

INSURANCE & FINANCIAL MEETINGS MANAGEMENT

THE EXECUTIVE SOURCE FOR PLANNING MEETINGS & INCENTIVES

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By Diana Rowe

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Whether during an incentive or business meeting, awards programs frequently play a key role in setting the stage for the next year. Insurance and financial industry planners have the challenge of working in an industry tempted to follow traditional formulas of ho-hum ballroom awards dinners. The end result is that no one really wants to attend an awards dinner that is the same as last year's except perhaps those receiving the awards.

Instead of groaning with dread at another boring event, why not step up the energy and excitement the awards event and create over-the-top, memorable awards programs? A flexible and open mind with help from vendor partners allows planners to offer innovative awards programs that make all attendees winners. Whether it's finding a unique offsite venue or completely transforming a hotel ballroom, scintillating, innovative awards programs are often just a brainstorm away. Finding these out-of-the-box solutions takes a lot of creative thinking and time.



Adelle Heinz
Meetings & Events
Corporate Marketing
Wachovia
Charlotte, NC

"When my hotel is a first-class

When Adelle Heinz wants a successful awards program for her more than 90 attendees, she begins with an impressive site selection. Heinz is an assistant vice president, meetings & events, corporate marketing, for Charlotte, NC-based Wachovia.

First-Class Property

"When my hotel is a first-class property," said Heinz, "I'm already on the way to creating a successful awards program. Attendees frequently associate 'award' with warmth. We originally intended to hold this program on the East Coast. However, we weren't eliciting the response we wanted. We then selected the Laguna Cliffs Marriott Resort & Spa for its California sun and impressive scene and we finally got the response we wanted. When we presented the dramatic photographs of this resort to our team, who wouldn't want to hold a meeting there?"

Laguna Cliffs Marriott Resort & Spa is perched atop the cliffs of the dramatic Pacific coast in Dana Point along the beautiful Southern California Riviera, halfway between Los Angeles and San Diego. Recently transformed by a multimillion-dollar renovation, the resort features 376 spacious guest rooms,

including 15 suites, and 55,000 square feet of meeting and outdoor event space. Attendees can take a short stroll to the harbor's quaint restaurants, shops and 2,500 yacht slips, and planners will discover other nearby amenities and venues from world-class championship golf to the Mission San Juan Capistrano to Catalina Island.

Heinz acknowledged that, like most planners, she already has a full plate — RFPs, budget, expense reports and other tasks that dull her creative senses and snatch any extra minutes that might have been used to brainstorm. However, she always makes time to log on to the Internet and search the destination, jot down a few ideas for activities and offsite venues, and then she brings in the local experts, her vendor partners. "Although I may have never visited the destination," said Heinz, "I've done my background research enough to get a feel for the area, a theme and a short list of ideas, and of course talk with other meeting planners at Wachovia."

Heinz knew that she wanted to create a beach theme in a relaxed atmosphere to set the tone of the entire October meeting, but she didn't want the same old ballroom events. Her group of attendees work for Wachovia's education finance department, so when she discovered the Ocean Institute, she knew this would be the perfect venue for their awards gala.

Marine Theme

Ocean Institute is located on 2.4 acres in the Dana Point Harbor, a short distance from Laguna Cliffs Marriott Resort & Spa. At the edge of the Pacific Ocean and adjacent to a Marine Life Refuge, the site is ideal for hands-on learning about the sea, with a teaching laboratory containing tanks of local marine life including a jelly fish grow-out station, and teaching exhibits such as Oceanography Test Tank, Wave Tank, Shark and Ray Pool, and Shipboard Research Station.

However, Heinz also realized in order to create the best experience for her attendees, she needed to bring in a local expert who knew Laguna Beach inside and out. "At the referral of other groups within Wachovia, I contacted Karen Warrick at Fun Is First Inc." Warrick, president of the Laguna Beach destination management company, said she uses Ocean Institute frequently for hosting client cocktail parties, but Heinz' request for a formal awards event was her first. "Wachovia wanted a more upscale ocean-elegant awards night, so we designed this event especially for them. From a centerpiece created with driftwood and colorful seashells intertwined with white flowers to blue shimmering linen the setting brought the ocean into the ballroom, and the built-in aquariums and labs along with the whale bones skeleton hanging overhead cemented the nautical theme."

Ocean Institute's second story has an open-air deck overlooking the surf zone and ocean, and Heinz' group began her awards event here with an outdoor cocktail reception complete with a crackling fire pit. She also arranged for a professional photographer for individual and group pictures.

