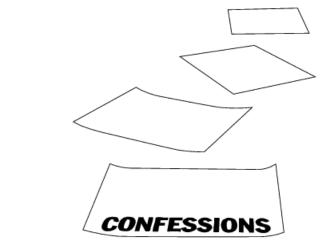
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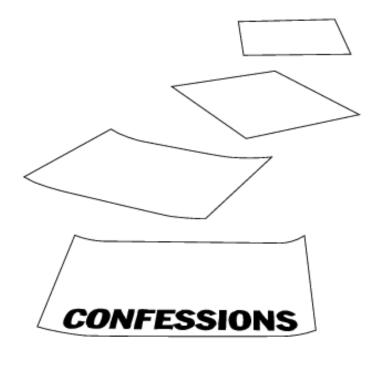
CONFESSIONS

PENTENT ANNER

Case Studies from the Real World of Events—How to Handle the Unexpected and How to Be a Master of Discretion









Case Studies from the Real World of Events—How to Handle the Unexpected and How to Be a Master of Discretion

Judy Allen



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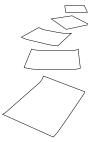
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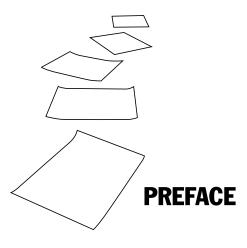
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This book is dedicated with love to Joe Thomas Shane, whom I am honored to call my 2jproductions business partner and so much more. You mean the world to me. Thank you for all the knowledge you have brought into my life personally and professionally. There is no one I could imagine sharing the exciting, new life journey in front of us other than you. Coming together with you has opened up a whole world of possibilities that fills me and fuels me with a new sense of purpose, passion and play and has brought clarity, direction, consciousness and inner knowing as to what is meant to come next. You challenge my mind, my creativity and my way of being in a way no one else ever has and I thank you for the incredible life-changing gifts that knowing you has given me. I believe that everything in life happens for a divine reason and I am looking forward to discovering all that we are meant to create and do together and through our company, 2 productions, and bring to each other and the world.



Confessions of an Event Planner: Case Studies from the Real World of Events—How to Handle the Unexpected and How to Be a Master of Discretion is a collection of fictionalized case studies that follows one corporate event planning company around the world. It showcases real-life scenarios both novice and experienced event planners can encounter on the job during actual event execution. Woven throughout the book are learning lessons and business ethical and etiquette situations based on actual occurrences in the industry that are played out time and time again around the world. They are meant to open the door for discussion and problem-solving exercises both in university and college classrooms around the world and in event planning and corporate business offices, with staff working together with their company's lawyers and financial controllers to determine what should be done in specific situations and to establish and define company policies, procedures and protocol in the office and on-site. This in turn helps to protect the individual, the event planning company, their event suppliers and event venues, the corporate client and their guests from legal ramifications. Not knowing what to do when an event planning crisis occurs or what steps to take to prevent one from happening can be costly both personally and professionally to those involved and to the corporations hosting and orchestrating the event.

Confessions of an Event Planner is a case study workbook/ office training manual that offers students and new and established industry employees a behind-the-scenes look into the perceived

glamorous world of business entertaining—from boardrooms to resort guest bedrooms—by a fictional event planning company owner as she travels the globe creating one-of-a-kind corporate, social and celebrity events for her clients. The intention of this book is to make sure that event planners, their clients and suppliers are well prepared going on-site, where being ready to handle the sorts of real-life scenarios described here is essential. Event planners must know the appropriate course of action that they need to take to protect themselves, their company, their client, their guests and their suppliers if guests (or staff or suppliers) go wild during their event. Also, clients and suppliers need to know the course of action their individual company lawyers and advisors want them to take as well.

