

NOTE: Although its subscriber list is coveted for marketing purposes, the first (and only two) special advertising sections (see below) for *Business Week* magazine were poorly supported by the meetings/travel industry. None have followed, since.

Why not supported? A couple of possible reasons:

- a) Conceivably, the writer didn't know the subject matter well.
- b) Possibly the meetings/travel industry would not support any special issue by any magazine whose editorial content it could not control. . .as it can't, *Business Week*. . .but can and does control the content of virtually all publications within the meetings/travel industry, including its several associations. But that situation probably leads you to ask, "What does such editorial control entail?" and "How might that distort the information that reaches me?"

Cavalier has his answering ideas; but you can reach your own conclusions after looking through the materials on this website.

The second year's transmittal letter and subsequent thank you note for that *BW* contract follow here, because this industry is rife with unsupported claims, and Cavalier doesn't wish to endorse that misleading industry tactic.

Re: Point (a) above: Unannounced, Cavalier wrote the consumerist materials for both of those first two issues at *Business Week*; so possible personal attack on the writer was not an issue. But the viewpoint expressed was consistent with those of Cavalier's first book (*Achieving Objectives in Meetings*, 1973), the world's first how-to text in the meetings industry and source of most current methodology and terminology.

AOM described a proved methodology and system (with content-control forms and guides provided) that had been developed by Cavalier and proved effective via his then-employer (United Attractions, Inc, of Chicago) during the early 1960s. UA was the world's first convention-consulting organization.

United Attractions is mentioned in other credence items on this site, too. UA's name might not be familiar to all, but its legacies are:

- 1) In the late 1950's, UA created the first themed presentation at auto shows for the color-lighted Cadillac Brougham, shown in Chicago. Featuring a bride (in bridal gown) and groom (in tux) discussing their honeymoon trip, Cadillac's exhibit became the hit of that show and the model for themed presentations ever since;

- 2) Themed banquet entertainment for association (and then corporate) events was invented by UA in the late 1950s (before Cavalier joined that firm). Their original format: themed decorations plus orchestra and floorshow entertainment at a relatively-low flat price; with unrestricted choice of any available entertainment star(s) at individual cost-plus. That's *budget control*, and it's still effective today!;

- 3) UA created back-stage, hands-on management for both business and entertainment segments on request for two of its early banquet-entertainment-only clients, the American Linen Supply Association and the Steel Service Center Institute. Until that time (1960), and no producer of entertainments business-stage, had offered total on-site convention service.

- 4) Also in the early 1960s, UA created the first multi-media presentation for the American Gas Assn convention because no single medium would do the whole job. However, within months, a competitive magazine printed an "expert" opinion that multi-media had originate with "a couple of hippies who had wandered into each other on the beach." Of course, all hippies wandered about with projectors and other electronic equipment that couldn't be plugged in (no wireless at that time). It does illustrate the early desperation of the industry to remove purpose from the selection of media, and that viewpoint (together with the Kodak hemispheric film exhibit at the NYC World's Fair of 1964) helped to create the mindless orgy of *multi-media-for-the-sake-of-multi-media* that still plagues meetings. However, today the mindless thrust is toward *e-learning-for-the sake-of-e-learning*. Content is the determiner, and content must control all else if you hope to control the outcome of the meeting!

See the cover letter and a couple of brief passages (from manuscript) from LSAA/Joseph L. Koach's 1961 (LSAA) article for *Sales Meetings* magazine. See: "Supporting Ideas"

The significance is that, whereas UA used Broadway music to punch up a few inter-business-presentation announcements at the business meetings, the magazine's headline shouted, "Association now turns to Broadway." Not really, Folks.

That misreading endorsed decades of wildly-entertaining, major *business-musical* presentations that had little or no relationship to meeting message! But the misreading did wonders for bolstering suppliers and their advertising. And that distortion drives the meetings/conventions industry press even today, because goods and services are still offered without consideration of how (or whether) they might help *your* (or anyone's) meeting.

And that question of relationship value to the meeting message was skewed for several decades by Marshall McLuhan's flawed dictum: "The medium is the message." Sorry, Marshall—the message is the message.

The questions that you should wisely ask yourself and suppliers (plus all the forms from *AOM*) are contained in the updated edition of *Sales Meetings That Work* (originally from Dow Jones-Irwin, 1983). For training specifically, use *Managing Through Training* (if you're new to that task) or go directly to the US military's own (RC's "business translation" methodology), *Common Sense ISD* (*Instructional Systems Development*).

BusinessWeek

1221 Avenue of the Americas
New York, New York 10020
Telephone 212/997-6868

Earl S. Moore, Jr.
Director of International Advertising

December 19, 1977

Mr. Dick Cavalier
3015 Normandy Place
Evanston, IL 60201

Dear Dick:

The attached Contributor's Agreement confirms that you will be writing three pages of copy for the Business Week Meetings and Conferences Section to be published in the March 6, 1978 issue. Please sign and date the agreement, make a copy for yourself and return the original to me.

We are pleased to be working with you on this section.

Cordially,



cc: L. deCamille

Business Week

Earl Moore

Dick:

Thanks for a nice job.





BusinessWeek

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1411

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NOTE:

Although Business Week's mailing list is coveted, the meetings industry refused to support these two special section issues. Why? Because the meetings industry could not control editorial content in Business Week, as it could with industry meetings publication. Uncredited, Cavalier wrote the consumerist materials in these two (and only) special sections.

Richard Cavalier

SAFEWAY TRYING TO CURE THE SUPERMARKET BLAHS

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**Painful process: Turning bankers
into managers at Manufacturers Hanover**

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Playing the options market

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MEETINGS & CONFERENCES



Meetings are communication tools. But before you can communicate, you must have something to say. Who should hear that message? What should be done as a result? How?

Skip any of these steps, and the meeting misfires, no matter how much money and effort go into the trappings.

Meetings are costly and should be subjected to the same cost-effective criteria as any other major business investment.

A meeting is any group communication event structured around an agenda. It can take many forms, each producing somewhat different results. For instance, an executive session usually takes the form of a conference, a two-way flow of information, with the interchange of ideas needed for decision-making. Conferences must be small to be effective, but they are the source of direction-by-consensus in all problem-identifying and solution-seeking cases.

The appearance of conference interplay can be duplicated (although the

results cannot) before an audience through the use of the techniques of the symposium (series of pre-set talks, often followed by question and answer periods) or panel discussions (free-flowing and undirected).

Large audiences cannot truly interact. Therefore the original message can be delivered in a one-way presentation (lecture) and personalized for each participant in workshops (practice sessions). Legitimate seminars require advance study and independent thinking or research from participants. The term is misused except at high professional levels. And the round-table breakout produces interaction but little substance unless highly structured assignments are given.

Adding exhibits, banquets, sightseeing, etc., to meetings creates a multiformal event—the convention. Lead times and detailwork can climb sharply.

Here are some professional steps toward the management of meetings, whatever their size:

—Define the objectives of the meeting and never lose sight of them.

—Establish a ballpark budget based on anticipated return from the achieved goal. If 100 men salaried at \$20,000 each (figuring 100% overhead) are called into a meeting, the group burns up \$2,000 per hour. That's the profit—at 4%—on \$50,000 in sales.

—Appoint a meeting manager. Be sure he is involved with every detail, including site selection, and has cross-functional authority to execute top management's decisions. Check all details through him, and hold him responsible for all budgets, schedules, and goods and services agreed upon. He needs help. If staff committees can't provide the time and knowhow, look outside to suppliers, supplier-advisors and consultants.

—Personal inspection before contract is mandatory. Choose the smallest facility which can effectively accommodate the group; the biggest frog dominates the pond. Avoid their peak season unless given written guarantees

of meeting-service standards: service helps make or break your program.

Once the proper meeting structure is decided upon, the attention switches to content (message) and format (medium). The medium is not the message in the meeting room.

Content includes all concepts and ideas whether spoken or implied; sought or reported; feedforward or feedback. Always seek and express meanings: facts cannot be acted upon until they have been interpreted. Visuals must illustrate meanings.

Format includes just about everything else, from the type of visuals and tools and take-home materials to the "psychological surroundings."

Atmosphere or ambience is what is commonly called surround by meeting experts. It includes everything in and around the participant except the people. Influenced by the surround, each participant receives a subtle message from management. How should the man feel about the company, his job, and himself when the event is over? That determines the kind of site you select.

Exercise your judgment. While it is true that people are motivated by recognition of their worth, it is also true that a flagrant waste of money can have a negative effect on the attendees.

Because objectives differ with every company and every new problem, no master meeting plan can exist.

Here are eleven essentials for a complete meeting plan. Ideally, decisions will be relatively firm before sites and facilities are contracted, since both must serve your stated objectives.

1) State purpose as an objective with qualitative/quantitative measures.

2) Prepare a concise message pinpointed to its audience. Make a specific continuing assignment—and make it stick.

3) Define the human relations goals. Is this a nose-to-the-grindstone sweatshop or an incentive-oriented event? Be sure all details and choices serve that decision.

4) Prepare a suitable agenda. For the conference, a problem-identifying and problem-solving session take slightly different approaches. Be explicit with solution-delivering meetings for large groups.

5) Structure workshops, discussion breakouts, training segments, etc. Think people. Without interaction and practice, the face-to-face advantage of the meeting is wasted.

6) Justify projected costs and establish firm working budgets.

7) Produce necessary workshop and sales tools, and speaker-support materials (product, charts, slides, etc.). And never entrust the main message entirely to film or machines without fail-safe backup on hand.

8) Establish control mechanisms for time, quality, and costs. Success is not accidental.

9) Contract for previously-inspected sites and facilities.

10) Execute the event.

11) Measure immediate, short-term, and long-term results against criteria established in Point #1.

Facility Evaluation

No evaluation system guarantees ultimate satisfaction, but these techniques will appreciably enhance your chances of success:

1) Check into likely hotels with your meeting manager without advance notice during evening rush hours. Sample the reception staff's competence and view a standard room. What you see is what your group will get.

2) Test service. How fast and accurate is night room service? How swift and hot is a restaurant breakfast? How late is the coffee shop open? Is service offered with an air of welcome or of "We're doing you a favor"? If satisfied by mid-morning, arrange an inspection tour. Once the hotel sales manager understands that your meeting manager speaks for top management, you can leave, if you choose. Your meeting manager takes over.

3) Analyze general quality. Is the atmosphere equal to the standards your people set at home? Trading down can cause resentment and sullen participants; too much extravagance can irritate and cause resentment.

4) Analyze technical capabilities. Mix of auditorium and workshop space required by meeting-plan adequate? All needed technical equipment furnished? If not, where to order? Test all electrical circuits and equipment. Maximum current available? AC or DC?

5) Verify critical dimensions and limitations. Printed diagrams should be checked. Maximum dimensions of load-

ing dock, elevators, doors for products and displays? Floor load? Height of chandelier? Take nothing for granted.

6) Analyze location. In town, will location encourage or discourage downtown activities? At resort, sufficient and various sports and activities to prevent boredom? How to get there?

7) Analyze promotability. Is the resort well known, and is it a psychological plus to attend because of its location? Attendance by spouses should be determined by the objective set for the meeting. Yes, if it's an incentive or reward meeting.

8) Gauge concern. Does hotel sales manager interrupt another group to show you the room? If so, beware. If he refuses, stick by: he cares. That group will break for lunch or coffee soon. Will hotel assign a service rep for permanent assistance? No hotel sales manager can sell and supervise meeting service simultaneously.

9) Calculate your weight. Favor smaller facilities to become the dominant party.

10) Compare. Evaluate other facilities. When trading off against needs-and-preferences list, favor service over fancy ballroom, food quality over decor, silence over nightlife. Then buy whichever facility serves your meeting objectives best.

11) Get written guarantee of public rooms by name and time, sleeping rooms by count and time. Get all service agreements in writing. How long is quotation valid? Inflation?

Tax Reform Act

Stringent limits on the tax deductibility of expenses incurred by voluntary participation in foreign conventions, seminars, conferences, etc., have been set by the omnibus Tax Reform Act of 1976 (H.R. 10612, Section 602). All corporate and private taxpayers are covered as of January 1, 1977, regardless of when the commitment was made.

Although official IRS guidelines have not yet been issued, it is possible that the **voluntary** concept will be extended to "junket" type trips, such as board meetings, largely within the executive's own control. Otherwise normal company business trips, including trade shows and incentive trips, are not limited by the reform law. (Incentive portions remain income and are reportable.)

Here's a capsule summary of key provisions:

- Only two deductible meetings yearly.
- Per diem subsistence (all inclusive) cannot exceed the State Department's allowance for U.S. staff in the same area. To verify, contact Director, Allowances Staff, Department of State, Room 501, State Annex No. 6, Washington, D.C. 20520. Phone (202) 235-9466.

From text of Section 602: Subsistence Expenses Defined—The term "subsistence expenses" means lodging, meals, and other necessary expenses for the personal sustenance and com-

fort of the traveler. Such term includes tips and taxi and other local transportation expenses.

- U.S. possessions and trust territories such as U.S. Virgin Islands, Puerto Rico and Guam are considered domestic.

- Transportation expense cannot exceed airline coach or economy rates, when these exist, or other lowest rate.

- Programming must total at least six business hours daily for full days claimed, and three hours daily for half days, both exclusive of travel days.

- Participants must attend at least two-thirds of all scheduled programming, averaged.

- Program days must constitute at least half of days spent abroad or entire trip could be disallowed; vacation days are permitted if all costs, including transport, are accurately prorated between business and pleasure time.

- Participant must attach a statement signed by an appropriate officer of the sponsoring organization. It details total number of convention days, business hours; certifies taxpayer's personal attendance. Falsely-sworn affidavits constitute tax fraud for both parties.

- Spouses' situation unchanged; not deductible except for proof of participation in legitimate business sessions.

When in doubt, ask the local IRS office for a written opinion of deductibility. Not a guarantee if audited, the opinion weights the hearing in your favor, eliminates fraud charges.

Some Per Diem Rate Allowances:

Maximum per diem rates allowed for tax deduction purposes on foreign convention trips vary with each country, and often, within the cities. In Germany, it's \$52 per day in Berlin; \$58 in Cologne. The Netherlands, however, has one figure of \$52 listed for Amsterdam, Rotterdam, and The Hague.

Consider also seasonal rate adjustments for resort areas, and slight changes of dates. Here's a sampling of the Caribbean Islands: Barbados, \$46 from Apr. 16-Dec. 14, \$70 from Dec. 15-Apr. 15; Antigua, \$46 from May 1-Nov. 30, \$64 from Dec. 1-Apr. 30; St. Lucia, \$25 from May 1-Nov. 30, \$47 from Dec. 1-Apr. 30.

While Jamaica has a single rate of \$50, the Bahamas has three per diem rates for three areas, Andros Island, Nassau, and Other (areas), and differences in seasonal rates. Nassau's rate of \$53 from May 1-Dec. 14, \$61 from Dec. 15-Apr. 30, will differ, albeit slightly, from other sites in the Bahamas. Bermuda's rates are simpler, \$49 from Dec. 1-Mar. 15; \$62 from Mar. 16-Nov. 30.

Note that the above per diem rates are now in effect but are subject to changes issued by the Allowances Staff, Department of State.

A booklet, Guidelines for Foreign Convention Tax Deductions, has been issued by the American Society of Association Executives, 1101 16th St., N.W., Washington, D.C. Price is \$1.00.

Transportation

Most group charters are not applicable to meetings, since most meetings last for only 3 to 5 days. Two that may work for meetings of a week's length are One-Stop Charters (OTCs), and Advanced Booking Charters (ABCs). If the meeting group qualifies, substantial savings may result.

Charters, of course, are not useful to organizations that restrict the number of their executives on any one flight. In addition, executives who have been tying in pre- or post-vacation trips, with spouses, will be unable to do so. Group charters have restrictive rules.

OTCs call for bookings at least 30 days in advance of departure; a minimum stay of seven days; a minimum group size of 40; and must include ground arrangements. ABC charters have similar rules with the exception that ground arrangements are not required.

Consult the airlines, convention bureaus and tourist offices, as well as group travel suppliers, to work out a travel package tailored to meet the group's specific needs.

Travel suppliers, carriers and other service-oriented firms often have convention staffs on hand to handle all or various stages of planning. Of course, the more sophisticated convention bureaus and tourist offices can help in the arrangements. Here's a brief list of organizations and addresses, from all segments of the travel industry, who do an outstanding job:

Airlines

American Airlines
633 Third Avenue
New York, N.Y. 10017
(212) 557-4818
Contact: Frank Svoboda,
Director of Convention Sales

Eastern Air Lines
Miami Intl. Airport
Miami, Fla. 33148
(305) 873-2751
Contact: C. P. Small

Lufthansa German Airlines
1640 Hempstead Tpk.
East Meadow, N.Y. 11554
(516) 794-2020
Contact: Wolfgang "Gus" Oergek,
Sales Manager

Northwest Orient Airlines
Minneapolis/St. Paul Int'l. Airport
St. Paul, Minnesota 55111
Toll Free: (800) 328-7747

TWA
605 Third Avenue
New York, N.Y. 10016
(212) 557-7690
Contact: Brian McGirl,
Mgr. Tour./Marketing

Tourist Boards

Bahamas Tourist Office
30 Rockefeller Plaza
New York, N.Y. 10020
(212) 757-1611
Contact: June Robinson

Bermuda Dept. of Tourism
630 Fifth Ave.
New York, N.Y. 10020
Contact: Thomas R. Nikels, Mgr.

British Tourist Authority
680 Fifth Ave.
New York, N.Y. 10019
(212) 581-4700
Contact: David Fahie, Mgr.
Conventions/Incentive Travel
Commonwealth of Puerto Rico
Tourism Development
1625 Massachusetts Ave., N.W.
Washington, D.C. 20036
(202) 387-1837
Contact: Jose M. Vazquez, Director
Netherlands Tourist Office
576 Fifth Ave.
New York, N.Y. 10036
(212) 245-5320
Contact: John Bertram

Miscellaneous

American Express, Business Meetings
& Conventions Division
375 Park Ave., New York, N.Y. 10022
(212) 751-9333
Contact: Sumner Baye, Vice President
E. F. MacDonald Travel Co.
113 S. Ludlow St.
Dayton, Ohio 45402
Contact: Harry Redman

More on Meetings and Conferences

Achieving Objectives in Meetings, by Richard Cavalier, Corporate Movement, Inc., 360 Lexington Avenue, New York, N.Y. 10017

How to Run Better Meetings, by B. Auger, 3M Co., Visual Products Division, 3M Center, St. Paul, Minnesota 55133

Library of Sales Conference Ideas, 1976, Sales Communications, Dept. P113, 1048 Ridgecrest St., Monterey Park, Cal.

Sight 'n Sound Techniques for Sales Meetings and Sales Presentations—A Dartnell Management Guide, by Robert B. Konikow, Dartnell Corp., 4660 Ravenswood Ave., Chicago, Ill. 60640

Making Your Convention More Effective, American Society of Association Executives, 1101 16th St., N.W., Washington, D.C. 20036

Meeting Planners Guide (specify area) Holiday Inns, Inc., 3796 Lamar Ave., Memphis, Tenn. 38118

Dollar Tips

To get the most from every dollar spent on services and materials, be sure your staff explores alternatives. That means rigid bid specifications for each critical need to perhaps three competitive suppliers. Weigh the experience, reputation, and understanding of each bidder along with his quotation.

For gauging facilities, create a needs-and-preferences list to aid staff. No facility will be absolutely perfect, and trade-offs will be made according to value judgments.

Here are specific pointers which will maximize your budget. Route this material to your meeting manager:

Sites: For domestic meetings, choose a location central to the greatest number of travelers; think rates, not geography. For incentive tour/meetings, check off-season rates. For foreign trips, check special package plans.

Transportation: Although airline rates are set by the Civil Aeronautics Board at home and the International Air Transport Association abroad, special fares and "packages" with hotels offer hidden subsidies. When moving 120 or more persons between two points, consider chartered aircraft. For smaller groups, consider advance booking plans and incentive (8 day) rates. Occasionally you can save substantially by going farther or staying longer. Charter or supplemental airlines to consider are Trans International Airlines, World Airways and Overseas National Airways. Charter flights can also be arranged through such scheduled carriers as Lufthansa and Pan Am.

Facilities: Splitting your meeting room and sleeping requirements can increase your options by combining several facilities for superior results. Each of the following has special features and advantages:

Airports: Some airlines offer small conference rooms in the terminal with ad-

vance reservation. Nearby hotels and motels are ideal for frequent travelers; late evening arrival followed by breakfast meetings and quick getaways. An example is the Hyatt at O'Hare.

Conference centers: Innkeeping functions (bed and meals) are subordinated to the meeting room complex. Silence, comfort, equipment for small and medium-sized groups.

Downtown hotels/motels: Often best mix of large assembly areas plus smaller conference rooms.

Resorts: Special places for special occasions in season. Off season, often a bargain. All-inclusive prices help protect the budget.

Convention halls: Space? Adjacent auditorium and meeting rooms often available on premises; hotels nearby. Educate salesmen at an industry trade show.

Public auditoriums: Ready-made communication centers; rental is usually cheaper than converting a hotel ballroom. Makes hotel choice more flexible, too.

Movie theatres and show-lounges: Smaller, often less expensive, and more abundant than public auditoriums. Most are available full mornings, some afternoons, and lend themselves to superb audio/visual presentations.

Recreation and sports: A luxury for two-day meetings; maybe not worth a 50% higher rate. By the third day, they're useful; absolute essentials for 4 days or longer. Six hours' work is the IRS full-day standard for voluntary foreign convention attendance; could become the norm for corporate business meetings too. Schedules can be adjusted to allow free hours in mid-day . . . without sacrificing working hours.

Entertainment: Included at resorts. Scheduled parties or outings strengthen inter-personal ties. Relatively inexpensive if tied to evening meal which company is already paying for.

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Richard Cavalier

Something good is happening at Rapid-American

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ALUMAX Turning aluminum capacity upside down

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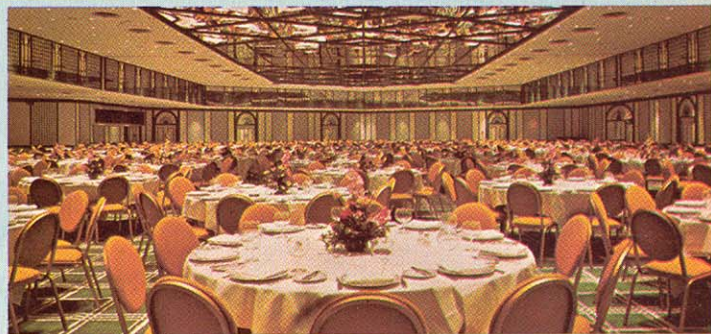
Supplement: Coping with teenage drinking

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Getting Braniff's great pumpkin to London — fast

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Meetings & Conferences

Motivating via Meetings & Conferences

Whether a formal round table executive session, a small personalized workshop, or an elaborate convention, one of the most effective ways management has of communicating with employees is via meetings and conferences.

