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Photo courtesy of Lansdowne Resort

The Amphitheatre at the IACC-certified Lansdowne Resort near Washington, DC.

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Meeting of the Minds

Lynette Owens & Associates Insurance Advisory Council Enters Its 21st Year

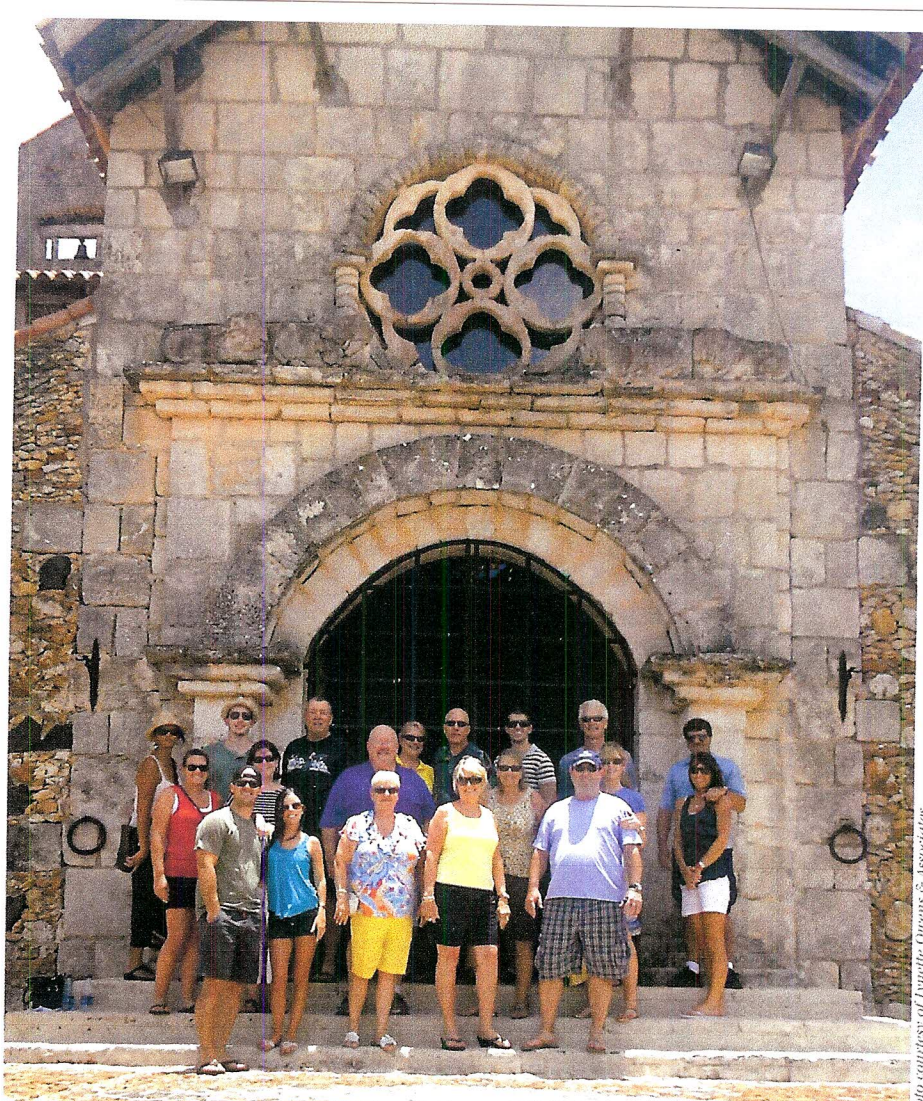
By Karen Brost

For more than 20 years, Lynette Owens, president of meeting and incentive management firm Lynette Owens & Associates (LOA), has been gathering together top execs in the insurance industry for a biannual advisory council meeting to discuss some of the industry's key issues.

For the 21st Annual LOA Insurance Advisory Council meeting in August, the group was hosted by the Hard Rock Hotel & Casino Punta Cana in the Dominican Republic. The expansive, all-inclusive beachfront resort includes 1,787 rooms, a 65,500-sf convention center, nine restaurants, 19 bars and lounges, 12 pools, a casino, spa, Jack Nicklaus golf course and Oro, the top nightclub in the Dominican Republic. Every room is a suite that includes a double jacuzzi, mini bar, premium liquor dispenser and 24-hour room service, so guests can truly feel like they are getting rock star treatment. Even calls back home to the U.S. and Canada are included.

