

INSURANCE & FINANCIAL MEETINGS MANAGEMENT

THE EXECUTIVE SOURCE FOR PLANNING MEETINGS & INCENTIVES

May/June 2010 Issue

Feature - May/June 2010



[Home / Breaking News](#)

[Other Publications](#)

[This Issue](#)

[On The Cover](#)

[Industry News](#)

[Meeting Value Line](#)

[Events Calendar](#)

[Columns](#)

[Features](#)

[Destinations](#)

[Corporate Ladder](#)

[Archives](#)

[Advertising](#)

[2010 Editorial Calendar](#)

[2010 Rate Card](#)

[2010 Web Ad Rate Card](#)

[Sales Offices & Reps](#)

[About Our Advertisers](#)

[Services](#)

[About Us](#)

[Contact Us](#)

[Subscribe](#)



A group event at the Oceanfront Beach Club at Marina Inn at Grande Dunes in Myrtle Beach, SC, where meetings are accommodated in 15,000 square feet of space including the Sand Dollar Boardroom (inset).
Photos courtesy of Marina Inn at Grande Dunes

Small Meetings, Big Results

Setting The Stage For Successful Executive Retreats

By Karen Brost

Sometimes, it's the smallest meetings that have the biggest impact on a company's future. At a board member retreat, for example, a whole new direction for the business could be charted over the course of a few days. So given their potential impact, these small meetings demand every bit of the attention to detail in planning that conferences that attract hundreds or thousands of attendees do.

Creating The Right Environment

Tom Cappucci is president of the International Association of Conference Centers (IACC) Americas and general manager of University Place Conference Center & Hotel in Indianapolis, IN. "I think the bottom line is if you're going to get executives together, which would be a high level group of people making high salaries, you want to make sure their time is well spent," he explained.

"It's critical that you're in an environment where there are no distractions, that they can be focused on the content of the meeting and not worry about the peripheral things," he continued. "I think conference centers do that well because of how we set up our continuous coffee breaks and conference dining. There's a lot more flexibility."

At IACC conference centers, continuous refreshment service is maintained outside of the meeting rooms and meals are offered on a flexible schedule, so groups don't have to interrupt the flow of their meeting just because a break or lunch has been scheduled. If they're on a roll, they can just keep going. Or, if the discussion gets heated and they need to take a break at 9:30 instead of 10:30, they can do that, too.



Fifty members of the AIMS Society networked and shared ideas at the 23rd annual Pro-to-Pro Executive Retreat held at the Bourbon Orleans Hotel.

Photos courtesy of the AIMS Society

"Everything plays off of that," Cappucci continued. "You also want to make sure they're comfortable so they're not distracted because the chair's uncomfortable or the A/V isn't working."

IACC has more than 300 member conference centers around the world. Each center agrees to follow the organization's detailed requirements for features such as ergonomic seating, non-glare work surfaces and appropriate lighting, all designed to create a productive meeting environment. IACC conference centers offer an all-inclusive Complete Meeting Package (CMP) that includes guest accommodations, three meals per day, continuous refreshment breaks, 24-hour meeting rooms and standard audio-visual equipment.

"The complete meeting package that conference centers sell is really a service element," Cappucci stated. "The room is available for 24 hours. Say they're in a discussion at 5 o'clock. They can keep going to 6, 7 or 9 o'clock. It doesn't matter.

We're not going to be turning the room. You're not going to be getting two or three housemen knocking on the door and

saying 'excuse me, you have to leave because we have to set up a dinner in here.'"

As Cappucci emphasized, "It needs to be their agenda-driven meeting, not a facility-driven meeting. (At a conference center) you can leave things up on the wall. There are some hotels I've worked at in years past where we had to go in and take all of the flip charts off the walls to set up for a dinner. Then the next morning, either you try to put them up in the same order or the meeting planner has to come in and try to recreate that energy in the room."

The Power Of Small Meetings

Kitty Ambers, CPIA, CIC, CISR, CPIW, CRMCS, has discovered firsthand just how productive a small meeting can be. As executive director of the American Insurance Marketing and Sales Society (AIMS Society), she's responsible for planning the organization's annual Pro-to-Pro Executive Retreat.

"We call it Pro-to-Pro because it is designed totally around networking, idea sharing, round tables, panel discussions and then also fun and casual networking events. The feedback we get year after year is that there's nothing like hearing things from people who have been there and done that."