Though the immediate purpose of a meeting may range from stimulating sales to correcting an internal company problem, one of the primary goals and end results of a well-planned meeting is employee motivation.

Therefore, when planning your next meeting or conference, consider the motivational possibilities. If you must travel, why not choose a desirable destination. If you choose a facility with recreational facilities, be sure to allow adequate time for all to enjoy them. What can you do for the families. At company expense? If spouses pay their way?

When planning, answer the employee's unstated question, "What's in it for me?" and you will present a program which will deserve attention and earn respect.

In the rush to offer material gifts, the major motivating power of the meeting or conference is often overlooked. For years, the annual meeting was treated as a necessary but uninteresting routine; in the age of Marshall McLuhan, it became an entertainment festival, avidly seeking applause.

Training and entertainment are virtually

incompatible within any single program unit, which is why so many expensive and fun program sequences fail to produce desired results. Rather than reach for entertainment, it is best to strive for interest. If a meeting comes to terms with employee interests and needs, it is bound to be challenging, engrossing, and more worthwhile.

Communicating with the employee about his human needs and then helping to fulfill those needs can build a lasting bond. One of the best places to conduct this dialog is in the meeting room, where both sides can speak and listen.

Because travel appeals to fundamental drives such as self-improvement, self-esteem, and education, meetings combined with travel succeed both as motivator and incentive.

In addition, a properly constructed motivational program usually pays for itself in savings or increased profits for the company because the incentives are geared to the anticipated returns.

Structuring Meaningful Meetings

Meaningful meetings don't just happen. They must be painstakingly constructed by an authority on the problem working closely with a group communications or training expert. Together the pair:

- Isolate one prime message or problem; consign secondary topics to another day.
- Establish quantified objectives. Hazy,

subjective goals (increase sales or build goodwill) are a cop-out and deprive a company of the real benefits from the meeting.

- Establish immediate, near-term and long-term measures for planned objectives. Use feedback during the meeting and adjust your program to achieve stated objectives.

- Try to foresee all possible interpretations of the message to avoid ambiguities or misunderstandings.

- Consider the levels and interests of persons attending. Line workers think differently from salesmen or in-house staff, and must be approached accordingly.

- Provide for psychological relief and recreation. Vary topics and schedules. Plan or recommend evening activities. Entertainment belongs in the overall plan, though not in the meeting room. Arrange for sports and physical activity if meeting runs longer than two days.

- Deliver explicit information and assignments. Use plain language, simplified instructions, and least-complicated media.

- Write an agenda that meets the objectives set and execute the meeting according to the agenda.

Tax Reform Revisited

Since the Tax Reform Act of 1976 (H.R. 10612; Section 602) took effect on January 1, 1977, the lack of written IRS guidelines for foreign travel has aroused much needless concern among businessmen.

By recognizing that it is the intent of Congress to curb abuse rather than to kill

international meetings, one can plan confidently for future travel.

Thus, for the legitimate businessman planning a legitimate meeting, very little has changed. Incentive travel is recognized as a powerful motivational tool, and the Reform Act does not affect that category. Rather, it is intended to eliminate fraud on the part of those individuals and organizations who used the pretense of business to enjoy tax-deductible vacations abroad.

Incentive travel has always been treated as income to the recipient, who is required to pay tax on the non-business portion of his stay. If business is conducted as the prime purpose of the trip—as with meetings and training programs—and if the program fulfills stipulations of Section 602, the entire trip is deductible.

The only exception is the top executive who is able to stipulate exotic locales for conferences which could be held as well in his board room. The *voluntary* nature of participation seems to be the crucial factor.

As the continuing furor over the deductibility of the business lunch indicates, the IRS is battling *perks*, which provide disguised income.

So the IRS reading of Section 602 is probably: *Be prepared to defend the legitimacy of that program and your participation in it.* That is neither unreasonable nor restrictive of normal business meeting practice.

By concentrating on what is allowed, most companies can substantially expand their incentive travel programs.

Here is what is permitted, given fair interpretation of Section 602:

Two allowable foreign meetings per man per year if:

a) business programming totals at least six hours daily for all full days claimed; or three hours daily for half days claimed; exclusive of travel days.

b) participants attend at least two-thirds of all scheduled business programming, hours averaged.

c) business program days constitute at least half of all days spent abroad.

d) combined vacations (less than 50% of time away) are accurately apportioned by time allotted and/or direct expense incurred.

e) transportation expense claimed does not exceed airline coach or economy rates, if available, or other lowest rate.

f) daily subsistence expense claimed does not exceed the allowance the State Department sets for its own personnel for the same city or region.

—Spouses can attend, but their expenses are not deductible except upon proof of participation in legitimate business sessions.

NOTE: U.S. possessions and trust territories are considered domestic.

While the weight of proof always falls on the taxpayer, the matter of proof of legitimacy under Section 602 is not particularly difficult: simply tape record all proceedings.

If you feel your planned program is borderline, ask in advance for a written opinion of deductibility from your local IRS office. While the written opinion is not a guarantee of acceptability if audited, it does eliminate the possibility of fraud charges.

If you conduct a legitimate business meeting and are challenged, fight. In the long run, that's the most positive thing you can do to help yourself and other businessmen.

To verify the per diem subsistence allowance for your destination city, contact the Director, Allowances Staff, Department of State, Room 501, State Annex No. 6, Washington, D.C. 20520. Phone: (202) 235-9466. Be sure to get the booklet, "Guidelines for Foreign Convention Tax Deductions," issued by the American Society of Association Executives, 1101 16th St. N.W., Washington, D.C. Price is \$1.00.

How to Buy Right in a Seller's Market

Getting value for your dollar is probably more uncertain in the convention industry



than in any other. There are few direct comparisons and nearly every significant program involves both outside services and subjective judgment.

Because the industry is devoid of written performance standards, professionalism is difficult to identify. Buyers learn by trial-and-error. Quality is spotty, and promises command a premium. Marginal and failed programs are costly in terms of both wasted dollars and lost opportunity.

Your company's best purchasing strategy is to apply two proven management techniques.

• FIRST, make the training or meeting manager's position persuasive, with authority to make all decisions once the objectives and budgets have been set by top management. If your company is small or

if your meetings are small and infrequent, appoint a capable person to a permanent responsibility, even if on a part-time basis. Experience matters.

• SECOND, apply rigid cost-effective criteria to all purchases. Be sure to: —Take competitive quotes on precise specifications. Include quality as well as quantity measures. Be alert to count, delivery dates, cost overruns. Request tangible-unit bids when buying writing, stagecraft, entertainment and other nebulous services.

—Make program objectives an integral part of the quote when dealing with first-time suppliers.

—Investigate supplier references. Many have worked for a glittering array of major name firms—once!

SPECIAL ADVERTISING SECTION

—Refuse a program structure in which your main message is consigned to machines or actors. Demand fail-safe backup.

—Get everything in writing from every supplier.

—Enforce all contract provisions. Refuse to accept inadequate work at full contract price; refuse inferior work; let the defaulting supplier bring suit if he can stand the publicity.

—Favor superior suppliers with repeat business.

—Recommend superior suppliers to other departments, divisions and colleagues in other companies.

Tips on Reflating Your Dollars

Although inflation is pushing program component costs higher every time around, here are ways to make your budget buy more, whatever its size.

When choosing meeting and conference sites:

• Be especially alert to the appreciable difference between high and off-season rates for identical rooms.

• Ask about the possibility of lower rates at the same facility if dates are slightly adjusted. The facility might want to fill a gap in its schedule.

• Consider ships as floating resorts. Nearly all cruise ship lines welcome corporate groups up to several hundred.

• Investigate tie-ins and special "packages" developed jointly by some airlines and hotels. Great savings.

• Check family rates. An incentive program including families might be arranged at a low additional cost.

When buying meeting support materials



and services:

• Take three competitive bids against detailed specifications if you don't already have a dependable supplier.

• Get firm cost quotes for units delivered. Stipulate all conditions, quality, unit rates, dates, etc., in writing. Establish conditions and rates for overruns.

• Avoid overtime by scheduling self and staff and then by honoring all deadlines.

• Avoid wasting supplier effort and money by unnecessary changes in non-critical areas once approved for production.

• Favor slide presentations when last-

minute information must be dropped into an otherwise complete presentation.

• Distrust unreasonably low cost quotes unless a new method accounts for the difference between this and other bids. Low bids followed by rampant overruns plague the convention industry.

• Distrust uncommonly high bids unless the price is justified by superior personnel, talent, or materials.

• Apply cost-effective criteria to all components. Favor quality and reputation over minor dollar differences. If a program fails, it's little consolation that you saved six percent somewhere.

meeting leader's guide

NOTE: Eden Ryl's motivational film *You Pack Your Own Chute* became the motivational film industry's all-time, best-selling film.

"Chute" deals with personal responsibility, not "rah-rah team"

As a consequence, the meetings industry is forgetting it. Criticism: clothes and hair styles are old.

Is "responsibility" old? Charlie Chaplin's clothes are old, too; but we gladly watch! Caveat emptor.

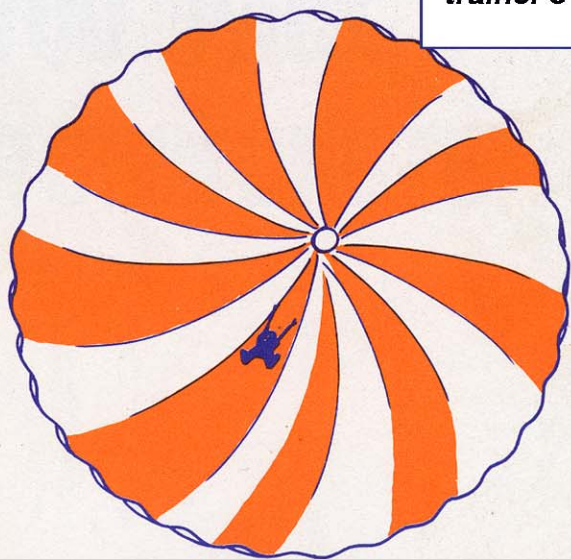
*Cavalier wrote this
trainer's guide*

for Eden Ryl's
great new
motivational film

YOU PACK YOUR OWN CHUTE

Detailed outlines and suggestions to insure stimulating
productive meetings based on this unusual film

RAMIC PRODUCTIONS, 60 W. 57th St., New York, N.Y. 10019 212-586-7730



meeting leader's guide

for

"YOU PACK YOUR OWN CHUTE"

*Thanks for
your help, Dick
Eden*

Ramic Productions

60 W. 57th St., New York, N.Y.

CERTIFIED INSTRUCTOR

RICHARD CAVALIER

FOR SUCCESSFUL COMPLETION OF

THE INSTRUCTORS' PROGRAM

"SELLING IN DEPTH"

FROM THE

CONTINUING TRAINING & DEVELOPMENT SERIES

FEBRUARY 1, 1968



MOTOROLA COMMUNICATIONS & ELECTRONICS, INC.

EASTERN

MIDWEST

CONCORD HOTEL, KIAMESHA LAKE, N. Y.
V ENGLAND, PHILADELPHIA, ALBANY
NEW YORK CITY/SEPTEMBER 28, 29, 30



FRENCH-LICK SHERATON,
FRENCH-LICK, INDIANA
DETROIT, CHICAGO/OCTOBER 5, 6, 7

CONVENTION
HEADQUARTERS
150 East 42nd Street
New York 17, N. Y.

June 10, 1964

Mr. Richard Cavalier
United Attractions, Inc.
22 East Huron Street
Chicago 11, Illinois

Dear Dick:

I am most anxious to receive your detailed recommendations regarding the social activities at our two Conventions. After I have had an opportunity to digest your suggestions, I would like to go out to the French Lick Hotel to discuss such details as the Luau, the Fashion Show, which the hotel says they can put on, and special wives activities for which you are not responsible.

Would you be interested in meeting me out there some time during the week of June 22 or early in the week of June 29?

We would like to publish details of entertainment at both Conventions in the August issue of our Dealer News, and consequently, many decisions need to be made.

As far as the Fashion Show at the Concord is concerned, I have not had much luck in persuading a New York department store to send a Fashion Show 100 miles from New York. However, before we go back to the same group which we have used for three straight years, I propose to make a final try. I will send letters today to Lord & Taylor, Bergdorf Goodman, and Bloomingdale's, hoping that they might find it possible to participate. Our requirement is much simpler this year, having one Convention and one big Wives Luncheon.

I am looking forward to receiving the final details on our various events.

Cordially

A handwritten signature in dark ink, appearing to read "E. N. Gravlin".

ENG:mi

cc: Rich Pugh

E. N. Gravlin
Merchandising Department

Dealer Advisory Committee

NEW YORK CITY
NATHAN ZISBLATT
1735 East 13th Street,
Brooklyn 23, N. Y.

HERMAN TICKTIN
30 Fleetwood Avenue,
Mount Vernon, N. Y.

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95 Sawka Drive,
East Hartford, Conn.

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PHILADELPHIA
HARRY DEITSCH
120 Bliss Lane,
Glen Burnie, Md.

ELMER STUCKERT
1416 Justine Avenue,
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ALBANY
JOSEPH HOBSON
25 Brentwood Drive,
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WILLIAM A. SIMPSON
62 McNutt Avenue,
Albany 5, N. Y.

DETROIT
EDWARD LONG
5172 Leavitt Road,
Lorain, Ohio
CHICAGO
ALVA HIPSHER
2249 North Church St.,
Decatur, Illinois



CERTIFICATE OF ACHIEVEMENT

BE IT KNOWN BY THESE PRESENTS THAT

R. CAVALIER

THE JOHN J. KIELTY COMPANY, CHICAGO, ILLINOIS

HAS COMPLETED THE KAISER ALUMINUM TRAINING COURSE
IN BASIC ALUMINUM PRODUCT KNOWLEDGE.

A circular seal with a decorative, sunburst-like border. The year "1966" is printed in the center, flanked by two horizontal lines.

1966

DATE

7-22-66

BY

A handwritten signature in dark ink, appearing to read "J.R. Heeman".

REGIONAL DISTRIBUTOR MANAGER
KAISER ALUMINUM & CHEMICAL SALES, INC.

KAISER
ALUMINUM

KAISER ALUMINUM & CHEMICAL SALES, INC.

July 1, 1966

Mr. Richard Cavalier
The John J. Kielty Company
36 South Wabash Avenue
Chicago, Illinois 60603

Dear Dick:

Thanks for your letter of June 14. I have been getting nothing but rave notices from all of the Distributors, and it now appears that the program is far more successful than we had hoped it would be. You have certainly done a great job for us and we appreciate it.

Best regards.



J. P. Dunston
Manager, Distributor Sales

JPD/A

cc: P. L. Small, Oakland.

Varian / 611 Hansen Way / P.O. Box 10800 / Palo Alto / California 94303 / U.S.A.
Tel. (415) 493-4000
Telex 348476



May 7, 1985

To Whom It May Concern:

RE: Human Resources Consultants Association

R. Cavalier has completed several highly successful consulting projects in training for various divisions of this corporation. I believe the repeat assignments to be the best possible commentary on the quality of his work.



A.D. Wilunowski
Assistant Group President

ADW:dmf

Norwegian America Line

(Den norske Amerikalinje a/s)

CRUISE DIVISION

July 20, 1977

Mr. Richard Cavalier
216 Broadway
Wilmette, Illinois 60091

Dear Richard:

Many thanks for your letter dated July 16, 1977. Your letter was very detailed and although it makes a lot of sense, I can only say that as far as NAL is concerned I would rather see us crawl first before we walk.

Just to make sure that we understand each other, I would like to outline the problems which we currently have with regard to the meetings and conventions market:

1. Our cruise schedule has been established until April of 1979 and the type of program that we currently have will not make it possible for us to tap the meeting and convention market in the fashion that you have suggested. Currently the only program which can be sold to incentive groups and meeting and convention groups is the Barbados Connection program offering us a total capacity of less than 3,000 passengers from November 1977 through May 1978.
2. In order for us to properly service this market segment, we will have to make substantial alterations to our current on board activities and entertainment and I am afraid this will be an evolutionary process which may take between a year to a year and a half. You have to remember that first I have to sell Oslo on the value of this market to us. In that respect, you have to remember that again the question here is: are there any other sources of business which can help us achieve a 100% load factor on our present cruises, which can bear a high per diem rate and that is cheaper to tap than the meeting and convention market? These are all questions which I will have to discuss with Oslo.

I do not mean to sound too negative, however, I think that we need to be very realistic if we want to develop some sort of long lasting relationship. With regards to the August 2 ship evaluation, the maximum fee I would be able to pay you from existing budgets would be \$500. I do not think it would require more than one day to look over the ship and one day to write the report, making it a total of two days.

Once we have completed this and we start showing some results as far as the incentive travel market is concerned, then I think that Oslo will be much more willing to listen to anything I have to say about the meetings and convention market.

Please call me or Barbara Morgan to let us know if you will be on board the ship August 2 for the evaluation.

With kind regards,



Alain de la Motte
Director of Sales and Marketing
North America



AMERICAN MEAT INSTITUTE

59 EAST VAN BUREN STREET • CHICAGO 5, ILLINOIS • WAbash 2-4686

September 27, 1961

Mr. Phil Consolo
United Attractions, Inc.
22 East Huron Street
Chicago, Illinois

Dear Mr. Consolo:

Before closing the books on the 1961 Annual Meeting of the American Meat Institute, I must let you know of our satisfaction with the services you performed to help make the convention a success.

The help your company gave in staging the science session on September 15, the panel program and the show you provided on September 18, were of high caliber. I heard many compliments for the staging of both these sessions.

It was a pleasure for our staff to work with yours, and I hope there will be other occasions in the future when we will be able to cooperate to our mutual advantage.

Our best wishes for your continuing success.

Sincerely yours,

AMERICAN MEAT INSTITUTE



Homer R. Davison
President

HRD:las



IBERIA
AIR LINES OF SPAIN

Where only the plane gets more attention than you!

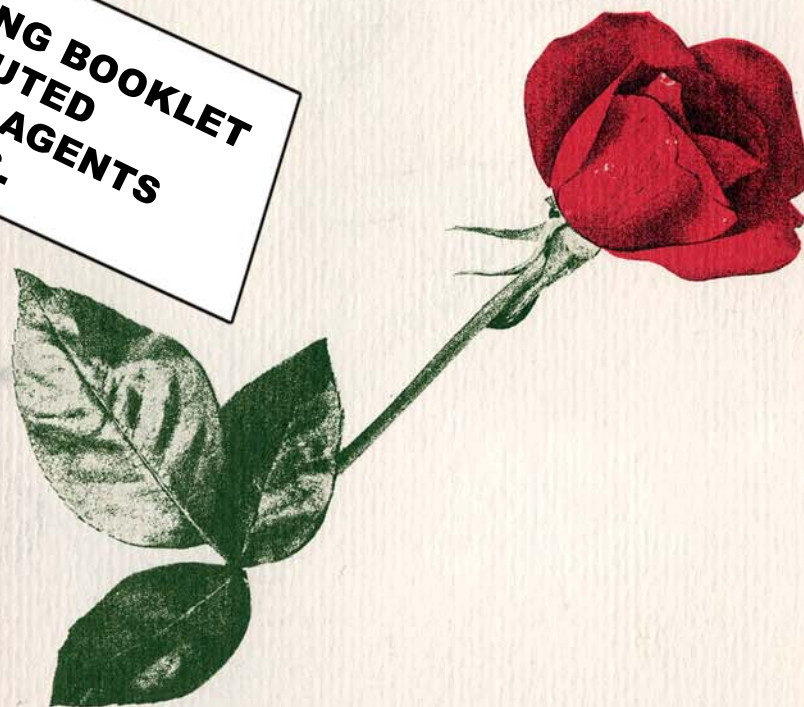
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Cleveland	(216) 696-8444
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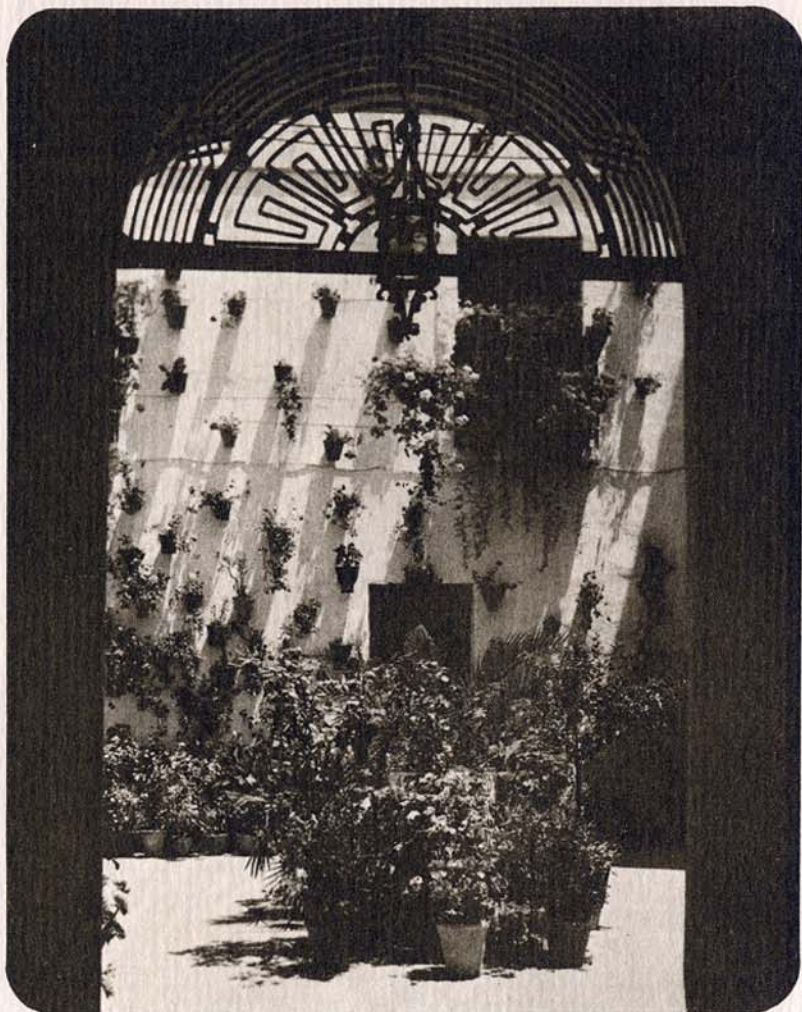
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The countryside of Spain & Portugal
our Royal Rose Service
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"To Iberia!" is an expression of our interest in every aspect of your trip abroad. . . more of the famed IBERIA attention. . . assuring you a realization of everything hoped for in your travels. . . every event of the way!

This booklet combines the practical knowledge and extensive experience of your IBERIA representative with the buoyant commentary of a globe-hopping Midwesterner whose travel articles appear in major metropolitan publications. "To Iberia!" marks a distinctive new dimension in vacation-planning assistance.