Destination Decisions

Meeting in a Hard Rock conference room designed for "taking care of business," the advisory council addressed a series of topics relating to current trends and the future of meet-



The Lynette Owens Advisory Council posed for a group shot in front of the Church of St. Stanislaus in Altos de Chavón, a replica of a 16th century Mediterranean village in the resort area of La Romana, Dominican Republic.

ings. The group was first asked which destinations they felt were the most motivational hotspots.

Ed Ledford, principal, business development for FFP Insurance Services Inc., said it really depends on the audience. For example, high-end producers may prefer an exotic destination

with a program that includes strong educational content to make the trip worth their time. On the other hand, people from smaller "mom and pop" firms often prefer to go somewhere they haven't been before. He cautioned, though, that depending on the destination, some of them may not be



Lynette Owens



Heath Bowen



Tyler Carr

able to afford to do activities outside the resort. That's why, he said, he's a big fan of all-inclusive resorts to ensure a good overall experience.

Owens commented that companies also can help defray attendees' additional expenses by distributing a set amount of cash to them when they arrive at the destination. She advised against sending it out in advance, however, since many attendees will be tempted to use it to pay bills.

Dave Krupa, assistant vice president for Baltimore Life Insurance Company, offered a simple formula for selecting a motivational destination: "Fun, sun and alcohol." He also favors all-inclusive resorts and including planned excursions.

Edward A. Carroll, LLIF, president and CEO of the consulting firm Ed Carroll and Associates, specializes in the fraternal insurance industry. He said that cruises are extremely popular with this segment. He noted, "Just say 'cruise' and they'll say when?" He added that cruises to Puerto Rico and Alaska have been popular with this group.

Neil Higger, president of Academic Financial, brought up the point that seasickness may prevent some people from enjoying a cruise. "An all-inclusive is like a cruise that doesn't go anywhere," he noted. "No one gets sick."

Debbie Grassi, Western regional director of sales for LOA, commented that connectivity is another important factor to consider when choosing a destination, as attendees are not likely to be very happy if poor cell service or the lack of Wi-Fi connections pre-

vent them from staying in touch with their family or business back home. On the topic of communications, Garrett Konrad, chief operating officer of Integrated Financial Concepts, also noted that choosing a destination that's English-friendly makes it easier for attendees to enjoy the experience.

Ann Rogers, corporate secretary for State Mutual Insurance Company in Rome, GA, said that safety is a key consideration when choosing a destination, a point that was echoed by many of the other participants. Garrett Konrad also discussed the idea of "perceived safety," noting that some attendees may prefer one destination over another because they think it's safer, even though statistics may not bear that out. An example was given of a program that a company moved from Cancun to another international destination because of safety concerns, when crime statistics were actually higher in the new destination chosen.

One topic of concern that many of the executives brought up involved the travel times required to participate in a program. They said that many attendees are simply not willing to take the long flights required to get to a distant destination like Europe, for example. "The convenience for spouses is (another) factor," Higger noted. "It can't take too long to get there." For many attendees, long travel times are more than a matter of inconvenience. "You can't take them out of the office too long if they're trying to build their business," stated Tyler Carr, regional vice president, Florida, for First Annuity Insurance Marketing.

Insurance Advisory Council Attendees

Heath Bowen

Chief Marketing Officer
Allegis Advisor Group, Salt Lake City, UT

Tyler Carr

Regional Vice President – Florida
First Annuity Insurance Marketing, Ft. Myers, FL

Edward A. Carroll, LLIF

President, CEO
Ed Carroll and Associates, Woodworth, LA

Ira Gottshall

President & CEO
FFP Insurance Services Inc., Valencia, CA

Neil Higger

President
Academic Financial, Fountain Valley, CA

Garrett Konrad

Chief Operating Officer
Integrated Financial Concepts, Auburn, CA

Peter Konrad

President
Integrated Financial Concepts, Auburn, CA

Dave Krupa

Assistant Vice President
Baltimore Life Insurance Company, Owings Mills, MD

Ed Ledford

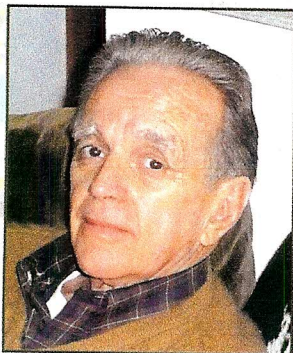
Principal, Business Development
FFP Insurance Services Inc., Carmel, IN

