

COMMUNITY ASSOCIATIONS INSTITUTE

# CEO-MC



RETREAT



**2018 CEO-MC RETREAT**

**OCT. 10-13, 2018 | BOCA RATON, FL**





Community Associations Institute presents  
**2018 CEO-MC RETREAT**

## **EMPOWER YOUR LEADERSHIP**

Experience interactive sessions, networking and idea swapping, and inspiring keynotes at this year's event. It's the only meeting that's tailor-made for management company CEOs and senior-level executives, presenting opportunities you can't find anywhere else.

### **Community Next: Beyond ~~2020~~ 2030**

**NEW!** Join your peers for a blockbuster opening session where you'll take a deep look at trends in today's community association industry and what the future holds for you and your organization. The interactive session features video, audience polling, Q&A, and group discussions.

### **Keynotes David Meerman Scott, James H. Gilmore, and Dennis Giannetti**

Hear how to improve your organization's marketability, business strategy, innovative value propositions, and how to understand your clients on a deeper level from three authors and thought leaders who will help you apply these concepts to real-world situations.

### **Breakout Sessions: Empower Your Leadership**

Engage in small-group sharing to discuss best practices for how to empower yourself, your business, and your future. Experienced moderators will keep you on track to get the most out of conversations with your peers.

### **CEO-MC Retreat Benefits**

- Professional contacts to enhance the success of your company and your career
- New solutions to build the financial growth and stability of your company
- Innovative ideas to recharge your company and motivate your employees
- Practical tips to improve your day-to-day business operations
- Insights from industry peers and experts to advance your business development
- Industry overviews to inform your strategic planning



### WEDNESDAY, OCT. 10

5–6 p.m. Welcome Reception

### THURSDAY, OCT. 11

7:30–8:45 a.m. Registration and Breakfast

Planning committee breakfast with first-time attendees

9 a.m.–4 p.m. CAI Press Bookstore

9 a.m.–Noon Opening General Session

#### **Community Next: Beyond ~~2020~~ 2030**

A dynamic, energetic, and interactive look at how the current trends and common mainstays within the community association industry will shape our future. Featuring video, audience polling, Q&A, and group discussions.

#### **State of the Industry Report**



In this session, CAI's Chief Executive Officer, Thomas M. Skiba, reports on the challenges, opportunities, and trends affecting community associations and management company leaders.

*Thomas M. Skiba, MBA, CAE, Community Associations Institute, Falls Church, VA*

#### **Community Next: Leadership Perspectives**



CAI President John Hammersmith shares leadership best practices that have contributed to his more than 20 year success as CEO of Hammersmith Management Inc. AAMC. Hear how to further develop your management skills as we move toward a new definition of community in an ever-changing landscape.

*John Hammersmith, CMCA, AMS, PCAM, Hammersmith Management Inc. AAMC, Englewood, CO*

#### **Government & Public Affairs Update**



CAI's Senior Vice President of Government and Public Affairs, Dawn Bauman, and her team monitor legislation at the federal level and in all 50 states. In this presentation, Dawn provides a federal affairs update covering critical changes to laws and regulations affecting community associations and the management profession. Hear about the trends, unique cases, and policy positions that you need to be aware of as an industry leader.

*Dawn Bauman, CAE, Community Associations Institute, Falls Church, VA*



Noon–1:30 p.m.

Lunch

1:30 p.m.–4 p.m.

General Session

## GENERAL SESSION



### *Generating Attention & Growing Business in a Real-Time World*

**David Meerman Scott** | Marketing & Sales Strategist

Our always-on, web-driven world has new rules for competing and growing business. Advanced planning is out—agile is in!

Those who embrace new ways will be far more successful than those who stay stuck and afraid to change. In this session, David Meerman Scott will give you new, real-time tools and strategies to spread ideas, influence minds, and build your business. An internationally acclaimed strategist whose books and blog are must-reads for professionals seeking to generate attention in ways that grow their business, Scott gives advice and insights that will help you, your products, and your organization stand out and get noticed.