Jeanne Friedman, senior convention services manager, Laguna Cliffs Marriott Resort & Spa, Dana Point, CA, partnered with Heinz to make Wachovia meeting attendees and other meetings feel like winners throughout the five-day, four-night program, not just on awards night. "When planners inform me that attendees have earned their trip, we begin by congratulating them at check in," she said. "When traveling can be nerve-racking, a welcome and personal congratulations gives that extra positive reinforcement. The majority of our rooms have coastal views, so awarding winners with ocean-view accommodations is another great incentive."

Friedman said that she begins working with planners during the sales process. "The sooner I can start a dialogue with the planner about the demographics of the group and exactly what their agenda is, the better the program will be. Most planners come in with at least an agenda, and from there, I ask questions." Her questions are geared toward discovering the dynamic and personality of the group. "Is this an incentive program? Is there a theme, and if not, can we brainstorm a theme? Do you want a ballroom event, or can we push it outside the ballroom to take advantage of the Laguna Cliffs' three outdoor venues?"



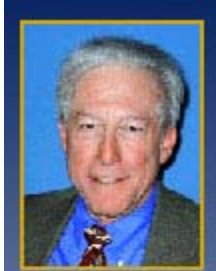
Attendees with Symetra Financial, Bellevue, WA, celebrate during their final night banquet held at the Ritz-Carlton, Laguna Niguel, Dana Point, CA.

Photo courtesy of ACCESS Destination Service

Friedman encourages planners to challenge her with questions, because she gets bored with cookie

cutter meetings, too. "Heinz came in with a theme and agenda, and she asked me to come up with suggestions fitting the theme and the relaxed tone of the meeting. We created an 'open' welcome reception where, at registration, attendees were given a drink coupon for the lounge. Since the group arrives at various times, this set up the laid-back tone without being a formal structured event, and it worked perfectly! The attendees invaded the lounge and had a blast mingling with each other at the leisure."

Earl Grout, manager of meetings and special events for Symetra Financial, Bellevue, WA, understands well the challenge of awards and incentive programs in the insurance and financial industry. "As our attendees are all independent producers, a successful awards program must reward all attendees equally. We consider our entire program an awards program, placing special emphasis on hospitality and the awards event night. Since we've been doing this for years, we're a familiar face, and attendees will approach us with questions and comments.



Earl Grout
Manager
Meetings &
Special Events
Symetra
Financial
Bellevue, WA

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"We spend a lot of time and effort on personal communication, before and during the event, both internally and with our vendor partners," said Grout. "Our staff consists of nine, and along with our vendor partners, we brainstorm a year in advance for each meeting. Weekly conference calls, strategizing sessions, and building personal relationships by including key and ancillary personnel both in house and at our vendor partners (the hotel, DMCs, and key and ancillary people) is what personalizes the entire event. That working relationship and camaraderie helps make everyone a winner. We tie our campaign, graphic design, opening entertainment – everything into the theme of the event, which helps us sell our destination to our independent producers."

"From one pile of sand to another," said Grout. "There is no doubt that warm weather and beaches attract our attendees, so we select a location that will attract our attendees to produce results. Last year's program was at the Ritz-Carlton, Laguna Niguel, and this hotel brand definitely garners people's attention."

One of the most renowned oceanfront resorts in the United States, the AAA Five Diamond Ritz-Carlton, Laguna Niguel is situated atop a 150-foot bluff offering dramatic views of the Pacific Ocean. Located halfway between Los Angeles and San Diego, this resort completed its \$40 million renovation just a few years ago which included updates to its 393 guest rooms and suites, lobby reception and

public spaces. Overlooking the surf, an oceanfront bar and lounge allow attendees to gather over a cocktail and savor the view.

Grout said that in order for every attendee to feel like a winner, he or she must be treated like a winner. "That may sound pretty basic, but when you begin singling one producer from another, well, the others will know it. That's why we've done away with a 'VIP' class and pay attention to hospitality and individuals. For instance, an attendee, whom I've known for years, wanted to bring his wife at the last minute. Last minute equals more expensive airfare, but of course, we're going to say yes, because he is a winner just like everyone else. We made a couple of adjustments to his schedule, booked his accommodations without admonishing him for being late. In other words, personal relationships are what make our awards programs successful, and keep our attendees returning."