These special events are fuelled by corporate budgets that range from modest to those that exceed millions of dollars to entertain, educate or enlighten their attendees. Events can range from one-day local meetings to events that include first-class air travel, private jets, stays in six- and seven-star resorts in luxury suites and major pampering—no matter the budget, the venue or the event style—with participants being wooed, wined and dined to show client appreciation, introduce guests to new products at company product launches, bring employees together for an outof-town conference, or reward top sales staff at an over-the-top incentive program at an exotic locale. The special events industry is a world where guests ride elephants through the jungle to their evening's meal (perhaps at the local zoo closed to host the event, or at a themed "jungle" dinner at a hotel or in Bali); dine in the desert, on a mountaintop, on the beach or even in the ocean under a canopy of stars listening a symphony orchestra; enjoy the magic of a private indoor firework display while being served a sumptuous supper; have Cirque perform a show designed exclusively for them; enjoy private performances by top-name entertainment on a tented rooftop; take pleasure from a custom dancing water display set to music in a private mansion; dine and dance on an acrylic-covered pool that has been set up just for them; savor a Preface xi

candlelit gourmet dinner surrounded by thousands of oak wine casks; watch juggling and dancing fire performers and fabulous custom fire sculptures; have their breath taken away by incredible technology special effects; or take part in an exclusive yacht regatta or road rally crafted just for them. Guests come to the party prepared to expect the unexpected, knowing they will be captivated and enchanted wherever the venue and whatever the theme, no matter the budget or if it is taking place down the street or around the world. Being dazzled and delighted, under the guise of doing business, is a big part of the game being played from Miami to the beaches of Mexico all the way to Mauritius and back.

Confessions of an Event Planner takes readers on an event planning journey around the world and brings the missing event planning element—on-site event execution—to life in a very new way. It is an informative and fun read on its own and allows readers to interact with the book and determine what their course of action would have been should they be party to a similar set of circumstances unfolding before their (sometimes greatly alarmed but never showing it) eyes once you add into the mix the unknown component—the actual invited guests and their personalities. You can plan, you can prepare, you can anticipate and have a backup plan, but crisis mode management is something event planners, corporate and social clients, event suppliers, and venues have to be aware of. They need to be fully apprised of how they should personally and professionally handle the expected and the unexpected.

The game of business travel and special events is one most recently seen acted out in world headlines with rising white-collar arrests. At Tyco CEO Dennis Kozlowski's trial for corporate looting, Kozlowski was accused of charging to Tyco a portion of the \$2 million birthday bash—on a Greek island with company executives wearing togas—held for Kozlowski's second wife in 2001. This example is still relevant today, as are further real-life examples laid out in the book, because it shows that corporate clients, as well as their guests, can go out of control and create ethical and legal issues

for event planning companies that event planners must be trained to handle and bring to the attention of event planning company heads and their lawyers before a corporate event allowed to run unrestrained by unscrupulous business heads ends up with them in court. There are many examples for event planning companies to study and set company policies from, such as the alleged corporate misspending of company funds by Conrad Black. This time the setting was Bali and a birthday celebration for his wife where board members were in attendance. Were these business affairs attended by corporate execs and paid for in part by the company, or personal parties being paid for out of company funds by the company president? Event planning companies need to know their position and how to protect themselves when asked to do events that bend or break ethical and legal lines.

Being a master of discretion is a major requirement of a corporate and social event planner's job, which can include being privy to sexual romps, financial shenanigans, ethical breaches and eyebrow-raising behavior by corporate execs—such as the recent example that was showcased in newspapers, shown on television and flashed around the Internet of company executives hiring strippers to perform lap dances and topless cart duties at a private corporate golfing tournament. Knowing what to do and how to handle unexpected happenings on location (during site inspections, event advance and when the program is running) to adhere to company policy and procedure and protecting themselves, their company, their clients and their guests from legal ramifications is of paramount importance. Note that in the age of YouTube, etc., corporate shenanigans can backfire more easily than ever.

