to showcase their thespian skills — with verve!

### Guiding Forces: Howe and Gilligan

I was pleased to be a part of the team that put the session together, and also played the role of the defense lawyer in both trials. Real-life attorney Jonathan T. Howe Esq. played the judge to perfection and was one of the guiding forces behind the session — generously sharing his experience and knowledge of the courtroom setup, legal lingo, procedures and documents, which made the trials as realistic as possible.

Padraic Gilligan of Ovation Global DMC was the other driving force of the event, bringing his talents as an effective and earnest lawyer for the plaintiffs to the proceedings, along with thoughtful input in the design and content of the cases themselves. The whole undertaking was an example of collegial collaboration, relevant subject mat-

ter and pure, unadulterated fun, all the while driving home some real-world messages.

### No. 1 Trial: Everything but the Kitchen Sink

In the first trial, “Everything but the Kitchen Sink,” a group of hotels, DMCs, CVBs and transportation companies initiated a class-action lawsuit against insurance company corporate meeting planner Snidely Scrupulless (played by Grant Snider). Led by DMC owner Debbie Doright (Kathy Roche), the suit claimed that the actions of Scrupulless were unethical and wasted everyone’s time — thereby costing the organizations money.

Mr. Scrupulless was accused of creating inefficiencies and unnecessary work by having a number of supplier companies respond to an extremely detailed RFP in multiple cities — with the chance of being selected extremely small. On the other hand, not responding to the RFP could potentially be detrimental to a potential long-term relationship with Snidely. In defense of his actions, he claimed innocence because he followed his company’s internal processes and cited additional factors as reasons why the RFP process was flawed.

Steve Bova, the executive director of FICP, was sworn in as an expert witness and was asked about FICP’s code of ethics and stance on the case. Steve masterfully reaffirmed FICP’s aspirational position on acceptable ethical practices without entering the fray or taking sides. After crafty maneuvering by plaintiff’s attorney Dewey Cheatem (Padraic Gilligan) and defense attorney I.M. Scheister (Mike Lyons),

the jury found that Mr. Scrupulless did not violate any laws, and he won the case, mainly because he never signed a non-disclosure agreement.

Throughout the rowdy proceedings, the Honorable Judge (Jonathan T. Howe Esq.) had to maintain order and threatened both attorneys (and witnesses alike) with contempt of court charges on multiple occasions, much to the delight of the audience.

### No. 2 Trial: Lack of Performance

In the second trial, financial services company meeting organizer Peter Planner (played by Chris Gilbert) brought Heavenly Resorts Hotel Company and DOS Sally Sellem (Koleen Roach) to court citing lack of performance during their annual meeting, resulting in poor attendee experience (and, in the process, damaging Peter Planner’s reputation in the company). In the suit, the plaintiff asked for heavy discounts on the hotel’s final bill as well as \$250,000 in damages.

The hotel director of sales (Koleen Roach) cited the BEOs as not being as precise as they should have been, bad communication on the part of the client, and unreasonable room rate negotiations leading to vulnerable service levels, as part of the hotel’s defense.

During the trial Mr. Planner cited numerous ways that the hotel short-changed the attendees, creating a terrible experience for many of them and resulting in poor morale rather than the positive, uplifting, inspired feeling the company was trying to create.

However in cross-examination testimony, Mr. Planner’s case fell apart as he was exposed for his lack of commu-

nication, follow-through and mismanagement of the meeting details, thereby causing the hotel to experience service issues. Also unveiled was his personal relationship with a key witness, which influenced her testimony and further damaged Mr. Planner’s credibility. In the end, the jury found in favor of the hotel, and no damages were awarded to the plaintiff.

All in all, a fun time was had by all, and the audience was left to ponder their own behavior if faced with similar circumstances in their own workplaces. A special call-out to

The audience was left to ponder their own behavior if faced with similar circumstances.

all the other actors not yet-mentioned, who did a terrific job acting out their parts: Witnesses Alison Hall, Linda Burley, Cindy Hoddeson and Bailiff Kevin Regan. **I&FMM**

**Michael J. Lyons** is an actor, speaker, writer, entrepreneur and hospitality industry executive. As an actor, he has dozens of credits in films, TV shows, commercials and more than 350 live appearances on home shopping network QVC as a product host. He also can be seen in the popular Netflix series “House of Cards” playing the Speaker of the House in Season 4, Episode 2. As a professional motivational speaker, he has given talks to numerous groups over the past few years on how to achieve goals, pursue your passion and enhance your personal brand. He has authored a number of articles in both travel industry trade journals as well as consumer magazines, and is frequently sought out by the media as one of the experts in the meetings and events industry. [www.michaeljlyons.com](http://www.michaeljlyons.com)



# The Winning TRIFECTA



Foxwoods Resort Casino offers Lake of Isles Golf Club, extensive gaming and two spas.

Credit: Foxwoods Resort Casino



## Resorts Offering Gaming, Golf & Spa

When insurance and financial advisers invite clients or prospects for a round of golf at the Mira Vista Country Club in Fort Worth, Texas, or the Village Club of Sands Point on Long Island's North Shore, they almost always play to win, to gain the respect of their golf partners to show they are as proficient on the greens as in business.

For many insurance and financial firm representatives, networking on the golf course is an important part of their professional and personal lives. Any avid golfer will attest to the fact that you learn quite a lot about someone during the round, and meeting planners have long known that getting their groups onto the greens at out-of-town conferences and meetings is not only good for their mental and physical health, but it's good business as well.

"For me, a business conference or meeting that includes golf offers the best of both worlds," said Brian Boder, a financial adviser for Northwestern Mutual in New York. "It is a sport that I truly enjoy playing, even by myself, so if I am golfing with Northwestern colleagues, or prospective clients, and the sun is shining, and the resort course is groomed and not crowded, then the business we may talk about on the course becomes a pleasurable activity, and the world is great."

After the difficult years during the recession, when the media was scrutinizing every corporate meeting for over-the-top-expenses, meeting planners for insurance and financial firms are cautiously beginning to book client and employee meetings, seminars, workshops, incentives and other events at resort properties that offer the three amenities that foster relaxation, relationship building and client/prospect networking — golf, spa and gaming.

Although most meeting planners do not make the spa

or casino amenity a major component of their resort event, these group activities often become morale boosters and offer amazing networking opportunities when arranged correctly and in good taste.

The following resorts are all able to offer those important three amenities that help transform routine conferences and meetings into productive, healthy and engaging events.

### We-Ko-Pa Resort & Conference Center

The Crest Insurance Group stayed at the 246-room We-Ko-Pa Resort & Conference Center in Scottsdale, Arizona, in March 2016, with approximately 25 brokers and their spouses. "With offices in Tucson and Scottsdale, we needed a convenient, yet, somewhat secluded location to have a broker meeting," says Jason Prosser, vice president of the Tucson-based Crest Insurance Group. "This was the first time in a while we had a joint family/business function, so We-Ko-Pa was perfect for all who attended."

The first day was dedicated to golf, with a scramble tournament in which almost all of the brokers participated. The golf course was in excellent condition, the greens were great, and the course was not too tough, but not too easy either, so everyone had fun. This was followed by dinner that night, and an early morning meeting for two to three hours on Saturday at the Wassaja Conference Center, which offers 25,000 sf of meeting and event space.

Prosser said that all the recreational amenities offered by the property were well suited to the individual brokers and their spouses or significant others. "The participants and significant others who did not want to play golf were treated to a spa or massage treatment. Plus, the pools, hot tubs and casino were a bonus for everyone."

The Fort McDowell Casino, adjacent to the resort, offers

## Exceed Attendee Expectations

By Ron Bernthal

### Talking Stick Resort

150,000 sf of casino space. The casino's Lucky 7 Saloon offers free entertainment nightly, and five dining venues provide everything from sushi to New York-style deli to the variety of the Red Rock Buffet.

We-Ko-Pa's Clubhouse is oriented to take advantage of the many spectacular views of the McDowell Mountains, Red Mountain, Four Peaks and the Superstitions. The two 18-hole championship courses, Cholla and Saguaro, designed by golf course veterans Bill Coore, Ben Crenshaw and Scott Miller, have been named "Best Resort Course" in the country by *Golfweek* magazine. Rolling fairways surrounded by Arizona's desert environment provide a memorable golf experience.



Jason Prosser (second from left) of the Crest Insurance Group at the We-Ko-Pa Resort.

Credit: Julie Kent/Crest Insurance

At the Amethyst Spa and Fitness Center guests can choose from a variety of indigenous spa therapies including the sweat lodge stone massage and Amethyst facial.

For meeting planners who want to arrange offsite events, the resort is convenient to horseback trail rides, cattle drives and themed cookouts at Fort McDowell Adventures, a private 25,000-acre desert recreation area only minutes away.

The resort is managed by, and maintains close cultural ties to, the Fort McDowell Yavapai Nation, and the name "We-Ko-Pa" means "Four Peaks" in the language of the Yavapai Tribe.

the resort is convenient to horseback trail rides, cattle drives and themed cookouts at Fort McDowell Adventures, a private 25,000-acre desert recreation area only minutes away.

Another Scottsdale resort appealed to Bloomington, Illinois-based Country Financial. "Talking Stick is an amazing resort, there is so much to do on the property," says Jeff Kerner, senior vice president of agency at Country Financial. The firm was at the resort last October for their Sales Team National Advisory Council meeting. "The meeting rooms are very professional and the PSAV team was responsive to all of our needs. The casino and golf are both onsite, and the dinner, as well as the beautiful view, at The Degree 270 are amazing. It was also very helpful to us that the property assisted our attendees with coordinating transportation to Topgolf." Topgolf is an indoor entertainment complex featuring hitting bays and golf games using computerized golf balls to track shots.

Talking Stick was booked for Country Financial's event by California-based Lynette Owens & Associates. "The Talking Stick Resort in Scottsdale offers great rooms, meeting facilities, and golf and spa amenities for many of our financial clients, plus it offers a casino that is as nice as any casino hotel in Las Vegas," says Debbie Grassi, vice president of sales at Lynette Owens & Associates. "It is wonderful for those companies that do not want the distractions of the Las Vegas Strip and the competition from other large city-wide conventions. The meeting space at Talking Stick is centralized and easy to get to, and outside function space and their Degree 270 venue offer great views of the Scottsdale Valley and beautiful sunset views of the Arizona mountains. Golf is on-property, which makes easy coordination for tournaments and other golf events."

The 496-room Talking Stick Resort, offers nightly entertainment, excellent dining venues, spa services, a popular casino, and cultural displays of the Pima and Maricopa tribes.

Standing 15 stories high the hotel is the tallest building in Scottsdale, providing spectacular views of the city and the surrounding mountains from guest rooms and the top floor Orange Sky Restaurant.

The Talking Stick Golf Club, adjacent to the resort, offers two professional courses managed by Troon Golf. The North course is a Scottish links-style course with deep bunkers, while the more traditional South course has tree-lined fairways and four holes with water hazards.

The 240,000-sf Casino Arizona boasts not only more than 700 slot machines, but the largest poker room in the state.

The 14th floor Spa at Talking Stick has 11 treatment rooms with services inspired by the Salt River Pima-Maricopa Indian Community's culture, located within a luxurious and soothing setting.

The hotel's conference center has more than 113,000 sf of indoor and outdoor meeting space with the flexibility to accommodate groups up to 2,000 participants.

Entertainment options include a 650-seat Showroom offering live entertainment; the Degree 270 weekend nighttime club; a Players Sports Bar; and Shadows — an elegant martini and cigar bar.

### Coeur d'Alene Resort

"The Coeur d'Alene Resort was an amazing venue for Northwest Farm Credit Services to celebrate our employee breast cancer survivors and breast cancer awareness volunteers meeting last August," says Jennifer Rohrer of Northwest Farm Credit Services in Spokane. The 338-room Coeur d'Alene Resort is located in the scenic lakeside town of Coeur d'Alene, Idaho. "The staff was so friendly and treated us like family, which included picking up the group at our home office and having a delicious lunch ready for us when we arrived. We had some of the best spa treatments we had ever received. All-in-all it was a phenomenal experience from start to finish." Rohrer and Northwest Farm Credit Services sponsored with the American Cancer Society and used the golf course for an event called Coaches vs. Cancer Golf, an annual tournament and fundraiser that is held at the resort's Stensgar Pavilion at the Circling Raven Golf Club.

