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*Communication and Hands-On Problem Resolution: A case in event management***Summary**

"The Best" Destination Management (TBDM) is considered a large full-service destination management company (DMC) serving many destinations across the country. Their mission is to provide their clients with unsurpassed service by offering flexibility and flawless event execution, in addition to creative, cutting-edge ideas for program development. By listening to their clients' objectives, by providing timely, creative, cost-effective proposals, and delivering with precision; they are able to not only meet, but also exceed the expectations of their clients. Their history can be best summarized by the wealth of experience and diversity each independent contractor brings to the organization. The president of this company has chosen to contract out all of her destination managers to reduce overhead, and increase her bottom line; making them independent contractors. Doing so allows the independent contractors to also maximize their profits. The payment structure for a program will vary, depending on whether or not the contractor books and/or services the group themselves.

Each independent contractor is given the title of destination manager, and can be responsible for selling and/or operating an event. Selling consists of more than just obtaining leads and closing sales. In a DMC it also consists of writing proposals and contracts, coordinating vendors, writing resume of services, and distributing event information/instructions to the operations team. The destination manager has the option to operate their own events to make a larger commission, however most choose to employ other independent contractors within, or ancillary to, the organization to operate their events. Many choose to do so because they either lack the operational experience to do it themselves, or they would rather use their time to close additional sales. If destination managers contract an event, they are responsible for staffing and communicating the program details to the event operators. Program details are conveyed to the operations team via the Resume of Services (comprehensive timeline), and the Contract for Services.

Carly is a destination manager at TBDM. She has very limited experience in the hospitality industry, besides waiting tables. Carly found the method of creating proposals at TBDM too time consuming, so she developed her own processes in place of the standard operation procedure (SOP). Since the clients seemed satisfied, her boss did not seem to notice that she wasn't using SOPs. So far, this process has worked for her, without problems in communication.

Hannah has recently started with TBDM as an operations manager. That is the entry level position for someone wanting to become a destination manager. After successfully mastering operations, the contractor can move up to sales and become a destination manager.

Hannah has degree in hospitality management with over 5 years experience in event operations in venues, so she expected a promotion to destination manager in no time.

Shannon is a meeting planner XYZ Medical Supplies, with a moderate level of experience, and has worked with TBDM in the past. She immediately thought to hire them again when she had a small group of VIPs looking to wine and dine a group of Doctors who were in the market for new medical supplies and equipment. The group totaled about 25 people, consisting of middle-aged male medical doctors who own their own practices.

After the contract was signed, Shannon called Carly to add a classy nightclub experience to the program. Carly suggested that Red Carpet Lounge be added to the existing itinerary to show the attendees a good time in a classy, yet entertaining, environment. Since Shannon did not contact Carly until the day before the event, Carly immediately called the lounge and booked a private party area on the patio with Stacey, one of the lounge's event managers. Since it was a last minute booking, the Carly did not add an addendum to the contract. Instead, Carly only included a copy of the contract between the Red Carpet Lounge and TBDM, along with the other function sheets, in the operator packet for Hannah. It wasn't until the day of the event that Carly emailed Hannah, explaining that another stop had been added to the itinerary that was not included in the resume or the contract. Instead, Carly explained that the contract between TBDM and Red Carpet Lounge was attached to the operator packet.

Hannah waited at the hotel for her group to load the 27-person VIP motor coach depart for an upscale restaurant; their first stop of the evening. Hannah took a head count as attendees were loading and sat down next to Shannon to confirm the arrival and departure times for the last stop at The Red Carpet Lounge, since it was a last minute addition to the schedule. Since Hannah had only received arrival and departure times for the additional event, she wanted to verify any additional details that may have been omitted with the planner. After the dinner, the group loaded the bus to proceed to the Red Carpet Lounge. Hannah began to notice that several of the attendees were intoxicated and hoped that the rest of the event would go smoothly.

