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Incentives

Meetings West, February 2006

The incentive planner is a rare breed, at once detail-oriented to a fault and incredibly imaginative. If a whirlwind itinerary including a Mr. Potato Head face kit (read on for details), spa treatments, a luau, and fabulous take-home gifts is what a client is after to motivate a sales force, incentive planners are up to the task. And that task often begins anywhere from six months to a full year prior to the time of the event, making planners key among the company's players and its year-end sales quota.

In this section, *Meetings West* interviewed several of the industry's finest to share tales of recently planned incentive programs, including explanations of extraordinary activities and social functions, gift ideas, challenges, and joys.

Please continue reading for a bit of "fire and ice," if you will, as the profiled planners booked Maui and Hawaii's Big Island, and, for an alternative winter program, Alberta's Banff, which attendees adored.

Christy Lamagna, CMP, CMM
Chief Strategist and President
Strategic Meetings and Events
New York, New Jersey and San Francisco

Briefly describe the incentive program.

The President's Club for the company BroadVision was held at Grand Wailea Resort Hotel and Spa in Maui, Hawaii. The five-day program welcomed 504 attendees.

In planning the incentive program, did you follow a timeline?

One year out: We chose the property, reserved the off-site venues, including an aquarium for a private dinner, checked out the excursion options, looked at giveaways and ordered samples, and made sure our budget was allocated correctly. At that time, we also started working with our airline partners on lift options for as many direct flights as we could get. We locked in our production vendor.

Six months out: We started designing the website, print pieces (save-the-date cards, refrigerator magnets, registration reminders, travel packets, luggage tags). We continued budget monitoring. We worked with the production vendor on the awards dinner theme.

Three months out: We revisited the site, selected florals, linens, did tastings, ordered giveaway items and awards.

Did the program have a "message," and if so, was it successfully conveyed to the participants?

The message was that they were important and this was a reward, so we made sure to make every detail count. We made sure no detail was overlooked. We put tropical scented air fresheners in all guest rooms. We had daycare for the kids where they learned a special song and local dance for a surprise concert on the final night. (The adults flipped and the kids were delighted!) We also had a gift—a photo frame—waiting for them when they returned home.

What did the program entail, including recreation, dinners, group outings, award ceremonies, etc.? Was there anything particularly unique about the program?

Upon arriving at the hotel, guests confirmed their excursions and went into our shirt shack to select the Hawaiian item of their choosing. There was a hospitality desk to get a quick bite and then they had the rest of the day to settle in. We had a welcome event out on the lawn overlooking the water. We rented high-powered telescopes and had maps for the night sky. We had palm readers and crystal readers.

We also had a traditional luau where the CEO was brought in on a canoe in authentic warrior dress with conch shell blowers and torches leading his way to the lawns where the group was mingling. A fire twirler and a private fireworks show was part of the evening as well.

We had a formal awards night that was spectacular. We turned the ballroom into a glamorous, magical place by pipe and draping all the walls in black velvet; hanging our centerpieces from the ceilings like chandeliers; using chair covers with flowers tied into sashes; pin spot lighting on the tables; gold up-lighting on the walls—it was simply incredible. While guests were inside we turned the prefunction space they gathered in into an outdoor martini lounge, so when the event ended they were surprised again to find a spot for after-hours fun.

Each night they had a room gift, and the night before the final night we sent a piece of collapsible luggage with wheels to each guest's room with the event logo on it so they had a piece of luggage for the many giveaway items they received. We had a video of candid shots that we took all week and showed on the final night as well. Everyone got a copy as a take-home gift (formatted for U.S. and European VCRs as well; again, you have to think of all the details).

How did you choose where the incentive program would be held?

We wanted something spectacular and where we'd have bright, sunny, happy weather. Maui is a great fit for us and the Grand Wailea made the presentation we wanted.

What did the attendees enjoy the most about the incentive program and the destination?

We surprised the group with a parking lot full of rental cars (many of them convertibles) for a road rally event. We had pineapples, a Polaroid camera and a Mr. Potato Head face kit in a bag for each team of four. Attendees were given maps of the island with questions about particular locations they would find as they explored. They were supposed to decorate their pineapple and take photos of it as



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it journeyed with them throughout the day. I still can't believe the adventures some of these pineapples had. One group talked the local police into letting them take photos of their pineapple in the back of a police car and behind bars in jail. They loved the island, the freedom of exploring without restriction and doing something fun and creative.

What take-home gifts were given to attendees?

We selected as many gifts local to the area as we could. We wanted to support the local economy, keep an authentic flavor in the gifts and save on shipping costs. Gifts included small wrapped tropical plants; robes; and flip-flops that had BroadVision lasered into the bottom to leave our logo in the sand as people walked on the beach.

What was the greatest challenge in executing the incentive program?