Ann Rogers

Corporate Secretary
State Mutual Insurance Company, Rome, GA

Bruce Seymour

Senior Vice President
Wells Fargo Advisors LLC, Los Angeles, CA



Edward A. Carroll



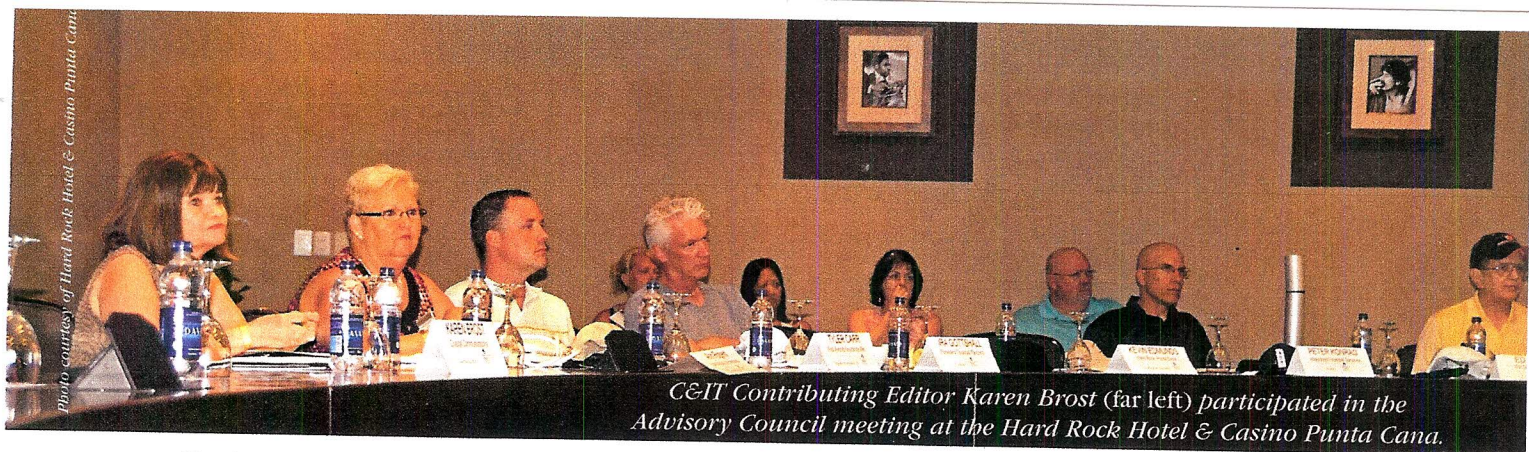
Dave Krupa



Ed Ledford



Ann Rogers



C&IT Contributing Editor Karen Brost (far left) participated in the Advisory Council meeting at the Hard Rock Hotel & Casino Punta Cana.

Ledford brought up another point related to incentive trips. "Incentives provide recognition and great relationship-building opportunities. They're part of a package the agent is looking for when establishing a relationship with a carrier or FMO (Field Marketing Organization). Quality product, superior service and appropriate compensation will more determine which carriers/FMOs the agent works with. The incentive component can be the glue that holds it together. Gone are the days when an agent would write a particular product based on the incentive trip."

Generational Differences

Given today's multi-generational workplace, the days of planning an incentive trip where all of the attendees are generally the same age are long gone. That presents some additional challenges when choosing both the destination and the array of activities that will be offered.

Heath Bowen, chief marketing officer for Allegis Advisor Group, explained that the top five producers in his company are under the age of 35. He said that some people, typically the older attendees, go on trips for the social interaction, while others are thrill-seekers who are more interested in experiencing what the destination has to offer. These individuals, one executive noted, are more likely to prefer activities that are "off the beaten path."

Peter Konrad, president of Integrated Financial Concepts, believes in offering a menu of activities much like a company would offer a series of breakout sessions, so attendees can choose what appeals to them.

The group indicated that in addition to more active excursions, traditional activities such as relaxing by the pool or on the beach, golf, spa and shopping continue to be popular as well as non-traditional activities such as cooking and winemaking classes and wellness programs.

Regardless of the activities offered, Krupa said it's still important to provide opportunities for the whole group to be together because of the valuable opportunities that creates for education and mentoring.

Corporate Social Responsibility

When the executives were asked if they incorporate CSR activities into their programs, the response was mixed. Some companies do and others don't, but the companies that do find a way to give back to the local community during their meetings were pleased with the results. "It feels good to help, and it's good for business," explained Ira Gottshall, president and CEO of FFP Insurance Services Inc. He noted that his company offers these opportunities on a volunteer-only basis, but that about 90 percent of the attendees generally participate. Some of the other executives were considering adding a CSR element to their programs.

Individual Travel Awards

If there was one point on which the group was unanimous, it was that individual travel awards have no place in their business. "There's no point," Higger said. Carr added that it would eliminate key opportunities for attendees to build relationships

and make connections. "Agents like to network," he stated.