Welcome aboard our Douglas DC-8 Super Fan Jet to the land of flamenco and fado. . . castles and castenets.

We of IBERIA wish you remarkable memories, too!

Reminiscences of Iberia. . .

Why Iberia? Because the stone-spined and sunsational peninsula preserves everything admirable from yesterday. . . tosses that with the newest plans for tomorrow. . . and lives the incongruous combination with zest today!

Portugal and Spain are cousins who have agreed to be different from each other and different together from everyone else.

That's the fascination of Iberia. More varied than any other geographic entity in Europe, the peninsula is a capsule world: mountains, deserts, foggy coasts, wind-raked plateaus, green plains and orchards, sea and sun-spangled beaches.

Iberia blends majesty with humor, pageantry with honor, spectacle with abandon, extravagance with dignity, and hospitality with heart. Life is lived here. Iberia touches any traveler and heightens his awareness of the richness and whimsicality of the human experience.

For one who is just beginning to see the world, Iberia is a preamble: landmark to the Phoenicians, corridor to Hannibal, handmaiden to the Caesars, mistress to the Moors, home port to Christopher Columbus and the first round-the-world voyagers, caretaker of a fabled age for a new world traveler.

For one who has seen the monuments of Thebes, the Acropolis of Athens, the marbles of Rome, the Renaissance trappings of Florence, and the exquisite natural setting of the Orient, Iberia is a summary statement: antiquities and art, incredible landscapes, haunting music, and vital people.

This is the Iberia I found. Share a quick look at just a handful of the great cities, the talked-about resorts, and the idyllic townlets. And then go and find an Iberia of your own. Be jealous of your view. . . It'll be like no other. . . spirited and gently stirring for all your days. Just a flight away.

Here's "To Iberia!". . . with warmth and admiration.

— RAC

Costa del Sol

If the rain in Spain falls mainly on the plain, it's no wonder the magnificent Costa del Sol—the Sun Coast—is the fairest lady among seaside playgrounds.

In the days when "Mediterranean" still meant "middle of the earth," the Phoenicians and Greeks and Romans used to camp out at a sunspot called Malaga. And the town still gets more than its share of sophisticates who arrive by boat and plane to absorb the mystique of the ages along with the sun in all the townlets nearby.

As the belle of the Costa del Sol, Malaga swings along with just about everyone who takes time to tell her how great she looks.

And she does. From the yacht harbor and the flower-strewn park to the castle on the cliff, everything fits like the latest of fashions. Villas, clubs, horse-drawn carriages to examine the tree-lined byways. Orange groves on a hill. A gloriously ornamented cathedral. And grand hotels left from an age which worshipped leisure. Good food, fishing, bullfights. And sun.

But Malaga isn't the whole show. All the way from Almeria to the straits of Gibraltar are the sunniest, showiest, laziest, livingest towns and resorts on the whole European shore.

Sure you've heard of Algeciras, Marbella, and Torremolinos. But you probably haven't heard of a score of other settlements along the sun-soaked coast—and you can take a hotel or villa or pension anywhere you please and still be in the thick of things.

Mobility is the watch-word of the sun-lotion set. And wherever the action goes, they go after it. Some by private car and some by shuttle train and some by public bus, which will take you as far as care to ride in one day for less than one dollar.

Costa del Sol:



Marbella? Why not? This fishing village which went worldly is the Costa del Sol's big rage. Society and nobility and just ordinary money mix it up or separately but always with the same spirit of don't-put-pl... tomorrow which haunts the puritan. But somehow the... There's razzle and dazzle and not very much... which is started takes off. After all, why... money?

Costa del Sol, Sun Coast of Spain

If the rain in Spain falls mainly on the plain, it's no wonder the magnificent Costa del Sol—the Sun Coast—is the fairest lady among seaside playgrounds. In the days when "Mediterranean" still meant "middle of the earth," the Phoenicians and Greeks and Romans used to camp out at a sunspot called Malaga. And the town still gets more than its share of sophisticates who arrive by boat and plane to absorb the mystique of the ages along with the sun in all the townlets nearby. As the belle of the Costa del Sol, Malaga swings along with just about everyone who takes time to tell her how great she looks. And she does. From the yacht harbor and the flower-strewn park to the castle on the cliff, everything fits like the latest of fashions. Villas, clubs, horse-drawn carriages to examine the tree-lined byways. Orange groves on a hill. A gloriously ornamented cathedral. And grand hotels left from an age which worshipped leisure. Good food, fishing, bullfights. And sun. But Malaga isn't the whole show. All the way from Almeria to the straits of Gibraltar are the sunniest, showiest, laziest, livingest towns and resorts on the whole European shore. Sure you've heard of Algeciras, Marbella, and Torremolinos. But you probably haven't heard of a score of other settlements along the sun-soaked coast—and you can take a hotel or villa or pension anywhere you please and still be in the thick of things. Mobility is the watch-word of the sun-lotion set. And wherever the action goes, they go after it. Some by private car and some by shuttle train and some by public bus, which will take you as far as care to ride in one day for less than one dollar.



LINEN SUPPLY ASSOCIATION OF AMERICA
22 WEST MONROE STREET • CHICAGO 3, ILLINOIS

COPY FOR Dick Cavalier

January 11, 1961

Mr. Robert Letwin, Editor
Sales Meetings
1212 Chestnut Street
Philadelphia 7, Pennsylvania

Dear Bob:

Enclosed is a copy of the article I promised you since October. I hope this is the type of thing you are looking for.

If you plan to use it, please let me know in what issue it will appear.

My photograph and biographical material is available if needed. Also, I have some photographs of the dramatic sketches presented at our Convention, if you want them.

Sincerely yours,

Joseph L. Koach
Administrative Assistant

JHK/Nellie Prentiss

Kicker: Creating pre-Meeting (Convention) interest:

Head: **THE SECOND TIME: AROUND OR AGROUND?**

By Joseph L. Koach, Administrative Assistant
Linen Supply Association of America

"I've seen everything twice," your member says.

How does a meeting manager interest that man in the next convention or business meeting?

We, at the Linen Supply Association of America, have discovered that we have no alternative but to give each member something he hasn't seen in the West End, the Follies Bergere, or the Uffizi Gallery: himself!

When a man is shown himself, he responds more genuinely to that presentation than to any other in the world.

That's why the programs of LSAA over the past several years have been deliberately slanted toward our industry and industry research—to give members an accurate appraisal of their industry's potential, of its probable direction, and of possible problems in the future. This information is available from no other source. What better function for an Association? What more meaningful "come-on" can it announce?

Correspondingly, we have used fewer of the "all-purpose" category of speaker—no bright-future-for-all charts and graphs. In our 1961 Convention everything is pitched directly to our members and to their specific problems. We'll be using only specialists in related fields and experienced linen suppliers.

Everyone won't agree with our choice, but we're dealing with successful business men—men who are aware—men who have access to general financial news through the Wall Street Journal, stock brokers, the Kiplinger Reports, Nation's Business, etc.

Knowing that we intend to put the Convention in their lap, members are exhibiting a heartening interest. Although it is no longer all-important to the success of our convention, we still send out promotional literature regarding the Convention.

Now that LSAA has discovered the one topic that interests every members, we're

Koach/ LSAA/ p2

concentrating on the elements indispensable to successful, productive meetings: time, technique, coordination.

Consider time. The demands on a business executive's time are phenomenal. His time is an investment. Communication—new ideas—must be brief, meaningful, forcefully presented. Another aspect: how can a man wholeheartedly support a convention or sales meeting if the meetings staff works so close to the deadline that members assume planning was hasty—so he stays away.

Then consider technique. Since the beginning of time, men have congregated for the express purpose of exchanging ideas. They talked. A while later, somebody invented the alphabet, and our predecessors in meeting management talked and recorded. After a few years, somebody else invented the opaque projector. Now our early

counterparts talked, visualized, and wrote about it. Modes of presentation were revolutionized by visual aids, and the job of attracting and maintaining attention grows more complex each year.

The Linen Supply Association of America departed radically from our early format (lectures, group discussions, etc.) when we decided to dramatize our business meetings—not just one segment of the total program (which method is not now)—but throughout the Convention, as an integral part of its structure.

With much effort we acquainted ourselves with various “entertainment consultants,” who operate primarily as talent booking agencies and some in-and-out with a show—probably creating additional problems in the process.

We also talked with several firms that write and produce I’ve programs. Most offer a basically identical service, which is acceptable for a one-time skit (even if repeated), but which is by no means a hype for the entire Convention.

A complete program service is what we decided we wanted. . . a counselor who could script and stage business meetings, of course, but additionally a counselor who had an organization that could enliven the whole Convention. He had to take an active part in making the thing go.

We found that counselor in the Chicago-based firm United Attractions. Working as a part of our staff—available from the first planning stages until hotel sign-out—United Attractions was there. They performed a complete program service.

Koach/LSAA/p3

Having selected our counselor, we went to work. After several intensive discussions about our organization’s background and purpose, we agreed upon a theme and manner of dramatizing the entire conclave.

During our first year with a fully-scripted Convention, we used a “staged” formal opening of the Convention; a 50-minute dramatization about public relations; banquet entertainment; and a totally new concept of brief, dramatized “re-caps” of the highlights of each day’s business. Members still recall many of the points made in this manner.

During our second year—to capitalize on the built-in enthusiasm—we did a partial repeat of the format. This time we dramatized our Research project; scheduled daily “re-caps”; member-participation banquet entertainment; and a formal opening for both the Convention and the Exhibits.

(Because we were meeting in Hollywood, we used several celebrities on various occasions to attract the members’ wives into the exhibit area. Where the women go, the men go along.)

This year—our third—we plan to change the program because even dramatics can become “routine.” Still using the services of United Attractions, we have scheduled a number of unusual services—almost gimmicks—to make the physical side of Conventions easier to endure.

We’ve planned a more effective reception, formal opening of Exhibits, message facilities, and faster registration. To perk up early morning meeting attendance and to enhance attendance at the Exhibits, we have added free continental breakfasts. Naturally, there will also be entertainment for the dinner sessions.

By this sharp change of program, we hope to get definite reactions and preferences from those members not

yet committed.

Briefly, we've considered time and technique in the Convention scheme; the last element we'll discuss here is coordination.

If coordination of the organization's activity is the hallmark of efficient business, coordination is also the basic ingredient of planning which will get your people to "buy" your meeting sight-unseen. Coordination gives the member confidence that his Convention or Sales Meeting week has been thoughtfully compounded, rather than frantically scrambled.

Coordination of countless details to the satisfaction of the meeting staff, the hotel, and
Koach/LSAA/p4
members themselves is a thankless task.

In our first year with United Attractions, we watched details closely. They proved themselves. In our second year's planning, problems such as hotel facilities and p.a. systems, stage construction, and a tangle of union regulations governing music, labor, and lighting were left more in the counselor's hands, with close supervision, of course.

Because of our counselor, our staff inherited countless hours of time, which was devoted to items on the agenda that only an association staff member can handle.

Naturally, such a complex program takes some "getting used to."

Daily dramatizations and other meeting embellishments require rehearsal space—space which everyone else could use to advantage—and wants. It is written that "out of chaos was created the earth." Managers should not be surprised when their shows originate in a similar fashion. It's theatre.

The whole alliance must be one of education and experimentation for both the meeting manager and his counselor. But with each successive year, planning and presentation become easier and more effective.

Interest is up! Convention attendance is up! What meeting manager would ignore this really new "find" in programming?

So far, we've talked about the meaning of professional assistance to the members and the organization. There's a third party to a successful meeting—the hotel. We all know that the attitude of a hotel staff—reflected in its service and cooperation—will either kill a carefully planned agenda or put a good one far over the top.

What do hotels think of convention counselors? Here are excerpts from a letter written to me by Louis E. Rogers, Southeastern Sales Manager of the Hotel Fontainebleau, Miami Beach. It's the result of our first year's association with United Attractions when Mr. Rogers was the Convention Service Manager at the Americana Hotel in Miami Beach.

"... Delegate and guest reaction through the hotel was unanimously favorable, and it was interesting to observe the enthusiasm as it mounted. . . . This interest and excitement also manifested itself with the hotel employees. Such a feeling results in a better spirit of cooperation and 'togetherness' between LSAA and hotel staffs—often elusive qualities, but so necessary for a completely successful Convention."

Koach/LSAA/p5

Mr. Rogers also mentioned a number of “unusual problems” which must be considered in planning any large assembly. Among them are:

- 1) Accurate area scheduling: meeting rooms must be completely set—at least one-and-a-half or two hours prior to the scheduled starting time of the program in order to allow for rehearsal and last-minute changes which invariably occur. In many instances, these alterations occur in full view of the audience, and it is mandatory that each hotel houseman participating be previously instructed in his particular duties.
- 2) Pre-planning for labor: extraordinary precautions must be taken to determine that the hotel utilizes proper union personnel for various jobs performed. This necessitates pre-planning and instruction to laborers, program speakers, and the cast. Advance planning for succeeding segments will utilize many man-hours otherwise wasted and make a larger work force economical.
- 3) Safety factors: staging must be constructed largely and solidly enough to support anything from one or two persons to a full chorus, or live animals. Economy dictates that a massive stage not be assembled for minimum presentation. . .”custom” construction, which results from pre-planning.
- 4) Rehearsal facilities: ordinarily rehearsals can be held on the stage of the hotel club, when it is free. Knowing the producer’s rehearsal need in advance, the hotel will schedule rehearsal areas away from meeting areas, to quarantine normal rehearsal noises. Because space is valuable, the hotel will further use its major rooms in normal “off hours,” avoiding conflicts with possible catering opportunities or other saleable events from which revenue may be derived.

That’s the gist of Lou Rogers’ comments—obviously his observations will apply to any hotel in the country.

Does anyone else share our enthusiasm for unified Conventions and the counselors who make them possible? At least a dozen major Associations across the country have used this type of complete Convention program format and service. Others have used one or several aspects of this varied service and are saving”the full treatment” for their anniversaries and other special occasions.

Mr. Rogers of the Fontainebleau predicts that “Undoubtedly, this type of Convention
Koach/LSAA/p6
presentation will grow in popularity in the near future. . .”

To sum it all up, we feel that when a good meeting counselor is retained, more productive *time*, advanced techniques, and professional *coordination* is purchased. Communication is quick, effective, painless.

Show Mr. Member himself—he’ll be back around for a second look!

#

NOTE:—The programs described above were conducted in the early 1960s, but the comments of both Messrs Koach and Rogers were considered *advanced* until well into the 1970s because the methods demand more thought than money. Money buys advertising and editorial attention. Consequently, most meeting planners of that era (and some, even today) think that problems can be eliminated by throwing money at the problems via pretty baubles.

But the magazine pushed Broadway in its headline. Scripting is not necessarily theatrical. Dramatization is not necessarily related to Broadway, but is always related to *emphasis*. But Broadway shows made suppliers happy for many years. . .while programs failed to educate.

Electronics *per se* are the big money-attractors today. And while they are wonderful in the presentation

perfections that they can help to create, nevertheless, the electronics equipment are not the main message of your program. They are only presentation techniques, related to the pencil-and-paper, blackboard, and slide projector in function—but just a tad slicker.

Pay special attention to the content of the numbered paragraphs above, because it's good advice that some hotel salesmen would rather that you don't know and ask for! Just sign for space and hope for the best! That's easy for them. . .but possibly disastrous for you. View it!

Anyone can invent nice comments and attribute them to someone else. So, to preclude any comments of that type, the original typescript of the pre-publication draft article is appended immediately below. With enough squinting, you can make out the text.

Sorry; the original typescript is as messy as the cover letter to the publisher, above. But both are carbon copies, from the days just after the dinosaurs. They're a chore to read, but if you're curious enough to do the work, you'll find the article word-for-word (although not page-for-page) in the seven pages that follow.

Then, knowing that such a sophisticated understanding of problems and solutions was available to users (association and company) more than four decades ago, ask your meetings/ conventions industry associations and publications editors why they've allowed the meetings industry to stray from *communications*.

If you get any answer at all, this program manager will be surprised. If an answer should be reasonable and meaningful, this program manager will be amazed!

Do you want to check for yourself? Read below:

#

Kicker: Creating pre- } interest:
 (Meeting
 (Convention

Head: THE SECOND TIME: AROUND OR AGROUND?

By Joseph L. Keach, Administrative Assistant
Linen Supply Association of America

"I've seen everything twice," your member says.

How does a meeting manager interest that man in the next convention or business meeting?

We, at the Linen Supply Association of America, have discovered that we have no alternative but to give each member something he hasn't seen in the West End, the Follies Bergere, or the Uffizi Gallery: himself!

When a man is shown himself, he responds more genuinely to that presentation than to any other in the world.

That's why the programs of LSAA over the past several years have been deliberately slanted toward our industry and industry research -- to give members an accurate appraisal of their industry's potential, of its probable direction, and of possible problems in the future. This information is available from no other source. What better function for an Association? What more meaningful "come-on" can it announce?

Correspondingly, we have used fewer of the "all-purpose" category of speaker -- no more bright-future-for-all charts and graphs. In our 1961 Convention everything is pitched directly to our members and to their specific problems. We'll be using only specialists in related fields and experienced linen suppliers.

Everyone won't agree with our choice, but we're dealing with successful business men -- men who are aware -- men who have access to general financial news through the Wall Street Journal, stock brokers, the Kiplinger Reports, Nation's Business, etc.

Knowing that we intend to put the Convention in their lap, members are exhibiting a heartening interest. Although it is no longer all-important to the success of our Convention, we still send out promotional literature regarding the Convention.

Now that LSAA has discovered the one topic that interests every member, we're concentrating on other elements indispensable to successful, productive meetings: time, technique, coordination.

Consider time. The demands on a business executive's time are phenomenal. His time is an investment. Communication -- new ideas -- must be brief, meaningful, forcefully presented. Another aspect: how can a man wholeheartedly support a convention or sales meeting if the meeting staff works so close to the deadline that members assume planning was hasty -- so he stays away.

Then consider technique: Since the beginning of time, men have congregated for the express purpose of exchanging ideas. They talked. A while later, somebody invented the alphabet, and our predecessors in meeting management talked and recorded. After a few years, somebody else invented the opaque projector. Now our early counterparts talked, visualized, and wrote about it. Modes of presentation were revolutionized by visual aids, and the job of attracting and maintaining attention grows more complex each year.

The Linen Supply Association of America departed radically from our early format (lectures, group discussions, etc.) when we decided to dramatize our business meeting -- not just one segment of the total program (which method is not new) -- but throughout the Convention, as an integral part of its structure.

With much effort we acquainted ourselves with various "entertainment consultants," who operate primarily as talent booking agencies and come in-and-out with a show -- probably creating additional problems in the

process.

We also talked with several firms that write and produce live programs. Most offer a basically identical service, which is acceptable for a one-time skit (even if repeated), but which is by no means a hypo for the entire Convention.

A complete program service is what we decided we wanted ... a counselor who could script and stage business meetings, of course, but additionally a counselor who had an organization that could enliven the whole Convention. He had to take an active part in making the thing go.

We found that counselor in the Chicago-based firm United Attractions. Working as a part of our staff -- available from the first planning stages until hotel sign-out -- United Attractions was there. They performed a complete program service.

Having selected our counselor, we went to work. After several intensive discussions about our organization's background and purpose, we agreed upon a theme and a manner of dramatizing the entire conclave.

During our first year with a fully-scripted Convention, we used a "staged" formal opening of the Convention; a 50-minute dramatization about public relations; banquet entertainment; and a totally new concept of brief dramatized "re-caps" of the highlights of each day's business. Members still recall many of the points made in this manner.

During our second year -- to capitalize on the built-in enthusiasm -- we did a partial repeat of the format. This time we dramatized our Research project; scheduled daily "re-caps"; member-participation banquet entertainment; and a formal opening for both the Convention and the Exhibits.

(Because we were meeting in Hollywood, we used several celebrities on various occasions to attract the members' wives into the exhibit area.

Where the women go, the men go along.)

This year -- our third -- we plan to change the program because even dramatics can become "routine." Still using the services of United Attractions, we have scheduled a number of unusual services -- almost gimmicks -- to make the physical side of Conventions easier to endure.

We've planned a more effective reception, formal opening of Exhibits, message facilities, and faster registration. To perk up early morning meeting attendance and to enhance attendance at the Exhibits, we have added free continental breakfasts. Naturally, there will also be entertainment for the dinner sessions.

By this sharp change of program, we hope to get definite reactions and preferences from those members not yet committed.

Briefly, we've considered time and technique in the Convention scheme; the last element we'll discuss here is coordination.

If coordination of the organization's activity is the hallmark of efficient business, coordination is also the basic ingredient of planning which will get your people to "buy" your meeting sight-unseen. Coordination gives the member confidence that his Convention or Sales Meeting week has been thoughtfully compounded, rather than frantically scrambled.

Coordination of countless details to the satisfaction of the meeting staff, the hotel, and members themselves is a thankless task.

In our first year with United Attractions, we watched details closely. They proved themselves. In our second year's planning, problems such as hotel facilities and p. a. systems, stage construction, and a tangle of union regulations governing music, labor, and lighting were left more in the counselor's hands, with close supervision, of course.

Because of our counselor, our staff inherited countless hours of time, which was devoted to items on the agenda that only an association staff member can handle.

Naturally, such a complex program takes some "getting used to".

Daily dramatizations and other meeting embellishments require rehearsal space -- space which everyone else could use to advantage -- and wants. It is written that "out of chaos was created the earth." Managers should not be surprised when their shows originate in a similar fashion. It's theatre.

The whole alliance must be one of education and experimentation for both the meeting manager and his counselor. But with each successive year, planning and presentation become easier and more effective.

Interest is up! Convention attendance is up! What meeting manager would ignore this really new "find" in programming?

So far we've talked about the meaning of professional assistance to the members and the organization. There's a third party to a successful meeting -- the hotel. We all know that the attitude of a hotel staff -- reflected in its service and cooperation -- will either kill a carefully planned agenda or put a good one far over the top.

What do hotels think of convention counselors? Here are excerpts from a letter written to me by Louis E. Rogers, Southeastern Sales Manager of the Hotel Fontainebleau, Miami Beach. It's the result of our first year's association with United Attractions when Mr. Rogers was the Convention Service Manager at the Americana Hotel in Miami Beach.

"... Delegate and guest reaction through the hotel was unanimously favorable, and it was interesting to observe the enthusiasm as it mounted... This interest and excitement also manifested itself with the hotel employees. Such a feeling results in a better spirit of cooperation and

'togetherness' between ISAA and hotel staffs -- often elusive qualities, but so necessary for a completely successful Convention."

