



Report: Trade Show Contacts

Created By: Debbie Picard

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Category: All Categories

Contact Tags: 2023 Smart Meetings - Monterey CA

Contact Name	Jennifer Hernandez	Address	PO Box 7743
Title	Event Planner		Newport Beach, CA 92658
			UNITED STATES
Account	The Roomeaze	Phone	5623384925
Note Title	2023 Smart Meetings - Monterey	Email	jen@theroomeaze.com

Date	Regarding
11/14/2023	Met with Jennifer at SM23 Monterey. She has met in Kalispell and RAVED about working with Dawn Jackson and how her expertise in the community saved her bacon. She definitely relies on the local CVB to help make the meeting go smoothly. She says as a third-party planner, she has more business for us and will recommend to clients to Meet in Montana. Will send RFP's through Cvent.

Contact Name	Melissa Pottorff	Address	20 F Street NW, 7th Floor
Title	Event Manager		Washington DC, DC 20001
			UNITED STATES
Account	The Recycling Partnership	Phone	831.471.7199
Note Title	2023 Smart Meetings - Monterey	Email	mpottorff@recyclingpartnership.org

Date	Regarding
11/14/2023	Met with Melissa at SM23 Monterey CA. They are a non-profit partnership out of DC. Through grants, they help implement recycling in communities and work with waste management companies. She is looking for a place to hold her "All Hands" retreat and loves the National Park's inclusion. They were at Shanandoah NP last time. 125 ppl max. (last time was 76 ppl) Mon - Thurs pattern (4 nights) in September 2024. I will follow up for a more specific RFP to be sent to our partners.

Contact Name	Saira Kianes	Address	Don't Know, NJ UNITED STATES
Title		Phone	908.507.4015
Account	Banu Event Solutions & Training (BEST)	Email	saira.kianes@gmail.com
Note Title	2023 Smart Meetings - Monterey CA		

Date 11/14/2023 **Regarding** Met with Saira at SM23 Monterey CA. I had also met with her at MTL 2022 Denver. She has worked at many hospitality jobs. She knows about Triple Creek Ranch and may look to retire to Montana and work there....She didn't seem overly interested in our other meeting opportunities. She said we would be an option for some of their smaller events. She shared photos of her newest grandbaby. I will follow up.

Contact Name	Keshena Patterson	Address	Houston, TX UNITED STATES
Title		Phone	414.975.8878
Account	HelmsBriscoe	Email	kpatterson@helmsbriscoe.com
Note Title	2023 Smart Meetings - Monterey CA		

Date 11/14/2023 **Regarding** Met with Keshena at SM23 Monterey CA. She has not been to or sourced Montana but was interested in learning more about what Montana had to offer. She mainly sources for corporate events. She knows Carole Machol-Atler our of Houston. She is interested in Paws Up - for a 50 person event, in fact all ranches we have and Missoula as well. I recommended Sept/early Oct as the perfect meeting time in MT. Will follow up.

Contact Name	Othmar Witteveen	Address	RICHMOND, VA UNITED STATES
Title		Phone	5109707900
Account	Sideways Incentives, Inc.	Email	othmar@sidewaysincentives.com
Note Title	2023 Smart Meetings - Monterey CA		

Date 11/14/2023 **Regarding** Met with Othmar at SM23 Monterey CA. He had been to Big Sky before but that was his extent in Montana. He only works with European inbound and mainly from the Netherlands. Their route is KLM into Minneapolis. With our directs from MSP, he thought we would be a doable destination. He didn't have any specific meetings he was sourcing for our area at the time but would LOVE to be included on a FAM Invite list for the future. I will follow up.

Contact Name [Debb Duff](#) **Address** 2733 North Power Road, Suite 102-132
Title Mesa, AZ 85215
UNITED STATES
Account HelmsBriscoe **Phone** 480.463.4259
Note Title 2023 Smart Meetings - Monterey CA **Email** dduff@helmsbriscoe.com

Date **Regarding**
11/14/2023 Met with Debb at SM23 Monterey CA. She has not been herself but has sourced Montana for meetings before. She asked if we were partners with HelmsBriscoe. She thought it would be good for me to look into it since probably a small percentage of HB planners had been to MT. I would be invited to their corporate event and/or invited to come to their meetings and share about Western Montana. I will look into it and the cost. She is very interested in being on a future FAM invite list. I will do that and follow up with Debb.

Contact Name [Diane Herrmann](#) **Address**
Title Carlsbad, CA
UNITED STATES
Account On The Road Events **Phone** 7603903352
Note Title 2023 Smart Meetings - Monterey CA **Email** dianehermann@roadrunner.com

Date **Regarding**
11/14/2023 Met with Diane at SM23 Monterey CA. She started her own company a few years back. She has been to Paws Up with a meeting. She mainly plans around San Diego, Phoenix and Palm Springs but does have meetings that venture outside of those destinations. She wants to connect on LinkedIn. She does not use Cvent, so all RFP's will come direct from her. I will follow up.