Confessions of an Event Planner will help individuals as well as companies—event planning and corporations (both for profit and nonprofit)—establish their company's event planning personal and professional A B Cs (A=Anticipation, B=Backup Plan, C=Crisis Mode Management/Code of Conduct) and help them to set company policy, procedure and protocol. *Masters of*

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Discretion will have relevance to readers of the entire Event Planning suite of books and The Executive Guide and move them from creative, strategic and tactical thinking into "real life" practical thinking. Each chapter of the book covers areas of event design (program layout), strategic thinking, guest safety and security, business etiquette, business ethics, time management and more—all topics discussed in the Event Planning series and The Executive Guide, as well as in my two wedding planners for the professional and consumer market: Your Stress-Free Wedding Planner: Experts' Best Secrets to Creating the Wedding of Your Dreams (Sourcebooks, Inc., 2004) and Plan a Great Wedding in 3 Months or Less (Sourcebooks, Inc., 2007). These other books will serve as additional training and educational reference guides and as ongoing valuable companion resources to this book, as will the staging and creative life experience design examples that can be found on my website—www.sensualhomeliving.com—and will encompass Sensual Home Living[™], Sensual Living for Two[™], Sensual Suite(s)™, Welationship(s)™ Building Timeouts for Two™ Activities, Wecation(s)TM Timeouts for TwoTM. On my website, I will teach event planners how to transform and change the energy of a room using my trademark design principles and how to create an environment and a life experience for participants that will evoke specific emotions and target all of their senses.

Following is an overview of my other books on event planning and related issues which you may find helpful. *Event Planning:* The Ultimate Guide to Successful Meetings, Corporate Events, Fund-Raising Galas, Conferences, Conventions, Incentives and Other Special Events, Second Edition (Wiley 2009). Any event you plan and stage is a reflection of your organization's image—from the initial invitation to on-site operations. Whether you're planning a product launch, conference, sales meeting, incentive event, or gala fund-raiser, remember that the magic of a truly memorable event is in the details, but so is the devil. Whether your event is for 50 or 2,000 people, whether it has a budget of a few thousand dollars



or hundreds of thousands, it has to be perfect. Fully revised and updated, *Event Planning* gives you a blueprint for planning and executing special events with flair and without any unexpected surprises and expenses. This unique book is loaded with practical advice on:

- Choosing the best venue
- Preparing and managing the budget, with sample costing forms included
- Scheduling, staffing and collaborating with other related professionals
- Coordinating food and beverage, decor, entertainment and themes

The second edition of this book is still the comprehensive guide that it always has been, but with much changing in the industry in recent years, this new edition of *Event Planning* includes:

- Changes in security planning since 9/11
- Innovations in technology and how they can improve—or ruin—an event
- How to stage an environmentally friendly event
- Event risk assessment—what you need to consider before contracting
- How to keep your budget on target and where to find hidden surcharges
- Ways to ease airport stress and make air travel a pleasurable part of the participant's event experience
- When and where event planners and their suppliers will need work visas
- What you need to include in your client's event history in order to design your next event so that it maximizes your client's return on their event investment

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- New and updated examples and case studies of where things went right—and wrong
- A companion website with downloadable versions of the checklists, additional forms and tools, author Q&A and more at www.wiley.ca/go/event_planning

What you don't know or know to ask can have a major effect on the success of your event and on your budget. *Event Planning* takes you behind the scenes and through every aspect of organizing and executing a successful event: the planning stages, timing and logistics, budget preparation, operations and on-site management, providing practical tools for anyone who has to plan and execute a truly special event:

- Corporate in-house event planners
- Public relations and communications companies and their clients
- Marketing and corporate communications professionals
- Fund-raisers and not-for-profit organizations
- Professionals in the hospitality and entertainment industries
- Business professionals in charge of planning and handling their company's events

This book will give readers of *Confessions of an Event Planner* a solid foundation of event design principles and clear direction of what to include in each event element to enhance the guest experience.