At 10:00 pm, the motor coach pulled up to The Red Carpet Lounge. Sloan, another event operator for TBDM who had staged the venue for the group's arrival, greeted Hannah. Staging an event means to prepare the venue for a groups arrival. Sloan informed Hannah that should could not stay for the remainder of the event. Typically, both event operators remain at the venue until the close of the event, but Hannah was confident in her abilities to be able to operate the event

on her own. After Sloan introduced Hannah to Becky, the contact person at the venue, she left for the evening. Hannah was unaware that Becky was filling in for her colleague Stacey, who had worked with Carly to contract the event. As the attendees settled in, they seemed pleased and began drinking and dancing to the live entertainment indoors. However, a good portion of the group decided to stay on the patio and order shots from the bar, since the weather was nice. While Hannah was offered many drinks that evening, she suspected it might be unethical to drink with a client, so she declined. Hannah thought it would be more advantageous to remain on the patio to oversee the event. However, because she decided to do so, she lost track of the planner as the evening progressed.

Since the event was scheduled to end at midnight, Hannah began searching for Shannon to coordinate the departure at 11:45 pm. When she found Shannon, it became apparent that she was intoxicated. When Hannah informed her that it was time to load the bus, and asked her for help to do so because the attendees did not want to leave, her attempts failed. Hannah informed Shannon that every half-hour that the driver was kept on the clock, they would have to pay \$50, but Shannon seemed indifferent. Just as Hannah began another attempt to gather the group, she noticed a server at the Red Carpet Lounge handing the bill to Shannon. Hannah intercepted the check, and turned to Becky, who was standing nearby, to ask why the bill was delivered to the client. Becky stated that she thought Stacey had told her that the group would be paying for themselves. By this point, Hannah was starting to panic, as she realized someone at TBDM had dropped the ball communicating the details. Since she was new to the company, she wasn't sure if it was customary for the client to pay on their own, but she thought to herself, "Why would we contract this event if we weren't going to make any money on it? If the client pays, we wouldn't be able to make a profit." Questioning her judgment, she tried calling Carly several times, with no answer.

Frustrated, Hannah tried to maintain her composure in front of the client. Shannon was fortunately oblivious to the situation, so with the check in hand, Hannah asked Becky to walk to the back office to compare her version contract between The Red Carpet Lounge and TBDM. Upon reviewing the venue's contract, she saw a company credit card with her boss's name on it, stapled on the front. Trying to reach Carly again, with no success, she decided to have Becky bill TBDM for the event. In her mind, the worst that could happen is that TBDM would have to invoice the client for the balance. Feeling confident in her decision, Hannah returned to the bus. By 12:30 Hannah was finally able to load the majority of participants on to the bus, while some others decided to stay back and take a taxi back to their hotel when they had finished for the evening.

## Target Audience

This study is targeted at undergraduate level of hospitality and/or event management disciplines. There are several ways to present this case in order to maximize understanding and the mastery of this study. The study could be presented at the beginning of a term and worked on congruently with lecture content as means of progressive learning. Alternatively, the study could be presented at mid-term, or at the end of the course, after topics related to program logistics and communication are covered. This case serves to contextualize topics learned in prior lessons and/or other courses, including:

- Knowledge of the different types of suppliers that service group business, including DMCs.
- Knowledge of the meeting planner's role.
- Knowledge of the various components that go into planning and implementing a meeting, event, and/or convention, and the importance of communicating program details.
- Knowledge of different types of function sheets (event specifications guide, resume of services, etc.).
- Knowledge of contract procedures and terms and conditions.
- Knowledge of risk management.

## Learning Outcomes

This case study outlines a real scenario pertaining to communication failures between a DMC, one of their contracted suppliers, and the meeting planner. Each program is unique, and each DMC has a different SOP, but what remains consistent is how program details should be communicated internally within an organization and contracted vendors. The key concepts presented in this case study are related to the importance of communication and careful planning when a DMC is hired as a third-party planning professional for a program. It also emphasizes the importance of standard operating procedures, and proper training for event operators. Risk management should address how to handle intoxicated guests and how to ethically behave in difficult situations. By the end of this lesson, the student should be able to:

- Extract the incidents in this case that led to communication failures between the respective parties, and describe the role of social exchange theory in ensuring a smooth program execution.
- Discuss the proper and careful planning processes from a supplier's perspective.
- Identify areas of risk and areas of ethical concern, and discuss the assessment and management of those areas.