Contact Name [Marianne Van Wagner-Jones](#) **Address** 1123 Comanche Path
Title Bandera, TX 78003
UNITED STATES
Account Society Offices Association Management Company **Phone** 8307969393
Note Title 2023 Smart Meetings - Monterey CA **Email** info@societyoffices.com

Date **Regarding**
11/14/2023 Met with Marianne at SM23 Monterey CA. I also met with her at DW22 Tucson. She used to live in Bozeman so knows the area well. She works for an Association Management Company. All of the associations she works with are science based and meeting at the University of Montana's Conference space would be fine. Attendee numbers run between 250 and 500 so would be too large for other communities. However, retreats and exec leadership meetings might work. I will include Missoula information to her for meetings needs. Also, she showed me a picture of her son who dressed as RIP from Yellowstone and she said she's obsessed with the show. Will follow up.

Contact Name [Zephia Bryant](#) **Address** Zephia Bryant
Title Owings Mills, MD 21117
UNITED STATES
Account Bryant Educational Leadership Group LLC **Phone** (205) 356-5898
Note Title 2023 Smart Meetings - Monterey CA **Email** zbryant@belgllc.com

Date **Regarding**
11/14/2023 Met with Zephia at SM23 in Monterey CA. She is not been to Montana so was on a fact-finding mission for our appointment. Her organization focuses on Diversity in colleges with the next generation to change the world. She has a regional meeting 250 - 350 ppl or some smaller with an intensive for maybe 50 ppl. She also does faith-based women's retreats. I told her all about Western Montana and she is very interested in coming on a FAM in the future to see it for herself. I will follow up with information.

Contact Name [Kimberly Bean](#) **Address** 000
Title Event Strategy Owner Brentwood, TN 00000
UNITED STATES
Account KBT Creative Support Services **Phone** 615.812.6152
Note Title 2023 Smart Meetings - Monterey CA **Email** kbtcreativesupport@comcast.net

Date **Regarding**
11/16/2023 Met with Kimberly at SM23 Monterey CA. She believes she has been to Missoula before. They were in the Tetons and drove up through Missoula? She does corporate retreats and works in the insurance, health and mental health, education and her largest client is Docusign. She was very intrigued with Montana and loved the Whitefish, Missoula and guest ranch options for her clients. I will follow up.

Contact Name [Dawn Stafford](#) **Address** 1123 Comanche Path
Title Events & Marketing Manager Bandera, TX 78003
UNITED STATES
Account American Aging Association **Phone** 210.827.7372
Note Title 2023 Smart Meetings - Monterey CA **Email** contact@americanagingassocition.org

Date **Regarding**
11/16/2023 Met with Dawn at SM23 in Monterey CA. I had also met with her at DW22 Tucson. She was at Smart Meetings looking for a destination for the Organization for the Study of Sex Differences. It's a 300 to 500 attendees and most are from the US. 2024's conference will be in Norway. I think it's a little large for us and will require an international airport for best results. But they work with lots of different organizations and associations, so still a great meeting. I will follow up.

Contact Name	Erica Pollack	Address	Jacksonville, FL 00000
Title	Owner		UNITED STATES
Account	Return Refreshed	Phone	309.416.7834
Note Title	2023 Smart Meetings - Monterey CA	Email	erica@returnrefreshed.org

Date 11/16/2023 **Regarding** Met with Erica at SM23 Monterey CA. She had been to Gardner Montana before. She produces smaller 20-30 ppl core leadership retreats for innovation, goal setting, wellness. It must have an outdoor aspect to the destination since so much wellness is garnered from nature and the out of doors. She was impressed that I knew what forest bathing was. We are the perfect retreat location for what she does. I will send her information and our blog on retreats and unique lodging options. GREAT appointment.

Contact Name	Steve Grubb	Address	4837 Inisheer Ct
Title	President		Dublin, OH 43017
Account	Eagle Performance Group	Phone	614.570.7600
Note Title	2023 Smart Meetings - Monterey CA	Email	sgrubb@eagleperformancegroup.com

Date 11/16/2023 **Regarding** Met with Steve at SM23 Monterey CA. He has not been to MT before. He is mainly interested in our corporate incentive offerings. His group meets in September mid week. We discussed our luxury guest ranches and the resort community of Whitefish. He needs options so that there are choices for the group. This year they are headed to Pebble Beach. I will follow up with information about incentive options.

Contact Name	Andrea Kinney	Address	St. Augustine, FL 00000
Title	President		UNITED STATES
Account	Bonevent	Phone	904.501.4977
Note Title	2023 Smart Meetings - Monterey CA	Email	andrea@bonevent.net

Date 11/16/2023 **Regarding** Met with Andrea at SM23 Monterey CA. She spent many years with HelmsBriscoe and has now started her own company. She was not familiar with Montana so was on a fact finding mission. We talked about our 3 cities with CVB offerings and the luxury guest ranches, airports and activities. I will follow up to see if she has any clients that we can bid RFPs on.