Scott is author or co-author of ten books, three of which are international bestsellers. “The New Rules of Marketing & PR” has been translated into 29 languages and is used as a textbook in hundreds of universities and business schools worldwide. Other best-selling titles include “Real-Time Marketing & PR,” “News-jacking, World Wide Rave,” and the “The New Rules 4 of Sales & Service.” Scott also co-authored “Marketing the Moon”—now in production as a feature-length film—and “Marketing Lessons from The Grateful Dead.”

## FRIDAY, OCT. 12

7:30–8:45 a.m.

Breakfast

7:30 a.m.–4:00 p.m.

CAI Bookstore

9–9:10 a.m.

Welcome and Announcements

9:15–10:30 a.m.

Breakout Sessions

## BREAKOUT SESSIONS

Small-group sessions allow for greater focus and more interaction. Each session will be offered twice.

### Breakout Session 1: Empower Yourself

Facilitator: Dennis Giannetti, CTO, Lang Realty, Palm City, FL



Dennis Giannetti has been in the real estate industry since 1988. He is a licensed and master Ninja Selling instructor, certified Go-Giver speaker, and Tony Robbins certified coach. He has masters degrees in training and conflict resolution.

### Breakout Session 2: Empower Your Business

Facilitator: Rob Felix, CMCA, LSM, PCAM, RS, CEO, Consolidated Community Services, LLC & The Felix Reserve Group, Carlsbad, CA



Rob Felix has been working in the community association industry since 1980. He has taught courses all over the United States and in several other countries on behalf of CAI. He received CAI's Educator of the Year award twice and has received the CAI President's Award and CAMICB's Distinguished Service Award.

### Breakout Session 3: Empower Your Future

Facilitator: Jonathan Louis, CMCA, AMS, LSM, PCAM, Chairman & Chief Executive Officer, ASG-Association Specialty Group AAMC, Pembroke Pines, FL



Jonathan Louis has been in the community management industry for nearly 30 years. He has been president and CEO of several management companies throughout his career, and has helped build numerous communities and resort properties from the ground up. He has been a CAI member since 2003.

10:30 a.m.–10:45 a.m. Break  
 10:45 a.m.–Noon Breakout Sessions

## BREAKOUT SESSIONS (REPEAT)

### Breakout Session 1: *Empower Yourself*

■ Dennis Giannetti, CTO of Lang Realty

### Breakout Session 2: *Empower Your Business*

■ Rob Felix, CMCA, LSM, PCAM, RS

### Breakout Session 3: *Empower Your Future*

■ Jonathan Louis, CMCA, AMS, LSM, PCAM

Noon–1:30 p.m. Lunch  
 1:30–4 p.m. General Session  
 2:30–3 p.m. Break

### **RISE UP—Start with Gratitude, Finish with Greatness**

Dennis Giannetti | CTO, Lang Realty, Palm City, FL



Regardless of how the pace and tools of the community association management business change, there is no greater commodity to any organization than the resourcefulness of its leaders and employees. And, there is no greater responsibility of a leader than to get the most out of their people by giving the most of themselves. In this powerful program, Dennis Giannetti will share some of the best leadership and business development material found in the Ninja Selling, Go-Giver, and Tony Robbins Coaching programs. Some of the areas of focus include:

- The Talent Triangle: Finding, Understanding & Developing Loyal and Committed Employees
- Inspiration, Expectation, Appreciation
- Ready, AIM, & RISE UP

Dennis is one of only six Master Ninja Selling Instructors in the world. He also currently serves as president of his homeowners association. Since 1995, Dennis has been speaking to executives, leaders, and entrepreneurs about how to “create meaningful and profitable careers & businesses.” In 1995, he co-founded a mediation firm in South Florida that evolved into a conflict resolution and negotiation training company. Dennis has worked with organizations such as Dell, Capital One, Lucent Technologies, Smithsonian Institute, Kellogg’s, and more.