The AIMS Society's 23rd annual event was held in March at the 218-room Bourbon Orleans Hotel in New Orleans. It attracted approximately 50 participants. "In large meetings, unless you're a very outgoing person, very often it's hard to break into the existing political structure," she noted. "It takes a pretty strong person to go stick out your hand and do that. The environment we work to create is very open and welcoming so that people are immediately embraced and their ideas are engaged, so we do a lot of interactive things."

At one of its luncheon events, the AIMS Society holds a "bright idea" contest. "We promote this ahead of time to say if you have something that has worked great for you, bring along the material and share," she said. "The whole idea is 'what is the one thing you've done this year that has either been wildly successful for you or maybe hasn't, but you learned a lot.?' She explained that attendees decide who has the best idea at their table, and then there's some friendly competition among the tables to determine the overall winner.

"We get some prizes and try to make it fun," Ambers stated. "I get to leave with all the ideas, and I use them as blog material or newsletter items or content throughout the year, so everybody wins. They have a great time doing it. It's very fun."

Another strategy Ambers uses to encourage networking is to include a profile of each attendee in the event's program guide. "It comes out of our membership directory, but we include things like lead carriers, specialties, niche markets, role in the agency, and split of business between personal lines or commercial lines." She commented that people read through the information ahead of time to decide who they want to meet based on what they have in common.

"I've seen some exciting deals come out of this," she added. "We have one fellow who is about to be 80. A couple of years ago he started an international coverage group based on a relationship he made in one of our meetings."

Finding The Right Venue

Ambers moves her annual meeting to a different city each year to attract people from different parts of the country. "We look for a city that has some character," she stated. "This year we were literally right on the corner of Bourbon and Orleans Street in New Orleans. We had this balcony over Bourbon Street. It got everybody out there joking around and talking and visiting, and you heard a lot of interesting follow-up conversations from the content of the day."

"The environment we work

Over the last few years the group has also met in

"I think the bottom line is if you're going to get executives together...



you want to make sure their time is well spent. It's critical that you're in an environment where there are no distractions."

**Tom Cappucci
President, IACC Americas
General Manager
University Place Hotel &
Conference Center
Indianapolis, IN**

Nashville, Savannah and San Antonio, cities that all also meet her criteria for “walkability.” “We usually choose a quaint hotel,” she said. “I don’t do the big convention hotels because we just get lost.”

Chuck Salem is president of Unique Venues, a company dedicated to helping meeting planners find, just as you would expect, unique venues for their meetings and events. The company represents stadiums and arenas, special events venues, colleges and universities, historical and cultural facilities, retreat centers and camps as well as conference centers. “We probably represent about 40 percent of IACC venues,” he noted.

“Everything we do for planners is complimentary,” Salem said. “There are no service fees. We don’t make commissions. Planners really don’t have to do anything but articulate their needs to us and sit back and wait for the proposal.”

Colleges And Universities

Salem explained that colleges and universities are an excellent option for small meetings and executive retreats. “There are about 1,800 colleges and universities in North America who open their doors to external users for meetings, conferences and special events,” he said. “Some have beautiful hotels on site. There are a number of universities that have their own conference center on campus. You can have everything from staying in a traditional residence hall and eating in the dining hall to very upscale experiences on college campuses.

“They’re getting rid of those old double-loaded corridors where everyone shares a bathroom,” he continued. “The residence halls they’re building are absolutely beautiful and affordable. We’ve got a venue at Loyola University in Chicago. There you are, one block off Michigan Avenue right by Water Tower Place in a brand new multi-story building that has kitchenettes and a couple of bedrooms and a couple of bathrooms. For a fraction of the cost, you’re in center city Chicago having a meeting.”

He described another advantage of meeting on a college campus. “What people really, really want now, it appears more than anything, is technology. Colleges and universities have built-in technology in almost every space on campus. They have to. It’s part of who they are. Classrooms on college campuses are already fitted with drop-down projection and wireless Internet. They also have networked computer labs, and it’s very, very affordable.

“Most colleges have at least one boardroom,” he added. “They’ve built these beautiful student unions. Many of them have meeting spaces that have outstanding seating and lighting. They’ll rival anything that you’ll find at a beautiful hotel, and they’ve got full-service catering.”