Contact Name [Alix Mendonca](#) **Address** 3253 McClintock Ave S
Title Regional Sales Seattle, WA 98144
UNITED STATES
Account Prestige Global Meeting Source **Phone** 206.953.9557
Note Title 2023 Smart Meetings - Monterey CA **Email** amendonca@meetprestige.com

Date **Regarding**
11/16/2023 I met with Alix at SM23 Monterey CA. He is good friends with Kelsey Chapelle and worked with her when he was at an association that moved around Washington State. He has been to Montana but thinks it was a wedding in Bozeman. He now sources for all sorts of meetings and wants me to send over information so he can add Western Montana to his RFPs. Great guy and lots of energy. I will follow up.

Contact Name [Doug Wheeler](#) **Address**
Title Principal La Jolla, CA 00000
UNITED STATES
Account Summit Performance Group, LLC **Phone** 858.385.2785
Note Title 2023 Smart Meetings - Monterey CA **Email** dwheeler@summitpg.com

Date **Regarding**
11/16/2023 I met with Doug at SM23 Monterey CA. He has been a planner for 24 years and has had programs all over the world, but not in Montana. However his son hiked the Pacific Crest Trail and they did come to Montana to see him or something like that. He does 30 corporate incentive meetings a year. When he's not sourcing he is traveling. He said he would like to be invited on a FAM but since he travels so much, not sure it would work. I told him about our incentive properties and airports and he would be interested to see them. I will follow up.

Contact Name [Gina Le](#) **Address** 3333 Scott Blvd
Title Events and Programs Manager Santa Clara, CA 94504
UNITED STATES
Account SPG Meetings & Events **Phone**
Note Title 2023 Smart Meetings - Monterey CA **Email** Gina_Le@amat.com

Date **Regarding**
11/16/2023 Met with Gina at SM23 Monterey CA. They do all the meetings for Applied Materials. She was thinking about Montana for a March /April 40 ppl 2 night meetings. Flying in from SFO. She herself had not been to Montana before so we talked about all the places she could hold this meeting and more. I will follow up.

Contact Name [Mike Dean](#) **Address** 9450 S.W. Commerce Circle Suite 200
Title Wilsonville, OR 97070
UNITED STATES
Account Associated General Contractors **Phone**
Note Title 2023 Smart Meetings - Monterey CA **Email** miked@agc-oregon.org

Date **Regarding**
11/16/2023 Met with Mike at SM23 Monterey CA. He just started in his role as event organizer for the Oregon chapter of Associated General Contractors. They have an annual meeting in August with 220 ppl. They have held it at Sun River for many years and people want something new. Also, August is a VERY busy time for contractors so they want to move it to late June or early September. He is at Smart Meetings to see what his options are. They do not have to meet in Oregon. I told him about our 3 main communities that would have capacity for this size of meetings and will follow up.

Contact Name [Susan Gibson](#) **Address** 2158 E Virginia Street
Title Event Strategist & Consultant Mesa, AZ 85213
UNITED STATES
Account Susan Gibson **Phone** 602.397.1571
Note Title **Email** susan@susanbgibson.com

Date **Regarding**
11/17/2023 Met Susan at SM23 in Monterey CA. She is an event strategist and consultant. We did not have an appointment to meet, but had dinner together at the Monterey Aquarium.

Contact Name [Erica Pollack](#) **Address**
Title Owner Jacksonville, FL 00000
UNITED STATES
Account Return Refreshed **Phone** 309.416.7834
Note Title **Email** erica@returnrefreshed.org

Date **Regarding**
11/30/2023 Hi Erica, It was such a pleasure meeting you at Smart Meetings in Monterey. In fact, I was thinking about our conversation regarding forest bathing. Ahhhhh. I wanted to follow up with some retreat locations and a blog that you might enjoy about retreat locations in Western Montana.
<https://b2b.glaciermt.com/unique-accommodations-for-retreats-in-western-montanas-glacier-country/>
Also, here is a link to our meetings website. <https://meetings.glaciermt.com/> Dancing Spirit Ranch Good Medicine Lodge Meadow Lake Resort All of these are within 30 minutes of Glacier National Park, which is spectacular and regenerative as well. Please let me know how I can help bring a group together here in Western Montana. Best,

Contact Name [Joseph Burke](#)
Title

Address 83 Hillcrest Road
Ogden Dunes, IN 46368
UNITED STATES

Account United States Steel Corporation
Note Title 2023 Smart Meetings - Monterey

Phone
Email josephburke@hotmail.com

Date **Regarding**
12/14/2023 Met with Joe at Smart Meetings Monterey. He has not been to Montana. The corporation is located in Pittsburgh. They book 40 to 50 meetings a year from 75 to 225 people. Lots of the meetings are Gov or Defense so top secret. He would be interested in the luxury guest ranches for buyout opportunities. I will send information.