Managing VIPs' personal requests pre-event and on-site can be a real time-eater and can run up a budget. We assigned a VIP handler for our CEO and his family and had a VIP point person for the rest of the VIPs who attended. We had a town car on standby at all times for the 'emergency' VIP needs and communicated what would and would not be covered well before the program to prevent running up our budget.

What is it you enjoyed most about planning the incentive program?

Letting my imagination run wild and then finding ways to recreate what was in my head and turn it into a reality. We had a very generous budget, which made it easier; we came in \$900K under budget [out of a \$3 million budget] because we negotiated well, planned well, comparison shopped, did our research, and got the most competitive deal we could out of our vendors.

Who on the supplier side did you depend on the most to successfully execute the event?

Michael Lambert from (then) Maritz in Mill Valley, Calif. He's one of the best in the business and I'm old so I've met my share of vendors!

What makes for a successful incentive program in general? And was this outcome achieved for this particular program?

While a generous budget is a help, it is not essential. It took a full year to plan this event; I met with my team almost every Friday for a full year to walk through every moment of the process, from first mailer to returning home, and we just let our imaginations go wild. You have to be creative, passionate and resourceful.

This incentive trip was wildly successful. When I see people who were on it, they still share something to remind me why they enjoyed it.

Marianne McNulty, CMP, CTIE
Managing Director
Your Right Source, LLC
Sugar Grove, Ill.

Briefly describe the incentive program.

This incentive program was themed "The Race to Victory Lane" and was produced by Rockwell International's Electronic Commerce division. The "Rockwell Cup" was rewarded to the victorious in Banff, Alberta, where winners and guests stayed at the luxurious Fairmont Banff Springs hotel. The program was a five-day, four-night stay for 58 attendees.

In planning the incentive program, did you follow a timeline?

Yes, a timeline was followed for this project, dictated by the fact that the client held a one-year qualification period to win the trip. We started with a site inspection about 16 months before our preferred dates of program. At this time, we discovered all the possibilities for evening functions and activities available to us. Upon our return from the site inspection, the hotel and DMC contracts were executed. Each month of the qualification period, a different letter of motivation was sent to the many hopefuls. Six months out, we finalized the different events we would hold each evening. Three months out, the activities that would be hosted by the company were chosen.

Did the program have a "message," and if so, was it successfully conveyed to the participants?

Using the overall theme "The Race to Victory Lane," and a strong graphic of a race car and a checkered flag, the potential field was "revved up" to concentrate on every "lap" (month of competition) until the flag comes down on the final lap. The message being that effort must be consistent and sustained over the entire qualification period and that the race can be won or lost in that final lap. The monthly mailings were consistent and targeted to the challenge at hand. But one thing was not revealed—the destination. That surprise was saved until the winners stood in "Victory Lane" during the sales meeting at the end of the fiscal year.

What did the program entail, including recreation, dinners, group outings, award ceremonies, etc.? Was there anything particularly unique about the program?

The program was a wonderful mixture of casual and elegant. We started with a transfer from the Calgary Airport to the Banff Springs hotel, and it was cold! So, we warmed everyone up with mugs of hot chocolate and very knowledgeable guides on each transfer vehicle. These guides acclimated the attendees to the area.

Our welcome reception was a "Taste of Canada," held in the hotel's conservatory. Two strolling local musicians kept the mood light.

For the final night gala we took everyone to the sister property of The Fairmont Banff Springs, the beautiful Fairmont Chateau Lake Louise. Here we transformed a ballroom into a winter wonderland and brought in a quartet of Russian balalaika performers. As we arrived, guests were settled into horse-drawn sleighs for a ride along the lake. Then, upon entrance to the ballroom, vodka shots were offered to each guest and an evening of *Doctor Zhivago* Russian elegance ensued.

On the second and third days of the program, the attendees had pre-selected an activity that was covered by the company. Skiing, spa treatments and dogsledding were the favorites.

On the last full day, everyone participated in the Rockwell Winter Olympics and had a great time playing broomball hockey, snow sculpting and downhill sledding.

Early in their stay, we had all guests go to a special room and choose a medieval costume supplied by a costume company from Calgary. Then on the third evening of the program, in St. Stephan's Hall, our participants ate a meal entirely with their hands, drank mead, laughed to the antics of a few medieval characters, and had a marvelous time.

How did you choose where the incentive program would be held?

Once we decided to go against the grain (sun destinations) for this program, we quickly narrowed the field, and the beauty of Banff rose to the top. With a world-class property such as The Fairmont Banff Springs, you are able to offer your guests every amenity to accompany the destination's outdoor activities. Add to this the fact that the Canadian dollar is so favorably converted into USD and we felt we had our own incentive.

What did the attendees enjoy the most about the incentive program and the destination?

The attendees loved the dogsledding activity! And the medieval banquet was a great success. Several were already avid skiers and brought their own equipment along. But the hotel can completely outfit anyone for a day on the slopes. Overall, the fact that we chose a winter destination proved to be a great choice.