Out-Of-The-Box Thinking

Symetra Financial plans several gala events with the help of ACCESS Destination Services, an Irvine, CA destination management company. According to Fiona Collin, director of sales for ACCESS, "What made this program so unique is that the Symetra planners are very out-of-the-box thinkers with very clear ideas on how they desired something different incorporating 'wow' factors throughout. Grout made it very clear that the entire program was a reward, although awards would be presented throughout, and every attendee was to be treated like a VIP winner."



Fiona Collin
Director of
Sales
ACCESS
Destination
Services
Irvine, CA

"Attendees
were greeted
by..."

The gala event that both ACCESS and Symetra are most proud of is the "Evening in Vintage Hollywood" at the Santa Ana Performing Arts and Event Center, boasting a progressive theme-within-a-theme affair. The event began with a pre-party at the Ritz-Carlton Laguna Niguel, with hors d'oeuvres and champagne while mingling with some of Hollywood's most famous celebrity look-

a-likes. The “Hollywood Five” group entertained guests by playing movie and show tunes while the attendees were escorted to their waiting chariots (motor coaches) for a fun ride to the real party.

The Red Carpet Treatment

Collin described Symetra’s arrival at the Santa Ana Performing Arts and Event Center: “Attendees were greeted by screaming ‘fans’ and paparazzi snapping photos, while they were escorted down the red carpet runway. A Joan Rivers look-a-like was on hand to conduct red carpet interviews. Once inside the center, we treated them to an evening that only the Hollywood elite experience. With a variety of entertainment from country rock band to dueling pianos to a ‘Hollywood Blues’ lounge, the evening exploded into a multilevel, multiroom venue filled with music and food. Each room had a different theme, all falling into the realm of Vintage Hollywood.”

Grout recalled, “The report back from our attendees was nothing but positive, and we could tell the Hollywood event was successful by all the smiles and laughter. Every attendee felt like a winner.”

Rick Rosen, president of TriStar Incentive Group Inc., a Minneapolis, MN, meeting and events planning company, annually plans an October program at Disneyland (California) for Wells Fargo qualifiers from their Texas banking region. This group of 1,100 diverse attendees, which includes approximately 500 winners and their guests as well as management representatives, ranges in age from early 20s to 60s. On behalf of Wells Fargo, Rosen progressively honors the awards winners during the entire four-day, three-night event with a red carpet welcome by management, themed with props and Disney characters, and Disneyland passes.

“Disney is a frequent choice for planners, because the destination caters to diverse demographics,” Rosen said. “Disney programs just add fun. From a planner standpoint, Disney offers a wealth of all types of entertainment from small bands to singing groups to Disney characters, and it is extremely easy to use and accessible. Feedback from participants is that one of the best forms of recognition for their achievements is exiting the motor coach and seeing the regional president and upper management standing alongside the Disney characters on the red carpet cheering and offering high fives as they make their way to their hotel.



Attendees wine, dine and get their groove on at Disney-MGM Studios where rock 'n' roll fantasy-themed programs make everyone feel like a superstar.
Photo courtesy of Disney

Disney Characters

“Since we’re at Disney, we didn’t want our attendees to miss out on activities at the park in the evening for an awards dinner,” Rosen added. “Attendees spent the day and evening at the park, returning to the host hotel for an after-hours pizza party before settling in for the night. The next morning, we hosted a lively, fun and casual awards breakfast buffet. We used various forms of Disn

entertainment again — Disney characters and singing groups serenading the attendees as they enjoyed breakfast. The awards ceremony followed, recognizing 500 winners who walked across the stage to meet the regional vice president, shake hands, and have a photo taken. Attendees still enjoy the reward of walking across the stage in a fun setting with lively music and cheers from their peers, and this casual atmosphere fit into the Disney destination theme better than pomp.”

Kelly Nicoletti, recruiting director and planner of New England Financial’s annual awards banquet, cited Disney’s biggest advantage to meeting planners: an endless creative well of venues and ideas. Nicoletti, who is based in Orlando, FL, begins with a budget, presenting these numbers to her Disney sales manager who offers several unique ideas and themes, ever-conscious of her budget.



Kelly Nicoletti
Recruiting
Director
New England
Financial
Orlando, FL

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“Disney makes everything magical and special,” said Nicoletti. “Disney pays attention to the little details and knows how to treat our award winners like VIPs; always feel like I’m important to their business, versus other venues that make me feel like I’m just another meeting planner or a dollar sign.”