Coeur d'Alene Resort's Floating Green.

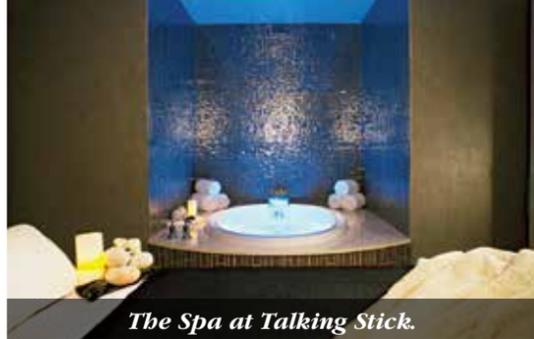


Credit: Coeur d'Alene Resort

Coeur d'Alene Resort's Circling Raven Golf Club course is located on the Coeur d'Alene Indian Reservation, on the other side of the lake. Golfers can drive there from the resort in five minutes, or take the shuttle boat across the lake in about sev-

en minutes. The course's famous Floating Green on the 14th hole is one of the best known in golf. Golfers who arrive by the wooden boat are greeted by their personal forecaddies, and the lake makes a spectacular backdrop.

The Spa at Talking Stick.



Credit: Talking Stick Resort

The par-71, 6,803-yard course, designed by Scott Miller, features stunning lake views from all 18 holes and is contoured so golfers are not able to see other golfers. There's also a 6,500-sf clubhouse and a practice course that occupies 25 acres.

The 15,000-sf Spa Ssakwa'q'n, with hot and cold tubs, features a heated pool area, which is open to the sky year-round. Because of the golf course and the increase in year-round business meetings, the spa has seen an increase in the number of male guests, who now comprise 35 percent of the spa's business, while the national average is just 20 percent.

The resort offers more than 32,000 sf of conference, exhibit and meeting space in 25 meeting rooms, including the beautiful Hagadone Event Center with its 11,000 sf of indoor/outdoor function space overlooking Lake Coeur d'Alene.

### Beau Rivage Resort & Casino

"Beau Rivage is an excellent resort with great amenities," says Dan Gleason, president of Associated Risk Managers South in Madison, Mississippi. The 1,740-room Beau Rivage Resort & Casino, an MGM Resorts International property, is located in Biloxi on Mississippi's Gulf Coast "They know how to take care of you, from the poolside service to the top-notch spa and exercise facilities," he says. "The meetings facilities have flexible space for big general sessions to small breakout venues, and the staff is great to work with, too. Fallen Oak is a fantastic



Gaming at Beau Rivage.

Credit: Beau Rivage Resort & Casino

golf experience, it is really much more than just an excellent golf course."

The Beau Rivage Fallen Oak Golf Course hosts the annual Mississippi Gulf Resort Classic with the best players on the Champions Tour. Unique among Gulf Coast courses, Fallen Oak features dramatic elevation changes, which course designer Tom Fazio incorporated among the more than 4,000 oaks, magnolias, pine and other hardwood trees that join the ponds, streams and wetlands that frame the course.

Aside from the elevation changes, and Fazio's design tactics of using the DeSoto National Forest and all its natural elements as a template, the multimillion-dollar course also features gently rolling terrain and pecan orchards. Each year all three tournament rounds of the Mississippi Golf Resort Classic are broadcast live on the Golf Channel.

Beau Rivage has recently completed several enhancements in the resort's 85,000-sf Mediterranean-themed casino, including a redesigned High Limits salon.

The award-winning Spa and Salon at Beau Rivage offers more than 100 services in 21 treatment rooms and many innovative treatments, including the exclusive Art de Beauté Body Treatment, available at just five spas nationwide.

"MGM Resorts International operates some of the finest resort spa facilities in the world, and the newly renovated Beau Rivage Spa and Salon is no exception," says Natalee Lynch, director of spa and salon operations.

### Rocky Gap Casino Resort

"I chose Rocky Gap because of the central location to my Erie Insurance agents that operate in western Maryland," says Jason Arndt, district sales manager for the Maryland-based company. "After reviewing the facility online, and speaking to folks at the property, I just knew this place would deliver! The executive boardroom and private dining room were great for our formal meetings with agents and also for several informal gatherings."

Located in western Maryland's Allegany County, Rocky Gap Casino Resort overlooks Lake Habeeb and Rocky Gap State Park, and is about eight miles from Cumberland, Maryland. The property offers 198 guest rooms and suites, a conference center and a 24-hour casino.

Rocky Gap's golf course is nestled in the foothills of the Appalachian Mountains, and the scenic vistas and mountain lake provide a perfect backdrop for the award-winning Jack Nicklaus-designed golf course. The Rocky Gap course was included in *Golf Week* magazine's list of the best courses to play in Maryland, and one of the best casino courses in the country.

The property provides more than 10,000 sf of indoor and outdoor space, including the 5,000-sf Allegheny Event Center offering lake views.

The Spa at Rocky Gap Casino Resort has Spa Day Pack-



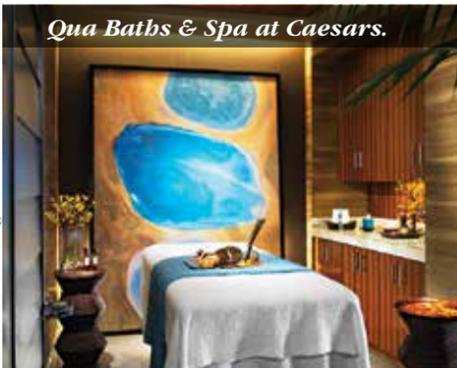
Rocky Gap Casino Resort.

ages that range from 50 minutes to four hours of various treatments, including 12 different massage options.

### Caesars Las Vegas

Some attendees might be surprised that Caesars Palace on the Las Vegas Strip, with 3,960 guest rooms and 300,000 sf of meeting space, offers the opportunity for a round of golf. Hotel guests can book a tee time at Cascata, which is 30 minutes away. The scenic par-72 course winds among streams, canyons and lakes. "Cascata is the perfect location for a corporate golf outing," says Eric Dutt, vice president of golf operations at Caesars Entertainment in Las Vegas. "This Rees Jones-designed course has been a top 100-rated facility since it opened, and now groups can take advantage of this exclusive course, beautiful clubhouse and unique outdoor spaces to create a memorable golf experience."

The Qua Baths & Spa at Caesars Palace has 48 treatment rooms that can be utilized by small to large groups, and can easily accommodate a buy-out.



Qua Baths & Spa at Caesars.

Credit: Caesars Las Vegas

### Foxwoods Resort Casino

Owned and operated by the Mashantucket Pequot Tribal Nation, Foxwoods Resort Casino in Mashantucket, Connecticut, is the largest resort casino in North America, with four AAA Four Diamond hotels and 150,000 sf of meeting and event space, including the largest ballroom in the Northeast.

The Lake of Isles Golf Club, part of the Foxwoods resort complex, features the Rees Jones-designed North Course, which is built around 900 acres of woodlands and a 90-acre lake. The club's 4,500-sf ballroom features floor-to-ceiling windows with views of the lake.

The Fox Tower has the 21,000-sf G Spa and Salon, which includes a eucalyptus steam room, sauna, waterfall whirlpool, indoor lap pool and full-service fitness center. The Grand Pequot Tower's Norwich Spa has a whirlpools, steam room, sauna and lounge area.

Of course, Foxwoods offers extensive gaming facilities as well, with the only \$1 blackjack tables in Connecticut and the largest poker room on the East Coast.

At a large financial group meeting at the property in February it was too cold for golf, but the group did use the resort's spa services and the gaming facilities. The attendees participated in the Casino 101 activity, where the resort arranges for blackjack tables and dealers, and roulette wheels in one of their private rooms away from the casino. The dealers can provide either a casual, educational experience

for the participants not familiar with gaming, or run it like they do in the casino for experienced gamers. Either way, Casino 101 participants are always playing for sponsored prizes or points. No cash is ever involved during the off-casino group events.

### Mohegan Sun

Mohegan Sun, located in Uncasville in eastern Connecticut, will debut the new Earth Tower this fall that will add meeting space and another 400 deluxe guest rooms to the resort's current 1,200-room Sky Tower. The Convention Center at Mohegan Sun offers more than 100,000 sf of meeting and function space, and the 10,000-seat Arena can be transformed into another 30,000 sf of exhibition space.

A short drive from the resort, the Mohegan Sun Golf Club's 18-hole championship golf course is open to all resort guests and the public. The course was originally designed by the late architect Geoffrey Cornish, now remembered as one of the country's most renowned and prolific golf course designers.

The 20,000-sf Elemis Spa offers a wide range of treatments and services in its private treatment rooms, a full-service hair and nail salon, state-of-the-art fitness center and separate aerobics room.

The Warren Group, a long-established, Boston-based real estate and financial information firm, holds two annual trade shows at Mohegan Sun. "We will continue to return to the property due to the overall exceptional service they provide," says George Chateaufeuf, the firm's director of business media. "Our conference and banquets managers work diligently with us to ensure our events run flawlessly and that our expectations are exceeded. The convention center is ideal for our needs, the meeting room locations work well, and the hotel rooms are spacious and clean. Our attendees and exhibitors tell us all the time how thrilled they are to be onsite and how much they enjoy staying at the hotel. This positive feedback ensures we'll be returning for years to come."

### Caesars Atlantic City

Caesars Atlantic City's newly renovated second floor has the largest contiguous gaming area in Atlantic City. Located on the boardwalk side of the casino is the Asian gaming area called Palace East, with a design layout influenced by the direction and the placement of elements to influence players' luck and to create the luckiest seating in the gaming pit. The 1,144-room hotel, with 28,000 sf of meeting space, also houses Qua Baths & Spa featuring the natural, healing powers of water in three distinct pools.

Just 15 minutes from Caesars Atlantic City is the Atlantic City Country Club, one of the oldest and most prestigious country clubs in the country, and open to hotel guests. This famous course is where the term "birdie" is said to have been invented, and where high-profile golf professionals and celebrities, including Arnold Palmer, Bing Crosby, Bob

Hope, Bobby Jones and many others have played. The present 6,577-yard course, designed by Tom Doak, has a challenging layout and picturesque coastal views. The original 1897 clubhouse is still part of the now renovated and expanded facility that is used today. The Country Club's Grand Ballroom offers banquet seating for up to 260 guests.

### Grand Traverse Resort and Spa

The Grand Traverse Resort and Spa and the Turtle Creek Casino & Hotel are close to Traverse City, on Michigan's Lower Peninsula. Both properties are under the same ownership, but are separate businesses located just eight minutes' drive from each other. There is no onsite gaming at the Grand Traverse Resort, but complimentary 24-hour shuttles run between the Turtle Creek Casino and the resort, offering no-wait rides between the properties.

Both hotels and the casino are owned by the Grand Traverse Band of Ottawa and Chippewa Indians. With three professionally designed, 18-hole golf courses (The Bear — a Jack Nicklaus signature course, The Wolverine — a Gary Player signature course, and Spruce Run — designed by Bill Newcomb) and a two-story, 7,000-sf full-service resort spa,



Grand Traverse Resort and Spa's Bear course.

Credit: Grand Traverse Resort and Spa

the Grand Traverse Resort complex offers great amenities for insurance and financial groups (one firm recently returned for its 29th visit). For groups or family-oriented meetings and incentives, there are resort homes on the golf course as well as one-, two- and three-bedroom condo accommodations.

Flying into Traverse City's Cherry Capital Airport, just seven miles and a free shuttle van away from the Grand Traverse Resort, is one of life's most rewarding travel experiences. The terminal is Arts and Crafts/Frank Lloyd Wright-style inspired and reflects the openness and natural setting of the Grand Traverse region. The terminal complex is reminiscent of a north woods lodge, complete with a stone fireplace, often lit with a flickering fire on cold or snowy days.

Michigan produces 70 to 75 percent of the tart cherries grown in the United States, and the Traverse City area — the Cherry Capital — grows most of them. In July and early August, the countryside around Traverse City is dotted with stands, markets and u-pick signs offering cartons of sweet, dark cherries, a perfect field trip for a business group looking for a relaxing and unique break from meetings — which, of course, would add a fourth option to the winning trifecta.