## Lesson Plan

There are two ways to present this case, depending on the level of event management knowledge the students have upon enrolling in the course. First, for an introductory event management course, it is recommended that the case be introduced in the beginning of

the course and worked on through the length of the semester, as a progressive means of learning. The students should work through the case as they are learning course topics, specifically topics related to program logistics and communication.

Second, for a mid to upper level event management course, it is recommended that the case be introduced at mid-term, or at the end of the course, after topics related to program logistics and communication have been covered. This will allow students to contextualize topics previously learned in prior lessons, and/or other courses. The case would be used as a check for practical understanding relevant topics. In either case, when the case is presented, additional readings should accompany the case to enhance learning and promote discussion.

## DISCUSSION TOPICS AND QUESTIONS

### *Communication Failure on a Program*

- Create a table listing the incidents of communication failure, who was responsible (Carly, Hannah, Shannon, Sloan, Stacey, and/or Becky), and why.
- For each incident, provide a brief explanation for how to improve communication, if possible.
- Discuss the benefits of using standard operation procedures for program coordination and communication, and how social exchange theory can encourage a smooth program execution (Colquitt, et al, 2012).

### *Proper & Careful Planning Process – Supplier’s Perspective*

- Discuss the role of a DMC in assisting a planner. Be sure to include what TBDM was hired to do for the client in this case in your response.
- Discuss the Red Carpet Lounge’s role as a supplier in this scenario. Be sure to discuss how a supplier should interact with the client when contracted by a DMC.
- Outline the incidents and/or tasks where proper planning did not occur within the DMC, and who was responsible (Carly, Hannah, or Sloan).

### *Areas for Risk & Ethical Concerns*

- What are the risks when working on a program where alcohol is involved? Explain how to work with a client that is intoxicated, and how it can be prevented.
- Is it acceptable to drink with a client on a program, when the client and/or the attendees offer it? Outline the risks and/or ethical considerations that should be taken into account when making your decision.
- Discuss the process of assessing risk on a program and explain what a risk management plan should include.

## Instruction

The three learning outcomes attached to the teaching note for this case will require more than one class session to execute. At the minimum, 45-60 minutes per outcome is recommended, if time is dedicated toward completing the objectives in-class. If the objectives are assigned as out-of-class work, the students could be put into groups to formulate their answers. The case could be assigned as an individual task as well. Students could either complete at home and turn in as a means of individual assessment, or the students could complete the work at home and bring it back to class. The later may be a more beneficial means of collaborative learning. In that case, the that students should be advised to bring their completed tasks to class, and the instructor would lead an in-class discussion revolving around the students’ findings. Regardless, if an in-class discussion method is used, it is recommended that the case and supplemental readings, be assigned in advance so that students will be prepared to discuss in class. The following elements should be included in a 60-minute in-class discussion format:

### *Small Group Discussion*

Students should gather in small groups of 2-4 students (depending on the class size). The first 5 minutes should be dedicated toward outlining the key incidents in the case. The next 20 minutes should be dedicated toward each student group working on one themed learning objective. If the students come with their individual work completed for each learning objective, each group can use this time to collaborate and compare and contrast on their individual responses, then agree to one resolution.

### *Presentation*

A representative from each student group should present their collaborative work on the learning objective(s) to the class. At this point the class will have the opportunity to question the group’s decision and provide feedback (25 minutes).

### *Check for Understanding*

In the last 5 to 10 minutes, the student groups should be asked to take an opposing view from their classmates during their presentation and write up a defense to their original position. If there is time remaining, the groups may discuss their defenses to the opposing view(s) along with their justification.