Mr. Rogers also mentioned a number of "unusual problems" which must be considered in planning any large assembly. Among these are:

- 1) Accurate area scheduling: meeting rooms must be completely set -- at least one-and-a-half or two hours prior to the scheduled starting time of the program in order to allow for rehearsal and last-minute changes which invariably occur. In many instances, these alterations occur in full view of the audience, and it is mandatory that each hotel houseman participating be previously instructed in his particular duties.
- 2) Pre-planning for labor: extraordinary precautions must be taken to determine that the hotel utilizes proper union personnel for various jobs performed. This necessitates pre-planning and instruction to laborers, program speakers, and the cast. Advance planning for succeeding segments will utilize many man-hours otherwise wasted and make a larger work force economical.
- 3) Safety factors: staging must be constructed largely and solidly enough to support anything from one or two persons to a full chorus, or live animals. Economy dictates that a massive stage not be assembled for a minimum presentation ... "custom" construction, which results from pre-planning.
- 4) Rehearsal facilities: ordinarily rehearsals can be held on the stage of the hotel club, when it is free. Knowing the producer's rehearsal needs in advance, the hotel will schedule rehearsal areas away from meeting areas, to quarantine normal rehearsal noises. Because space is valuable, the hotel will further use its major rooms in normal "off hours", avoiding

conflicts with possible catering opportunities or other saleable events from which revenue may be derived.

That's the gist of Lou Rogers' comments -- obviously his observations will apply to any hotel in the country.

Does anyone else share our enthusiasm for unified Conventions and the counselors who make them possible? At least a dozen major Associations across the country have used this type of complete Convention program format and service. Others have used one or several aspects of this varied service and are saving "the full treatment" for their anniversary and other special occasions.

Mr. Rogers of the Fontainebleau predicts that "Undoubtedly, this type of Convention presentation will grow in popularity in the near future ..."

To sum it all up, we feel that when a good meeting counselor is retained, more productive time, advanced techniques, and professional coordination is purchased. Communication is quick, effective, painless.

Show Mr. Member himself -- he'll be back around for a second look!



About the author...

RICHARD CAVALIER has designed, written, produced, and or run countless meetings and conventions of every size, type, and complexity for both corporations and associations on a national and international level.

In the early 1960s he began using techniques then considered innovative and advanced—closed-circuit TV, multimedia, sociodrama in the meeting room, and exhibit games. His sales promotion and sales training techniques have included live regional meetings, semi-packaged regional forums, and semi- or fully-packaged meetings for field use.

For over five years, his regular column for *Advertising & Sales Promotion* and *Sales & Marketing Management* magazines have created a new awareness of business standards and communications principles in what had been a complacent, glamor-oriented field.

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Richard Cavalier

Sales Meetings That Work

Sales Meetings That Work:

Planning & Managing Meetings To Achieve Your Goals

Richard Cavalier



Sales Meetings That Work:

Planning and Managing Meetings to Achieve Your Goals

by Richard Cavalier

If your sales meeting has become a fragmented, unproductive event which consumes your sales force and fails to get your message across, you need help.

Sales Meetings That Work gives you the help you need! It shows you how to understand your function and how to cope with the problems, suppliers, options, and opportunities you face in planning and managing a successful sales meeting. Here is a step-by-step method for organizing, producing, and evaluating a successful sales meeting from initial goal setting through final measurement of achievement. The crucial issue of deciding just what you want to say to your sales force and why you need to say it is carefully explored. You will learn how to select the best equipment and methods to reach your objectives while making sure the meeting's message is not lost in the media itself.

Sales Meetings That Work presents a system for the management of meetings. A Location Comparison Guide helps you to calculate relative costs for either central multiple meetings or video-conferencing. The PERT diagram, a cost benefit value analysis guide, and 20 other practical analysis guides constitute a virtual blueprint that you can vary to suit your needs. A special feature of the book is the first comprehensive diagram integrating each planning and execution function of a sales meeting. This universal Activities Correlator is applicable to any meeting you will ever need to create.

Whether you are a field sales manager, a middle manager, or a vice president of sales and marketing, you can learn to communicate your ideas and expectations clearly, concisely, and successfully to any sales audiences—and within your budget! There is no mystique to meetings. *Sales Meetings That Work* will show you how to take charge of your meetings and how to get your message across every time!

Pow Jones
If you win



national underwriter

PROPERTY & CASUALTY INSURANCE EDITION

N.C. REGULATOR, GUARANTY FUND WRANGLE OVER ANNUITIES . . . PAGE 56

KEY TO EFFECTIVE MEETINGS: MAKE THEM RELEVANT

By **RICHARD CAVALIER**

Meetings are an underrated vehicle for marketing as well as for the more common applications of education and information-exchange.

That's true because most resistance to the meetings format has developed as a result of poorly-planned meetings which did not have a measurable purpose or goal—much less try to achieve

goals by specific means, proved by measure.

So if you and the people you work among or sell to hate meetings, blame the meeting planner, not the agenda format. It works! Negative feelings toward meetings can be changed by holding good ones. When you do, you'll get a surprising return on your investment of time, thought, and effort.

Talk ideas and meanings—never raw facts.

Before examining some of the opportunities the agenda format offers, it's probably best to identify the key problems of the past.

While no one would expect an airliner to fly without a wing or a tail assembly, countless meeting planners expect a meeting to "fly" even though it might be missing equally indispensable parts. Each meeting must be valid in its construct—providing for all needs. That includes a full and concise message and assignment plus all tools needed to do the job assigned to the given audience. Only that combination will assure that the meeting participant can perform as expected.

Meetings (the agenda format) can be used to seek information, exchange information, or deliver information. The first two often depend on the conference format of discussion (purposeful talk) in which the process of exchange is crucial. Other discussion formats include panels, symposiums, buzz groups, etc.

The conference lends itself perfectly to the definition of a problem or to de-



Richard Cavalier

but these types of formal programs can produce measurable results and succeed.

Claims of success must be founded on measured results. No other definitions are relevant. That applies especially to applause, an over-valued showbiz response indicating present-moment satisfaction. You're not in showbiz, and neither is the insurance industry. Adult education long ago established that present-moment dissatisfaction is needed to promote change.

Continuing education tends to follow the traditional classroom technique of lecture augmenting textbook concepts, with student participation. And despite the state-to-state discrepancies which present logistical or legal problems, the underlying Common Body of Knowledge is constant. So this area can be considered managed today, even if not under control.

But there are two other areas in which company or cooperative action could provide tremendous benefits. The first lies in creating either the day-to-day meeting at field office level or the public-service meeting that helps to market by uncovering prospects. The second is the issue-oriented conference which can bring consensus to the trade and help solve critical problems. The first can be done by any individual or company; the second might be overseen by associations.

Issues and problems

Because it's the more challenging area, let's start with issues and problems:

- Consider medical malpractice. The health care and insurance fields both feel the problem is out of control. Yet the computer data base at Professional

Risk Management, Inc., in Santa Ana—covering the universe of the County of Los Angeles public health care system—indicates that the incidence of damage to patients is both predictable and containable.

PRM is the risk management arm of the American legal counsel for Lloyd's of London, provider of excess coverage for the self-insured county. PRM's statistics demolish the Iceberg Theory derived from the 1975 study by Don Harper Mills, M.D. That study has been interpreted to encourage hospitals and physicians to hide the fact of damage from patients, leading to vindictiveness on discovery and soaring punitive awards.

By contrast, PRM's human relations stance includes full and prompt disclosure of damage, together with a future-care plan and structured settlement. The more honestly and openly the damaged patient is approached, the more cooperative he becomes.

PRM reports (Hospitals: American Hospital Association, May 1, 1980) lower damage rates, lower legal costs, higher structured settlements; 40 percent reduction in losses; shielding of physicians and other professionals; and the heightened respect of the legal community.

PRM's experience since 1975 parallels that of Michael Reese Hospital in Chicago, which saw costs fall beyond one-third after initiation, in 1969, of a patient advocacy/crisis intervention program based on the altruistic work of Chicago's Crisis Minister, Rev. Robert A. Holderby, D.D., in inner-city hospitals during 10 years prior (Modern Hospitals: McGraw-Hill, January, 1970).

The crux

Now the crux: Several years ago, PRM created a two-day seminar on the malpractice topic. We developed the syllabus for training, which was led by plaintiff's attorney, M.D.s and R.N.s, PRM staff, and Rev. Holderby. Los Angeles County supervisors and invited guests participated. In a subsequent repeat seminar for related professionals at large, neither the health care nor insurance industries showed interest. Why? Is reduced and better-compensated patient damage at reduced cost undesirable? Or is the industry saying that if premiums are high enough, the patient's suffering is inconsequential? Or is the industry unwilling to admit, along with the A.H.A., that it bought an Iceberg at premium price? Apparently the only thing out of control re: malpractice is reason.

- Consider radically new methodology: If medical insurance futures are ultimately traded at the Chicago Board of Trade (National Underwriter/L&H edition, October 29, 1983), underwriter and agency trainers never present at the structuring conferences will be charged with creating programs unlike any other: futures are neither insurance: nor sales-orientations—they're commodities. Caution!

We were consulting for CBOT, evaluating the first broker seminars that followed the introduction of financial

futures. That, in turn, proceeded from the discovery by traders that a sheaf of commercial paper behaved just like a sheaf of wheat.

Reinsurance on the open market through the trading of risk is as reasonable as the trading of any other financial instrument. And the problems are not insurmountable. So the insurance industry would wisely begin to create soon with CBOT, a consolidated education program, jointly developed and funded by underwriters. Training should begin among house staffs before trading begins. To fail here is to forego creation of a Common Body of Knowledge on a fundamental need newly perceived.

- Consider claims fraud: Burned-out buildings are a hazard and blight to any community. Torching is profitable because insurance value is not tied to current income, as traditional real estate investment value is. Since annual income tends to reflect both the building's condition and the market, income is an automatic indexer. An empty building is either worth nothing, if abandoned, or worth the bank's appraisal if the owner can prove rehabilitation plans. These concepts are a conference issue.

Since no underwriter is obligated to insure any property, it would seem that torching continues because of greed on both sides of the policy. An industry-wide program against fraud is not anti-competitive!

Endless possibilities

The possibilities are endless. Our point is that the meetings format has a depth and breadth not yet plumbed.

Now let's return to the area of public service marketing:

- First, cut the intellectual umbilical cord. Recognize that there are some people who do not need your firm's type of policy; to force a sale is irresponsible; to force a sale knowingly upon someone who cannot afford the policy, whether or not he continues to pay, is to perform with questionable ethics. Corporate and professional responsibility are growing movements. Your prospects and customers are increasingly aware that business and ethics are not mutually-exclusive terms. Some think the time is coming when the latter will be a prerequisite to the former. Practice the future now, and you'll tap new levels of consumer trust, forging deeper client bonds.

- Then look for ways to serve as you sell. Many manufacturing firms regularly market their products through the wholesaler/retailer to the ultimate user. In insurance, that might translate into open discussion programs for the public. Yes, these exist, but most appeal primarily to the person already insurance-conscious: "Have you re-examined your life lately?" That re-slices the existing pie but does little to enlarge it. No insurance company has offered me a presentation comparing insurance to other investments. The stock brokers have. Aren't there two sides to a return-vs-risk equation? Similarly, no insurance firm has of-

CONVENTION PLANNING REPORT

velopment of its solution. The delivery of the solution or other information is best accomplished by the training format, sometimes disguised with workshop or seminar appellations. This is the adult education/continuing education mode. There's feedback.

A non-agenda gathering is only a bull session; and a one-way flow of information, in which feedback is not valued, is a speech or spoken memo. Speeches and memos kill "conferences."

Everyone knows the insurance industry was among the first to appreciate the formal training program. Major underwriters maintain large and competent training staffs to oversee central training sessions at headquarters and to prepare self-contained program packages on critical topics. The latter are mailed to the field manager, who conducts from instructions and/or scripts provided. Results depend in part on the skill of the local meeting leader,

Mr. Cavalier is a Chicago-based consultant in group communications, author of two books on meetings, including *Sales Meetings That Work*, published 1983 by Dow Jones-Irwin. He was the recipient of the December, 1982, best-presentation award at the fall conference of Meeting Planners International and wrote columns for *Advertising & Sales Promotion* and *Sales & Marketing Management* magazines.

MAKE THEM RELEVANT

ferred me a how-to session in estimating fair value of real or personal property. Appraisers are expensive (and often disagree about values). Why must I pay an appraiser before I can shop for coverage among underwriters who might want different information from the same appraiser? Do you really value the uninformed customer? What does that say about your confidence and competence?

If you present a public program, you'll surely attract duds and maybe a shill. But it costs no more time or effort to address a group of 20 than a group of four or five. So you attract a broader spectrum of people interested in a given topic—and the duds and shills cost you nothing extra. Besides, you get them in straight prospecting, too.

In essence, that suggests that local efforts would net more and more productive exposure with a why-I-buy approach rather than a what-you-sell approach. While that orientation is already factored into formal training, it is less regularly practiced in local efforts.

Because any approach to a local market must reflect the specific demographics surrounding the given office, local presentation topics are not prime candidates for headquarters packages. Therefore, local sales and office managers must learn and implement basic meeting planning techniques. It's not that difficult.

Meetings are synergistic events which provide highly predictable results when the meeting plan is valid. If in doubt, run a test session and refine the plan.

The construct of valid meetings is far more a matter of basic concepts meticulously applied than of long experience. Of course experience embellishes—it always does if competent. But in dealing with the human experience—and that's what meetings are really about, despite the topic—common sense and fair treatment far outweigh the merely slick or impressive.

Moreover, studies made by and for the U.S. Army (do less-well motivated groups exist?) long ago established that color and motion add to cost but not necessary to learning effectiveness; that workbook diagrams can be just as effective as high-priced movies, depending on the relative skill with which each is used. That means your own input counts for more than your budget. That's especially good news in a time when cost-effective criteria are increasingly being applied to group communications. Cost is easy to calculate, but what is the real value to you and the firm of the goal you seek to achieve?

Moreover, careful thought in advance of producing expensive meeting room tools, including printed matter, will often enable you to use the basic material in other ways, thereby amortizing the cost.

It's also wise to seek to share the costs with other departments whose own interests are served by the program you plan. You might get assistance with a local program from the underwriter's training or advertising or public relations department if you develop an idea they can recognize as a

pilot operation. Ideas are cheap and plentiful. Good ideas that work are rare and valuable, and a competent management is always on the lookout for them.

If you profile your target audience and present an honest, complete message; and if you present a clear goal which can be achieved with the tools and strategic practice you provide, then the meeting cannot fail.

Those concepts virtually dictate the decisions needed. That, in turn, dictates the budget needed. If you cannot afford that budget, re-think the entire project. Prepare a core program properly now and add to it later. Never present an inadequate program for lack of funds. Do it differently. The world has survived 5,000 years without film and video. That happened because people—good teachers—are audiovisual devices, too. So are demonstrations. So are blackboards. If you go half way by getting your ideas together, the audience will willingly go the other half. That's the message of Rollo May's Hawthorne Effect: people want to cooperate!

Don't interpret that as a knock to modern communications devices. Video-conferencing is creating major changes in the conventions trade. Although cost increments seem to fall into the tens of thousands of dollars, video-conferencing saves substantially for organizations which need to gather hundreds or thousands of scattered people.

By booking rooms for fewer nights in smaller towns, and by minimizing or even eliminating long-distance travel, video-conferencing more than pays its own way. The assembly of people is done by moving the image, instead of the people, by satellite or microwave relay tower. While the picture goes out from the headquarters location, the scattered audience has feedback via telephone hookup.

What does that have to do with local meetings?

Because broadcast video communications are not secure, sensitive or secret material cannot be broadcast. Therefore all of the workshop sessions common to training programs plus all of the classified materials must be han-

dled in parallel meetings held in the scattered locations during and following the broadcast portions. More local managers will have both the opportu-

nity and the need to personalize and augment the information or packages originated at headquarters for the video-conferenced event.

Because telephone conversations are considered "personal" contacts, it's likely that video-conferencing will become common in years ahead.

If you are becoming convinced that valid meetings can accomplish measurable goals in the marketing context, then you are getting my message . . .

and also getting a new handle on one of the most effective communication tools at your disposal.

Communication is the purpose of meetings. And communication is simply comprehension signalled by an appropriate response. So if you get the message, do something about it. Make valid meetings that make business sense.

There's really no excuse for any other kind!

Convention planners

review

The Message is the Message

There is a growing realization among meeting managers that the trappings of their meetings — the physical surroundings, the food and drink, the fringe benefits of a meeting, as it were — have been overemphasized at the expense of meeting content. One of the leading industry spokesmen for this point of view has been Richard Cavalier, a meetings consultant and contributor to *Sales Management Magazine*, where his column "How Meetings Help Sales" has long appeared.

A book by Mr. Cavalier entitled *Achieving Objectives in Meetings: Theory and Practice of Solving Business Meeting Problems* recently came to our attention. It was evidently published as part of the organizing efforts of a new meeting consultants company called *Corporate Movement, Inc.*, to whom Cavalier was a consultant. Although the company seems not to have survived, the book is nevertheless a worthwhile addition to any meeting manager's library and worthy of review in this space.

The handsomely designed, hard cover volume is divided into two parts. Part One, *In Theory* takes up only 19 of the book's 218 pages, but a lot of pitch is packed into that short span.

Mr. Cavalier's thesis is that the meeting is changing. The focus is shifting toward content and away from packaging. Show-biz is out of date, although statistically it was never really in, as the author points out. The day of the dog-and-pony show has come and gone. In today's, and tomorrow's meetings, the message is the message.

This not unpainful switch, according to the author, has far-reaching consequences for the meeting manager ("Almost anything can help destroy a meeting, but only near-perfect decision-making can give it life."); for the industry's suppliers and producers ("Your meeting management responsibility includes riding herd on show-biz types who really believe a catchy lyric sung to the sales force will ring up sales with the customers."); for the facilities industry ("When you know what you should be saying, where you say it is of secondary importance."); and, most critically, for the people for whom meetings are staged ("The personnel problems of a company cannot be solved by the meeting manager alone;

yet . . . he can help acclimate the company to the potential of its prime asset — the intelligent employee.").

Mr. Cavalier builds a strong case for the meeting with the adult education-oriented format. "People are the stuff of your meetings, and education is where it's at for tomorrow's meetings," he says.

He lays the blame for past emphasis on packaging at several doorsteps. The industry press, he believes, has reported the dramatic spectacles on the meetings circuit and ignored "the prospect of changing people's lives through adult education via the meeting format." Producers and other suppliers, realizing that windfall profits lay in theatre productions, have tended to stress what they know best, at the expense of understanding industry and the corporate viewpoint. And meeting facilities management has stressed reputation and decor — important parts of the show-biz spectacular — often at the expense of service.

Finally, citing the work of social scientists like A.H. Maslow, Frederick Herzberg and Mehmet Beqiraj in motivational research, Cavalier builds a case for content in meetings as a means of providing meaningful incentive for employees and sales forces. He sees multi-media extravaganzas as self-defeating bribes. And he takes a swipe at sensitivity group training, characterizing it as "quack medicine." Get back to fundamentals: people, he concludes.

Part Two, *In Practice* constitutes the balance of the book and is its major section. Some of its chapter headings say things like "The Message and Meanings," "Agenda and Control," "Tooling Up," "Handling Hotels," and "Meetings Abroad." It is a blend of new and old material, the old being selected pieces Mr. Cavalier wrote for his column in *Sales Management*, and before that for *Advertising and Sales Promotion*.

Some of the new material includes a series of checklists. "Message Profile" asks questions which force the user to analyze the nature of the message that needs to be communicated. A part of that analysis gets at the question, is a meeting the best means of communication for that specific message?

"Audience Profile" forces you to look at the message from the point of view of the intended audience, and leads to a decision on the viability of the proposed meeting with regard to that audience.

In a section entitled *Working with a Consultant*, the author offers both a "Consultant Evaluator" and a "Something-for-Nothing Evaluator. The first asks some tough-minded questions about prospective consultants. You may not learn anything new here, but you probably haven't seen it all put down in one place before quite like this. And helping you to remember what you've known all along is worth something.

The "Something-for-Nothing Evaluator" is to be used prior to and during a first interview with the supplier of a proposed "free" service. It helps you to come to a determination of whether the free service is positive or negative, and finally whether it's worth filling out a "Consultant Evaluator" form on the supplier. Again, it makes you think a bit, which can't be all bad.

There's also a balance sheet which puts the cost of the proposed meeting into perspective with a quantification of the profits and return on investment to be derived from it. It gives benefits less costs.

Under *Agenda and Control*, an "Objectives Profile" is more or less standard management practice stuff. A "Training Profile" helps make the final decision on the training value of the proposed meeting. A "Preliminary Agenda" and a "Meeting Justification Guide" are pretty much what their names imply.

There is a chapter on PERT (Problem Evaluation and Review Technique) and Critical Path Analysis methods as applied to meetings management, for those not yet familiar with the technique originated by the U.S. Navy during development of the Polaris System. As the author points out, this is a particularly useful device for bringing all of the pieces together.

In "Handling Hotels," the emphasis is on the contract. Most of a facility's failures can be avoided if both the letter and the intent of what is to be provided appear in a well-thought-out-and-drawn-up contract that included penalties for non-performance. There are also useful tips for seeing that a hotel's personnel understand and cater to your problems. Included in this chapter is a reprint of the master Hotel/Association Facility Contract developed by the American Society of Association Executives in cooperation with representatives of the hotel industry, as well as the author's suggestions of protective contract provisions. And in this day of all-inclusive convention centers, there is a useful reminder that you are better off

to pick and choose from among a variety of separate facilities in any given location, rather than to bend and fit your meeting requirements to one super, all-under-one-roof facility.

In the section on meetings abroad, a "Foreign Trip Cost Comparison Guide" should prove useful to meeting planners drawn to distant shores. And some space is devoted to the pitfalls of taking a group abroad, only to confine all of their contacts to Americans and American-type facilities.

The above are only a few of the useful subjects dealt with and guideline lists provided to jog the reader out of his or her meetings-as-usual lethargy. With its combination of theory and practice, this book should be of interest to meeting and convention managers of all persuasions and degrees of experience. To quote part of the author's summary: "Because the meeting is an event, it never exists prior to the unfolding, cannot be viewed as a complete entity at any point during its unfolding, and can be described but not recaptured after it is finished. Therefore, it really exists only in the mind of the meeting manager — validated by results." □

How Videoconferencing Can Achieve its Potential

Videoconferencing seems to be a market of the future – with no present . . . if you listen to the complaints of the site-dependent contingent. That's largely the hotels, airlines and magazines that the former support.

Therefore the incipient *videoconferencing industry* needs to act in concert to counter the negative publicity that's being pumped out by the site-dependency people and the publications that they support and control through advertising. The small complication is that there is no *videoconferencing industry*. A lot of inter-dependent organizations are trying to *go it alone* . . . with potentially disastrous results.