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# Incentives at Sea



*Katie Reavis and her team often prepare their own promotional materials during a site visit such as this foray on the Norwegian Epic for a Mediterranean cruise incentive program for the National Agents Alliance.*

**Cruise Programs Are Popular, Proven Motivators**  
By Patrick Simms

Insurance and financial companies have been taking incentive groups to the high seas for decades, simply because cruises are proven motivators for agents to reach their sales goals.

But despite their effectiveness, cruise programs remain less frequent than land-based incentives: At some firms they might be deployed once every three or four years, while at other companies cruising enjoys a few years of popularity before falling off for many years.

The obstacle to more frequent usage certainly isn't cost, as cruise lines offer attractive, all-inclusive pricing that competes with hoteliers of comparable quality. Nor are cruise incentives more difficult to plan, as the cruise line itself often will be the only vendor a planner needs to deal with for all aspects of the event. Rather, the obstacle to more frequent usage seems to be psychological: Booking cruises regularly can be perceived as repetitive, despite the fact that the ships are visiting different destinations and ports.

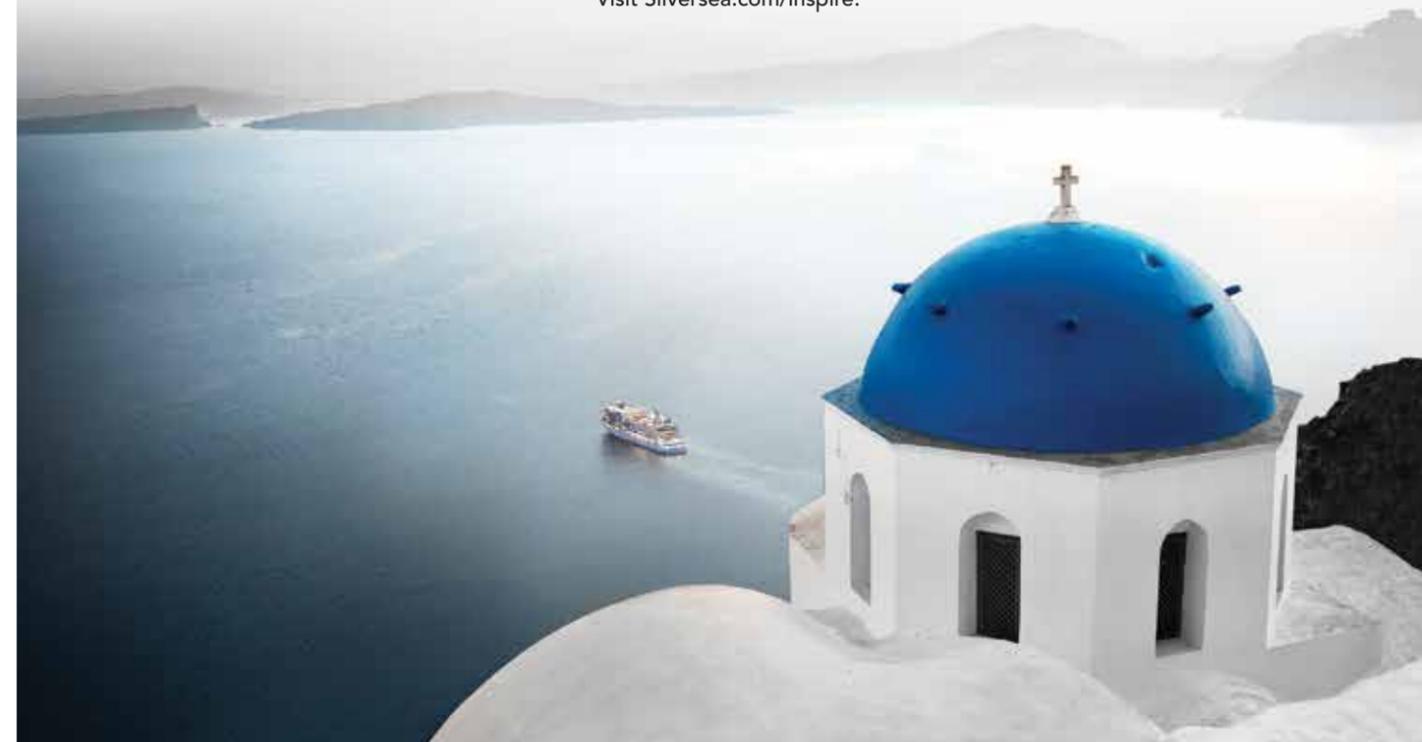
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That insight comes from Shari Wallack, president of Plantation, Florida-based Buy the Sea, a cruise and all-inclusive resort brokerage company that has long been a resource for incentive planners. Insurance and financial companies “will repeat a hotel product. For example, if they’re Ritz-Carlton clients they’ll do a Ritz in California, in Spain and in Hawaii and not feel like they’re repeating anything,” Wallack observes. “But with a cruise, even if I gave them a totally different destination, it wouldn’t matter because it’s still a cruise. It’s as if the cruise in and of itself is the destination.”



**“We’ve gotten really good feedback with them being able to see four or five different ports on a trip versus just one destination.”**

**Katie Reavis, Event Coordinator**  
National Agents Alliance, Burlington, NC

### Visit Several Ports

In reality, a cruise experience can be as varied as a resort experience, and even more so due to the opportunity to explore several destinations. Brett Barrowman, vice president conference and travel management with American Fidelity in Oklahoma City, notes that with a cruise, attendees “get to see different places they might not be able to see on their own, whereas with a land-based program to San Francisco, for example, you just see San Francisco and the surrounding area.”

Barrowman has been working with Buy the Sea to plan Royal Caribbean cruise incentives in May and June, to the Baltic Sea and the Caribbean, respectively. Katie Reavis, event coordinator with the National Agents Alliance in Burlington, North Carolina, offers evidence that attendees appreciate the variety Barrowman discusses: “We’ve gotten really good feedback with them being able to see four or five different ports on a trip versus just one destination.” Indeed, there is a greater likelihood a cruise will promise the well-traveled agent an experience with an unfamiliar destination.

Moreover, the itineraries companies are considering today range well beyond the Caribbean and the Mediterranean. “Financial and insurance com-

panies are naturally conservative, and lately we have had more requests to keep programs closer to home,” Wallack reports, “which is why we have seen more interest in cruises to Bermuda and Alaska than what is typical. Other cruise destinations that have garnered interest are Tahiti, Norway, Iceland and the British Isles. Additionally, Croatia continues

to gain in popularity for clients looking for a less traditional Mediterranean destination.”

Attendee demographics can inform the destination choice and the itineraries within those destinations. For example, American Fidelity’s June cruise is geared toward mainly domestic-



*The Regent Seven Seas Navigator.*

based sales reps of widely varying ages. “The Caribbean cruise would appeal to a multitude of age ranges, 30s to 50s to 60s,” says Barrowman. “The one going to the Baltic Sea area is for our Latin American division, and it’s a totally different dynamic.” These agents are more incentivized by a destination that is more of a cultural and scenic departure from their home countries, and they will experience that with stops in Copenhagen, Helsinki and Stockholm, among other ports. “We’ve gotten a lot of excitement, especially once we rolled out the registration and they see all the ports of call,” says Barrowman.

### The Marketing Push

Of course, it’s vital to generate excitement for a cruise throughout the entire qualifying period, and just like CVBs and resorts, cruise lines are ready to provide planners with quality marketing materials. “All the ships now have beautiful brochures that you can include as marketing pieces or even videos on YouTube so you can send out links,” notes Jana Stern, AVP, direc-

tor of meetings and events, Voya Financial, Minneapolis, Minnesota. The company is set for a Regent Seven Seas cruise to Alaska in 2017 after a successful Greek Isles program with Regent in 2014, prior to which the group was in Hawaii for a land-based incentive. “As a teaser for the Greek Isles cruise, on the last night of the Hawaii program we gave them some Regent-branded tchotchkes,” she adds.

National Agents Alliance, which conducted a Greek Isles incentive with Norwegian last year, has actually been able to produce its own marketing materials with site visits to the ship. Says Reavis, “We take full advantage of a site inspection, so myself along with our CEO and someone from our in-house media team go on the ship ahead of time and create promotional materials for ourselves. We take some photos and do some videos telling them, ‘You don’t want to miss this’ and highlighting some of the ports of call.” Supplementing a planner’s own marketing efforts is the general advertising the major cruise lines often do. “Our people realize ‘Hey, we’re going to be on Oasis of the Seas,’ and there’s a commercial for it. We get some free advertising and hype, if you will,” says Barrowman.

Related to the marketing push is



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the reassurance that planners may have to give for those with little or no cruise experience. These potential qualifiers may have concerns ranging from the size of the cabins (a concern that a quick onsite video can allay) to the possibility of motion sickness. Clearly all ships have staff trained in assisting ill passengers and signage for emergency procedures, but that preparation may need to be stressed for those new to cruising.

### Ships Are Very Secure

In terms of security, ships are superior to hotels, Wallack asserts. "To get on a ship, you have to be a registered passenger, unlike a hotel where anybody can walk in and go to the bar or restaurant," she points out. "Second, if you book a cruise and the cruise line subsequently feels it's not safe to go to that destination, they will reposition the ship. With a client who books a land program (and later discovers there is a safety issue with the destination), all of a sudden they're scrambling to re-book that somewhere else."

### Full-Ship Charters

The flexibility in destination that cruises offer is accentuated when chartering, a trend that is "certainly continuing," says Wallack. "With smaller ships, clients are able to navigate intimate harbors and visit less crowded ports of call, making the entire experience more customized and unique. Chartering allows a company to chart its own course and stay overnight in one or more ports to allow the passengers to truly experience the destinations without feeling rushed. We see this predominantly in Europe where our clients are hosting elaborate on-shore dinners and gala events, and extremely creative and adventurous excursions. These overnights make for a much more relaxing experience for the passengers."

Charters also are very promotable

to potential qualifiers: Planners can stress that the ship will be the group's exclusive home, and a luxury one at that, since a chartered ship is typically more high-end than the mega ships holding thousands of passengers.

Silversea's stellar reputation as an all-suite luxury cruise ship line makes it ideal for ship charters. The voyage can be custom-



***"From the casino to entertainment such as synchronized diving, they do all of that; I don't have to coordinate it, sign contracts or do site visits."***

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

ized including ports of call, duration of time in port, and daily scheduling. Also, Silversea offers the flexibility to arrange special events, design tailor-made tours and even create menus that include favorite dishes. Silversea Cruises' intimate ships include: Silver Explorer, 130 guests; Silver Galapa-



Silversea Cruises' Silver Cloud

gos, 99 guests; Silver Discoverer, 120 guests; Silver Cloud and Silver Wind, 294 guests; Silver Shadow and Silver Whisper, 388 guests; and Silver Spirit, 540 guests.

### Bigger Can Be Better

On the other hand, the mass-market ships are richer in entertainment programming and dining options. "We prefer bigger ships that have more to offer our attendees to do at night," Reavis says. "Our group tends to be younger, with the average age around 35, so we definitely need the shows and the comedy clubs." The slew of

onboard diversions on these ships also makes things easier for the planner. "As a meeting planner I don't have to entertain them," says Amy Ingalls, senior meeting and event planner with Transamerica Life & Protection in Cedar Rapids, Iowa, who has booked mega ships such as Allure of the Seas and Oasis of the Seas. "From the casino to entertainment such as synchronized diving, they do all of that; I don't have to coordi-

nate it, sign contracts or do site visits."

There also is a certain excitement that comes with experiencing one of the largest ships in the world. "The downside," says Barrowman, "is that you can get swallowed up by 5,000 or 6,000 people onboard, but we think we've figured out a way to identify our people, utilizing wristbands. One of the worst things is to have a recognition program where nobody recognizes you," he quips.

Another point to bear in mind is that, while mega ships do have a great diversity in venues, planners will not have exactly free rein over those venues for group gatherings, as they would on a chartered ship. "Your choice of times for using a theater or other venues is limited, so book it early," Ingalls advises. "You also have to do some planning in the back of your mind: You're not going to get into the theater for a rehearsal four hours prior; you get a two-hour window to get into that theater, do your rehearsal and your program. It's not like a hotel where you can block the space for a 24-hour hold for three days. So you really need to have everything organized and be flexible."