The Business of Event Planning: Behind-the-Scenes Secrets of Successful Special Events (Wiley, 2002) takes event planning to the next level. Its comprehensive coverage includes strategic event design; how to prepare winning proposals and how to understand them if you're the client; how to determine management fees and negotiate contracts; guest safety and security issues that need to be

taken into consideration; how to design events in multicultural settings; new technology that makes event operations more efficient; practical tools such as sample letters of agreement, sample layouts for client proposals, forms, tips and checklists; and a detailed case study that runs throughout the book—one company that is organizing two very different events. *The Business of Event Planning* will show you the behind-the-scenes tasks you need to take care of in your own event planning business before you even plan an event, and how to take your event design and execution skills to the next level. This book will show readers of *Confessions of an Event Planner* how to strategically design and stage both an event element and a room for targeted results.

Event Planning Ethics and Etiquette: A Principled Approach to the Business of Special Event Management (Wiley, 2003) covers the business side of event planning ethics, etiquette, entertaining, acceptable codes of conduct and industry standards. The book provides event planners with the information they need to stay out of trouble, keep professional relationships healthy and profitable, avoid the riskier temptations of the lifestyle and win business in a highly competitive market using ethical business practices. Harvard Business School said this book "is a must-read not only for event professionals, but also for small-business people conceiving product introductions and conference appearances." This book will bring important event planning industry business entertaining, business ethics and business etiquette issues to Confessions of an Event Planner readers.

Marketing Your Event Planning Business: A Creative Approach to Gaining the Competitive Edge (Wiley, 2004) takes readers through marketability, market development and marketing endeavors (business and personal). Topics covered include diversifying the client base, developing niche markets and areas of expertise, establishing a backup plan for use during downturns and finding innovative ways to solicit new sales. This book will show readers

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of *Confessions of an Event Planner* how to develop their brand, build customer loyalty and market themselves and their company both in the corporate boardroom and on-site.

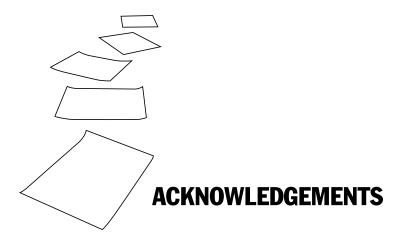
Time Management for Event Planners: Expert Techniques and Time-Saving Tips for Organizing Your Workload, Prioritizing Your Day, and Taking Control of Your Schedule (Wiley, 2005) offers expert insight on time management as it relates specifically to the event planning and hospitality industry. Event planning is a high-pressure, around-the-clock job where planners juggle multiple tasks and work down to the wire against crushing deadlines and a mountain of obstacles. For smooth event implementation, and for business success, it is essential that planners manage their own time as expertly as they manage an event. This book illustrates how to do just that. It shows Confessions of an Event Planner readers how to create order in their personal and professional time commitments and bring balance into their lives at home and while traveling for business and pleasure.

The Executive's Guide to Corporate Events and Business Entertaining: How to Choose and Use Corporate Functions to Increase Brand Awareness, Develop New Business, Nurture Customer Loyalty and Drive Growth (Wiley, 2007). The primary focus of this book is the strategic event marketing thinking from a business objective perspective, not just an event planning one, and will give business executives—who are now being held accountable for event results—insight on how to choose, design and use events to achieve business objectives and how to generate a return on their company's investment of time and money. As well, design elements and strategies found in this book will give event planners the tools they need to understand how the events they plan can better meet multiple layers of corporate objectives. This book will give event planners the ability to see the event from their client's perspective as well as an event planning perspective. Executing events flawlessly does not mean that corporate goals are

being met. This book shows not only how to plan and execute the perfect event, but also how, for best results, to closely tie it in to company strategy and objectives. Covered in detail are how to identify clear objectives for each event; which type of function is best suited to meeting your objectives; what you need to establish before forging ahead with organizing committees and reviewing or developing proposals; how to develop a realistic budget, and when to question expenses proposed by staff or professional event planners; the importance of sign-offs; how to identify controversial spending and other red flag areas that could seriously damage the company's reputation, or even put it at financial or legal risk; how to establish spending guidelines and policies on employee conduct at company functions; and how to evaluate the success and results of your business functions. The Executive Guide teaches readers of Confessions of an Event Planner how to choose the right event style to maximize the client's event investment and to bring them the external and internal returns (not limited to those financial) they are looking for by delivering results that exceed all expectations.