The property Cappucci manages, the 278-room University Place Conference Center & Hotel, is located on the shared campus of Indiana University and Purdue University in Indianapolis. It has the distinction of being both a Four Diamond, Four Star hotel and IACC-certified conference center. Last year, the facility added a 7,000-square-foot multipurpose room to bring even more flexibility to its meeting space.



Loyola University’s Kasbeer Hall hosted this special event. Loyola is an example of upscale experiences available on college campuses — even overnight accommodations.

Photo by Bridget Montgomery Photography

Camps And Retreats

Salem said that camps and retreats are another option. “They’re more typically in an introspective environment, which I think is a real benefit for corporate retreats, because we’re all so tied to our handheld devices. These types of environments make it much more conducive to cell phone-free, text-free retreats. They’re really all about developing camaraderie. A lot of these places have really incredible teambuilding facilities built in with facilitators who can lead you through teambuilding.”

One such facility is the Garrett Creek Ranch Conference Center in Paradise, TX, 50 miles from Dallas. Set on 460 acres, the center was designed by its owner, a professional meeting planner. It offers 50 guest rooms, and its CMP includes use of the property’s recreational offerings, which include a 23-acre nature trail, bicycles, tennis, basketball, driving range and fishing. The property also offers a ropes course for teambuilding activities.

Unique Venues also offers historic properties, such as Rockwood Manor in Potomac, MD. Built in the 1920s as a country estate, and located on 30 wooded acres 15 miles from Washington, DC, the manor provides a secluded site for small meetings and retreats. One important “non-historic” feature is that Wi-Fi service is available.

Salem stated why he believes it’s important for planners to think outside the (meeting room) box when choosing a venue. “We believe the view from outside of the box offers a greater perspective. One that is unique is inherently memorable, as well.”



Camps and retreats are “more typically in an introspective environment, which I think is a real benefit for corporate retreats, because we’re all so tied to our handheld devices.”

**Chuck Salem
President
Unique Venues
Johnstown, PA**

A Meeting Of The Minds

A well-planned retreat can offer a unique opportunity for parties who are normally on the opposite sides of the fence to come together. Bill Campbell, senior counsel for the San Francisco law firm Chapman, Popik & White LLP, has attended the American Bar Association's Annual Insurance Coverage Litigation Seminar in Tucson, AZ, for more than 20 years and has planned the event in the past.

"It's a great way to keep informed of developments in our field. One of the best things about it is that we have a terrific exchange of the best ideas that great lawyers on the policyholder side and the insurance company side have, so interchange is really an important part of it." The annual event is also attended by insurance company executives, claims personnel and risk management professionals.

"You get to see problems from someone else's point of view and understand what's important to them," Campbell explained. "It enables people to nurture and maintain relationships throughout the years because we see each other at this meeting in Arizona. Another benefit of this meeting is the collegiality of lawyers who normally are opposed to each other in litigation working together on programs and enjoying each other's company in a relaxed setting."

The event is held each year on the first weekend of March at the 487-room Westin La Paloma Resort & Spa, which is set in the foothills of the Santa Catalina Mountains in Tucson. "It's a very relaxed setting," Campbell said. "It's not pretentious. It's very comfortable. Springtime in Arizona is a great time to be there."

Spouses and families also attend the event, and Campbell mentioned the wide variety of things there are to do, including baseball spring training games, hiking, golf and visits to the Arizona-Sonora Desert Museum. "The Santa Catalina Mountains are beautiful. There are always things to do in Tucson and people to do them with." He said he enjoys returning to the same location each year. "We know what we're going to get."

Campbell also noted that the seminar committee works hard to create the ideal environment for networking. In addition to general sessions and breakouts, there is a separate reception for young lawyers, a diversity reception and a women's networking event. First-time attendees also have their name badges flagged so the "regulars" will know to welcome them.

"We've been doing this for over 20 years now, so we've kind of figured out what works. It's a process of continuous improvement," he said.

So Many Venues, So Little Time

Small meeting groups seeking a secluded retreat will find it at Marina Inn at Grande Dunes, tucked away between the Atlantic Ocean and the Intracoastal Waterway on 2,220 acres in Myrtle Beach, SC. This AAA Four Diamond property has 200 oversized guest rooms and suites all of which overlook the Intracoastal or the resort's marina. Also overlooking the Intracoastal is the Grande Dunes Resort Club Course, named the 2009 National Golf Course of the Year by the National Golf Course Association. Meeting space totals 15,000 square feet and accommodates up to 700 attendees. Additionally, the



beachfront Ocean Club at Grande Dunes can entertain up to 250. The private Members Club at Grande Dunes accommodates up to 125 attendees in its plush, old-world Tuscan-style clubhouse, headquarters for the Nick Price-designed, par 71 Members Club Course.