Carroll pointed out that the value of group trips extends beyond the agents themselves, noting that families often become friends and look forward to seeing each other from year to year. He said this becomes an additional motivating factor for agents to keep earning the trips.

The Future of Meetings

Carroll noted that he has seen tremendous changes in meetings in recent years and predicts more changes are coming in the next 10 years. Owens reported that she is seeing far fewer regional meetings in the insurance industry than in years past.

The executives were in agreement that their companies need to embrace the use of technology for some meetings, but that there will always be a place for face-to-face meetings. "We were designed for relationships, to have a connection," Peter Konrad stated. "The more people rely on technology, the more people realize the need for connections."

Bowen is a big believer in using technology to conduct activities such as training. But, he said, "You cannot network with somebody over a computer, even if you have HD. You can't ignite a fire in them that way."

"Relationships make the virtual meetings possible," Gottshall noted. Bowen commented that the cost savings achieved by holding some meetings via teleconference can be used to create better face-to-face meetings.

What About Golf?

The game of golf has a long tradi-

tion of providing lucrative networking opportunities in the insurance and financial services industries, so the executives were asked if golf is still as important as it once was. One executive stated that having the opportunity to play golf at a high-profile course such as Pelican Hill is still a draw for many individuals. Another commented that there are fewer young people playing golf now, so he feels that golf is less important and that teambuilding activities now have a higher value.

Krupa commented that nearly half of his field managers are female, and they're asking, "Why are we always golfing?" On the subject of activities that are more female-oriented, Owens and Grassi described a unique meeting they participated in where the women were treated to nail services in a spa. The content of the meeting was presented to them while they were a "captive audience" having their nails done.

Exploring the Options

In addition to experiencing the all-inclusive amenities of the Hard Rock Hotel & Casino Punta Cana, advisory council members received a presentation from Suzanne Moore, CMP, senior sales manager for the Omni Orlando Resort at ChampionsGate. Describing the property as being "near the attractions without the distraction," she gave an overview of the 1,200-acre resort, which includes 720 newly renovated guest rooms, two Greg Norman golf courses, a golf academy and spa.

The group also learned more about what the Dominican Republic has to offer through a presentation by Mark Jordan and Robert Traveras of Amstar, the destination management company that partners with the Hard Rock Hotel & Casino Punta Cana. The company also has operations in Mexico and Jamaica.

Amstar representatives say they can handle groups of from 20 to 3,000 people, and one of the first services they can offer is expedited processing through customs. Visitors to the DR are required to purchase a \$10 Tourist Card upon arrival, and Amstar can pre-order

these cards so attendees don't have to wait in that line. Amstar also offers airport transfers, including handicapped-accessible vans and VIP vehicles, and the representatives described a wide variety of tours that are available. These include catamaran snorkeling trips, tours of communities to interact with local residents, shopping excursions and CSR activities. They also can arrange for high-end lobster and champagne cruises, a spa cruise, speed boating and opportunities for attendees to test their skills on the largest zip lines in the Caribbean.

Amstar's representatives also discussed how a new highway currently under construction will soon expedite travel between the airport, Santo Domingo and the island's resort areas of Punta Cana and La Romana. The new highway is expected to be completed later this year.

Creative Punta Cana, the in-house décor company for the Hard Rock Hotel & Casino Punta Cana, met with the group to describe some of the items they offer, including giant guitars and other rock décor, "chill out" lounge furniture, sand sculptures and Caribbean, pirate, and Thai-themed parties. As they say, "Anything can happen with budget and time." One unique item the company offers is a "paparazzi wall," a mural featuring a lineup of paparazzi ready to "greet" attendees as they arrive at an event, complete with flashes popping. The hotel's in-house AV company, J&A Audio Visual, provides staging, lasers, lighting, concert productions, gobos and LED dance floors.

The All-Inclusive Option

Since the Hard Rock Hotel & Casino Punta Cana is an all-inclusive resort, groups do not incur additional setup charges for private events unless they take place on the beach. Food and beverage charges are included in the all-inclusive rate, and the only other charges groups would incur onsite would be for items such as décor, AV or amenities such as golf and spa services.

"The all-inclusive destinations are such a good value, and there aren't

that many," Owens comments. "When you narrow it down, you've got Mexico and some in the Caribbean. For an all-inclusive destination, I have to say that Punta Cana is equally as nice as Mexico. The Hard Rock did such a nice job for us. It's especially ideal for large groups. When you're taking 900 people somewhere like that, you really have to look at the whole budget, air included, and it really is a very good value. They're now transitioning the property in Riviera Maya (Mexico), which used to be the Aventura Spa Palace, into a Hard Rock, so that's in the works now. I'm sure that will be just as pretty."