While making hundreds of phone calls and faxes to that market's users and providers (in preparation for the new edition of *Sales Meetings That Work* plus other books), we were struck by the number of persons who agreed implicitly in principle with the ideas expressed about that market but thought that they themselves were "too small" or "too peripheral" to make an assault on – or even a modest challenge to – a well-financed, site-dependent industry. As individuals, they're probably right.

But what's stopping SSPI from creating and promoting videoconferencing under a new wing dedicated to video conferencing – and open to all interested manufacturers and meetings producers? What's wrong with gathering all those firms in a shared how-to effort as a brand new marketing dynamo? Contribute whatever you can . . . take only the risks that you can justify to yourself . . . but help to expand the incipient market for all. Get involved!

Who besides satellite people might be interested? Get a thousand names of prospective members among producers from www.referenceUSA.com (SIC code #482206). Talk to at least one video equipment manufacturer who is already selling \$2,000 desktop units (two-way, full-motion) that could replace those producers if they don't join you in promoting now. Other manufacturers promise additional types of desktop units within 2-5 years. Many current and potential buyers of video conferencing-capable broadband and equipment now hold forward contracts with hotels for those same 2-5 years; so there's a need to begin selling *yesterday* for the mid-future *delivery*. Nobody is buying for tomorrow morning, but every one of the meetings sponsors is interested in the benefits to be derived.

What can the satellite industry do? Three suggestions:

- 1) Organize. Get the industry focused on the stated purpose: videoconferencing for corporate meetings. Pool your knowledge! Getting information now is frustrating beyond value!
- 2) Demonstrate. Create a two-way, full-motion program (and/or seminar series) that a) can go out over the web, if not two-way, full-motion video demo; and b) can be accessed one-way by anyone with broadband (or web connection) at the announced time.
- 3) Stand back so you're not crushed in the stampede to buy once prospective users learn facts!

Corporate users have been fed the Pabulum of it's-gotta-be-face-to-face for so long that they believe it. What's the alternative? Until broadband, there really wasn't a good one. But meetings managers will buy faster, easier, effective/cost-effective meetings. They're not shopping for pixels! Talk programming. And *SMTW* just happens to teach *how-to program*; so it does much of your initial selling job. See www.meetingsCavalier.com and/or request more commentary on videoconferencing from SSPI.

Hotel and airline expense eats up about 66% of corporate travel budgets, according to American Express. But video conferencing would permit the bulk of that *site-dependent circus* money to be used for *content* of meetings . . . not fun-and-games . . . meaning more focused and (we hope) better meetings. Ford Motors now broadcasts hundreds of meetings monthly to its dealers! Is there a message for you there?

This writer worked with the Chicago company that created the convention consulting function, back in 1960, and he wrote the first how-to articles and books in that industry—based on his personal experience. Eschewing his criticisms of the field, some user-associations and most magazines opted to run with the advertisers in an industry now largely without professional standards. Enter your opportunity!

Just as this article speaks to you, so *SMTW* speaks to your potential customers! Their interest in videoconferencing is as great as yours—but they don't realize that yet, either. Now prove it!

SSPI member, Richard Cavalier, submitted the previous to *The Orbiter* for publication. It is published in its entirety as an open letter to the industry and solely reflects Mr. Cavalier's opinions..

Have a comment on this story? Send your comment or contribution to orbiter@sspi.org. It will be forwarded to the author as well as being considered for publication in our next issue. Thanks!

Richard Cavalier is a meeting planning consultant and author of *Sales Meetings That Work*, now being published in its third edition.

The Orbiter is published 6 times per year by the Society of Satellite Professionals International (www.sspi.org).

EVENT PLANNING GUIDE

Teleconferencing slowly taking hold

By Diane Freeman
Business Report Correspondent

In the post-9/11 world when fewer business people are traveling, more videoconferencing centers are opening up in Northern Colorado to accommodate business users and the general public.

But some have been at it for a while. Kurt Woolner, store manager at the Kinko's shop at 226 E. Harmony in Fort Collins, said the location has offered videoconferencing for about five years.

"It's in one room with multi-point hookups, seven points across the country," he said.

The videoconferencing center costs about \$150 per hour, Woolner said.

"It's primarily businesses that use it as an alternative to business travel," he said.

Overall, usage of the service has increased about 25 to 30 percent since it became available, he said. There also was a sharp spike in the increase shortly after the terrorist attacks on Sept. 11, 2001, but that has slipped some since then, he said.

"It's just an extra service that we offer. It's not our core business by any stretch," Woolner said.



STEVE PORJER • THE BUSINESS REPORT

VIDEOCONFERENCING EQUIPPED — Kinko's shift supervisor Chris Campbell demonstrates how the videoconferencing equipment works in the copy company's 226 E. Harmony Road location in south Fort Collins. Videoconferencing has become more popular in the wake of the Sept. 11, 2001, terrorist attacks.

2 to 3 conferences a week

Generally, the store accommodates two to three videoconferences a week, or about 10 to 12 hours of videoconferencing a week, he said.

"Often, it's the same people who are using it again and again," Woolner said.

Frequently, business travelers to Fort Collins will use it to connect with people in their headquarters offices, he said. Usually, a single individual will use it rather than a group of people.

"We do occasionally see people using

it for personal use. There have been occasions where people have used it for birthdays," he said.

For example, someone who can't travel to a relative's or friend's birthday party or reunion might want to participate in the party through videoconferencing, he said.

The room holds one video camera and there are hookups for users' computers. It also has two large screens for multi-point conferencing.

"There are ways to do presentations on the screen," he said.

The Fort Collins Marriott Hotel recently renovated its meeting space area and now offers videoconferencing to guests and groups meeting there, said Sarah Harding, event manager.

"We have the capabilities to do videoconferencing or Web conferencing," she said.

Web conferencing similar

Web conferencing is similar to videoconferencing, but instead of transmitting to another location it is transmitted over the Web. It can even be stored and broadcast later, she said.

Harding said groups began asking for the videoconferencing services about a year ago.

"It hasn't become a real popular

See TELECON, 33

TELECON, from 16

thing yet, but it's an emerging trend. We recently renovated all our meeting space for about \$100,000, including new sound and video equipment," she said.

Sometimes organizations meeting at the hotel will bring some of their own videoconferencing equipment and also use some of the hotel's equipment.

The charge for entirely using the hotel's equipment and its high-speed Internet access is about \$2,000, she said. "That's top of the line."

Sometimes the group may want to video just the speaker and other times it may want to video a larger group of people, she said.

The Marriott, built in 1985, has 230 guest rooms and 15,000 square feet of meeting space.

It also offers high-speed Internet access in guest rooms and recently went wireless with those capacities so

there are locations throughout the hotel where guests can use wireless to access the Internet, she said.

Site meeting opposition

Richard Cavalier, a Los Angeles-based author and expert in the meetings business who consults for various corporations, said videoconferencing has not spread quickly because site meetings are still heavily promoted by hotels and other travel-related businesses.

"The (meetings) industry has been dominated by suppliers," he said. "Videoconferencing is catching on very slowly," he said.

Many groups do not need to travel to hold sales meetings or even training meetings when they could reduce costs by using videoconferencing, he said.

Cavalier noted that there are various types of equipment for videoconferencing that can connect up to six offices. "They can tie all their regions together and everyone can see and hear everything and discuss it," he said.



SEPT. 5-18, 2003

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The VC solution

Video Conferencing can save time and money as an alternative to air travel for traditional business meetings.

THE NEXT BEST THING TO MEETING face-to-face is an emerging technology that has revolutionized the way business meetings are conducted: Video Conferencing (VC).

VC equipment/software packages can connect the home or office from five additional regional sites (or districts within regions) allowing multiple participants to carry on a two-way, full-motion meeting. No more jerky still frames, the big objection in years past. Meanwhile, unlimited numbers of virtual participants can audit worldwide via streaming (without the two-way capability), but with the ability to phone in questions. Because no speaker ever answers all possible questions from an auditorium audience, very little true opportunity is actually lost via VC.

The best part, of course, is the potential savings that can be calculated by subtracting the sum of \$5,000 by this year's number of linkable-sites (plus DSL, cable or satellite "airtime") from last year's total central-meetings budget. According to American Express, almost two-thirds of the corporate travel budget is given to group/central meeting purposes. *Sales & Marketing Management* magazine points out further that central meetings always are the most expensive, and even unnecessary. Home office staff can visit later, with more effect.

The cost formula above applies to any company of any size for any group meeting for any purpose. Because there are additional imputed savings, the benefits can be both greater and permanent for the life of the equipment. Unlimited group participants can log on via PCs from any of six given sites, and each of the six can exchange documents. Control can be ceded from "home" to remote for that document so it can be modified in real time; then sent via Web to all. This flexibility does not necessarily extend to the screen-only software now available.

The VC alternative: easy to learn

In choosing the VC alternative to face-to-face meetings, there are many points to be con-



sidered. For starters, it's easy to learn VC techniques – a day with the company's computer guru should ready any moderator. Also: Take an assessment of the company's needs since 9/11 and you may arrive at the following:

a) Your business must continue to communicate, whether or not in a central meeting room; if travel is agonizing but not essential, why require it?

b) If air travel is no longer the joy it was in the days of the French Caravelle, attendees will arrive frazzled. Do you prefer them to be out of office routine or not to be out of office routine at all? VC lets meetings occur in or nearer employees' daily offices.

c) If employees would rather not fly these days, what liability does your company incur if it insists on air travel? And what if something untoward should then happen?

d) Do you actually need your-hands-on-their-hands to guide an indescribable operation, or are you simply hoping that proximity will accomplish something magical?

f) If you need simultaneity of announcement, VC is as good a format as is a central meeting – and at far less cost. If you don't need simultaneity, you don't need a central

meeting unless only a single product/prototype is available for show. Multiple prototypes? Then try multiple meetings, likely on different days/weeks with physical meetings, but on the same day with VC's virtual meetings. Much time-off-the-job can be saved by everyone participating.

g) Finally, the unrecognized benefit: Any problem discovered on the day after one central meeting might need to wait 364 more days for its turn before an assembled group. But the virtual meeting can be conducted on short notice whenever needed – even at the employees' own desks! Count the meeting time in hours committed, not days or weeks.

Now what do you think VC can do for you? And how soon will you test it?

Richard Cavalier is a specialist in group communications, including meeting planning, audio/visual scripts and corporate training. With 40 years in the meetings/convention industry he has authored two books in the field and has worked with companies such as Motorola, Mobil Oil, the American Dairy Association and Kaiser Aluminum. Reach him at (310) 671-7262.

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— See Pg. 72

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One Day to a Productive Home Office — Pg. 82 • **Work-From-Home Success Stories** — Pg. 10

Grow Large While Small

With Inexpensive SOHO Video Conferencing

BY RICHARD CAVALIER

Small office or home office? Would you rather be known as an octopus office? Now, you can be in several places at once, using new technology for video conferencing. It's much less expensive than you'd expect. Short on cash? Buy one for yourself. Then add the initial \$3-\$5,000 extra equipment cost to your next proposal to "give" to the client: permanent access!

In so doing, you can automatically establish a direct virtual contact in all-business hours with each and every client or customer. What client would not consider paying up to \$5,000 one time to gain quick virtual contact with your home-based organization — forever? It's all repaid with travel cost-savings!

How VC Works

Given the new two-way, full-motion video conferencing (VC), home- and small-business operators can develop a far-flung operation with associates in any location at any distance — and still virtually "meet" easily and regularly on the tube. No more jerky still photos in sequence.

For only \$3,000 - \$5,000 per site, any group of up to six sites can be linked with two-way view/conversation with the moderator with full motion by speaking participants. Multiple units can multiply effects. Any number of persons worldwide can tune in and witness everything one-way. All can participate and ask questions via telephone while viewing everything broadcast.

Apart from the enabling equipment, the sole requirement is broadband access — which is in oversupply at this time. Broadband can be obtained for about \$50

— \$100 per month/site by cable/DSL or about double by satellite. This plus the "phone call" usage are the sole continuing costs for the life of the equipment. Through a professional program producer, the charges could be about \$1,000 per program hour. *Buying saves!*

VC equipment features vary; your needs determine any trade-offs. Compare the products on the market: different suppliers have different specifications — just buy matching VC equipment for all links. Fords don't use Chevy parts. Uncomplicated: get competent in a half-day's practice with your computer guru.

When someone is virtually viewable at any time needed, the convenience factor goes up...

Time and Travel Savings

New flexibility with VC is the key benefit for smaller businesses, because a "branch office" can be established wherever and whenever an associate chooses to join the overall business effort. The savings in time and travel costs can be substantial, especially given short-haul airfares. This theory applies equally to larger companies, if connecting up to six regional offices.

When someone is virtually viewable at any time needed, the convenience factor goes up: so even distant parties are essentially sharing the "same" office. Any two colleagues can cooperate in a major business venture without moving their households. Multi-person tasks (such as document editing and proofreading or miscellaneous checking operations) can be facilitated easily with a virtual get-together because document home-control can be ceded.



Home-based entrepreneurs can be in several places at once, using new technology for video conferencing.

Safer Meetings

Moreover, *Entrepreneur Magazine* recently (Feb/03) quoted from a survey of corporate travel managers by the National Business Travel Association: "More than two thirds said they'll switch to teleconferencing if more isn't done to improve safety. Half said they'll rely more heavily on webcasts, and 40 percent will reduce out-of-town meetings."

Why the Silence?

Why haven't you heard more about two-way, full-motion VC? Suppliers claim that business meetings are an area unto themselves and need face-to-face. Truth: the magazines and organizations in the meetings/training field depend on advertising and exhibit revenue from the hotels and airlines — and travel ads could be reduced when VC is widely used. Silence on VC is better for their magazines' businesses than for your home-based business.

HBM
Find full discussion of this viewpoint on state-of-the-art VC (plus how-to methodology for protecting the message in any meeting of any size for any purpose) in Richard Cavalier's book, *Sales Meetings That Work*, newly available in updated/expanded third edition from www.1stBooks.com. For a free reading of significant excerpts from all three of Richard Cavalier's business books, see his website: www.meetingsCavalier.com.

"I've always tried to go a step past wherever people expected me to end up."

— Beverly Sills

www.FindLaw.com

This web site offers comprehensive, plain-English legal information to businesses and individuals. Topics addressed include: starting a business; choosing a business structure; business finance; taxes and accounting; debt and bankruptcy; employers' rights; employees' rights; workers' compensation; business operations; intellectual property; dissolution; and many other small business legal concerns.

June 29, 1984

Mr. Lincoln H. [REDACTED]
Director of Field Communications and
Development

[REDACTED]
Sumneytown Pike
West Point, Pennsylvania 19486

Dear Linc:

It was good to see you in Washington, and I appreciate your invitation to formulate some examination questions on entertainment for the MPI certification program.

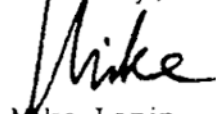
I read the section on entertainment in the Body of Knowledge. To say that it barely scratches the surface would be an understatement. Considering the enormous amounts spent on entertainment for meetings and conventions and the critical role that entertainment plays in the success or failure of many meetings, I think that a lot more work needs to be done on the Body of Knowledge before writing examination questions.

I would be willing to take on the assignment of developing a comprehensive Body of Knowledge about entertainment, but I think it would be even better if it were done in consultation with the other leading professionals in the field, several of whom are here in New York.

Please let me know if you would like me to get involved.

Best regards.

Sincerely,



Mike Lanin
President

ML/kl

cc: Susan [REDACTED]
Doug [REDACTED]

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P.S. Are you familiar with the work of Richard Cavalier? In my opinion, his book, Sale Meetings That Work, is the best book that has been written on the subject and one that would surely appeal to your own bias for truly educational meetings. I strongly recommend this book and Cavalier's previous work be included in the certification program's bibliography.

IH Reaped Return On \$279,000 Russian Training Program

By Richard Cavalier, field correspondent

SCHILLER PARK, Ill. — "Training is a condition of the sale," the Russian government told International Harvester's (IH) Pay Line group. "And the trainees don't speak English!"

But since the sale involved 400 units of heavy equipment worth about \$100,000 each, the IH division decided to meet the condition.

It budgeted nearly \$279,000 for a bilingual training program, spent several years to develop and implement it, and in the process discovered an effective sales tool that has become part of its presentation to other foreign governments.

Already, Iran and Poland have made substantial purchases.

"Naturally, the size of the order must justify the effort and expense of developing an entire program in another language," said Bob Bensinger, supervisor of instruction at the Pay Line division's training center in Schiller Park.

Overall cost of the Russian program was less than one percent of the sale.

Bensinger and Bill Thrash, manager of program development, discussed the evolution of a bilingual training program in a series of interviews with MEETING NEWS.

Two types of equipment were sold to the Russians: IH's crawler and its huge loader. Full operational capability for the Russians required skilled mechanics as well as trained operators. With each type of equipment completely different, it was decided to set up two schools, with two programs (operators and mechanics) in each.

A 'spectacular' presentation wasn't even considered. "They just don't do a training job," said Thrash. "And they're not cost-effective, although we have used them in the past for customers or new product presentations."

"Movies were out," he continued, "because they go too fast for this type of training." And soundtracks cover one language. Of the more than 100 men to be trained, only a handful could speak even

rudimentary English. Translation was needed. The big question was how to present it.

IH concluded that the most effective method would be a parallel construct of all written materials in English and Russian. Verbal instruction and question-and-answer sessions would be delivered in English and translated by the permanent interpreter.

That decision created live training sessions in Ufa, Irkutsk and Pechenga, the cities designated for the 'classes.' There were no 'canned' segments.

Two Sets of Slides

Two sets of 35mm slides were



ON-THE-JOB TRAINING IN IRKUTSK, RUSSIA, was a condition of International Harvester's sale of 400 pieces of heavy equipment. Nearly \$279,000 was budgeted for a bilingual training program, noted Bob Bensinger (Far right), supervisor of instruction for International Harvester's Pay Line division.

PROGRAM DEVELOPMENT FOR RUSSIAN SALE

Program development and production	\$165,000.
(About 50% for translation and other preparation, including staff time; 50% for visuals)	
Workshop tools (hardware)	4,700.
Manuals & catalogs (in Russian); printing	2,100.
Audio-visual equipment and conversion to Russian electrical current	1,020.
Shipping	3,100.
Transportation, mostly airline	21,000.
Instructors' salary while assigned	82,000.
GRAND TOTAL:	\$278,920.

prepared, with callouts printed in either language. Only the Russian text was projected for trainees; trainers used hand viewers for the identical slide with English callouts.

Translation of explanatory material and questions were handled on-the-spot. Participation was encouraged.

To protect the agreement with the Russians (and the \$165,000 spent in program development and production), every element of the lesson plan was written down.

The lesson plans included:

- General orientation to the

machine and its capabilities;

- Understanding scheduled maintenance;

- Theory of engine transmission and torque converters.

Skilled learning segments in the workshop provided:

- On-equipment practice for operators;

- Disassembly and reconditioning practice for mechanics.

One-third of the training was classroom, the balance on-the-job.

As a control in the project, Bensinger elected to teach one course without the English-version slides, depending on notes in his outline. He was able to get the information across but only with great attention to the notes. The double slide concept proved out.

More to the point, the entire program proved out. Although translation doubled the running time of spoken portions, the heightened personal involvement fostered camaraderie. Trainers and trainees isolated politics and became friends.

The seven classes ranged in length from 4½ to 7½ weeks. Training teams were rotated to lighten the burden of so much time away from home. The program also called for result measurement several months after the 'graduation' test.

IH is proud of two indicators of the program's success. First, it was asked to leave behind a master set of all materials. And second, it recently hosted a group of 15 ministers and trainers for a special training class.

The Russians enjoyed the exposure to advanced training systems and theory as well as the specific programs relating to their equipment.

MEETING NEWS

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Ten months ago 400 questionnaires were mailed to S/M/E members in 12 different Associations of the Southwest to find out what members wanted most at this year's convention. The reply was 75% information, 25% entertainment. Since then our 18 member Fiesta Committee has been hard at work lining up the best speakers to be found to inform you about the ten subjects to which you gave top preference.

Look who's gonna lay it on you!



John H. (Jack) Marsh, Director of Association Services for S/M/E, New York City, 14 year veteran with S/M/E, has served as Manager of Association Services, Manager of Youth Education Divisions. Formerly of American Petroleum Institute and The Standard Oil Company.



Fred Hofheinz, Mayor of Houston.

Jack Morton, president of Jack Morton Productions, Inc., Washington, D. C. Graduate of George Washington University. Has devoted his entire life to some phase of the theatrical business.



Al Pollard, Chairman of the Board of Brooks-Pollard Company, Little Rock, Arkansas. 41 year veteran of advertising, public relations, and management, president of Al Pollard and Associates management consultant firm, past president of Little Rock Chamber of Commerce, past vice-president of Arkansas State Chamber of Commerce.



Dick Cavalier, Meeting Editor of Sales Management Magazine, New York City.

Bob Pease, convention and meeting specialist from American Airlines, New York City, and a real motivational pro.



Dr. John Hezel, president of Personnel Assessment & Development Corp., San Antonio. Past president of the American Society for Training & Development, B.A. in Industrial Relations, Ph.D. in Psychology, expert in selection and training of management.



If you think the Fiesta is going to sizzle just because of those speakers, check out the pepper we put into the program:



Thursday the 18th

1 pm — Jack Marsh, Director of Management Services, S/M/E, New York City, will conduct and moderate one of his famous and effective S/M/E Leadership Conferences. It will be packed with subjects you wanted to learn more about — membership, programs, leadership, fund raising, money management, career education programs. The bigger the delegation you send, the more you'll profit.

5 pm — Early Bird Party and reception

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Cost effective media goals

By Richard Cavalier

Responsibility for safeguarding instructional or other communications content of any audiovisual presentation falls squarely on company Audiovisual Specialists. Yet, despite abundant research into AV learning, awards in the trade are still given almost exclusively on the basis of show business principles that celebrate production values and techniques, not communication.

Production bias can cost you your job. The films you rent or design and produce are subject to a production team's conscious or unconscious bias toward purposes and values other than yours. The result can be higher costs, wasted effort for instructors and participants, failed programs, and lost opportunity for the company.

Cost-effective calculations help the AV Specialist steer a course through the shoals of show biz blandishments because the process itself requires that the value of the end result to the company be both specified in advance and verified later. The cost-effectiveness process tends to catch production abuses before they occur. And, by nature, the process encourages comparisons between various mediation techniques and their respective sources. So you tend to get the most for your money.

Let's examine some of these key ideas.

Trade practices: As a judge of industrial film entries for a recent major film festival (film will be used in its generic sense) we saw the award for best film go—by split vote—to the best cinematographic effort. The sets, ensemble acting, lighting, etc., were excellent; and the filmmakers and critics on the judges panel rewarded those technical values.

Unfortunately, however pretty it was to behold, this "instructional" film violated fundamental training principles by featuring not only the cliché right-way/wrong-way approach, but also by using wrong-way almost exclusively throughout the film. Right-way material was tacked on with a film "lecture." From a trainer's viewpoint, this prize-winner was a dog.