Another truly private meeting location is the IACC-certified Airlie Center in Warrenton, VA. Airlie Center, which has been hosting meetings for half a century, is located 50 miles southwest of Washington, DC. The center's North Campus includes the International House, a 19th century manor house offering executive-style guest rooms, flexible meeting space and a private pool and tennis court. Also located on this campus are a lakeside retreat called The Loft, as well as The Stables, a facility that houses 27 guest rooms.

The spectacular Monterey Peninsula is the site of Unique Venues member the Asilomar Conference Grounds in Pacific Grove, CA. Accommodations at Asilomar, which means "refuge by the sea," are located in 30 buildings set along shoreline forests and sand dunes. Designed in the

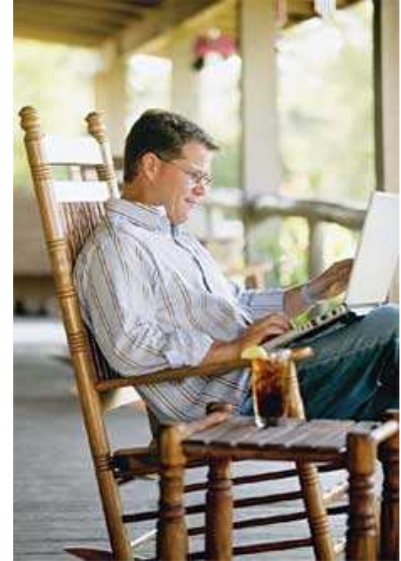


Photo courtesy of Garrett Creek Ranch Conference Center

Wi-Fi porches at Garrett Creek Ranch Conference Center in Paradise, TX, encourage some laidback productivity.

Photo courtesy of Garrett Creek Ranch Conference Center

Arts and Crafts style of architecture, the facility offers a choice of 28 meeting rooms. To preserve the property's ambience as a tranquil retreat, guest rooms contain no phones or televisions.

For meetings and retreats that have teambuilding on the agenda, the IACC-certified Beaver Hollow Conference Center in upstate New York offers dozens of options for groups to choose from based on their goals, amount of time available and level of physical activity desired. The 91-room property is set on more than 300 wooded acres between Buffalo and Rochester.

Eleventh-Hour Planning

Due to budget considerations and changing business conditions, many meetings are now being planned with shorter lead times. "We're seeing a lot of last-minute bookings," Cappucci noted. "But because we have the continuous coffee breaks and conference dining, adding another meeting really doesn't make it that much more difficult for us. We add more food, but it's not like we have to plan all new menus and so forth. For short-term bookings, conference centers are better positioned to be able to handle that because we can turn that booking into reality a lot faster."

"Whether you call it the AIG effect or whatever, people are concerned about going to too luxurious of a place," Cappucci stated. "Executives have to be more accountable based on what's going on in the marketplace. Perception is reality, and we have to deal with that."

"It's no longer just return on investment for a meeting," he added.

"I've also heard (the term) return on experience, ROE. What was their experience of getting together? You really don't know the impact of that meeting until six months after that meeting. Did something change? Did a new product come out? Did the training that you performed work and change people's behavior?"

"There's such a focus on dollars right now," Salem said. "In our opinion, the perfect executive retreat site right now should start with the budget. A lot of the venues we represent begin with a really affordable approach to meetings but are surprisingly upscale and offer a solid executive experience."

Cappucci shared a conversation he recently had with the president of a company. "He said he's having a meeting for the first time in two years. I asked, 'Why so long?' He said, 'All of our budgets have been cut, and we had to be careful. But I can't afford to continue not having a meeting because I see the culture of our company declining by people not getting together face-to-face.' Yes, you can have e-mails, you can do some conference calls, but the company culture changes when people can't look at each other in the eye and shake hands, and when you can't give one message to a group of people."

Ambers didn't skip a beat when asked to describe the value of interacting in person at executive retreats. "It's priceless," she said. **I&FMM**



"You get to see problems from someone else's point of view. It enables people to nurture and maintain relationships throughout the years because we see each other at this meeting in Arizona."

**Bill Campbell
Senior Counsel
Chapman, Popik & White LLP
San Francisco, CA**