### Budget Concerns

Ultimately, the decision to eschew the chartering option can come down

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to cost. “No. 1 is budget,” says Wallack. “Once a client tells me their budget, I know whether they could even look at a charter, because the ships that can be chartered are far more expensive than buying a cabin or group of cabins on a mass-market ship. No. 2 is how sure they are of the number of participants.” Chartering a 300-capacity ship only to end up with half that amount of qualifiers, for example, would be a waste of funds, and to end up with more than 300 qualifiers would be a problem. “We have one financial client who typically has about 240 passengers. The ship they charter holds 297, so they know they’re not going to use 25 cabins or so but they’re OK with that, they have the budget,” Wallack relates.



**“All the ships now have beautiful brochures that you can include as marketing pieces or even videos on YouTube so you can send out links.”**

**Jana Stern, AVP, Director of Meetings and Events**  
Voya Financial, Minneapolis, MN

Planners who find that chartering isn’t practical may yet be able to create a sense of exclusivity for their group via private events. “We have done amazing private events for clients on large ships,” says Wallack. “A good option in that respect is the Royal Caribbean Oasis of the Sea that has dedicated conference space. There are four venues on that ship that will each hold at least 1,000 attendees for private parties.”

Aboard the 2,402-capacity Norwegian Jade, the National Agents Alliance incentive group bought out The Haven, an all-suite area at the top of the ship that created an exclusive feel. “All of our attendees were able to come up to the courtyard area where we did a cocktail reception. Only people in The Haven can get up to that part of the ship, so it made them feel very special,” Reavis recounts.

### Exclusivity and Customization

Some degree of exclusivity also can be created with the group shore excursions offered on a non-chartered cruise, by keeping attendees together within the larger group of passengers. Utilizing Regent Seven Seas’ tour of Rhodes, for example, the Voya Financial group was

able to stay together on two tour buses reserved for them, Stern relates.

The excursions offered also can be customized for a group; alternatively, a group can use a local DMC to design and execute the tour. There are certain disadvantages to the latter option, however. “The biggest challenge,” says Wallack, “is that you could be hitting four countries in

seven days, and you may have to use three or four different DMC companies. So sometimes it is easier to work with the cruise lines, but there are many cases where our partners will use their own partners they’ve used before for land programs to create experiences. When a DMC is really necessary is when



Oceania Cruises' Sirena.

you’re doing something like an evening gala (at a port-of-call venue), which is not the specialty of a cruise line.”

A trend in interactive shore excursions is taking hold, Wallack observes. “Companies are looking for more hands-on activities as opposed to traditional tours. For example, excursions that take passengers to local markets to learn about the regional products and cuisine are popular. Oceania’s Marina and Riviera ships house elaborate on-board cooking schools, so passengers can literally source products in town and come back onboard to create their own meals.”

Additionally, CSR activities at ports of call are increasing, she reports. Groups can visit orphanages or do a Habitat for Humanity project at a city on their itinerary, for example.

Given the diversity of potential experiences both onboard and onshore, it is far from repetitive to add more cruises to the rotation of incentive destinations. Itineraries, even for non-chartered vessels, are rich in variety,

and the options in ships, entertainment, dining and shore excursions are growing every day as cruise lines seek to spark the interest of new clientele.

### New Ships, New Possibilities

**Celebrity Cruises** plans to acquire Galápagos Islands tour operator Ocean Adventures and its two ships, the 48-guest ship M/V Eclipse and the 16-guest catamaran M/C Athala II. As a result, Celebrity’s guest capacity in the Galápagos will expand by 65 percent.

The **Regent Seven Seas Explorer**, touted as most luxurious ship ever built, embarks on its maiden voyage this summer. The all-suite, all-balcony 750-guest luxurious ship calls on iconic destinations throughout the Mediterranean from Saint-Tropez and Ibiza to alluring Venice and Cinque Terre.

The 596-capacity **Silversea Muse** debuts in 2017. The addition of the all-suite accommodations Silver Muse will expand Silversea’s fleet to nine ships.

**Carnival Vista**, which debuted May 1, offers nearly 30 dining and bar venues showcasing diverse flavors from around the world as well as a wide variety of bars, lounges and watering holes including the line’s first on-board brewery. **I&FMM**

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Penn Mutual Life's spectacular incentive program in Portugal included events at Queluz National Palace and Carmo Convent Ruins.



## Over-the-Top Incentive Travel Programs Inspire Top Performance

Call it the Downton Abbey effect: When it comes to incentive meetings, austerity measures are out and bespoke is in.

### Port in a Storm: Lisbon

"We wanted to give them a feel for what Portuguese royalty would have felt like," says Kristin T. Huston, CMP, director, conferences and meeting planning, for Penn Mutual Life Insurance.

For her company's annual Golden

Eagle elite conference in June 2015, she opted to take her group of about 100 advisors, field leaders, and home office executives and their families to Lisbon, where they stayed at the Four Seasons.

At first glance, Lisbon is an unlikely choice; certainly it's not a common bucket list destination — for attendees or, presumably, for royals. But Huston says that's part of why it works so well: It's "fairly cost-effective compared to somewhere like Monaco. You feel very welcome; people want to do so much

for your groups because they love the business."

The attendees felt cared for in ways both big and small: They were provided a police escort to their venues, so locals believed they were celebrities; they received certificates with seals noting they'd been to the western-most point in Europe; and a select group of "star producers" had photo opportunities with people who appeared to be royal courtiers. Attendees also visited a UNESCO World Heritage site, the 19th

century Romanticist Pena National Palace, on a hill above the town of Sintra, about 20 miles from Lisbon.

Huston strives to make Penn Mutual's conferences warm and inviting; attendees are encouraged to bring their children and, as such, they become very involved in each others' lives. On the first night, a fado singer performed in the Four Seasons ballroom, which Huston says has a "high-end yet friendly feel, so people don't feel it's a stuffy experience."

For awards night, the group convened at the 18th century rococo-style Queluz National Palace; they walked through various rooms of the palace, greeted by different characters of the period dressed and coiffed ornately, before reaching the gilded throne room for the awards ceremony.

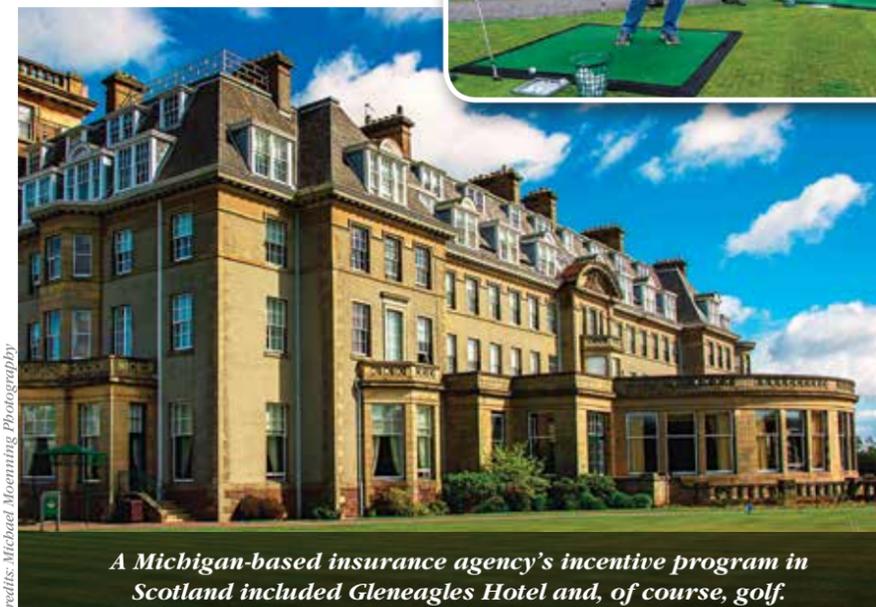
The evening's entertainment also was period-appropriate, including dances and an opera singer.

On the final night, attendees repaired to the Carmo Convent Ruins, created during the 1755 Lisbon earthquake. The ruins consist of the original convent walls but no ceiling. "During the day you see all the ruins; as the sun starts to set after dinner, with uplighting, it totally changes the appearance," Huston remembers. The evening began with a cocktail reception in the square, then the sound of approaching drumming: an all-

ages parade of drummers dressed in white and red. Dinner was buffet-style, with a giant paella station in the center of the ruins: "comfortish food with a twist; people really loved it."

Later, a robed, hooded group walked in accompanied by acoustic music; once they reached the stage, they lowered their hoods and began singing gospel music. "Amazing music in the open air, looking out at the stars. The whole group danced, and this is not a dancing group! It was such a powerful evening that brought everyone together," Huston says.

"Even for someone like me, who's traveled so much, this was a really exhilarating experience," she says. Her executives said it was one of the best conferences they've ever been to. "If you can end a conference on a wow, it's really what people remember." Next year, she has her sights on Scotland's Balmoral, complete with highland games, log throwing and an award night with men dressed in kilts.



A Michigan-based insurance agency's incentive program in Scotland included Gleneagles Hotel and, of course, golf.

*"We wanted to give them a feel for what Portuguese royalty would have felt like. ... Even for someone like me, who's traveled so much, this was a really exhilarating experience."*



**Kristin T. Huston, CMP**  
Director, Conferences & Meeting Planning  
Penn Mutual Life Insurance  
Horsham, PA

### Castles to Keep: Scotland

One group that has already visited Balmoral did so in May 2015 as part of an agent incentive award trip. Johan Marzuki, account executive with BCD Meetings & Events, offered his group of about 170 agents from a Michigan-based insurance agency a taste of both town and country: Edinburgh at the Waldorf Astoria Edinburgh — the Caldonian, and Perthshire at the Gleneagles Hotel. "We wanted the group to get a rounded experience of the destination," he says. Gleneagles, as the location of the 2014 Ryder Cup, caused extra special excitement for the group of gold enthusiasts. A "welcome" event held there "showcased the experiences the group can and will have the few days that they were there, exhibiting local falconry, gun dogs, off-road vehicles, archery, horseback" and, of course, golf.

Along with another "welcome" at the British royal family's private estate, the group also enjoyed a gala dinner at the cliffside Stirling Castle, where Mary, Queen of Scots was once crowned, as well as country manor dinners. At the latter, agents broke into small groups of 12 to 20 to enjoy a "quintessential Scottish country dining experience with excellent food, wine and whiskey," including an authentic Presentation of the Haggis at the final dinner.

Marzuki found not only the magnificent venues but also the people of

## ► Planner Trip Tips

When it came to knocking attendees' socks off, there were some recurring themes among planners.

► **Picking a bucket list spot.** Scotland was perfect for his group, says Johan Marzuki of BCD Meetings & Events, not only because of the obvious opulence of many of its venues, but also because “there were many whose ancestry was Scottish, so there was a lot of personal meaning to those individuals.”

And it's not always enough that it should be an obviously desirable destination; the trip should bring something truly inimitable to the table: “We incorporate activities/events during the trip that they could not do on their own,” says a Cape Town incentive trip planner.

► **Working with a DMC.** Sometimes there's no substitute for local knowledge. Aimia's Alan Melichar was originally planning to go to Ho Chi Minh and Shanghai, but the DMC he chose, Destination Asia, “challenged our original thinking and provided their expert advice on our chosen locations. They encouraged us to explore Beijing and Hanoi instead...and we are so thankful we did.” And for getting access “authentic, exclusive experiences” of the kind Kristin Huston of Penn Mutual was in search of, there is no substitute. “They really set the bar high,” she says of her Lisbon DMC, Events by TLC.

► **Balancing new experiences with the familiar.** “We try to look for properties that have an image of status or have a story to tell, truly representative of the destination, but also offering the luxurious amenities deserving of this group's status,” says Marzuki of his modus operandi in general and for Scotland in particular. “We do, however, at times look and can find this in known brands like Ritz and Four Seasons — these properties provide the luxury and comfort familiar to the U.S.-centric clientele.”

These global hotels also are quite used to catering to a variety of dietary requests. “It is always critical to bal-

ance the authentic, local cuisine with familiar flavors for the American palate. Particularly at breakfast, jet-lagged travelers are happy to find something familiar,” says Dittman Incentive Marketing's Jennifer Mazza of her Barcelona trip. “We offered tried-and-true American breakfast selections, but also added Serrano ham and Iberian sausage.”