Special note: The event planning case stories captured blog-style are based on true but fictionalized events, and actual names, locations, programs as they took place and companies have not been used.

Judy Allen



Over the course of seven years, because of reader response for the first edition of *Event Planning: The Ultimate Guide* and requests from planners-to-be, planners working in the field and business professionals for more event planning answers, *Event Planning: The Ultimate Guide* grew into a best-selling series of business books that are being used around the world by industry professionals and corporate executives as well as universities and colleges for course adoption and required reading. The books have now been translated into five languages.

This well-received series of books then became the crossover platform for two mass-market consumer books—with more to come. My first wedding planning guide led the way in wedding planning category sales and received media reviews, deeming the wedding planner to be one of the best wedding planners on the market because of its event planning focus.

Confessions of an Event Planner returns me to the event planning realm. It came into being as a direct result of readers' queries as to how to handle situations on-site that no one had prepared them for and how to protect themselves from legal and ethical repercussions from actions they were privy to both in corporate boardrooms and resort guest bedrooms.

I would like to thank my publisher, John Wiley, for bringing this book out to serve as a full-circle teaching tool that embraces the entire suite of *Event Planning* books.

Acknowledgements

I would like to thank the outstanding professionals at John Wiley & Sons Canada, Ltd. for their contribution to the making of this book and express my appreciation to Robert Harris, General Manager; Bill Zerter, COO; Jennifer Smith, Vice President and Publisher; Elizabeth McCurdy, Project Manager; Kimberly Rossetti, Senior Coordinator, Editorial & Special Projects; Deborah Guichelaar, Publicist; Erin Kelly, Publicity Manager; Erika Zupko, Publicity Coordinator; Lucas Wilk, Marketing Manager; Adrian So, Senior Graphics Designer; Pauline Ricablanca, Project Coordinator; Brian Will, Editorial Assistant; Meghan Brousseau, New Media and Rights Manager; Jessica Ting, Accounting and Royalty Manager; Stacey Clark, Corporate Sales Manager.

I would like to say a special thank-you to Karen Milner, Executive Editor, whose vision and direction opened the door to this series coming into being. She suggested that I expand the original concept I had for the first book to encompass all of my event planning knowledge and areas of expertise that came from designing one-of-a-kind special events in more than 30 countries and the incredible opportunity of working with some amazingly talented people in the special event industry.

I have truly enjoyed working with Michelle Bullard on the structure and copyedit of my books. Michelle challenges me constantly to go further in order to bring to *Event Planning* readers the maximum amount of wisdom I can share. Having worked with me on the majority of my event planning books, Michelle is a master at catching me when I slip into industry language without detailing or showing what I mean by example. Her trained eye is one of the best, and the questions she poses to me are very relevant to making a better book.

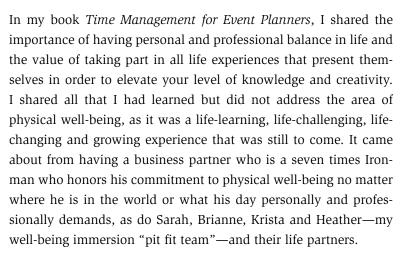
I would also like to thank everyone who has reviewed my books and provided such positive comments and feedback. I greatly appreciate the time you have given to me and to my readers by reviewing this book. Your opinions are greatly valued by all of us.