Second prize went to a superior training film which contained a most competent and arresting survey of a highly sensitive job-related societal problem. It was by far the better instructional device, although less visually provocative.

Down-graded, this superior instructional film is cheated of the attention it deserved; and that discourages other imaginative entries into the arena of ideas. Once honored, the inadequate instructional film damages the industry by bad example: that of medium over message. Marshall McLuhan was wrong, and his legacy plagues us. About 25 percent of all entries were usable in any serious company program; and 25 percent were embarrassing.

Commissioned films, whether for the company's internal or external use, are subject to the same skewing pressures. Even the prestigious awards of the International Association of Business Communicators (IABC), for instance, talk of communication but require no proofs that such has occurred in the intended audience. Their asking for "results" does not fulfill the instructional imperatives of observable, measurable and verifiable objectives demonstrably met.

Honoring the principles of AV learning: Communication is commonly defined as comprehension signalled by an appropriate response. If audience response is neither measured nor evaluated, there is no basis whatsoever for claiming successful communication. Applause is irrelevant, a show business indicator of present-moment satisfaction. That, as Malcolm Knowles has indicated, can conflict with instructional goals.

Moreover, despite concerted attempts to prove that "liking goes with learning," no conclusive evidence has been developed on either side.

So any staff AV Specialist must look beyond easy production values to the message itself and to the ability of the target audience to perform as requested using the AV presentation as a tool.

Fortunately, substantial helps are available in the research done over the past dozen or so years, much of it by or with the Human Resources Research Organization (HumRRO) in conjunction with the U.S. Military, as well as by social sciences researchers. (See adjoining story, "Basic Principles".)

Much of the material has been correlated under adult education concepts. Since change (occasionally reinforcement) of performance skills, habits, or attitudes is the general purpose of perhaps all business communications, all marketing, advertising, and even public relations efforts should share the audience-feedback concerns of the corporate trainer. Suddenly, accountability becomes a factor, and nebulous goals (more, better, improved) are seen as self-defeating.

Buying value: Surprisingly, the newest technology, which has in the past helped escalate costs, is now aiding the trend to down-scaling. Three relatively recent developments indicate that a trend toward more modest—but message-oriented—presentations is well

underway.

First, the success of the daily video address by top corporate officers to all employees indicates their openness to the message apart from embroidery. Cost per contact is negligible after installation of the equipment. Keep it short and simple.

Second, computer-aided instruction can relieve people of the more tedious tasks. In addition, computer-generated graphics—including slides—have a built-in bias toward business: the computer can't deliver "cutesie." Some AV modules might be eliminated by the fact of

converting to CAI, yielding savings from several sources.

Third, the growing acceptance of video-conferencing is changing the way we deal with crowds. Video-conferencing can save money despite high initial costs for transmission because of transportation and hotel savings. Time costs: the business relevancy of all broadcast material must be demonstrated. Further, the economical freeze-frame mode cuts the slide count to six-per-minute, not exactly an entertaining blitz.

The pressure to prove the value of

communications programs is growing. Whether the pressure originates with internal budget or external technology is beside the point because the effects are merging: the formats of business communications will increasingly reflect applied learning theory based on research, not slogans.

Cost-effectiveness is here to stay!

In summary: Skill in programming any AV presentation can count for more than budget. That's your challenge. Since related research has indicated that problem-solving is the highest form of creativity, camera angles, jiggles, and applause are aspects of packaging. If packaging is substituted for communications, it is undeniably destructive.

None of this should be construed as a case for dull programs or faulty technique, since discomfort interferes with concentration. But the salient ingredient in persuasion is involvement; and we respond fastest to ideas and processes which affect us. People need to be engrossed, not coddled or entertained. Life is full of tough lessons; and we learn from them... sometimes the first time.

When you treat your AV audience (internal or external) as rational human beings, your effectiveness as a communicator rises while your per-person cost for media and technology declines.

Doesn't that objective justify your re-evaluating AV's easy answers of the past?

Richard Cavalier has summarized his 25 years' experience in designing and producing group communications programs and conventions in "Sales Meetings That Work," published by Dow Jones-Irwin.

FIRST TAKE

Basic principles of AV learning

The following are capsule summaries of published studies; all are in agreement with the training-demonstrated phenomenon of memory reinforcement, retroactive inhibition, and performance-based instruction:

- No significant difference in learning when comparing color to black/white (Joseph Kanner, 1960).
- Entertainment has as its goal present-moment satisfaction. Adult education's goal is present moment dissatisfaction to promote change (Malcolm Knowles, 1966).
- The brain cannot sustain attention in multiple sensory channels simultaneously; it prioritizes and blocks; attention-splitting reduces learning efficiency (Broadbent, 1958, and others).
- Projected written words appeal to the same (left) hemisphere of the

brain as does the spoken word without aiding right-hemisphere conceptualization (Sperry and Gazzaniga, 1967).

- Complexity and expense of the media have less bearing on learning results than does the skill with which various media are used (Kanner/HumRRO, 1971).

- Motion contributes to expense but not necessarily to learning effectiveness (HumRRO, 1971).

- Step-by-step procedure (Programmed Learning) does not necessarily aid conceptual learning (HumRRO, 1971).

- Wrong-way/right-way (the cliché how-to) structure degrades performance because some wrong-way learning takes place (HumRRO, 1971).

- Visual and/or oral "roadmapping" enhances the ability of the ear to comprehend even poorly-organized material (Bransford and McCarrell, 1974, 1979).

- Performance efficiency in sustained tasks involving auditory signals tends to be superior to that in tasks involving visual eye signals (Dember and Warm, 1979).

These studies, together with means of practical application, are discussed at length in Sales Meetings That Work, by Richard Cavalier (Dow-Jones Irwin, 1983).

Professional groups geared to the USER'S viewpoint (YOURS!) gave immediate acceptance to this authoritative how-to text:

"Recommended reading"

mpi

meeting planners international

Achieving Objectives in Meetings—Theory and Practice for Solving Business Meetings Problems/337

Richard Cavalier, Corporate Movement, Inc. Because it is a collage of columns, articles and freshly written prose, this work is less than even. But the author manages to get his ideas on corporate meetings off his chest. His main ideas are exactly contrary to McLuhan's; namely Cavalier believes that the content far overshadows the form. Beyond that, he believes meetings should not be an end in themselves—that form and content should combine to achieve some rational goal for the company. Cavalier lances some of the boils that afflict the meetings game—the hypes, ripoffs, hucksterism, and free-booting. Sometimes the training theory is a little weak, but there is a lot of useful stuff here. \$14.95.

ACHIEVING OBJECTIVES IN MEETINGS

by Richard Cavalier

Corporate Movement, Inc., 219-page hardback

\$14.95

Business meetings and conventions have been complex. Discussion of ideal formulas, the standard "how to" format, is no longer a valid approach to the real problems in structuring and producing a meaningful meeting or convention.

This book is an innovation in "how-to" texts in several ways. It doesn't pretend to be all things to all meeting managers, and so it bypasses the beginner's primer on ashtrays, ice cubes, and seating diagrams. It presents a rationale for every element of the planning, coordination and execution of the meeting. Its information units are self-contained and cross-referenced so you can find needed material quickly. The author recognizes that textbook problems are not the only ones. He builds an understanding of the fundamental stresses and weaknesses of programs both inside and outside the direct control of the meeting manager. As a result, you are better prepared to make the right decisions, even under pressure.

The book is a problem-solving kit for nonpersonal and interpersonal communications, including corporate sales promotion and training; advertising and public relations; employee publications; and syllabus development (with and without lectern scripts) for identifying and correcting people-problems.

The author is also knowledgeable about stage craft and visual media. As a co-originator of convention coordination as a consulting function, he has implemented his methods in the meetings and conventions of many blue chip corporations and major national associations.



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November 25, 1985

Mr. Richard Cavalier
CAVALIER INDUSTRIAL WRITING
4900 Marine Drive
Chicago, IL 60640

Dear Richard:

I did not want any more time to pass without writing to let you know how much I enjoyed our phone conversation in September.

People who are ahead of their time are often misunderstood... until the masses catch up and then those same people suddenly become very smart. Our industry is just now beginning to see your message.

Your book has been a great help to me and I hope we will have an opportunity to work together on some future projects.

Enclosed for your information is our **Meetings and Conventions** concept and Type 1 Client Profile.

When I am in Chicago for the June, 1986 Meetings and Conventions Dialogue program, I will contact you and hopefully we will have an opportunity to meet.

Cordially,

Cari Lyn Vinci
Director
MEETINGS & CONNECTIONS

/lbp

Noted 12/6

January 1976

Holding a Planning Conference

RECEIVED FEB 9 1976

Probably every Christian executive agrees that planning is an asset to effective management. Probably just as many of us would admit that we do far less planning than we believe we should. The difficulty is that planning takes time. And time is a commodity which is in continual short supply. The enemy of planning is the tyranny of the urgent. Just about the time we sit down together to figure out where we go next, our secretary announces a newly discovered brushfire that demands our immediate attention.

Good planning requires extended periods of quality time, the right mix of people, the right environment and the right preparation. Or, to put it another way, good planning is the result of good planning.

One of the best ways we know to maintain a continual flow of fruitful planning is the vehicle of the planning conference. By this we mean a conference which is isolated from the interruption of everyday fire fighting, which is purposely constructed to produce the desired result and which is planned far enough in advance so that all needed participants can be available and can be adequately prepared.

How Often Should You Hold A Planning Conference?

This is another way of saying "How often should one plan?" Planning should be a continuous process. When we sit down at the end of the day or early in the morning to scratch out a things-to-do list, we are doing daily planning. When we put an hour aside with members of our staff at the beginning of the week to talk about the week ahead, we are doing weekly planning. Many Christian organizations and local

churches find that a monthly planning meeting with the entire professional staff is a good way to keep their house in order. However, in terms of setting new goals and deciding how we are going to reach them, you will want to consider quarterly, bi-annual or annual times with the appropriate staff together. The planning conference meets this need.

What Is The Goal?

"The goal of a planning conference is to plan, right?" Wrong. The goal of a planning conference is to discover how to reach goals through plans. Therefore, it may be necessary to include as an early item on the conference agenda a definition of goals - measurable, time-bounded statements of achievement. But by its very nature of having people together for an extended period of time, a planning conference gives potential for doing a number of other things. It can have a number of goals. Not the least of these is team building. By now most of us are conscious of the positive benefits that result from shared goals and shared plans. As people work together setting goals, making plans for them and then working to bring those goals into reality, they learn to appreciate each other's strong points and to work around each other's weaknesses. They have an opportunity to experience each other as people and as individuals.

Another goal of the conference may be training. How you set up the conference and how you hold it will say a great deal in itself and will become a model that will help others lead their own group's planning. The best way to learn to plan is to be part of an effective planning meeting.

books and papers on brainstorming and group process can be used to good effect. By dividing the large group into smaller subgroups and by having the subgroups brainstorm around similar or different topics, a way can be found to have each individual make a contribution. This needs to be more than just an exercise. Plan on ways of gathering information from the groups, synthesizing it and then putting the groups back to work on higher priority items. Usually the best results are obtained if the group process is used to sort through perceived needs and desired goals. These needs and goals can then be prioritized and can in themselves become an overall statement against which detailed plans can be made.

Many times such conferences, particularly where volunteer organizations such as local churches are involved, can be done as a two-step process. The first session is used to gather ideas, while the second session is used to put groups to work in doing specific planning. In this case it is helpful to pre-train group leaders, particularly in planning techniques.



For Further Reading

A large book that would be useful to anyone planning an extensive conference is Achieving Objectives in Meetings by Richard Cavalier.

A NEW, GROWING MARKET— UNTAPPED BY AGENTS

*Offshore corporate meetings are possibly the industry's
best long term answer to the problem of creating new business*



by JOSEPH GARDEN

Director, Group Travel Development
Pan American World Airways

JUST AS THE TRAVEL industry was coming to regret the capacity of the jumbo jets, a new jumbo-sized, off-season sales market has appeared. It's the offshore corporate business meetings market, and it's never been tapped.

Most corporations have at least one major sales meeting each year, and many have numerous smaller meetings . . . distinct from all other kinds of travel originating with the corporation or its employees, such as top management committee meetings abroad or recreational groups and charters. Neither can the corporate meeting be safely pigeon-holed with association conventions, which they resemble only superficially.

Many have considered incentive travel to be the corporation's direct contribution, but that overlooks three key elements: first, only a relatively small number of all major companies have a formal incentive program which includes travel; second, the in-

centive house often blocks three tours to operate one, which heightens the appearance of volume; and third, incentives are a special "program," whereas meetings are an unavoidable reality. Therefore, incentive groups can be considered only the tip of the corporate iceberg—a fraction of the business which can be generated inside corporation walls.

The offshore corporate meetings market is new. It has occurred because of the coincidence of increased capacity with lower air fares in a recession period, forcing the travel industry to seek new sources of business. Although student fares might be seen as a short-term and possibly self-defeating response, the offshore meetings are possibly our best long-term answer to the new-business problem, and we owe ourselves the proper investment in time and money to help the market mature.

Yet for all its preoccupation with finding new sources of revenue, our

industry did not discover the corporate meetings market. That corporations could take their regular business abroad at about the same or even lower cost than a domestic meeting was announced in a business publication in February 1971 by Richard Cavalier, a world-traveled meetings consultant, now the meetings columnist for *Sales Management* magazine. In effect, the business community has discovered its own uses for our resources and now is asking how we will respond.

In a word, we must respond professionally.

A survey of potential produces astounding figures. While the total meetings and convention industry represents about \$4.2 billion in annual expenditures, most travel industry effort has been limited in the past to association and international professional and fraternal organizations.

More than 50,000 business meetings take place each year outside the corporate headquarters city—there's no count on those held just down the street. According to latest (1968) census figures, about 1.6 million men are employed in direct sales, excluding retail. Counting wives, we are dealing with a market potential of three million passengers—repeatable annually! Predominantly family men working on salary-type commission arrangement, these prospects have not planned to travel abroad before their children have graduated. Therefore we are not stealing from our high-season market.

Yet for all the advantages inherent in the business meetings market, we have been slow to respond. Professional marketing demands a responsible program now. Corporations demand competence. It's an industry challenge.

Continued on page 28

CORPORATE MEETINGS

Corporations are value-minded and, unlike tourists, can and will examine facilities in advance and request specific changes in services and itineraries.

Although the glamour of the foreign destination remains the first interest of the employee—thereby offering substantial motivational benefits to the sponsoring company—the purpose of the trip is business, not pleasure. For the first time (considering all past meetings and convention) the emphasis is on the quality of the meeting facilities, not the beaches or ski lifts. This is a significant departure from the incentive group, which is a pre-paid vacation crowd who hold meetings essentially to satisfy the tax regulations. The Internal Revenue Service claims many professional seminars are held abroad as a maneuver to win a tax-deductible vacation; new interpretations are more stringent.

Further, corporations have both the financial and legal muscle to resist abuses stemming from carelessness or incompetence or misrepresentation. A recent customer survey by an IATA carrier demonstrated that a majority

of CIT package customers were dissatisfied with some element of the package. Whether that is the fault of overselling or over-expecting is incidental—we cannot permit such attitudes to jeopardize our new market.

In summary, this corporate meetings market is a brand-new market with a brand-new set of rules. It's a situation new to the travel industry: the customer is in charge!

As a result, the travel industry must guarantee the basic on-site service components of the meeting itself in order to develop the market to full potential. Not necessarily more services, but surely more consistently first-quality services.

If any one corporation is treated badly, the business community will know the names of the travel industry suppliers who failed. If several corporations are mishandled, the wisdom of going abroad will be questioned—and the entire market can fail.

Need for high standards

Clearly the travel industry must set high standards of service for corporate meetings. These standards will affect nearly every aspect of the total air/ground/service arrangement, requiring that we warrant every meeting component we promise—apart from the washer. It might even be in the best interests of our industry to put economic pressure on laggards through unfavorable publicity in the trade press. Competitive advantage will lie, as it always has, in offering legitimate extra service at the most favorable cost.

Here are a few specific examples of those legitimate services. Air carriers must deal with the total transport problem for people and meeting materials, possibly from door to door. Reconfirmation desks and "how to pack" lectures cannot be billed as "special meeting service." Hotels must offer more than beds and meals and paper-thin contracts; they must oversee the delivery of the goods and services ordered on behalf of the customer and must guarantee the performance of their own employees. Sightseeing firms must be willing to reorganize their fragmented basic tours so that the meeting participants can visit all the important landmarks and locales in a reasonable amount of time. Wholesalers must guarantee the performance of all their subcontractors. In short, a "business meetings pack-

age" must be more than last year's ski package printed in a new shell!

Under the circumstances, there are two alternatives open to our industry. First, we can panic—deciding that the total combination of sophistication and performance standards of the corporate customer is beyond us—and abandon a potential of three million seats yearly. Remember only seven million traveled to points other than Canada for all reasons in all of the year preceding. Second, we can dig in and learn about the major traffic bonanza of the '70s, serve it well, and tie ourselves to the business community, which ultimately might prove to be the largest source of repeat business we can ever hope to encounter.

For Pan American the decision is easy—we're digging in. We believe the meetings market is valid. Not only do we believe that the travel agent should share in the new market, but we also recognize that without the travel agent, neither Pan Am nor the industry will realize its potential.

There are more than 11,000 corporations employing over 500 people; 75,000 firms employing more than 100; and about 3.5 million employing units. Nobody has a monopoly on such a market, even if the giants are already overattended.

Worthwhile investment

Only the travel agent can handle the numbers involved, because many of the major firms and employing units are managed or owned by the agents' own friends and business associates. Such groups can range from a half dozen to 40 to several hundreds—a worthwhile investment of time and effort.

The new market speaks the language of sales manager and training managers—you might or might not speak it; most airline reps don't; and despite all their protests to the contrary neither do hotel reps. This market calls for a totally new kind of know-how.

The agency/customer service package we have developed is essentially a consulting service, an answer to customer needs, not a money-making venture, whether those needs are discretionary or dictated by the physical makeup and potential of the foreign facility.

If you see for yourself the same potential in meetings that we see, we urge you to do something about it now.

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Meetings

ACHIEVING OBJECTIVES IN MEETINGS. By Richard Cavalier. 218 pages. Corporate Movement, Inc., New York. \$15.49.

ALL TOO OFTEN, meeting organizers spend most of their time on meeting mechanics—counting bodies present, the hotel decor, the food service. They ignore the actual purpose—communicating a message, says author Richard Cavalier.

His new book—*Achieving Objectives in Meetings*—focuses on planning, coordinating and executing meetings with the message in mind.

Cavalier looks at two broad areas:

- *The meeting message & meaning.* He shows how to determine a meeting's purpose and measure its success.
- *The speaker as authority.* He shows how meeting leaders must pace their program according to their working agenda.

Books

Richard Cavalier's *Achieving Objectives in Meetings* (Corporate Movement, New York City, 219 pp., \$14.95), subtitled *Theory and Practice for Solving Business Meeting Problems*, is as thorough a manual as a meetings manager would ever want to have. Cavalier, a contributing editor to SM and an established authority in the field, gives a comprehensive explanation of the theory behind meetings, and their successful production, in the first 20 pages of the book. The balance, containing reprints of his published articles, covers the practice of meetings. Topics include the message, the agenda, coordination, handling hotels and suppliers, and meetings held abroad. "Analysis forms"—checklists and evaluation sheets whose attention to detail borders on the obsessive—are included in each chapter. Logically presented, useful information, but not meant for beginners. ■

—ANDREW KAPOCIUNAS

SALES MANAGEMENT FOR MAY 13, 1974

FORUM NEWS

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M. G. Van Buskirk, Editor

February 1963

FEBRUARY MEETING

"Tested Techniques for Better Meetings" will be the topic discussed by Richard Cavalier, of United Attractions, Inc., Chicago, at the February meeting in the Century Room, LaSalle Hotel. United Attractions has a well deserved reputation for dramatizing and adding interest to convention meetings.

The FIVE MINUTE IDEA CAPSULE will be given by Ruth K. Holmes, Evanston-North Shore Board of Realtors. Her helpful hint will be "Professional Assistance in Hiring".

F E B R U A R Y M E E T I N G

La Salle Hotel - Century Room

Thursday - February 21, 1963
12:15 p.m. sharp

Speaker - RICHARD CAVALIER

Subject - "TESTED TECHNIQUES FOR
BETTER MEETINGS"

OFFICIAL PUBLICATION OF THE
AMERICAN SOCIETY
OF TRAVEL AGENTS, INC.

ASTA

TRAVEL NEWS

OCTOBER 15, 1979/PART 1 OF 4 PARTS

CHINA: Tourism Moves to Prime Time

Guatemala Reaches for the Top ■ Improving Your Salesmanship ■ Cruising the Red Sea ■ The Meetings Market: How to Get Your Share ■ The Many-Splendored Channel Islands ■ Progress at Eurailpass ■ Hawaii: The Outlook for 1980 ■ Skiing Switzerland at Affordable Prices ■ Gatwick Airport: Number Two and Trying Harder

PREVIEW: The Big Picture/Travel '79-80

BY RICHARD CAVALIER

Getting a Competitive Edge on the Business Meetings Market

Explore your alternatives and know what (and whom) you're up against

IN 1971, ADVERTISING & SALES PROMOTION MAGAZINE told the corporate world that business meetings could be held abroad less expensively than at home. The retail travel industry toyed with that market until it was lost to inflation, the declining dollar, and Congressional restrictions on out-of-country meetings. Despite corporate interest, little is being done today to develop the meetings market as a lasting resource.

Yet the business meetings market, combining domestic and foreign destinations, is perhaps the richest repeat market the travel industry could capture. You can enter that market because your present capabilities are highly saleable.

But you must enter on the market's own terms: personalized service with utmost dependability. Meeting requirements are different every time, even for the same client. "Average" service is not enough.

Never having satisfied the legitimate needs of that market, the travel industry has failed to capture either package tour business or the corporation's confidence. As a result, piecemeal purchasing of each program component is today's norm, which permits you to approach major companies.

This is especially true if your agency is presently writing individual trip tickets for corporate executives.

UNDERSTANDING THE MARKET

Two key executives dominate corporate travel purchases.

The vice president of sales will control meetings/conventions group travel. At least one major sales meeting is held annually and sometimes quarterly. The eight- to ten-month calendar generally avoids summer, although summer incentive trips are common.

The vice president of industrial relations controls group recreational travel and incentives for staff and production

line personnel. Activities are concentrated in summer months, and group tours are most welcome at facilities that close for the vacation month.

One phone call will get you both names. Although airlines and incentive houses separate meetings, incentives, and recreation for their own ease of selling, the corporation sees all three as alternatives in achieving its major purpose of increasing productivity. The three overlap in corporate planning, and any program that enhances the good-employer/competent-management image will get serious attention.