► **Providing multiple possibilities including alone time.** Even a very social group may need some brief time away from the other attendees. Melichar set aside time for his attendees to explore The Great Wall on their own. In Barcelona: “For those more inclined to explore the city at their own pace, we offered GoCars, self-driven vehicles with advanced GPS capabilities,” Mazza says. “We also offered visits to the medieval town of Sitges, as well as to Montserrat and a winery.”

Common among all the incentive trips was an embarrassment of choices. “We allowed guests to pick activities that most interested them,” says Marzuki of the Scotland trip. “Whiskey tasting was popular, off-roading and horseback were equally popular. The local watering holes pubs and restaurants offered great options for groups to either form in large or smaller intimate crowds.”

► **Helping attendees remember the trip.** Marzuki traveled with a professional photographer on the Scotland trip. “At the end of the trip and as a follow-up gift, we create coffee table books with these pictures, chronicling the trip with memorable moments. Each couple gets a copy along with the hundreds of pictures that have been taken by the photographer that can be downloaded for their personal use.” Huston had the same impulse. “With group photos, if they can go back to the albums and remember what they did, it motivates them, gets them excited for next year, and that's sort of our goal.”

— SC



BCD Meetings & Events planned this gala dinner at Stirling Castle as part of a Michigan insurance agency's Scotland incentive.

Credit: Michael Moenning Photography

Scotland to be a big draw: “extremely friendly, accommodating and so keen on sharing their personal space and lives with visitors.

“We provide the group with a trip survey at the end of their program, which was rated 4.7 out of 5.0. The client also measures the productivity of the following year's trip promotion as a gauge of the program's popularity.”

He says timing is everything. “We were blessed by the weather allowing everyone to enjoy the countryside, and the city of Edinburgh.” But if you go earlier than April, he says, “you may encounter colder weather prohibiting you from enjoying the outdoors and the countryside experiences that make

Scotland unique and exciting.” He also recommends giving the local watering holes a heads-up before arriving so they're prepared to accommodate a large group. “They will be happy to accommodate and anticipate your arrival with good notice,” he says.

Also in Edinburgh, Dundas Castle hosted a group of 85 delegates and 17 senior members in October 2015, the second time this group has chosen the castle for an incentive. The 17 stayed overnight, filling the castle's available en suite bedrooms; the other attendees stayed 1.25 miles away at the Dakota Edinburgh hotel. Built in 1818 and now the private home of Sir Jack and Lady Stewart-Clark, Dundas Castle includes its own 600-year-old “Auld Keep” — a kind of giant medieval “panic room” tower. Both the keep and the castle itself offer meeting spaces, and the castle also has a dining room and a billiard room. The 1,000-acre grounds include a golf course and a helicopter pad, and though attendees might expect to see Downton Abbey's Lord Grantham himself approach at any moment, in fact the spot is 10 minutes from Edinburgh Airport and 30 minutes from downtown Edinburgh.

Alyson Thompson, operations manager for Dundas Castle, notes that the owner of the castle mingled with attendees during the cocktail reception, welcoming them to his home. After a tour of the keep, including a visit to the roof for views that include the Forth Rail Bridge UNESCO World Heritage site, the group had a dinner catered by Sodexo Prestige that included all locally sourced foods, including haggis, foie gras and mushroom duxelle, fillet of Buccleuch beef and cep tortellini with red wine jus.

“Despite many of the delegates being local, very few of them had previously had the opportunity to visit the castle...which left them feeling valued and rewarded by their company,” Thompson says.

### Howdy, Gaudí: Barcelona

Dittman Incentive Marketing chose Barcelona for a 200-attendee, four-night combined incentive and networking event for a U.S.-based insurer. The group stayed at the Ritz-Carlton's waterfront Hotel Arts Barcelona, where art figures heavily throughout. “At every turn, there are interesting pieces, often by local artists,” says Jennifer Mazza, senior manager, travel accounts for Dittman Incentive Marketing. Mazza also was impressed with the lower-level meeting space, where “the architecture echoes the ‘caves’ of Spanish wineries and incorporates the same regional artists featured throughout the hotel.”

Choosing the hotel “allowed us to thematically link our events and materials, with art and creativity as a recurring element,” including tours focused on

Dinner on the Great Wall of China.



Credit: Imperial Tours

Antoni Gaudí and Pablo Picasso and a gala dinner at the Barcelona Museum of Contemporary Art, “the absolute highlight of the program.” After cocktails and live music in the entrance hall, attendees convened in the courtyard to watch nearly 40 “castellers” build a human tower, or Castell — a Catalan tradition that dates back to the early 18th century and truly exemplifies the notion of teambuilding.

The group then moved to the museum's 15th century Gothic chapel to dine on Spanish cuisine at “long tables beneath a soaring vaulted ceiling” to the strains of flamenco performed by

*“We try to look for properties that have an image of status or have a story to tell, truly representative of the destination, but also offering the luxurious amenities deserving of this group's status.”*



Johan Marzuki  
Account Executive  
BCD Meetings & Events  
Aurora, IL

a string trio. “The décor included vast arrays of candles, florals and gold chargers, giving a warm glow to the entire event,” Mazza says. Post-trip, attendees rated this event 4.9 out of 5 stars; post-program surveys showed that more than 90 percent of the participants considered the travel program effective to very effective at inspiring them to reach their peak performance.”

She advises planners considering Barcelona to take note that city leaders “are working hard to protect Barcelona from too many visitors,” including limiting the number of new hotel rooms and restricting access times for some tourist attractions. A local partner is de rigueur for

this destination. Mazza also suggests: “Leave yourself enough time to sort out any differences of understanding,” particularly with contract negotiations, “and to discuss the program face-to-face whenever possible. A site inspection can be invaluable.”

To help attendees cope with jet lag on arrival, often long before check-in was available, Mazza offered small walking tours of the neighborhood as an option to orient attendees. “This was a very popular component of the program and got our guests off to a great start,” she says. The hotel also offers its own guided running tours of the city.

*“Post-program surveys showed that more than 90 percent of the participants considered the travel program effective to very effective at inspiring them to reach their peak performance.”*



**Jennifer Mazza**  
Senior Manager, Travel Accounts  
Dittman Incentive Marketing  
New Brunswick, NJ

### Trifecta of Thrills: Beijing, Hanoi, Hong Kong

Sometimes, one destination just isn't enough, as Alan Melichar, account director for Aimia, determined when he prepared an eight-day travel program in May 2015 for State Auto Insurance's Super Achievers Program. The pressure was on to provide something really spectacular because the attendees, two groups of 280 each, are in high demand; not only do they provide 100 percent of the organization's sales, but they are well-traveled and wooed by competing insurers to attend other incentive programs.

Melichar offered each group the option of spending the first four nights in either Beijing, China, at the Shangri-La Hotel, or Hanoi, Vietnam, at the French colonial Hotel Metropole Hanoi, built in 1901 and now run by Sofitel. Both groups then converged at the Shangri-La Hong Kong, centrally located in Kowloon, for the final four nights. The itinerary was further complicated by the fact that the second group of 280 arrived in the first two cities just as the first group was leaving for Hong Kong.

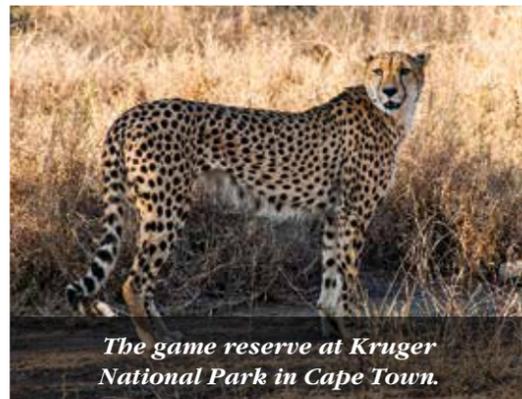
“The high number (of participants) was particularly challenging in both Hanoi and Hong Kong,” Melichar notes; both cities are overpopulated, and simple logistical moments such as loading buses can become nightmarish if planners overbook. Further, participants needed to be registered with

the embassy before arriving and they needed visas. He partnered with Trivisa to create a custom website to track where attendees were in the application process, which he says worked very well.

Once the groups arrived, it was nonstop “surprise and delight.” “Food was not only consumed; it was experienced,” he says, noting the various cooking classes he arranged in each city and the quality of the meals and the unexpectedness of the settings.

A particular highlight in Beijing was a private dinner on The Great Wall of China, complete with traditional Chinese music during the cocktail reception and a traditional Kung Fu demonstration. “Dinner was set outside on the Great Wall while the group welcomed in the night by witnessing the wall light up before their eyes,” he says. Attendees who chose Hanoi had a private dinner at the Temple of Literature, built in 1070.

Melichar also arranged for unexpected transportation in each city: rickshaws in Beijing; three-wheeled taxi



*The game reserve at Kruger National Park in Cape Town.*

“cyclos” in Old Hanoi; and in Hong Kong, a trip “back in time” on the Star Ferry for the Hong Kong tour, followed by a tram ride to Victoria Peak, where attendees were treated to dinner with a view. The agents also took a ride on traditional flat-bottomed wooden boats called sampans and had the option of day trips to Macau, Lamma Island and Lantau Island.

“A program is successful if employees or partners sell more, are encour-

aged to stay with the brand longer and invest more with the brand. (This) program knocked all three of these objectives out of the park, which is why the client continues to find incentive travel as the best way to motivate agents,” Melichar says. “Spouses and other guests are known to push their agent to sell more State Auto business, so they have the ability to travel with the group again!”

### Into the Bush: Cape Town and Kruger National Park

For a sales incentive trip in August 2015 for 40 couples, one planner split the trip between Cape Town, South Africa, at the One&Only Resort and Sabi Sabi Bush and Earth Lodges in the 7,523-square-mile game reserve, Kruger National Park.

The group's time in Cape Town included a Cape of Good Hope tour, a tour of Robben Island (notorious as one of Nelson Mandela's prison sites), various wine tastings, lunch at De laire Graff Estate winery and a wine-blending competition. Their gala dinner on the final night was held at the Cape Town Club, built in 1898, where the attendees had the opportunity to be photographed with a cheetah.

But it was Sabi Sabi that really wowed the group. “This was a ‘bucket list’ trip for many of them. Sabi Sabi was first class all the way, service, F&B, rooms, guides, beauty of the area. The safari game drives by far were the most popular, just the sheer beauty of the bush, seeing the animals in their natural habitat and so close up.”

On the last night at the reserve, the group had “dinner out in the bush. It was in a boma (a colonial fortified compound) with beautiful décor and lighting — a spectacular way to end a memorable trip.”

“Not sure how we will top this one!” she says. “Our participants raved about the trip and said our trip by far surpassed safari trips they had been on in the past.”

**I&FMM**

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Gotta say this conference has been an inspiring experience for the whole team. So glad we made the trip to Orlando! Title of today's team-building event: Management Secrets from a Master Chef. BTW, I found a hot new sales lead at last night's Oscar party! #ThisMeetingRocks #OrlandoMeeting



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# Sales Training Meetings

By Derek Reveron

Peer-to-Peer Learning Sessions Produce the Most Motivating Meetings

*The amphitheater at the IACC-certified conference center at Lansdowne Resort & Spa in Leesburg, Virginia, near Washington, DC.*



**Barb Orvis**  
Senior Meetings and Events Planner  
Voya Financial, St. Cloud, MN

“*People come down before the conference and extend their stay with families. It makes it more exciting for them.*”

Professional meeting planners charged with designing and executing sales training meetings that motivate and engage attendees have a monumental task at hand. These pros are under the gun to succeed more than ever due to tight budgets and a greater demand for ROI, which is why planners must ensure that these meetings include presentations, sessions and networking events that encourage attendees to interact among the participants. Interactive training meetings are sure to spark mo-

tivation and inspire learning, which can improve sales productivity year-round.

## Where to Start

For Barb Orvis, senior meetings and events planner for Voya Financial in St. Cloud, Minnesota, creating an interactive training environment for an annual meeting of 1,000 salespeople starts with choosing a suitable destination and property. “This meeting is tricky because there are lots of breakouts and sessions, and it is space-intensive,” says Orvis. “We are not at the

point of going to a convention center because we would end up with various fees that could take away from the budget. And we try to put everything under one roof, so our choices narrow down quickly.”