What take-home gifts were given to attendees?

Whenever I do an incentive program, I try to keep all gifts to things that are either useful at the destination or indigenous to the destination. Every day when the guests went out for activities, we had a bowl of "heat" packets that we encouraged them to take in quantity to put inside gloves, inside boots, inside pockets—anywhere a bit of warmth was going to be needed. And, of course, we also

provided gloves and scarves.

The big gift was unusual, but indigenous to the destination. We contracted with a local jeweler/museum to provide an etched glass Inukshuk. These totem-like statues were used as indicators for those traveling the wilderness in the earliest days. It was a beacon, a welcome sight to weary travelers crossing a barren tundra. We gave these gifts with a note from the president.

What was the greatest challenge in executing the incentive program?

The greatest challenge was convincing the winners that they would enjoy a winter destination as much as a summer destination. Those who were already ski aficionados needed no convincing, but they were the minority. We waged a campaign of mailings highlighting one event or activity with each postcard, which served to get them in the right frame of mind. For the last two weeks before the trip, we bombarded them with e-mails to "sell" the destination.

What is it you enjoyed most about planning the incentive program?

I was delighted to be working against the sun destination momentum we had going. Choosing the different activities and events that were possible in Banff was a little reward for me.

Who on the supplier side did you depend on the most to successfully execute the event?

There is simply no way such a program could have been carried off as flawlessly as it was without the cooperation of a great property, The Fairmont Banff Springs, and a fantastic DMC, Road West. I would never be as thoughtless as to choose one over the other, because it was in working together and sharing what we each knew that this program succeeded.

What makes for a successful incentive program in general? And was this outcome achieved for this particular program?

An incentive program is only successful with the complete buy-in by all concerned. There must be superb cooperation between planner, hotel and DMC. The client and the planner must see eye-to-eye, and the DMC must be able to indulge the whims and wishes of the client. More importantly, the potential attendees/winners must feel as though they are being asked to achieve something achievable. They must be motivated and prodded often along the route. And they must be rewarded beyond the level of their perceptions.

This program succeeded on all levels.

Andrea Michaels

President

Extraordinary Events

Sherman Oaks (Los Angeles), Calif.

Briefly describe the incentive program.

Washington Mutual's 2005 President's Club was held at the Hilton Waikoloa Village on Hawaii's Big Island. The four-night, five-day program welcomed 900 attendees.

In planning the incentive program, did you follow a timeline?

We started a year out. We began by developing a variety of themes for the client's approval. About nine months out we did our first site inspection to look for creative and technical as well as logistical elements, to meet with suppliers, the hotel catering department, and most especially, to evaluate function space. Six months out we narrowed down possible themes and did the first pass at a budget; this continued to be refined for the next three months. By three months out, themes were selected, renderings completed, and we began to get down to specifics of entertainment, linens and floral and design elements.

Did the program have a "message," and if so, was it successfully conveyed to the participants?

The message was that all attendees were indeed winners, and valued by their company. Additionally, this year's theme was "Pure Aloha"—we worked hard to ensure each event incorporated that message.

What did the program entail, including recreation, dinners, group outings, award ceremonies, etc.? Was there anything particularly unique about the program?

The program entailed a welcome party, two general sessions, an awards night dinner, and a theme event, each incredibly unique. The awards dinner included an Academy Awards-style entrance infused with this year's Aloha theme. The cocktail reception began with an Oscar-worthy red carpet entrance. Two hosts—one a former Miss Hawaii!—interviewed guests as they sauntered down the red carpet. Guests were pleasantly surprised to see that Magic Johnson—spokesman for Washington Mutual—was ready, microphone in hand, to conduct some of the interviews. Live recordings of the interviews were fed to plasma monitors throughout the event space and video screens in the ballroom, which kept the guests' excitement level high.

What was the greatest challenge in executing the incentive program?

One challenge was that this client had held many programs in Hawaii and we needed to be completely unique and not replicate anything that had been done before. Also, Hawaii has many natural resources, but not as many unique event elements that can be locally tapped into. (And when the surf is up, attendees can disappear quickly.)

Who on the supplier side did you depend on the most to successfully execute the event?

We relied on our designer, Sean de Freitas of Designs by Sean, and our great technical team, headed up by Greg Christy of Brite Ideas. Members of the team from Extraordinary Events include Isabelle Zimmerman, account executive, and producers Donna Richardson, Liv Scheinbaum, Megan Reynolds, and Taylor Black.

What makes for a successful incentive program in general? And was this outcome achieved for this particular program?

A successful incentive program always recognizes the winners and their needs. It is motivating, inspiring and satisfying. It allows for both networking and downtime. It provides unique experiences in an exciting venue that the guests could never achieve on their own.