After the meetings wrapped up, Amstar treated the advisory board members to a half-day *Marinarium Excursions* sightseeing catamaran cruise. The outing offered participants a chance to snorkel with stingrays and nurse sharks, and cruise along the island's turquoise waters and palm tree-fringed coastline while enjoying island music played by a local disc jockey.

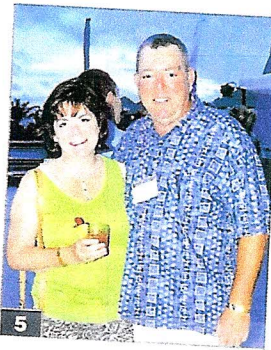
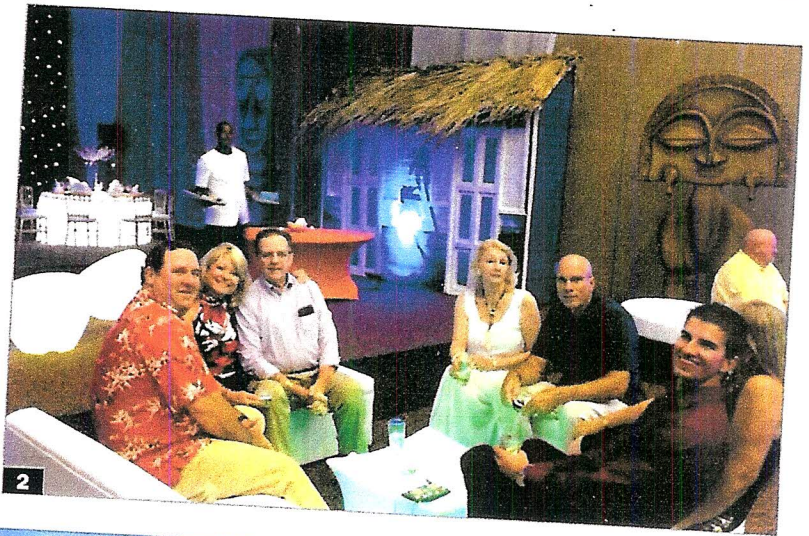
At the conclusion of the advisory council's activities at the Hard Rock, a number of the members traveled to nearby La Romana to experience Casa de Campo, another all-inclusive resort. This 7,000-acre luxury retreat, which offers private villas and hotel accommodations, is dedicated to the sporting life and features three Pete Dye-designed golf courses, tennis, polo, horseback riding, water sports and a 245-acre shooting facility. "Everything was flawless," Owens describes. "It's also an amazing destination for incentives and meetings."

Lynette Owens & Associates also represents these properties to the insurance market: Colonial Williamsburg Resorts in Virginia, Nemaocolin Woodlands Resort in Pennsylvania, and three properties in Florida: Omni Orlando Resort at ChampionsGate, Omni Amelia Island Plantation Resort and PGA National Resort & Spa.

The next Advisory Council meeting is November 3-9, 2013 at Adare Manor near Limerick City, Ireland, and the K Club near Dublin. **I&FMM**

More photos on page 7.

SnapShots



Photos 1-6: Meeting and incentive management firm Lynette Owens & Associates hosted their 21st Annual Insurance Advisory Council meeting in August at the Hard Rock Hotel & Casino Punta Cana and Casa De Campo, Dominican Republic (see full story on page 10). Attendees and guests included: **1** (l to r) Garrett Konrad, COO, Integrated Financial Concepts, Auburn, CA; Danelle Konrad; Melina Grassi; Debbie Grassi, Western regional director of sales, Lynette Owens & Associates. **2** Lynette Owens, president of Lynette Owens & Associates (second from left) enjoys the farewell dinner with Advisory Council attendees at the Hard Rock Hotel & Casino Punta Cana. **3** Neil Higger, president, Academic Financial, Fountain Valley, CA; Elaine Kavanaugh. **4** Brenda Krupa; Dave Krupa, assistant vice president, Baltimore Life Insurance Company, Owings Mills, MD. **5** Ann Ledford; Ed Ledford, principal, business development, FFP Insurance Services Inc., Carmel, IN. **6** (l to r) Eddie Ledford Jr.; Robert Taveras, Amstar DMC, Punta Cana, Dominican Republic; Mark Jordan, Amstar DMC.

Photo credits: 1-6, Lynette Owens & Associates and Hard Rock Hotel & Casino Punta Cana; 7, Barbara L. Scisbury; 8, Christies Photography