Orvis typically chooses a resort with a conference center in a sunny destination for the meeting. “We find that it helps motivate people,” she says. “Meeting in (a warm weather destination) during the first week in February is exciting for people in the Northeast. People come down before the confer-

ence and extend their stay with families. It makes it more exciting for them.”

During the meeting, breakouts and small sessions focusing on peer-to-peer learning are keys to creating the right motivational environment. Attendees value mutual learning most of all, says Orvis. “Prior to the conference, we ask a question on our meeting app about what attendees look forward to the most at the conference — hearing from executives, keynote speakers, the warm weather or breakout sessions,” she says. “What we find is that peer-to-

peer sessions have the highest ratings because they want to learn from each other. They find it more motivating.”

## Use Peers as Presenters

The most popular and motivating peer-to-peer sessions include successful salespeople as presenters. “We might have top producers from the company on panels in breakout sessions talking about how they were able to elevate their sales and taking questions,” says Orvis. “If I have a top producer that’s well known among peers talking about

how he works with his team and manages his business operations, that session will be packed to the wall. We also make sure we have a wide range of topics that meet multiple needs. Some attendees have been in the business only a year and others over 25 years. You have to motivate all groups.”

Other successful formats for small-group motivational sales training include the 60/20/8 approach, which varies the manner in which attendees interact with the learning material. Learning topics change every 20



**Karin Hurt**  
CEO  
Let's Grow Leaders  
Laurel, MD

**“Complicated PowerPoint slides with graphs and charts will bore the crowd. Make your slides pop with visuals that reinforce the messages and make them memorable.”**

minutes, and the approach to teaching the topic changes every eight minutes. For example, attendees can examine a case study for 20 minutes but, within that time, change the approach from discussion to reading or examining a flip chart. The learning session ends after 60 minutes.

Another alternative, the EAT approach, emphasizes training via Experience (case studies), Application (role playing) and Theory, in that order. Traditionally, the order has been reversed, but experts believe the EAT approach better engages attendees. To facilitate the EAT approach, it's best to use small groups of 10 to 12 people in open setups such as crescent-style, instead of classroom or theater-style formats.

Many planners favor group and interactive discussions instead of exhaustive “talking head” lectures about sales techniques. However, motivational speakers remain popular, especially for kick-off sessions. Choosing the wrong kick-off speaker who falls flat can generate negative buzz throughout the meeting, which undermines a company's motivational goals, says Karin Hurt, CEO, Let's Grow Leaders, who also is a leadership consultant, speaker

and professor at the University of Maryland. “It's impossible to have a once-a-year, high-energy sales motivational kickoff speech by an executive who is unpopular or who leads through fear and intimidation,” says Hurt.

### Book Engaging Speakers

It's important for planners to choose speakers who engage attendees emotionally. “Emotional engagement can be huge,” says Hurt. “Professional speakers should create that connection, but executive speakers can also do that. They should get out of their comfort zone. Sometimes you go to these sales events and people talk about making a lot of money. That's not really going to get into the hearts and minds of people.”

Ensure that speakers offer messages that resonate with attendees. “People relate to stories about how speakers overcame some of the things they wrestle with,” says Hurt. “Speakers should also share the microphone, encouraging attendees to share talk about their own motivational stories and messages. This inspires them and helps them connect with each other.”

But planning successful sales training meetings involves having speakers who do more than motivate. “I look for speakers who can also provide something practical that people can take back to their offices and implement to elevate their business, whether it's sales strategy, how to organize the business or use new technology,” says Orvis. “For our conference, which is

financial advisors, we always look for speakers that are talking about what is hot in the industry, whether it's what's going on in the market or retirement, or financial compliance issues.”

Experts offer the following additional advice for planners to pass on to executive and professional speakers.

Discuss operational vision. “Explain the breakthrough goal the company is trying to achieve,” says Hurt. “Describe the specific behaviors needed to achieve that vision. Inspire them to want to be part of something bigger. Follow speeches with at least 15 minutes of open discussion.”

Choose three key motivational messages for the meeting and have speakers drive them home. “Hit the points strong from several angles,” says Hurt. “Complicated PowerPoint slides with graphs and charts will bore the crowd. Make your slides pop with visuals that reinforce the messages and make them memorable.”

### Make It Personal

To motivate executive speakers, share stories with them about training meetings that were successful in part because the CEO used personal stories to deliver a message. Encourage executives to tell similar stories and explain their value to attendees. However, “If the CEO is terrible at speaking, then identify other executives who are good at delivering the message the CEO wants to get across,” says Hurt.

Repeat key themes throughout the meeting in several ways. “If the mes-



Participants use a combination of words, pictures and any other creative sparks to articulate their credo at the 2015 conference of Let's Grow Leaders.

sage is, say, to penetrate the small and medium-size business space, you can hire a keynote speaker who has tapped into that market and can share success stories about it,” says Hurt. “Then you might have breakout sessions focusing on specific strategies for breaking into that space. You can also provide post-conference materials with content reinforcing the message.”

Orvis uses technology to reinforce motivational messages and encourage networking. “We have been using a mobile app for the last few years, and its use continues to grow,” she says. “This year we implemented an activity feed on the app to get people engaged. In the past it was just an agenda and activity list.”

The activity feed was designed to

increase engagement and generate buzz during the conference. “People could take and post pictures, and make comments about anything,” says Orvis. “People were posting comments and photos about sessions, speakers and what they said. I was surprised at how well it worked. We made it a game. People who posted got points, and we held random



The National Conference Center in Leesburg, Virginia, boasts attractive, suitable spaces for sales training and networking.

## Site Selection Pointers

Offsite venues for motivational sales training meetings should encourage learning, networking and discussions among attendees, speakers and presenters.

That's why planners often choose facilities with ample meeting rooms, breakout space and other venues that facilitate peer-to-peer interaction.

It's important to choose a conference facility with the location, layout and space that matches meeting goals. Many planners seeking productive sales training meetings turn to standalone conference centers, which are dedicated solely to training meetings and provide the latest technology, setup options and specialized furniture.

Any venue that planners choose should include spaces and setups conducive to small-group learning. “We use environments that enable people to share with each other and have an open dialogue about what they do in their day-to-day business,” says Barb Orvis, senior meetings and events planner for New York-based Voya Financial. “We usually choose places where we can have small groups sitting in a crescent round situation or theater seating. Or, depending on whether it's a double breakout session with more of a workshop feel, we might use a classroom setting.”

According to planners and other experts, the following factors are keys to choosing the right offsite venue for learning.

- **Choose a site with a variety of indoor and outdoor venues that facilitate networking.** Plan evening activities and events in venues that encourage interaction among attendees. For example, turn a room into a themed event after a day of training. Have receptions with buffet stations and bars spread throughout the room to encourage attendees to circulate.
- **Guard against technology problems.** Ensure that AV and computer technicians remain onsite during training. Double-check equipment every day before training starts. Make sure that reliable Wi-Fi is available throughout the facility so that attendees don't have to move around the building to gain access.
- **Avoid distractions.** Don't hold training sessions at conference centers adjacent to restaurants, entertainment districts and shopping outlets. Choose a facility without temptations that impede focus and collaboration among attendees.
- **Select a facility that takes nutrition seriously.** Attendees must eat nutritious foods at the right times to maintain focus and energy. People should refuel with foods such as fruit and nuts rather than sweets that cause energy levels to soar then drop, according to a white paper by the National Conference Center entitled “The Science of Food for Thought: Enhancing Meetings Through Food.”

— DR



**Lori Sullivan**  
Director of Learning Solutions  
Wolters Kluwer  
Chicago, IL

“We try to use different kinds of entertainers to create energy. The goal of the kickoff meeting is to get folks excited about what they are doing and where the company is going.”

drawings to award prizes to the top point-getters.”

### Motivate Through Fun

Motivating and engaging attendees also should include fun activities. The United States division of Wolters Kluwer, a global provider of products and services for industries that include financial services and accounting, uses fun activities to engage attendees at its annual kickoff sales meeting every January. “We try to use different kinds of entertainers to create energy,” says Lori Sullivan, director of learning solutions and meeting planner, Wolters Kluwer in Chicago. “The goal of the kickoff meeting is to get folks excited about what they are doing and where the company is going.”

Walters Kluwer hired a comedian to entertain about 100 salespeople to kick off the company’s 2014 sales training meeting in New Orleans. “I met with him several times beforehand to talk about who we are, what we do and our goals for the year,” says Sullivan. “We also discussed our theme, ‘We’ve Got the Power.’ I also gave him a list of people to call on in the audience who would have fun

participating. He built our theme into his act and used audience participation to spread the message of staying motivated and focused. It was 90 minutes of pure belly laughs.”

Hurt cites examples of entertaining and offbeat activities she has experienced as a former sales executive. “I have seen the entire fully costumed ‘cast’ of ‘We Are the World’ in a kickoff that reinforced sales strategy; and a vice president dressed as a 1950s greaser sharing how to ‘rock’ sales results,” says Hurt. “At a sales meeting in Las Vegas, the CEO dressed like Elvis Presley, and other executives sung back-up dressed as other singers. Another time, I dressed as Princess Leia from Star Wars. My team dressed as other characters from the movie. To get ideas, involve the sales team and see what they come up with. There is a singer-songwriter in every group who can write a song for a meeting.”

Hurt believes that entertainment can have a lasting impact on motivation. “The activities work because you bring your team together to have fun, and fun is good from a team-building perspective,” she says. “You know it is working because people



Meeting at Ocean Reef Club in Key Largo, Florida, checks off all the boxes for a memorable and successful sales training event.

Credit: Ocean Reef Club

are still talking about what you did months later and linking it back to the meeting’s message. But mostly you know it is working because productivity goes up.”

The most successful motivational

sales training meetings reward more than productivity. “The mistake I see happening is rewarding people only for their sales numbers,” says Hurt. “I’ve also seen people get rewarded for one specific metric when the rest of their metrics weren’t good. That can demotivate people. You want to reward performance as well as behaviors, such as helping other people perform better or those who improved significantly.”

Every planner wants the motivation generated during sales meetings to last throughout the year. Accomplish that with a follow-up strategy that keeps the meeting’s energy and theme alive, says Sullivan. “We send out a weekly newsletter called ‘Be the Change’ named after the theme of our meeting in Tampa this year,” she says. “In that newsletter, we talk about what works, recognize people for achievements that are above and beyond. It’s also an avenue we use to communicate upcoming training.”

Successful motivational sales training meetings spur networking, peer-to-peer learning and engagement with speakers and presenters. Effective meetings also make attendees en-

thusiastic about learning so they can absorb information they can use to increase sales productivity. “As a planner, you want to have a meeting that will add value and have an impact on the organization,” says Hurt. **I&FMM**

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# Arizona

## Where Planners Create Exceptional Events on the Desert Canvas

By Christine Loomis

Arizona is a place where the term “larger than life” might have originated. The scale of grandness here is off the charts, starting with the mother of all grand things, the Grand Canyon. Even Arizona’s state flower is, by comparison to most flowers, larger than life, blooming as it does on those soaring towers of the Sonoran Desert, saguaro cactus.

Some of the state’s most famous, and infamous, characters loom large in our history and collective imagination — Wyatt Earp, Doc Holliday, Geronimo and Cochise, among them. Arguably the most famous shootout in American history, the gunfight at the O.K. Corral, took place in Tombstone, Arizona, and the incident still conjures up the very essence of the Wild West, a place where those who were strong enough, fast enough, smart enough, brazen enough and bold enough could not only survive but thrive — at least long enough to make a fortune or a name for themselves...or both.

The inherent wildness of the West lives on in the vast landscapes of the Sonoran Desert and in the culture and history of Native Americans and cowboys, which visitors can tap into; however, brand-spanking new, trending and sophisticated define the state, too.

The combination of all the above makes Arizona a compelling meeting destination — that and glorious weather much of the year. As for summers, budget-friendly options pair nicely with AC, and most desert evenings cool down to surprisingly pleasant temps. Beyond all that, each city and region also brings its own special something to the meeting table.

## 2016 MEETING & INCENTIVE TRAVEL PLANNER GUIDE

# Valley of the Sun

Part of the greater metropolitan area called The Valley of the Sun, Scottsdale embodies everything that name conjures up — a stunning valley edged by mountains under deep blue skies with the bright Western sun shining down. Upscale and the epitome of modern sophistication, Scottsdale also celebrates its Western roots in Old Town, where some of the city’s top restaurants can be found alongside galleries and eclectic shops.