I had the opportunity to write this book as well as the second edition of *Event Planning: The Ultimate Guide* in the wonderful "active living" town of Collingwood, Ontario. I wish to repeat my thank-yous to some very special people who came into my life while I was living there:

- Sarah Applegarth MSc, CSCS, CSEP-CEP, SCS, Strength & Conditioning Coach, Active Life Conditioning Inc. (www.activelifeconditioning.com), whose business is "Taking Care of What Matters Most—You." Sarah is a world-class high-performance trainer and someone I was privileged enough to call my personal trainer when I turned to her for expert help in an area that I had no knowledge in and needed her expertise in learning how to develop the physical, mental and emotional strength, stamina and flexibility athletes carry at their core to become their best so that they can do more, give more and bring their best to themselves, their family, their friends, their work (life purpose) and the world.
- Brianne Law, World Cup coach for the Canadian Para-Alpine Ski Team (www.canski.org), who joined Sarah in training me this past summer, and is an amazing trainer and teacher.
- Krista Campbell, Registered Massage Therapist, my massage therapist who is trained in Swedish massage techniques and whose amazing healing touch had my muscles back moving as they are meant to.
- Dr. Heather Munroe, Chiropractor, Mountain Chiropractic (www.mountainchiropractic.ca), who in just one session was able to undo the damage a fall had done and brought me back to pain-free alignment, and then went on to release years of joint compression caused by years of sitting behind a computer, sitting in an airplane and sitting in meetings around the world.

Acknowledgements



Living in an active living community for a year with people committed to health and well-being and surrounded by nature has been an incredible journey and one I am grateful to have experienced. I have learned that there is an amazing benefit to living an active lifestyle at home, at work and as you travel around the world on site inspections, fam trips and on-site programs; to being fueled by nurturing and nourishing foods and fitness workouts, not just caffeine and meals on the run when they can be fit in between work deadlines and demands that can be intensive in this 24/7 industry; and to bringing wellness, fitness and health lifestyle elements into not only your everyday and work life but the programs that you design so that others can experience the benefits.

I would also like to thank Judith Somborac, Personal Direction, Training and Coaching, my yoga and Pilates trainer; and Jackey Fox, Assistant Manager, A&P. Each played an important part in my fitness mission to counteract years of sitting at the computer and taught me about nutrition, stamina, strength and stretching—literally, not just physically—as a tool to push past discomfort in all areas of life. They shared their talents and expert knowledge with me, giving me new tools I can use every day for the rest of my life while I take on the world and the world of possibilities in front of

me personally and professionally through my company, 2jproductions, with Joe Shane. I am excited to gain a new sense of purpose, passion and play that is bringing me closer to my personal, professional (life purpose) and creative best.

I would like to say a very special thank-you to Ysabelle Allard, Bilingual Meetings & Incentives (Toronto), whom I came to know through my first event planning book, Event Planning: The Ultimate Guide, and with whom I share a deep affection for the island of Barbados. Ysabelle is directly responsible for a move that will take me into the next chapter of my life. I appreciate her friendship and all that knowing her has brought to me. Sometimes, in some areas, we are teachers, and sometimes, in other areas, we are students with the right teachers having been placed in our path to move us in the direction we are meant to go and grow in. As you grow in awakening and awareness, it gets easier to recognize special people coming into your life for a reason. Both Ysabelle and my business partner and beloved friend Joe Shane came into my life through my writing my first book. Life is an interesting journey that can be lived as a special event when you let it unfold as it is meant to without self-imposed roadblocks and resistance.

I would like to thank my incredible new trainer in Barbados, Levar Greaves, who works out of Surfside Wellness Centre and Surfside Fitness Centre and who is known for "breaking barriers"—physical, mental and emotional—and who is taking me to a new level of active living, one that embraces a sense of play as well as perfect workout form. And Natasha and Mike Mahy, dive shop Reefers and Wreckers owner, and their son, Oscar, whose apartment I am renting during my stay in Barbados—with added thanks to Ysabelle for the part she played in bringing this about. It's the perfect setting and location for working out, writing, working on a new website for Joe and me, and several design projects.