The client's single-mindedness makes you better able to serve him than the narrow-assignment industry sales rep also calling there. At times he has a (perhaps unfair) competitive advantage, which will be discussed later. By observing the fine points of the overall meetings/conventions market, you can maximize your own strengths:

—Employee-paid recreational travel is essentially the traditional group or charter arrangement; you need no special tools or staff. If employee response to a "teaser" letter ("Would you take your family to _____, if...?") is positive, then the company should guarantee the trip's operation to avoid disappointments. Begin promoting several months ahead.

—The special needs of incentive programs—and how to sell them—were detailed in "The Incentive Travel Bonanza" (*ASTA Travel News*; July 1976). Review it and then follow through. Even small local firms are prospects.

Association conventions are highly political; unpredictable because of voluntary attendance and hotel guarantee terms; and sometimes disloyal despite good service (new presidents annually). Avoid them until you are skilled and confident in the meetings business.

The balance of this article, therefore, will deal only with corporate business meeting travel.

continued ►

Your business stability is one of your most important competitive advantages, a welcome contrast to the musical chairs game played often by airline personnel. When a sales or service rep leaves an airline, the client loses all the time, effort and special understanding for service that the employee carries with him. As a local businessperson, you can assure personal interest and long-term continuity of handling for the account.

Apart from transportation and accommodations, service is the prime need of the corporate client. Meticulous attention to detail is perhaps the crucial factor in choice of suppliers. You must address the quality and stability issues directly if you hope to earn the business, for the client has been promised *ad nauseam*. Provide facts plus references from your bank and your satisfied clients. Your troubles will be well repaid.

The market potential is staggering. There are at least 400,000 business meetings conducted outside company walls each year, and an estimated 50,000 of those are held

Most airlines perform special, unannounced services on request for clients as a competitive extra vis-a-vis each other. Because the travel agency client must buy services he may not be given, airlines defend their limited published services by quoting ATC Resolution 90.1 and 90.2, which states that "nothing of monetary value" (including beneficial contracts) is to be offered to any travel agent. The airlines can now offer services directly to the client that the agent cannot obtain on behalf of the same client—seemingly unfair competition.

TWA's Linda Lockman summarized many airlines' attitudes with, "Our services are ticket-related, but specific additional help will depend on group size and the portion on-line."

Practical effects of the policy were best expressed by United's Mike Houghton, who said, "ATC resolutions do not permit airlines" to turn business or leads back to agents and so agents "must perform added services" if they hope to obtain corporate business.

'Almost without realizing it, the travel agent is losing his partnership with airlines and hotels and is becoming their adversary.'

in places other than the headquarters city.

While the Fortune 500 companies are besieged with attention from all travel principals, the majority of the nation's 80,000 middle-sized (100-1,000 employees) firms are rarely called upon; most of the 4 million small ones have never been approached.

MEETING THE COMPETITIVE CHALLENGE

Almost without realizing it, the travel agent is losing his partnership status with airlines and hotels and is becoming their adversary. It is realistic to consider both as your competitors when determining how you can sell and serve the middle-sized national corporation or its local regional office.

Here's what you're facing:

Most announced airline services are ticket-control oriented (i.e., reconfirmation desks, computer lists, etc.) and do not answer general client needs. These announced services are usually published and so are available either through the agent or directly to customers.

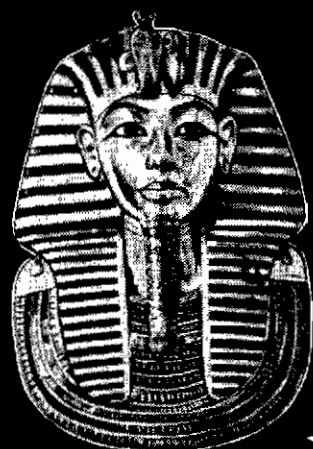
However, Eastern's Loren Cain claims EA will advise clients directly but offers to allow corporations to take the business back to the established agent, if they choose to do so.

In investigating pricing procedures among hotels, the Federal Trade Commission is challenging another area affecting your ability to do business. Hotel prices are negotiable, and hotels generally refuse to discuss other terms except on written request, answering only specific questions. That makes the task of your assembling effective cost comparisons (meeting rooms, lights, labor, sound equipment) arduous and time-consuming.

Especially important to group business are the terms of advance guarantees of the minimum number of meals to be served. The difference between guarantees paid and actual lower count is known as *breakage*.

"Breakage is a source of profit to the hotels, and they are unprepared to deal with anyone who understands this," says Ray Hall, current president of Meeting Planners International.

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EGYPT

King Tut says,

"I've visited your country. Now come visit mine."



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Advance notice of 24 hours has been standard for more than two decades and has resisted some hotels' attempts to hike it to 48 hours. Then a convention industry publication ran an article calling 48 hours the standard, while withholding survey information indicating that 24 hours was still firmly entrenched and that sales managers of nearly all 48-hour facilities contacted had stated they would meet the competition.

While hotels are free to waive their advance-guarantee policy in direct sales, the travel agent may be stuck with stated policy. So breakage policy, which increases client liability and/or costs, can make the agent's proposal less attractive than the hotel's own.

Hall's user organization has not objected to either the magazine's article or the industry practice itself (nor has MPI suggested acceptable standards) because suppliers

Fill-in brochures and by-the-number ringbinders unfortunately seem to be elementary and passenger-control-oriented. You will not pass muster with a sophisticated meetings manager if you have only that level of familiarity to offer, although the checklists can be helpful at times. There is no substitute for understanding every element of the program, which becomes your ultimate control tool.

You, along with your associates. Assess your strengths and weaknesses, and discuss them frankly with the prospect. He will appreciate your honesty and can buy even knowing specific limitations because he can plan around them.

Competitive problems have evidently intimidated travel agents. United's Houghton estimates that possibly 10 percent of all agents have had any corporate meetings involvement, and only ten-15 agencies specialize in corporate meetings travel nationally. More agents are involved in

Elaine Lerner, Group Travel Associates:
'What I must have from the airlines is
the assurance that promotional fares will be retained long enough
so I can produce sales.'

object, and, "We need our associate (supplier) members' economic support to maintain a viable organization."

Clearly, corrective action is overdue. But you can still capture business if you explore your alternatives and act.

SOURCES OF HELP

City convention bureaus are a dependable source of information about facilities and local services. Let your customer contract directly for non-travel needs. For foreign destinations, the respective national tourist offices are unbiased and updated regarding internal availabilities, services and average costs. The convention services of foreign airlines are largely those of their NTOs. Both domestic and foreign service groups deal in commonly-requested services; and the client's oddball need, if you agree to fill it, can become your personal headache.

Wholesalers are edging into the market with basic services, offering commissions or markup, as arranged. American Express has established a separate agent service office and quotes net for markup on its services. For other services, "We will refer agents to sources," says U.S. Regional Vice President Paul Spitzberg.

small movements than in large ones, he feels.

HOW TO SELL, SERVE AND PROFIT

"The business is out there—go out and sell," says agent Elaine Lerner, chief of Group Travel Associates in Allentown, Pennsylvania. Lerner estimates that her business is 40 percent corporate/convention, 30 percent incentive and the balance standard retail.

Today her staff numbers 15, and GTA has a Sabre system, with computer control of tickets and rooms. But GTA began more modestly and grew with the volume over the past half-dozen years.

"What I must have from the airlines," she says, "is the assurance that promotional fares will be retained long enough so I can produce sales. I'm not interested in having the 800 number work for me—there's too much uncertainty for me to rely on them. We do all our own work [in protection of reputation and client]. Certain airlines are cooperative . . . and by working always with only one or two people by name on their charter/tour desks, we get consistent recognition and attention."

continued ▶

We want to help, we know what you go through to get them there!

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In Lerner's opinion, there are no insurmountable problems. So we are outlining nine indispensable steps to help you capture your share of corporate meetings business:

1. Stick with travel-related services. Perform them with meticulous attention to both promises and detail. Outline in a written agreement exactly what you will and will not do; how you will interact with other suppliers, if that is appropriate; how and when you will bill. Never guarantee the work of strangers as your subcontractors. The client is probably already buying program production and coordination services from specialists, and you cannot easily duplicate those educational or theatrical types of functions. And once you promise, deliver!

2. Begin by selling individual executive trips. Same-day delivery (or airport pickup) makes no unusual demands but permits you to demonstrate your reliability. Earn more business.

3. Once established, ask for their group business. By writing the group's return and leaving the outward leg open, you help control limited exit space, permitting each traveler to select his best departure schedule, while eliminating re-writes.

4. Nail down the billing procedure. Many companies require consolidated billing and count on the float of delayed billing. If their volume is greater than you can carry, ask for cash or credit cards. The latter offer all the benefits the corporation needs.

5. Offer cost advantages by creating land-based tours. Even with markups, these are often significantly cheaper than full fares paid by individual purchasers. The client

benefits while you earn commissions on dozens or hundreds of tickets and rooms otherwise outside your market and your reach.

6. Suggest many alternative sites without attempting to block routes or facilities. Since each competing airline is pushing its own on-line destinations, you can benefit from the unbiased selection. When he expresses a preference, investigate two or, at most, three facilities.

7. Alert your client to unusual values made possible by seasonal or promotional air fares and/or hotel off-season rates. Most are flexible within a few weeks of original target—ask.

8. Analyze all major movements before recommending the best site. Because of disproportionate employee locations, a geographically central site is not necessarily the most economical. LAX-NYC is cheaper than LAX-CHI these days.

9. Make dependable airline contacts. Keep aware of what each airline is offering directly to accounts in your area and demand those same services for your groups. If refused, complain to the CAB or FTC, offering specific facts and comparisons.

As deregulation proceeds, promotional fares will proliferate while falling prices and 800 numbers mean decreasing revenues on rising workloads for most agencies. The corporate client offers you a unique opportunity to write a substantial increase in business with no upfront investment. That's a client worth planning for, and worth serving well. He's worth fighting for. Sell as if your survival depends on corporate clients. It just might. ■

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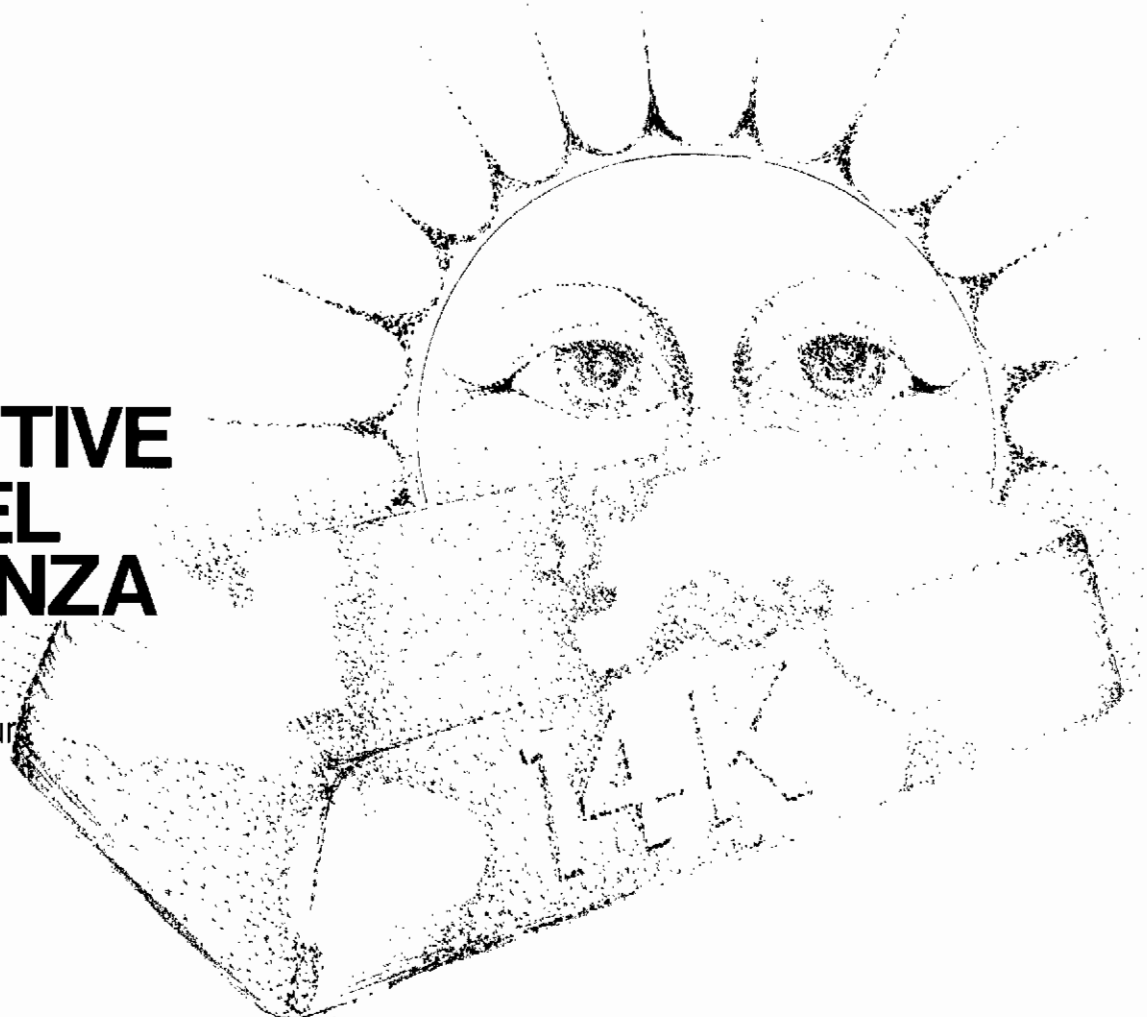
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THE INCENTIVE TRAVEL BONANZA

Here's how
you
can stake your
claim on
this
\$5 billion
mother lode



BY RICHARD CAVALIER

In 1974, (the last year for which complete figures are available), incentive travel sales exceeded \$556 million, an all-time high. The travel industry was elated. Sales for 1976 will surpass 1974, even if '75 dips a little. The trade is cheering. At the same time, the share of travel to merchandise rose from 10 percent to about 11.5 percent of the market total. Travel principals are jubilant. Suppliers of transportation and accommodations know they've stumbled onto a gold mine. Yet the travel agent probably has seen more of the shaft than of the mother lode.

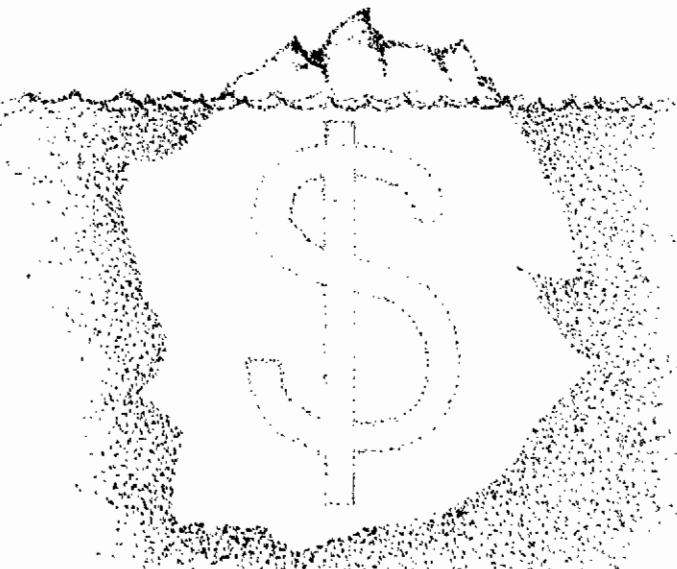
There are reasons. Historically, travel was one of hundreds of items offered by the trading stamp companies and merchandise wholesalers who pioneered the incentives field. Some of your best prospects don't recognize themselves, so you're not dealing with walk-in customers. And too many agents have been scared off by tales of computer control centers, staffs of hundreds, and merchandise bottle-necks that mark the incentive house operation.

But the scariest aspect, from the viewpoint of most travel agents, is probably the word *motivation* and the complex social and psychological know-how that is implied.

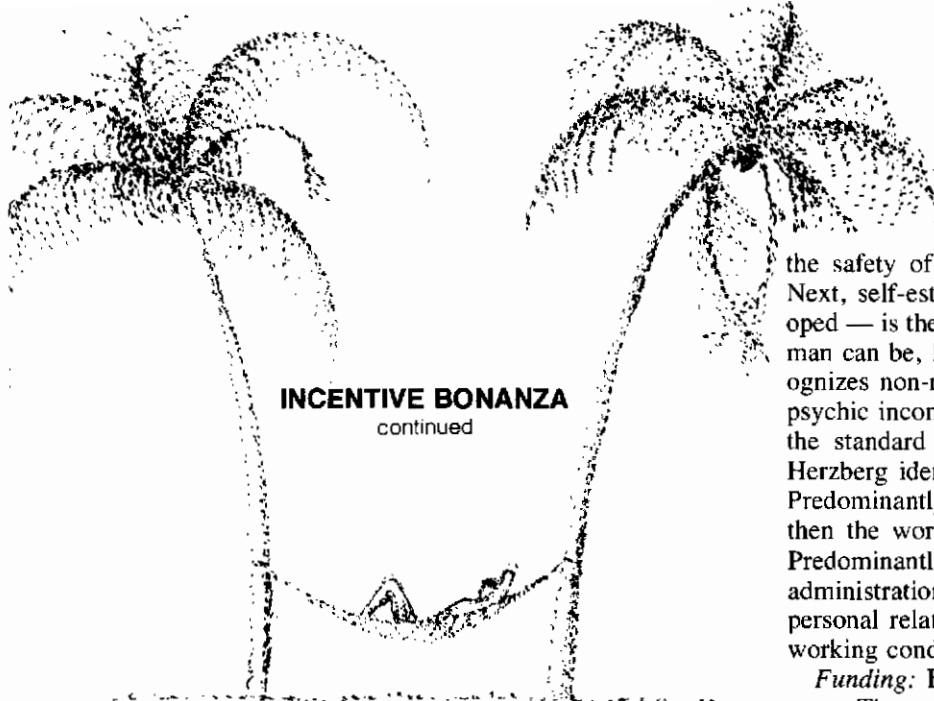
A few basic points are in order. First, the 10 percent share of the overall incentives market is grossly inadequate — a product of the tithing mentality acquired by the travel industry over the years. Second, although the contest, funding, and gift shipping or transportation/lodging services of suppliers range from superior to marginal, the motivational assistance ranges from inadequate to fraudulent. Third, because of the scope of

the customers in the market, the travel agent can sell vigorously without competing with the established incentive houses. Fourth, you can sell substantial amounts of incentive travel to existing corporate clients with existing facilities and staff if you will learn the underlying principles and apply them.

Understand the size of the market. Tithing the \$5 billion incentives market is poor business practice. The major incentive houses have for years been selling merchandise and travel on a 50/50 mix. That reflects the



FOR ALL ITS POTENTIAL, THE CURRENT
MARKET IS ONLY THE TIP OF THE ICEBERG



INCENTIVE BONANZA

continued

TRAVEL AWARDS SHOULD BE DELUXE . . . FAVOR GLAMOROUS LOCALES

lished annual meetings budget. The net effect is the same: the company is a great place to work. Few if any companies are too small to consider incentives.

Master the basics. There are a few essentials you must command before you can put all the pieces together, including:

Theory: Abraham Maslow established five categories of human needs. Lowest and most fundamental on the scale are physiological needs (food, shelter, sex). Then,

the safety of those needs. Then, belonging and love. Next, self-esteem and prestige. Highest — most developed — is the need to become self-actualizing. "What a man can be, he must be," Dr. Maslow asserts. He recognizes non-monetary rewards and satisfactions, called psychic income — that is, the quality of life apart from the standard of living. In related research, Frederick Herzberg identified ten motivation-hygiene job factors. Predominantly satisfying is achievement; recognition; then the work itself; responsibility; and advancement. Predominantly dissatisfying are company policy and administration; then quality of supervision; salary; interpersonal relationships, especially with supervisors; and working conditions.

Funding: Every incentive program generates start-up costs. The responsibility for estimating costs and respecting quotations is yours. Generally the money is paid back out of profits on the increased productivity or added sales or by savings gained or losses eliminated. Every company problem has a price tag; generally the company is willing to spend about half of the program; a few spend it all the first year. Encourage the latter; leverage on higher cash flow or lower expenses often gives a substantial boost to year-end earnings. Benefits accrue for years.

Qualifying: Everyone who actually does what he agrees to try to do deserves the full incentive. In the best-designed programs, everyone wins! However, most

Convention site-seeking got you down?



If convention site-seeking is getting the better of you, try our personalized group service. Frenchman's Reef in St. Thomas offers facilities for up to 600, the latest in a/v equipment, a permanent stage and experienced group professionals to help you. For relaxation Frenchman's Reef offers a perfect climate, luxurious rooms, day and night tennis, secluded white beach, fresh-water pool, water sports, duty-free shopping (\$200 custom exemption), 18 shops right in the hotel, exciting nightspots, unsurpassed cuisine. For our super group rates, or mail the coupon now.

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demand for travel by the customer. So travel is \$2-billion short of its potential in the existing incentive market.

Understand the scope of the market. Most established suppliers compete for the volume business of a few dozen giant corporations. But there are nearly 12,000 firms that employ at least 500 persons; nearly 70,000 more firms employ between 100 and 500 persons. Counting mom-and-pop stores, there are 3.5 million employing units. The incentive industry has concentrated on the sales group; yet any employee at any level is worth motivating if he's worth keeping. For all its immediate potential, the current market is only the tip of the iceberg.

Understand the customer's problems. Incentives cost money. Even though a solid program is self-sustaining, the customer must commit to an initial appropriation which will be lost if the program fails. If he's willing to take that risk, his problem is serious. He wants help. He deserves competent help — and there's the crux: some suppliers have pushed merchandise incentives when incentives were irrelevant or aggravating to the basic problem. For instance, employees who feel underpaid will resent seeing others win color TVs and trips — especially if they themselves can't compete. Perhaps absenteeism is causing havoc on the assembly line. Offering 50 per cent of unused sick days as extra vacation time is an incentive that works for many companies; outside purchases aren't necessary. The type of problem to be solved determines whether or not an incentive should be psychic or monetary, and whether a full motivational program is needed. A supplier with no expertise in the customer's own business should not attempt to advise. Management consultants or industrial/motivational psychologists are needed.

Never confuse incentives with motivation. Here's where most suppliers make most of their mistakes. An incentive is simply a carrot, a reward reflecting what management wants; incentives are an outside influence. Incentives are, therefore, activators — that is, any reward that justifies for the recipient his making an extra effort to obtain that reward. Carelessly used, incentives may be seen as bribes, and big problems often follow. By contrast, motivation is a reflection of what a person *is*; motivation is an inner force. It is complex and somewhat different in each of us.