That’s just the start of its diversity. Heather Husom, DMCP, general manager of Scottsdale-based Hello! Arizona Destination Management, says, “A planner may bring the same group several years in a row, yet each year the guests will be in awe of the experiences and discoveries to be made.”

She notes that incorporating local culture, for example, has almost endless possibilities. “It may include entertainment such as Native American storytellers or hoop dancers, an all-female mariachi band, an aura reader, potbellied pig racing, state historians or a foot rodeo.”

Ditto activities. Of course there’s riding horses and learning about cowboy life, Husom notes, and there are historic native ruins and ancient petroglyphs that provide insight into the past.

But, she adds, groups also can book four-wheeling adventures in the desert in a variety of vehicles, from Jeeps and Hummers to a military-grade Tomcar off-road vehicle, and there’s rafting, fishing, kayaking and even drone shooting, too.

And because Scottsdale is “the embodiment of casual elegance,” Husom says it’s possible to create extraordinary events on the desert canvas.

“We recently had a client who wanted a unique evening to reward top producers and make them feel incredibly special. The group had a history of fine dining, so we created a sensational desert dining experience of a lifetime. We built 20 tasting tables, each to seat 12–15 people. Each custom table had its own décor, menu, wines and its own award-winning chef who prepared a four-course dining experience under the stars — 20 chefs at 20 tables.

“Each table featured a menu to showcase the chef’s signature dish plus a pre-selected wine pairing to enhance the culinary experience. The artistry of the individual chefs coupled with the individual table décor, entertainment and the



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# Valley of the Sun

backdrop of an Arizona sunset mesmerized our guests,” Husom says.

The event was a huge success, but it’s just one of countless possible custom experiences to be found or created in the Sonoran Desert.

Scottsdale accommodations range from moderately priced hotels to opulent resorts. A favorite is The Westin Kierland Resort & Spa, which brings the region’s Scottish heritage into the mix with a resident bagpiper who plays to the sunset each evening, and a Scotch Library where individuals and groups can learn, among other things, about Scotch pairings and taste from an extensive collection of fine Scotch whisky, both blended and single malt. There are even a few very rare bottles among the more than 200 labels.

Ed Siegel, president of Pittsburgh-based EBJ Consultants Inc., brought the IMARK Group Inc. to The Westin Kierland for the company’s 2012 annual meeting. Based on the success of that meeting, the group is booked at the resort for its 2016 annual meeting, which will take place in October.

“Scottsdale has just about everything we look for in a meeting destination: great and dependable weather, a very good airport with non-stop service from many of

our participants’ home cities, excellent optional dining and shopping opportunities, and an enormous number of quality golf courses for our very avid players,” Siegel says.

The resort met the group’s requirements for “superior meeting space, a large number of upscale sleeping rooms in an easily accessible area, high-quality recreational facilities and a reasonable rate during the high-demand convention season.” Its walking distance to Kierland Commons and Scottsdale Quarter was a bonus.

Siegel says The Westin Kierland’s sales team and staff were also factors. “Tracy Davies and Lara Anderson made us feel welcome and comfortable during the negotiation process, and were very visible and helpful in follow-up during our weeklong

conference. The staff of the golf shop, headed by Nancy Dickens, could not have been more professional or helpful to both myself and our guests, before and throughout our stay.”

The group utilized a large number of breakout rooms and the Kierland Grand Ballroom for the two-day, one-on-one sessions and group banquets. The Marshall’s Outpost area worked well for the outdoor welcome dinner, which included more than 700 guests. Siegel says many of the attendees used the Agave Spa, and a large number of golfers “thoroughly enjoyed the very fair yet challenging golf” on the resort’s Troon-managed course.

“Since our meeting in 2012 was such a success, there is very little that we plan to change for this year’s meeting,” Siegel notes. “We did add entertainment to our welcome dinner at Marshall’s Outpost, where we once again expect over 700 guests to enjoy a warm October evening in an outdoor setting.”

Siegel advises planners considering the property to reserve the space as far in advance as possible. “The hotel is extremely busy during the high seasons and is even heavily booked in the traditionally slower seasons of winter and summer,” he says.

## Phoenix

There’s so much new in Phoenix, especially in the downtown area, that planners may have a hard time keeping up. Within a mile of the Phoenix Convention Center are more than 3,300 hotel rooms with an additional 320 coming in 2017.

Occupying the historic former Professional Building, Hilton Garden Inn Phoenix Downtown melds art deco architectural details with a stylish design and stellar location. In April, the Lexington Hotel reopens as FOUND:RE, a property centered on local and modern art. Lurhs City Center Marriott will open this year downtown, featuring two Marriott brands, a Courtyard and a Residence Inn. Just north, The Camby, its name a nod to horizon-defining Camelback Mountain, offers more than 20,000 sf of meeting space and a look that’s timeless, bold, innovative and contemporary all at once. Perhaps most interesting, Phoenix now has the state’s first and only distillery using locally grown grain. Arizona Distilling Company won a double gold in one prestigious competition for its Desert Dry Gin. Ask about private tours for groups.

## Greater Maricopa County: Mesa, Carefree and Paradise Valley

Maricopa County doesn’t end with Phoe-



Credit: The Westin Kierland Resort & Spa

The Acacia Course at The Westin Kierland Resort & Spa.



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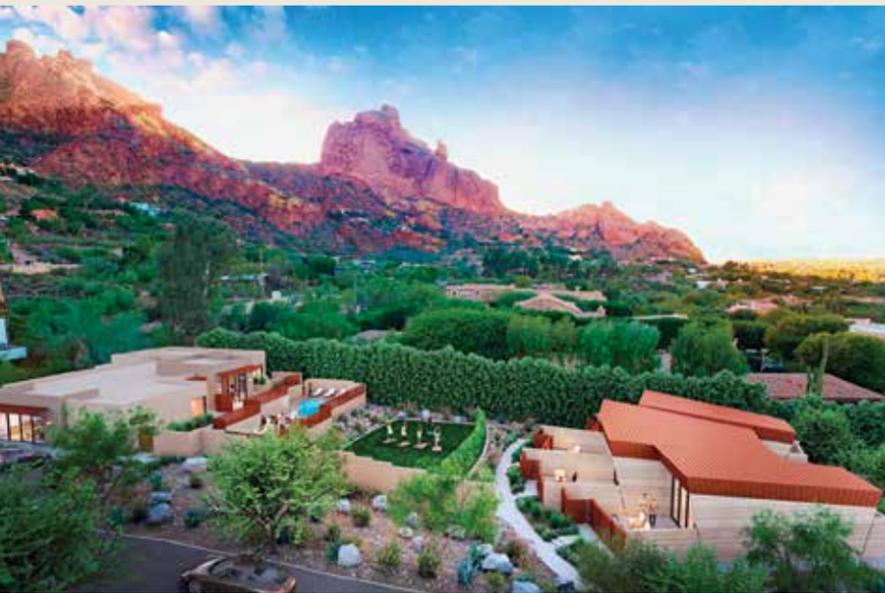
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# Valley of the Sun

nix and Scottsdale. It has an embarrassment of riches when it comes to hotels and resorts, and its towns showcase the diversity of the extended metropolitan area.

Arizona's third largest city covers 133 square miles. Sitting 20 miles east of Phoenix and less than 12 miles from Sky Harbor International Airport, Mesa prides itself on offering planners the Arizona experience they want for their attendees — at a lower cost. The city's multitude of lakes and rivers and its proximity to Tonto National Forest make it easy to incorporate Arizona's natural landscapes into a meeting via offsites and team-building options. Mesa hotels include 5,452 guest rooms and 140,000 sf of meeting space; some have adjoining conference centers.

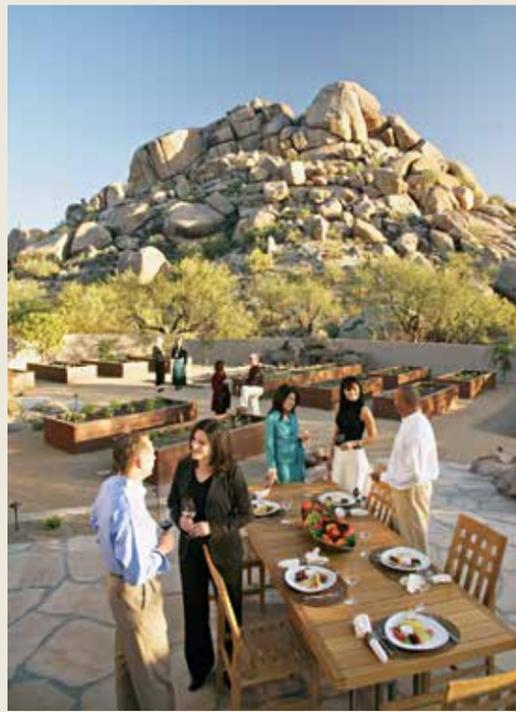
Among the city's stellar venues is Mesa Arts Center, with performances, meeting spaces and a host of programs, including immersion art experiences and options for spouses and teambuilding. Several area museums have meeting space and education opportunities, particularly related to native cultures, and Visit Mesa's Fresh Foodie Trail takes attendees to local farms, gardens, a dairy, a winery and mills in Mesa and neighboring Gilbert and Queen Creek, as well as to farmer's markets and food-truck events.



Credit: Sanctuary Camelback Mountain Resort

A rendering of the new Spa House debuting this month at Sanctuary Camelback Mountain Resort.

Thirty-five miles north of Phoenix, Carefree encompasses 8.9 square miles of spectacular nature. The Boulders Resort & Spa has thoroughly embraced its landscape and made it part of the resort experience — a bonus for guests and for planners looking to inspire attendees and incen-



Credit: The Boulders Resort & Spa

A gathering in the Herb Garden at the Boulders.

tive qualifiers. The resort encourages attendees to get out of meeting rooms and into its 1,300 acres.

Options include Cowboy for a Day programs and a culinary hunt via golf cart where every clue leads to a striking vista and interesting culinary bites. The resort offers a glowing hot-air balloon and nighttime vertical rides above its golf course, and foraging for edible goodies under the guidance of a master gardener. Wellness programs include outdoor yoga and brain-fitness classes, as well as a group shamanic experience for spiritual growth. Perhaps the most endearing option is inviting Mijja and Burrito, the resort's two "beer burros," to a group's reception where they offer beer from their saddlebags and memorable photo ops.

Paradise Valley, 14 miles northeast of Phoenix, is known for its dramatic mountains, including Mummy Mountain in the central valley and Camelback Mountain to the south. It is also known among C-suite execs and high-end incentive groups as home to Sanctuary Camelback Mountain Resort, where luxury, privacy and exclusive amenities provide a top-tier experience. The resort's private homes offer a combination of luxury lodging and a venue for intimate gatherings and high-level meetings, and they're close to all the resort offers. Debuting this month is the Spa House, a 3,500-sf, four bedroom private hideaway for executive corporate gatherings and featuring in-home spa services. Nearby are four new 875-sf casitas. ■

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# Tucson & Marana

Tucson has its own compelling geological drama, surrounded as it is by five mountain ranges. It sits at 2,643 feet above sea level and is one of the sunniest cities in the nation. In addition to miles of paved bike paths, Tucson also has more than 300 miles of mountain biking trails



The Fiesta de los Vaqueros Tucson Rodeo, Tombstone street performers and Old Tucson Studios (opposite page) capture the Wild West spirit of Tucson.



Credit: Visit Tucson



Credit: Desert Diamond Casino & Hotel

and many more miles of trails for hikers, horseback riders and shared use, giving outdoor enthusiasts plenty to do when business wraps up — no wonder the city draws 7 million visitors annually.

Tucson's historical roots include Hohokam people who lived and farmed in the valley for 4,000 years, Spanish missionaries, soldiers, Mexican families, Western expansionists and others. The rich cultural mélange gives Tucson a colorful vibe, and planners will want to bring some of that culture into meetings to provide a compelling sense of place.

The city and surrounding area have no lack of meeting-friendly hotels and resorts to choose from, and there are ranches where groups can

mix business with authentic ranch activities that foster teambuilding and leadership training. At White Stallion Ranch, for example, groups can participate in Wisdom Horse Coaching, a highly interactive leadership program that requires no previous equestrian experience. There also are resorts with phenomenal golf and tennis facilities, The Westin La Paloma Resort & Spa and Loews Ventana Canyon Resort among them.