## SATURDAY, OCT. 13

- 7:30–8:45 a.m.                      Breakfast
- 7:30 a.m.–11:30 a.m.              CAI Press Bookstore
- 9–11 a.m.                              General Session (with breaks)

### GENERAL SESSION

#### *The Future: Industry Disruptors and Opportunities*



**James H. Gilmore** | Co-founder, Strategic Horizons LLP

James H. Gilmore is an author, speaker, and management advisor to organizations throughout the world, helping them go deep on innovative ways to create customer value and new revenue.

As co-author of “The Experience Economy,” Gilmore wrote the book that spawned worldwide interest in experience design, customer experience management, and experiential marketing. In this session, Gilmore will explain how consumer experiences—memorable events that engage consumers in an inherently personal way—affect your business plan, offering tips on how to conceive and design new ways of adding value to your management company, how to understand the experience economy, and how its implications affect your business operations.

In addition to “The Experience Economy,” Gilmore also has authored “Look: A Practical Guide for Improving Your Observational Skills,” which details his approach to seeing the world and discovering new ideas. Gilmore is an assistant professor at the Weatherhead School of Management at Case Western Reserve University, an adjunct lecturer at the Darden Graduate School of Business at the University of Virginia, and a visiting lecturer in Apologetics at Westminster Seminary California.





## Boca Raton Resort & Club, A Waldorf Astoria Resort

501 East Camino Real  
Boca Raton, FL 33432

The Boca Raton Resort and Club, A Waldorf Astoria Resort redefines luxury and fun in south Florida—and is the perfect CEO-MC Retreat location for work and play. The Mediterranean-inspired historic village is located just a few steps from the south Florida coastline. The resort also features 11 award-winning restaurants and the No. 1 spa in the country offering a wide range of services. Guest rooms offer rich amenities and concierge service is available.

You also have access to the Boca Beach Club, which includes the following activities:

### All-Access Fee Includes

- Golf
- Surfing
- Boating
- Private beach access
- FlowRider Wave Simulator
- Tennis
- Quest Club, an education and entertaining children's program

### RATES AND RESERVATIONS

CAI Signature Room Group Rate: **\$249 + resort fee\***

*\*Resort fee includes internet access in guest rooms; Mizner's quest discovery tour; access to two full-service fitness centers; unlimited driving range usage and golf club storage; and bellman gratuities for arrival and departure.*

For reservations, please visit [aws.passkey.com/e/49545618](https://aws.passkey.com/e/49545618) or contact Hilton Reservations at **(800) 445-8667** or the direct hotel line **(561) 447-3000**. Reserve your room early, and mention you are a CAI CEO-MC Retreat attendee to receive our discounted group rate. CAI room rates are available until Sept. 7 or until the room block has been filled.

### PARTICIPATION

The CEO-MC Retreat is exclusively for CEOs and senior executives of association management companies. Please contact Holly Carson, director of meetings, at [hcarson@caionline.org](mailto:hcarson@caionline.org) or **(703) 970-9240** if you have questions about eligibility for participation.





# 2018 CEO-MC RETREAT PLANNING COMMITTEE



**Chair**

**Edward San George, PCAM**  
Integra Management Corporation AAMC  
Mount Arlington, NJ



**Elizabeth Caswell Dyer, CMCA**  
Sopra Communities, Inc.  
Denver, CO



**Tom Emele, CMCA**  
Associated Property Management  
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**Jay Gelder, CMCA, AMS, PCAM**  
Emerald Coast Association  
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Miramar Beach, FL



**Traci Lehman, CMCA, AMS, PCAM**  
Cities Management Inc. AAMC  
Minneapolis, MN



**Jonathan Louis, CMCA, AMS, LSM, PCAM**  
Chairman & Chief Executive Officer, ASG-Association  
Specialty Group, AAMC  
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**Kevin McGrath, PCAM**  
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Narberth, PA



**Liaison to CAI Managers Council**  
**Brian Murphy, CMCA, AMS, PCAM**  
ProActive Professional Management  
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