For one of her events, Nicoletti chose Living Seas Salon at Epcot, a one-of-a-kind hideaway at the Walt Disney World Resort in Orlando. “This venue took my breath away,” said Nicoletti. “The attraction offers a private VIP lounge with a backdrop of an aquarium filled with marine life.” When the attendee enters the undersea realm, they are greeted with aromas, sights, sounds and an up-close opportunity to view more than 3,000 varieties of sea life in the Living Seas’ 5.7-million-gallon aquarium.

“Our treatment was first-class all the way,” said Nicoletti. “Instead of entering the front gate and trudging through the park, an escort met us at a private entrance guiding our group to the meeting venue. An elegant sit-down dinner with cocktails, and an entrancing look at the marine life swimming in the aquarium was finished off by an awards presentation of a ‘Mouse-Car,’ an Oscar-esque trophy with Mickey Mouse dressed in a tuxedo. Attendees still talk about that amazingly fun award!”

Private Fireworks Display

“The finale of the evening was an exclusive dessert party in a viewing area overlooking the World Showcase Lagoon,” Nicoletti related. “An escort took our group of 65 to another private area where we enjoyed what felt like our own private fireworks display.”

IllumiNations: Reflections of Earth, the premier evening spectacular at Epcot, is offered to the public but private viewing areas are available for groups. This distinctive show is an experience for the senses, as it tells a story with amazing video technology, water fountains, lasers, special lighting effects and pyrotechnics, all programmed to an original music score.

Last year’s awards program for New England Financial was held in a more traditional ballroom setting catered by an upscale local restaurant, but Nicoletti said, “It was like any other event, nothing special and almost impersonal. When I announced that our 2007 event would be at Disney again, everyone was up and was very excited.” Nicoletti wanted a more informal setting in which to thank attendees for their contributions. Thus, her company will take attendees to the Downtown Disney Pleasure Island BET Soundstage Club, a contemporary urban, high-tech, two-story dance club where the DJ spins ‘phat’ tunes from the latest hip-hop to old-school R&B favorites.



When it's time to loosen up and celebrate corporate achievements, Universal Studios, Orlando, FL, can deliver a colorful awards "action plan" that includes a number of customized programs including this Mardi Gras-themed event.

Photo courtesy of Universal Studios

Oasis Of Entertainment

Pleasure Island is billed as an oasis of entertainment and non-stop fun. During the day, this party to is the perfect place for shopping. But when the sun sets, the streets fill up, and eight great clubs start hopping. It's comedy, jazz and rock with live bands playing on stages throughout the venue. And every night at midnight, attendees can be treated to a full-blown New Year's Eve celebration — a perfect opportunity to award attendees for their hard work.

Anne Hamilton, vice president of resort sales and services for Disney Resort Destinations, partners with planners from all industries. Final-night awards banquets come in all shapes and sizes, from casual and formal to everything in between. The creation of a successful program really culminates an understanding of what the planner wants to accomplish and the "wow" factor, said Hamilton, adding that Disney is successful because they have a massive repertoire of props and themes from the past and can recreate a time machine with their archive of props and history.

"Most important though," she said, "we partner with our planners to come up with a story. We ask a of questions because we want to know your group, including the big one: what is the message or feeling you want to convey to your individual attendees? Answers to our questions allow us to match the appropriate location for their demographics, and then we will brainstorm ideas and themes. For example, just because 'Pirates of the Caribbean' is a great movie, doesn't mean that it will make a good awards program for your group of attendees."

But how do you top yourselves when you are Disney? Like the insurance and financial industry, Disney has to create their own company awards programs, and Hamilton admits that it can be quite challenge to find something that their award winners haven't already experienced — and keep it a secret.

"For our awards banquet this year," Hamilton said, "we launched our 'Year of a Million Dreams' program, with the goal of portraying a dream to our award winners. Our venue was Pleasure Island' nightclub Motion. We transformed the nightclub setting into clouds and blue sky. The clouds were created with the fog machine and cool air, and the white tables displayed blue under-lighting, accentuating our theme about making dreams come true."

Final awards banquets don't have to be pigeon-holed into ho-hum, ballroom sit-down plated dinners according to Hamilton. Planners can make a lasting impression on their award winners by placing their events in different settings, from formal Oscar-themed banquets to interactive food and wine stations.

The verdict is in. From paparazzi and red-carpet welcomes to themed awards events in unique venues, treat every attendee like a winner from the moment they arrive, strive to engage and excite every opportunity, and every attendee and planner will leave the meeting energized and motivated to return next year as a winner. **I&FMM**