The Desert Diamond Casino & Hotel offers options for private group entertainment and events in the Monsoon Night Club.

Hotel updates in Tucson include the historic

Credits: Visit Tucson

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# Tucson & Marana



Credits: The Ritz-Carlton, Dove Mountain



Tucson landmark Hacienda Del Sol Guest Ranch, which just completed a multimillion-dollar expansion that added 32 guest rooms and a new 5,100-sf event space, the Casa Luna Ballroom.

Hilton Tucson El Conquistador Golf & Tennis Resort embarked this spring on the largest makeover in its 34-year history. Renovations of all 428 guest rooms and the lobby will be completed by spring 2017. Started last fall and completed this spring was a redesign of the pool area and the addition of new courtyards.

Miraval Resort & Spa recently introduced a program that offers a new taste of the area — an immersive beekeeping experience led by a local resident professional beekeeper. Participants don protective gear and harvest honey; partake in a tasting of local honeys; and learn all the buzz on bees' role in our ecosystem through a series of lectures.

Desert Diamond Casino & Hotel adds something else to the meeting experience. Owned by the Tohono O'odham Nation, Desert Diamond is a place where attendees can enjoy gaming in their free time, but also where they can experience native culture firsthand. Planners can incorporate a traditional basket-dance performance into receptions or learn about and taste traditional native foods at a local co-op farm. The Mission San Xavier del Bac, a historic Spanish mission on the Tohono O'odham San Xavier Indian Reservation, provides insight into the history of missions throughout the Southwest.

The Ritz-Carlton, Dove Mountain (top) offers a slate of localized activities for groups that want to experience the wonders of the Southwest, including astronomer-guided stargazing.

## Marana

In Marana, just west of Tucson along I-10, are more choices for planners. To start, Marana is home to the AAA Five Diamond Ritz-Carlton, Dove Mountain, with more than 40 options for meeting and function space, from ballrooms and boardrooms to outdoor venues with the Tortolita Mountains as backdrop.

Groups can participate in such activities as cooking classes, nighttime golf, guided rock art tours to discover ancient Hohokam petroglyphs, geocaching hikes, cactus discovery tours and astronomer-guided stargazing, to name a few, all of it enhanced by Ritz-Carlton's impeccable service and upscale amenities. Attendees also can gain some cultural inspiration during a nightly Spirit of Adventure Celebration that features a Native American flutist performing from the surrounding Tortolita Foothills.

To more meaningfully connect with the local community, The Ritz-Carlton, Dove Mountain also offers VolunTeaming programs, which combine teambuilding activities with community service volunteer activities.

Marana is more than an adjunct to Tucson. The city has its own draws including easy access to Phoenix Sky Harbor International Airport (100 miles) and Tucson International (31 miles), as well as its own regional airport where private jets can touch down and their passengers can be at five-star resorts in minutes.

Toby Parks, tourism and marketing manager for Discover Marana, a local DMC, says, "Been there, done that? Check out Marana. As the gateway to Southern Arizona, Marana is brimming with adventure, excitement and fun for the whole family or the most serious of meetings."

Among the city's highlights, Parks points out, are an array of accommodations from five-star to mid-range hotels, venues for every possible purpose, outstanding local restaurants and catering, easy-to-navigate roadways, easy access to I-10 and exceptional recreational activities — especially in the Tortolita Mountains.

"The Tortolita mountain range offers nationally recognized hiking and biking trails," Parks says, "and a visit to awe-inspiring Saguaro National Park provides memories that will last a lifetime."

The national park is home to the nation's largest cactus, the giant saguaro. Although it's found in only a small portion of the United States, this desert giant is a singular symbol of the American West, especially when silhouetted against a brilliant orange sunset. ■

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# Sedona

Sedona is a four-season destination with typically balmy temperatures and 300 days of sunshine annually. Add its famously rose-hued rocks, widely acknowledged spiritual connections and a location almost halfway between Phoenix and the Grand Canyon, and it's a destination with powerful drawing potential.

Sedona offers a range of resorts and hotels to meet a planner's needs and easy access into a surrounding landscape that can be described without hype as breathtaking. It effortlessly provides what incentive groups are looking for — “wow” and all. But it's also an ideal site for an executive retreat, a corporate teambuilding event or a leadership training session. Phoenix's airport is just two hours away.

For those who may not make it as far as the Grand Canyon, Sedona offers its own smaller but incredibly beautiful Oak Creek Canyon, which sits within Coconino National Forest. The red-rock canyon gives visitors plenty to do, from hiking to fishing and swimming in Oak Creek. Slide Rock State

It is Sedona's more mystical elements, however, that set it apart. It's said that powerful vortexes in the area emit energy that has a positive effect on all who come in contact with it. Sedona is known as a place of spiritual healing where meditation and self-exploration enhance personal growth. Many visitors feel that Sedona is inspiring and rejuvenating, a place that's good for body, mind and spirit. Those elements may make it ideal for leadership sessions, which require self-reflection and openness to doing things in new ways. Life coaches, spiritual counselors and shamans are all on hand to offer their expertise. Whether one believes in the specifics of Sedona's mystique or not, there is no question that its incredible natural beauty will inspire anyone who visits.

Among Sedona's most inviting properties is aptly named Enchantment Resort, tucked into a red-rock canyon where the juxtaposition of grand geologic formations and luxury amenities wields a seductive power. It makes a planner's job easy — attendees need no coaxing to come here. Enchantment Resort's Meeting Village was designed with flow of space in mind. The Village Terrace is the centerpiece, situated perfectly for al fresco dining. Spanning 5,100 sf, the grand Anasazi Ballroom with adjacent foyer, boardroom and business services center is ideal for general sessions. And the Juniper House, a separate space replete with fireplace and exposed beam ceilings is a comfortable “war room” for event planners seeking both privacy and proximity. Ample breakout space is available opposite the terrace in the Agave and Ocotillo Ballrooms, along with the exquisitely designed Manzanita Executive Boardroom.

In addition to the award-winning spa and a golf course surrounded by 100,000 acres of Coconino National Forest, Enchantment offers a wealth of group activities, including rugged jeep tours, horseback riding, hot air ballooning, air tours of Sedona and the Grand Canyon, private train excursions, hiking and mountain biking, archeological site tours and more. ■



Credit: Enchantment Resort

The stunning view from Enchantment Resort's signature restaurant, Che-Ah-Chi, the Apache name for Boynton Canyon.

Park, within the canyon, is a must-visit for outdoor enthusiasts, kids and kids-at-heart. The famous natural slide on the creek was named by *USA Today* as one of the nation's 10 best swimming holes.

## Arizona's Powerful Sense of Place

In total, Arizona is home to three national parks — Grand Canyon, Saguaro and Petrified Forest — and 14 national monuments, plus numerous national forests, recreation areas and historic sites. All are able to add immeasurably to a meeting experience by providing attendees with a deep sense of place via immersion in the powerful natural landscapes of the West.

As if that weren't enough for meeting planners to put Arizona at the top of their destination lists, Husom adds this: “Three hundred thirty sunny days a year, friendly locals, inspiring sunsets, vibrant nightlife, fine dining, wine bars, microbreweries, world-class resorts, historical properties, Western ranches, destination spas and the best Prickly Pear Margarita you will ever taste — those are just a few reasons for a planner to consider Arizona.” **I&FMM**

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Celebrity Cruises has named **Lisa Vogt** as associate vice president, global meetings, incentives and charter sales. Most recently, she served as director, global sales and marketing for Celebrity Cruises and Royal Caribbean.

**Kim Thompson** has been appointed as director of sales at Hawks Cay Resort in the Florida Keys. She was director of sales at Beach House, Hilton Head Island, South Carolina.

The Westin La Paloma Resort & Spa in Tucson, Arizona, has named **Deborah Weiss** as group sales manager. She was sales manager for the Omni Tucson National Golf Resort.

Mission Inn Resort & Club in Howey-in-the-Hills, Florida, has named **Daniel J. Sierka** as national sales manager. He was senior sales manager at Hyatt Regency Scottsdale Resort and Spa at Gainey Ranch. **Brian Lowery**

was named national sales manager responsible for Southeast Florida and Midwest. He was national sales manager for Sanibel Harbour Resort & Spa, Fort Myers, Florida.

**Peter Thoene** was named director of sales and marketing at Mauna Lani Bay Hotel & Bungalows on Hawaii's Big Island. He most recently was director of sales and marketing at Mauna Kea Resort. **I&FMM**

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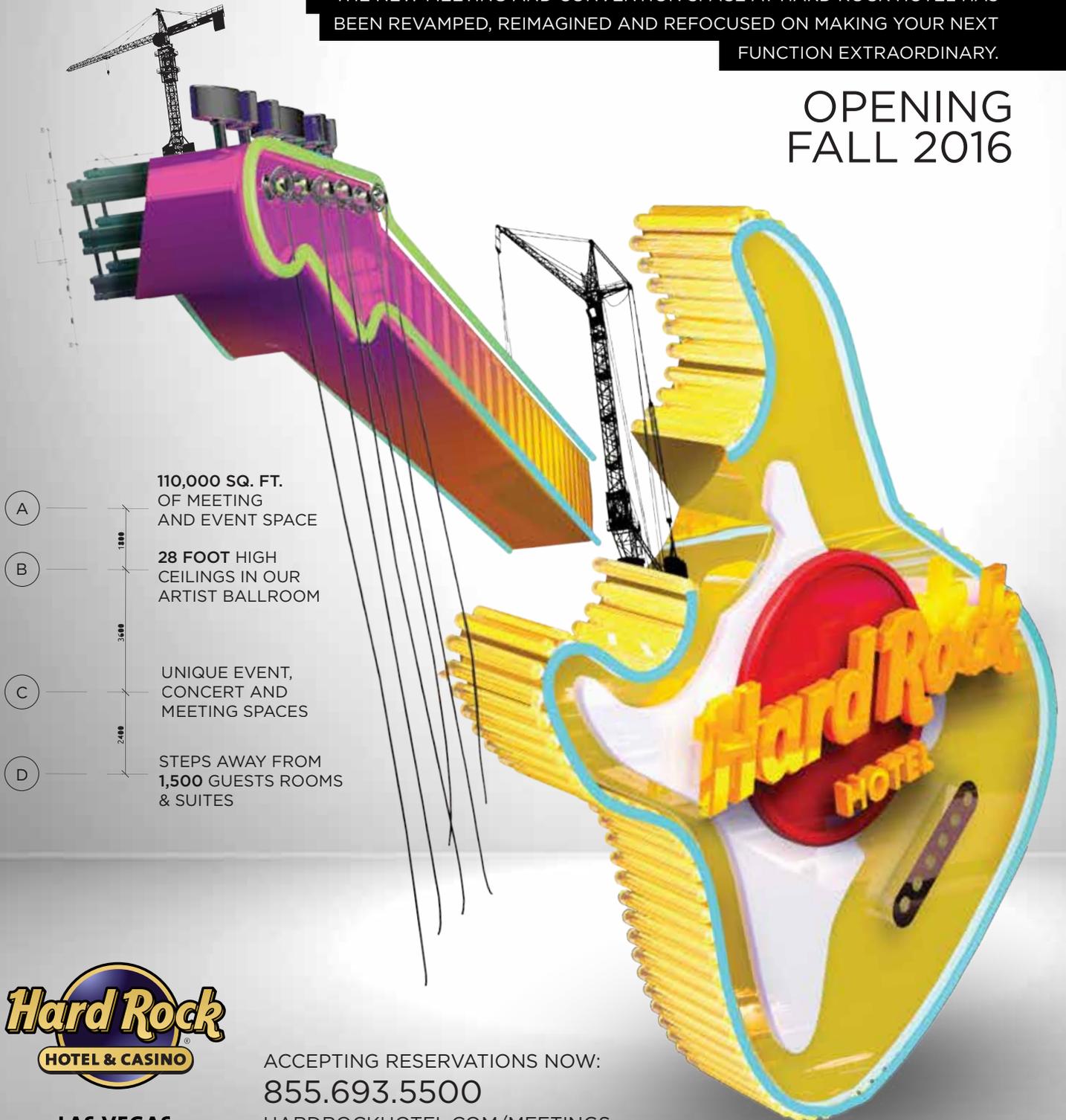
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