### *Assessment*

Regardless of the mode of interaction to complete the learning objectives, an individual assessment should be conducted to test the transfer of learning from the case, to a situation in the real world. The students should be given an oral situation judgment test to assess their application of the learning objectives when presented with a short scenario, without the assistance of course materials/ supplements. An oral assessment will test their ability to implement hands-on problem resolution under pressure, as Hannah was chal-

lenged to in the case. An example situational judgment test may include the following types of questions:

1. What risks should you consider for a team-building ski race event?

**Sample Answer:** “safety nets would need to be installed on the runs as a protective measure; that the participants are being physically protected with quality equipment, safety headgear, etc.; that highly trained staff are supervising the event; that EMS has been included in case of any accidents; that waivers have been signed, permits are in place and insurance has been taken out; that a backup weather plan is prepared; and that all other event design logistical and legal requirements are in place” (Allen, 2009a, p. 338).

2. How should you deal with surprises when an event is taking place?

**Sample Answer:** Event attendees should never be made aware of the situation, unless it is safety and security risk. If at all possible, the DMC representative should not involve the client. In outward appearance, the event should appear to be running smoothly, with behind-the-scenes actions taking place without bringing attention or alarm to the participants. (Allen, 2009b).

## Analysis of Teaching Objectives

### *Communication Failure on a Program*

Using standard operating procedures for program coordination and communication helps to mitigate risks during an event. Below is a preliminary list of the incidents of communication failures, why they happened, who was at fault, and a brief explanation of how to improve communication, if possible:

1. Failure to communicate program needs in a timely fashion – Shannon

**How to improve:** Shannon should have advised the DMC well in advance of program changes to ensure a smooth program. Unfortunately, this is a very common occurrence in the MICE industry. Meeting planners change their minds, or want additional inclusions, within a very narrow timeframe, and the vendor is expected to produce. How the vendor responds to the client is critical. Carly should have advised Shannon of any company restrictions on booking new services within a 24-hour window. In general, meeting professionals are aware that changes made last minute do not always lead to favorable outcomes, but that does not change a client’s expectation of performance for a contracted service if the vendor guarantees that they can provide the service requested. As a supplier, it is important to manage client expectations and set the bar for performance.

2. Failure to addend existing contract – Carly

**How to improve:** Carly should have added an addendum for the Red Carpet Lounge Event to the existing contract. The addendum should have been signed by Shannon, and included in the operations packet for Hannah.

3. Failure to communicate payment details effectively – Carly

**How to improve:** In addition to the contract addendum, Carly should have provided details regarding the event payment in the operations packet for Hannah.

4. Failure to communicate staff schedule for the event – Carly, Sloan, & Stacey

**How to improve:** Hannah should have been made aware, in advance, that Sloan would not be remaining on site for the length of the program. Carly and/or Sloan should have advised. Likewise, Stacey at the Red Carpet Lounge should have advised TBDM that she would not be present for the event, and that Becky was the contact person on-site.

5. Failure to respond to critical concerns on the event – Carly

**How to improve:** Carly did not pick up her phone, nor did she respond to Hannah throughout the evening about her concerns for payment on the event. If Carly knew she would not be available for questions, alternate contact numbers for operation questions should have been provided (i.e. Carly’s supervisor, etc.). Social exchange theory serves as a useful theoretical underpinning to understand why Carly may not perform according to the SOPs as outlined for creating and distributing function sheets. It also serves as a useful context to understand how communication failures, and a lack of reciprocity, can impact trust in the exchange between Hannah and Carly, especially at the end of the night when Hannah did not receive any support for her program concerns. Colquitt, et al (2012) provide a comprehensive overview of how trust influences performance in an exchange, particularly at the employee level. Not only can trust serve as an exchange deepener, where a deeper sense of obligation is formed in the relationship as a result of trust, but it can also serve as an uncertainty reducer to mitigate any work uncertainty suspected in the exchange. In this case, Hannah trusted Carly, but because Carly did not reciprocate in the exchange, the exchange will likely be hindered in the future. While this event may have been executed successfully at the end of the day, Hannah will likely have trust issues with Carly, and potentially the organization, going forward. The manner by which the organization handles the situation the day after the program, and communicates with Hannah, could greatly impact Hannah’s perception of the company and her relationship with Carly.