As always, I would like to thank my family—my parents, Walter and Ruth; my sister, Marilyn, and my brother-in-law, Hans; and

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my nieces and their partners: Natasha and her husband, Ed, and their much loved new baby Gillian, and Jasmine and Rodney—and my friends for their continued love and support.

And again, I would like to say thank you to my 2jproductions partner, Joe Shane. I look forward to working with you on taking event planning to an exciting, creative and innovative new level. There is no one I would want to take this journey with more than you.

PROFILE

Name: Emma (Em) Starr Age: Thirty-something
Gender: Female Marital Status: Divorced

Location: Always somewhere different—or on my way there

Occupation: Owner and Creative Director of Starr Productions, a boutique event management company that specializes in designing, producing and orchestrating corporate and high-profile social and celebrity events around the world.

Favorite Things: Family; friends; travel; photography; snorkelling; kick boxing; strength and resistance training; Pilates; biking; horseback riding; exploring new (preferably warm) destinations; shopping for one-of-a-kind finds; clothes made from natural fabrics; writing in my journal; dining out or room service; dancing under the stars; walking the beach in Barbados, Hawaii, the South Pacific, Greece, the Maldives; or hiking through the woods; romping with my dogs; doing yoga on the beach by the lake at home; staying in six- and seven-star hotels; flying first class or in private planes; being pampered; convertibles; luxury linens; spicy food; fine wines and champagne; being first to create something new; making meaningful and magical memories for others to enjoy; being successful in business

Least Favorite Things: Cooking, cleaning, shopping malls with their cookie-cutter clothes, roughing it and playing sports (I'd much rather be the official photographer and cheerleader)

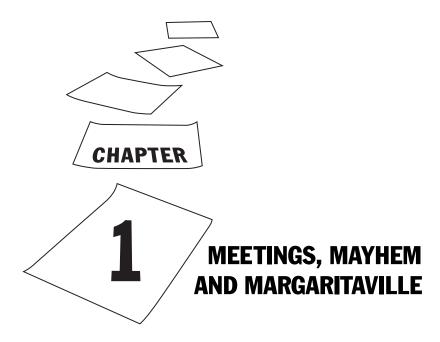
Favorite Quote: Your life is the ultimate special event—design it with care." —*Emma Starr*

Favorite Music: Mixed; everything from Sade and Keiko Matsui to pop, calypso and reggae

Favorite Movies: Classic movies from the 40s, 50s, 60s and 70s, but I stay on top of today's hits

Favorite Television Shows: Reality shows like *The Amazing Race* and *Survivor*, in which show components are very similar to corporate events with team and individual challenges

Favorite Books to Read: Professionally, bestsellers to keep tabs on the mood of today and what could be the next cutting-edge theme or hot trend; and personally, books that educate and enlighten, that challenge my mind, body and soul to grow



Em finds herself in a distressing real-life situation that tests her ability to walk the fine event planning line of giving her clients what they want and keeping their guests safe, as they spiral out of control on an all-male incentive getaway reward for top sales that would turn into an event planner's worst nightmare of "guests gone wild."

DECEMBER 13

What a day it's been! Started out the same as most arrival days, with "they're herrrrrrre"—à la *Poltergeist*—echoing through my mind as soon as I learned the plane had touched down. I knew I was minutes away from experiencing another round of "some things have to be seen to be believed." I know the actual phrase is "some things have to be believed to be seen" but in my case I *know* the opposite is true. What takes place under the premise of business is entertaining to say the least, guaranteed to raise an eyebrow or two and sometimes my blood pressure, and today did exactly that.

It began with my airport arrival team calling to let me know that all 50 men were present and accounted for but . . . and I have