Be aware of differences in effect. In a few uncomplicated situations, a little extra effort for a short time might be all that's needed. In such cases, an incentive probably can activate an employee, even though it will not motivate him. That is, he will work harder for the prescribed length of time in exchange for the reward offered; but he will stop pushing as soon as the prescribed period is ended or the reward is gained. Activators result in shallow commitment, short-term results, and demands for more of the same. Most situations



AN INCENTIVE IS
SIMPLY A CARROT . . .

are more complicated. Changes sought by management are usually intended to be permanent. If so, the motivational program must appeal to the employee's own sense of values, creating changes in his driving force. This is a task for a motivational specialist. The specialist might recommend the use of purchased incentives (such as travel), but he might also recommend purely honorary awards — recognition alone, which costs nothing — or even change in company policy — again, not leading to purchased incentive awards.

Take stock of your capabilities and potential. You are better prepared to enter the incentives market than you realize. First, the materials you need are easy to get, and the basics will follow in this article. Second, every established company account can be further developed: executive travel plus employee vacation travel plus incentive travel. Third, many prime prospects have never been approached with the idea. Consider department and variety stores, supermarkets, hospitals and schools, government offices — anywhere numerous employees do similar, routine work. Employees who are bored or feel unappreciated need motivational help, and travel can help make a change in their attitudes. Fourth, you needn't hire additional staff until after you've proved the business is there.

Believe in travel's motivational ability. Travel has won a 50 percent share of the incentive houses' business because it produces results. It is superior to merchandise for many reasons. Travel appeals to such fundamental human motivations as self-improvement, education, esteem, and enrichment of life. Even though travel is a life's dream to the majority of people, only ten percent of our population holds a passport. Travel enhances the lives it touches. Still, it is a luxury in most family budgets, ranking in priority far behind college funds, dental and medical attention, and music lessons. Yet anyone can travel guiltfree when the incentive trip is "free" and not convertible to cash. Incentive travel can be combined with existing communications programs, especially the annual sales meeting. New commitments are cut in half when the employee is able to earn the spouse's expenses, while his are covered by the estab-

continued ►

INCENTIVE BONANZA

combination merchandise/travel awards use travel for the top award for the few. Although it is human nature to expect a partial reward for a partial success (especially in sales), pure win-or-lose rules are often used. Supplier bias is often the determining factor — and should not be. For skill or attitude changes, win-or-lose is sometimes the only fair and productive way, since partial success is usually of no value. If partial success has value, an employee can be awarded that same percentage of the trip's value; he pays the difference in cash if he doesn't want to lose outright. No one method is right for all.

Budgeting: Travel awards should be deluxe, since people who have earned their trip are more demanding than any other type of tourist. Given your allocation of money (often 10 per cent of added sales, when that's the project), you can expect to spend nearly 1 per cent on promotional materials and mailings; 35 per cent on transportation; about 25 per cent on hotel room; and 15-20 per cent on food and beverages. Allow for meetings, ground tours, dining outside the hotel, parties, and a final banquet with entertainment. Include ground transport, tips and taxes, and all other essentials. Companies usually do not pay for alcohol (except at parties or banquets), laundry, or personal services. The traveler should not pay out of pocket for any indispensable service or necessity. The destination chosen will depend on the amount of money available and the number of employees who will achieve the goal. Favor glamorous locales.

Competition and contests: These are not synonymous.

Individuals can compete against themselves (past performance or present quota) or against each other (individually or by departments or teams). The contest is the easiest way to establish partial wins; and a contest is relatively easy to promote to keep interest high. Even then, the longest contest period should not exceed six weeks, although the planning will begin three months or more in advance.

Calendar and duration: Employee time costs money. Weekend whirls are valid; weekends can be included in a five-day tour; both weekends in an eight-day tour. Do not use their regular vacation time unless the tour is an easy win and part of the original deal.

Announcing rules: Every element must be clearly understood. Tell who is eligible; what is required for a win; whether partial wins are permitted; precisely how scoring will be determined and validated; beginning, ending, and travel dates. Be absolutely fair and impartial.

Promoting: Start with a teaser — "See you in Acapulco." Next announce the rules with a colorful shell; one or two reminders with interim scores; a final list of winners. All mail goes to the home. Passport and visa materials can be controlled best at the company offices.

Multiplying positive effects: Photograph the winners, and send copies to their home town papers; be sure photos reach the company's own publication; if training is involved, offer certificates. Make it a big deal this year, and next year's trip is already sold!

There it is, in blueprint. New learning, new details, new challenge . . . all within your present capability. New business is the incentive for *your* extra effort. ■

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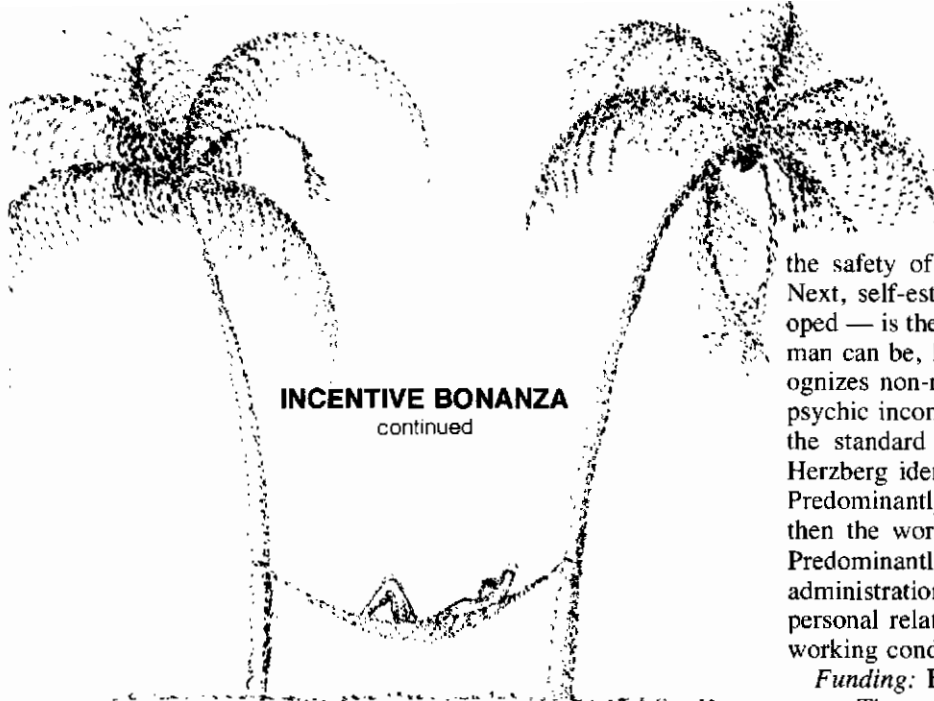
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INCENTIVE BONANZA

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ACHIEVING OBJECTIVES IN MEETINGS

by Richard Cavalier

Dear MPI Member:

Some of the most profit-oriented and human-relations conscious organizations have discovered a source of solid answers to meeting-room problems and potential. . . a source so uncompromising that the trade press did not acknowledge its publication . . . yielding insights so valid and so useful that it has become, in the half dozen years since its publication, the most-reviewed, most-recommended text in the meetings and conventions industry. Some call it the prime source document in its field.

That source is ACHIEVING OBJECTIVES IN MEETINGS, by Richard Cavalier. The scope, obvious expertise, and practical application to group communications are derived from Dick's remarkable background: co-originator of the convention consulting function; creator of significant training formats and programs; world traveler (about 45 or so countries). His clients have included major national associations, professional societies, and blue chip corporations. No blue-sky here!

For nearly six years Dick wrote a regular meetings column, first for A&SP and then for Sales & Marketing Management. His articles helped launch the industry's "consumer" movement--and certain vested interests won't forgive him. In the age of McLuhan's tautology, "The medium is the message," only AOM insisted "The medium can be the problem," and a subsequent study for the U.S. Army proved AOM right. A recent study by training directors (Bulletin on Training, March, 1980) corroborates his early contention that program formats must serve the audience and message. He was the first to identify adult education as the proper focus of a meeting and the first to demand standards in an industry plagued by incompetence. Your problems surely fall somewhere within his range of experience, his recommended approaches.

Too good to believe? Here are excerpts from published reviews: "Undoubtedly one of the best"/MPI News Letter, 1973. . . "An excellent communicator who mixes wisdom and wit, he's an exceptional teacher who expresses ideas in measurable terms. He provides, in addition to impeccable logic, appropriate supportive materials which enable the manager to use this text as an extremely valuable problem-solving kit"/Penny Hiernu, RMAMPI-Meeting News mag. . . "A comprehensive volume with a great deal of common-sense guidance and information, some innovative suggestions, plus a good introduction to PERT-type planning"/London Convention Bureau. . . "You are better prepared to make the right decisions, even under pressure"/American Society of Training Directors, T&D Journal. . . "At the opposite end of the McLuhan pole. Exposes himself as a knowledgeable stagecraft and visual media coordinator"/McGraw-Hill, Keys to Industrial Marketing . . . "As thorough a manual as a meetings manager would ever want to have"/Sales & Marketing Management. . . "Whether you're planning one meeting or many, AOM will prove useful and insure that your meeting accomplishes its objectives"/SMEI Marketing Times . . . "Should be of interest to meeting and convention managers of all persuasions and degrees of expertise"/Insurance Magazine (full page review). . . "A lot of useful stuff here"/Training in Business & Industry. . . "Useful to anyone planning an extensive conference"/Christian Leadership Letter (World Vision Int'l). Also noted by Business Week; Journal of the American Society of Association Executives; A&SP; Public Relations Society of America, and Working Woman mag. Here's the content reviewers think so great:

Part I: In Theory: Overview; Industry press; Producers and other suppliers; Facilities; People; Non-verbal communication; What's ahead. Part II: In Practice: Message and meanings; Agenda and control; Tooling up; Coordination and control; Handling hotels; Meetings abroad; Producer as business assistant; Show-biz for entertainment. PLUS twenty evaluation guides covering objectives, agendas, and supplier selection; and the industry's first PERT Diagram for positive convention control.

If you talk with people in groups, here's The Source for practical help. MPI gave copies as incentives; Metropolitan State College in Denver, the only school offering a degree program in our field, bought multiple copies when AOM was brand new. That's recognition! So much understanding, insight, knowhow-sharing, and tested techniques: AOM is a steal for only \$14.95. Coordinate with the best--the benefits are all yours.

TO: Joyce O'Brien, Agent; 15400 Belgrade St (105); Westminster, CA 92683

YES! I want all the help Dick Cavalier can deliver. Send me ___ copies of "Achieving Objectives in Meetings" (hardcover, 8 1/2 x 11 format, 219 pages).

Check with order, only; \$14.95 plus \$1.50 postage/insurance (Californians add tax).

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COPY FOR Dick Cavalier

January 11, 1961

Mr. Robert Letwin, Editor
Sales Meetings
1212 Chestnut Street
Philadelphia 7, Pennsylvania

Dear Bob:

Enclosed is a copy of the article I promised you since October. I hope this is the type of thing you are looking for.

If you plan to use it, please let me know in what issue it will appear.

My photograph and biographical material is available if needed. Also, I have some photographs of the dramatic sketches presented at our Convention, if you want them.

Sincerely yours,

Joseph L. Koach
Administrative Assistant

JHK/Nellie Prentiss

Kicker: Creating pre-Meeting (Convention) interest:

Head: **THE SECOND TIME: AROUND OR AGROUND?**

By Joseph L. Koach, Administrative Assistant
Linen Supply Association of America

"I've seen everything twice," your member says.

How does a meeting manager interest that man in the next convention or business meeting?

We, at the Linen Supply Association of America, have discovered that we have no alternative but to give each member something he hasn't seen in the West End, the Follies Bergere, or the Uffizi Gallery: himself!

When a man is shown himself, he responds more genuinely to that presentation than to any other in the world.

That's why the programs of LSAA over the past several years have been deliberately slanted toward our industry and industry research—to give members an accurate appraisal of their industry's potential, of its probable direction, and of possible problems in the future. This information is available from no other source. What better function for an Association? What more meaningful "come-on" can it announce?

Correspondingly, we have used fewer of the "all-purpose" category of speaker—no bright-future-for-all charts and graphs. In our 1961 Convention everything is pitched directly to our members and to their specific problems. We'll be using only specialists in related fields and experienced linen suppliers.

Everyone won't agree with our choice, but we're dealing with successful business men—men who are aware—men who have access to general financial news through the Wall Street Journal, stock brokers, the Kiplinger Reports, Nation's Business, etc.

Knowing that we intend to put the Convention in their lap, members are exhibiting a heartening interest. Although it is no longer all-important to the success of our convention, we still send out promotional literature regarding the Convention.

Now that LSAA has discovered the one topic that interests every members, we're

Koach/ LSAA/ p2

concentrating on the elements indispensable to successful, productive meetings: time, technique, coordination.

Consider time. The demands on a business executive's time are phenomenal. His time is an investment. Communication—new ideas—must be brief, meaningful, forcefully presented. Another aspect: how can a man wholeheartedly support a convention or sales meeting if the meetings staff works so close to the deadline that members assume planning was hasty—so he stays away.

Then consider technique. Since the beginning of time, men have congregated for the express purpose of exchanging ideas. They talked. A while later, somebody invented the alphabet, and our predecessors in meeting management talked and recorded. After a few years, somebody else invented the opaque projector. Now our early

counterparts talked, visualized, and wrote about it. Modes of presentation were revolutionized by visual aids, and the job of attracting and maintaining attention grows more complex each year.

The Linen Supply Association of America departed radically from our early format (lectures, group discussions, etc.) when we decided to dramatize our business meetings—not just one segment of the total program (which method is not now)—but throughout the Convention, as an integral part of its structure.

With much effort we acquainted ourselves with various “entertainment consultants,” who operate primarily as talent booking agencies and some in-and-out with a show—probably creating additional problems in the process.

We also talked with several firms that write and produce I’ve programs. Most offer a basically identical service, which is acceptable for a one-time skit (even if repeated), but which is by no means a hype for the entire Convention.

A complete program service is what we decided we wanted. . . a counselor who could script and stage business meetings, of course, but additionally a counselor who had an organization that could enliven the whole Convention. He had to take an active part in making the thing go.

We found that counselor in the Chicago-based firm United Attractions. Working as a part of our staff—available from the first planning stages until hotel sign-out—United Attractions was there. They performed a complete program service.

Koach/LSAA/p3

Having selected our counselor, we went to work. After several intensive discussions about our organization’s background and purpose, we agreed upon a theme and manner of dramatizing the entire conclave.

During our first year with a fully-scripted Convention, we used a “staged” formal opening of the Convention; a 50-minute dramatization about public relations; banquet entertainment; and a totally new concept of brief, dramatized “re-caps” of the highlights of each day’s business. Members still recall many of the points made in this manner.

During our second year—to capitalize on the built-in enthusiasm—we did a partial repeat of the format. This time we dramatized our Research project; scheduled daily “re-caps”; member-participation banquet entertainment; and a formal opening for both the Convention and the Exhibits.

(Because we were meeting in Hollywood, we used several celebrities on various occasions to attract the members’ wives into the exhibit area. Where the women go, the men go along.)

This year—our third—we plan to change the program because even dramatics can become “routine.” Still using the services of United Attractions, we have scheduled a number of unusual services—almost gimmicks—to make the physical side of Conventions easier to endure.

We’ve planned a more effective reception, formal opening of Exhibits, message facilities, and faster registration. To perk up early morning meeting attendance and to enhance attendance at the Exhibits, we have added free continental breakfasts. Naturally, there will also be entertainment for the dinner sessions.

By this sharp change of program, we hope to get definite reactions and preferences from those members not

yet committed.

Briefly, we've considered time and technique in the Convention scheme; the last element we'll discuss here is coordination.

If coordination of the organization's activity is the hallmark of efficient business, coordination is also the basic ingredient of planning which will get your people to "buy" your meeting sight-unseen. Coordination gives the member confidence that his Convention or Sales Meeting week has been thoughtfully compounded, rather than frantically scrambled.

Coordination of countless details to the satisfaction of the meeting staff, the hotel, and
Koach/LSAA/p4
members themselves is a thankless task.

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Koach/LSAA/p5

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Mr. Rogers of the Fontainebleau predicts that “Undoubtedly, this type of Convention
Koach/LSAA/p6
presentation will grow in popularity in the near future. . .”

To sum it all up, we feel that when a good meeting counselor is retained, more productive *time*, advanced techniques, and professional *coordination* is purchased. Communication is quick, effective, painless.

Show Mr. Member himself—he’ll be back around for a second look!

#

NOTE:—The programs described above were conducted in the early 1960s, but the comments of both Messrs Koach and Rogers were considered *advanced* until well into the 1970s because the methods demand more thought than money. Money buys advertising and editorial attention. Consequently, most meeting planners of that era (and some, even today) think that problems can be eliminated by throwing money at the problems via pretty baubles.

But the magazine pushed Broadway in its headline. Scripting is not necessarily theatrical. Dramatization is not necessarily related to Broadway, but is always related to *emphasis*. But Broadway shows made suppliers happy for many years. . .while programs failed to educate.

Electronics *per se* are the big money-attractors today. And while they are wonderful in the presentation

perfections that they can help to create, nevertheless, the electronics equipment are not the main message of your program. They are only presentation techniques, related to the pencil-and-paper, blackboard, and slide projector in function—but just a tad slicker.

Pay special attention to the content of the numbered paragraphs above, because it's good advice that some hotel salesmen would rather that you don't know and ask for! Just sign for space and hope for the best! That's easy for them. . .but possibly disastrous for you. View it!

Anyone can invent nice comments and attribute them to someone else. So, to preclude any comments of that type, the original typescript of the pre-publication draft article is appended immediately below. With enough squinting, you can make out the text.

Sorry; the original typescript is as messy as the cover letter to the publisher, above. But both are carbon copies, from the days just after the dinosaurs. They're a chore to read, but if you're curious enough to do the work, you'll find the article word-for-word (although not page-for-page) in the seven pages that follow.

Then, knowing that such a sophisticated understanding of problems and solutions was available to users (association and company) more than four decades ago, ask your meetings/ conventions industry associations and publications editors why they've allowed the meetings industry to stray from *communications*.

If you get any answer at all, this program manager will be surprised. If an answer should be reasonable and meaningful, this program manager will be amazed!

Do you want to check for yourself? Read below:

#

Kicker: Creating pre- } interest:
 (Meeting
 (Convention

Head: THE SECOND TIME: AROUND OR AGROUND?

By Joseph L. Keach, Administrative Assistant
Linen Supply Association of America

"I've seen everything twice," your member says.

How does a meeting manager interest that man in the next convention or business meeting?

We, at the Linen Supply Association of America, have discovered that we have no alternative but to give each member something he hasn't seen in the West End, the Follies Bergere, or the Uffizi Gallery: himself!

When a man is shown himself, he responds more genuinely to that presentation than to any other in the world.

That's why the programs of LSAA over the past several years have been deliberately slanted toward our industry and industry research -- to give members an accurate appraisal of their industry's potential, of its probable direction, and of possible problems in the future. This information is available from no other source. What better function for an Association? What more meaningful "come-on" can it announce?

Correspondingly, we have used fewer of the "all-purpose" category of speaker -- no more bright-future-for-all charts and graphs. In our 1961 Convention everything is pitched directly to our members and to their specific problems. We'll be using only specialists in related fields and experienced linen suppliers.

Everyone won't agree with our choice, but we're dealing with successful business men -- men who are aware -- men who have access to general financial news through the Wall Street Journal, stock brokers, the Kiplinger Reports, Nation's Business, etc.

Knowing that we intend to put the Convention in their lap, members are exhibiting a heartening interest. Although it is no longer all-important to the success of our Convention, we still send out promotional literature regarding the Convention.

Now that LSAA has discovered the one topic that interests every member, we're concentrating on other elements indispensable to successful, productive meetings: time, technique, coordination.

Consider time. The demands on a business executive's time are phenomenal. His time is an investment. Communication -- new ideas -- must be brief, meaningful, forcefully presented. Another aspect: how can a man wholeheartedly support a convention or sales meeting if the meeting staff works so close to the deadline that members assume planning was hasty -- so he stays away.

Then consider technique: Since the beginning of time, men have congregated for the express purpose of exchanging ideas. They talked. A while later, somebody invented the alphabet, and our predecessors in meeting management talked and recorded. After a few years, somebody else invented the opaque projector. Now our early counterparts talked, visualized, and wrote about it. Modes of presentation were revolutionized by visual aids, and the job of attracting and maintaining attention grows more complex each year.

The Linen Supply Association of America departed radically from our early format (lectures, group discussions, etc.) when we decided to dramatize our business meeting -- not just one segment of the total program (which method is not new) -- but throughout the Convention, as an integral part of its structure.

With much effort we acquainted ourselves with various "entertainment consultants," who operate primarily as talent booking agencies and come in-and-out with a show -- probably creating additional problems in the

process.

We also talked with several firms that write and produce live programs. Most offer a basically identical service, which is acceptable for a one-time skit (even if repeated), but which is by no means a hypo for the entire Convention.

A complete program service is what we decided we wanted ... a counselor who could script and stage business meetings, of course, but additionally a counselor who had an organization that could enliven the whole Convention. He had to take an active part in making the thing go.

We found that counselor in the Chicago-based firm United Attractions. Working as a part of our staff -- available from the first planning stages until hotel sign-out -- United Attractions was there. They performed a complete program service.

Having selected our counselor, we went to work. After several intensive discussions about our organization's background and purpose, we agreed upon a theme and a manner of dramatizing the entire conclave.

During our first year with a fully-scripted Convention, we used a "staged" formal opening of the Convention; a 50-minute dramatization about public relations; banquet entertainment; and a totally new concept of brief dramatized "re-caps" of the highlights of each day's business. Members still recall many of the points made in this manner.

During our second year -- to capitalize on the built-in enthusiasm -- we did a partial repeat of the format. This time we dramatized our Research project; scheduled daily "re-caps"; member-participation banquet entertainment; and a formal opening for both the Convention and the Exhibits.

(Because we were meeting in Hollywood, we used several celebrities on various occasions to attract the members' wives into the exhibit area.

Where the women go, the men go along.)

This year -- our third -- we plan to change the program because even dramatics can become "routine." Still using the services of United Attractions, we have scheduled a number of unusual services -- almost gimmicks -- to make the physical side of Conventions easier to endure.

We've planned a more effective reception, formal opening of Exhibits, message facilities, and faster registration. To perk up early morning meeting attendance and to enhance attendance at the Exhibits, we have added free continental breakfasts. Naturally, there will also be entertainment for the dinner sessions.

By this sharp change of program, we hope to get definite reactions and preferences from those members not yet committed.

Briefly, we've considered time and technique in the Convention scheme; the last element we'll discuss here is coordination.

If coordination of the organization's activity is the hallmark of efficient business, coordination is also the basic ingredient of planning which will get your people to "buy" your meeting sight-unseen. Coordination gives the member confidence that his Convention or Sales Meeting week has been thoughtfully compounded, rather than frantically scrambled.

Coordination of countless details to the satisfaction of the meeting staff, the hotel, and members themselves is a thankless task.

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