### ***Proper & Careful Planning Process – Supplier’s Perspective***

From the introduction of the case, the students should have a basic understanding of the role of a DMC in assisting a planner. For instance, DMCs are typically hired by meeting planners to assist with, or contract out additional vendors for ancillary conference activities. Students should also understand that DMCs could range in size, from large to small. Smaller DMCs may not be able to provide the same amount of services, or produce as many events per year as a large DMC, simply because their resources would probably not allow for it. Depending on the organizational structure, the human and financial resources will vary. For example, DMCs that are structured like TBDM would have a relatively low overhead because the owner has chosen not to “hire” any of the employees. All employees are independent contractors. So while they are considered a mid to large size DMC, primarily operating in one area of the United States, TBDM would free up additional financial resources to be able to produce more events per year and/or travel with their clients. It will also be important for students to understand that DMCs do not only service one destination, but that also can depend on the size of the organization. Larger DMCs have sufficient resources to be able to travel with their clients, or have multiple offices across the country, while smaller DMCs may be limited to producing events a specific city, state or region because their resources would not allow them to do more. It is recommended that the instructor supplement the case with additional lectures and/or information on DMCs. Students should also be directed to the Astroff & Abbey (2011) text for additional information on the types of services that DMCs provide, and to Gilmore (2011), and Harmon (2011) for more information the role of DMCs in the MICE industry.

As referenced in the introduction of the case, DMCs will frequently utilize suppliers and/or venues that have proven to be reliable in the past. Since DMCs are considered to be local experts in a destination (Astroff & Abbey, 2011), meeting planners will expect a smooth program execution. Therefore, DMCs are responsible for not only careful planning within their organization, but also with the vendors that they contract out. In this case TBDM was originally hired to contract a dinner event, with a last minute add-on event at the Red Carpet Lounge. In contracting the Red Carpet lounge, Carly should have followed standard operating procedures to mitigate communication problems. Likewise, the Red Carpet lounge should have been informed, if they hadn’t already, that they were to act as an extension of TBDM in servicing the client, and then acted appropriately. Where the fault in communication occurred is not certain. One could posit that the Red Carpet Lounge failed to act as an extension of the DMC when the server delivered the check to the client. However, one could also posit that Carly did not properly inform the venue of the policy. One way to ensure proper follow through on this policy is to include a clause

in the contract for it. In this case, it would be important for TBDM to follow up with the venue after the event to clarify their role and draw attention to the contracted guidelines for future reference. TBDM would then have a plausible reason to warn the vendor that violations would result in a breach of contract, and a potential loss of business in terms of client referrals.

Below is a preliminary list of the incidents/tasks where proper and careful planning did not occur within the DMC, and who was responsible:

1. Failure to follow SOP to coordinate appropriate operations staff for the event – Carly

**Reason:** If Sloan informed Carly that she was to stay for the program, a replacement event operator should have been staffed so that Hannah could have had support.

2. Failure to review function sheets, and inspect for missing information – Carly & Hannah

**Reason:** If Hannah had received appropriate training, she should have known to look for the payment information in the supplemental contract. If she was unsure of a procedure, she should have asked Carly prior to the event. It could be argued that a person does not know what they do not know. In the case of Hannah being a newly employed event operator, Carly should have double-checked the information she provided to Hannah to ensure that it was complete.

3. Failure to provide SOPs for problem resolution on a program – Carly

**Reason:** Carly should have provided an SOP for Hannah to follow in the event that a problem occurred on the program. Because there was a lack of careful planning in this regard, Hannah called Carly at a late hour to handle a problem.

4. Failure to monitor event progress efficiently – Hannah

**Reason:** Early on in the evening, Hannah lost track of her client, Shannon. Clients do not always need monitoring, but suppliers should always know the location of their client. Unfortunately, Hannah was working with an unprofessional client. A SOP for how to manage difficult clients would have been helpful for Hannah in this scenario. Hannah should have also attempted to load the bus earlier than 15 minutes prior to scheduled departure, taking into account the state of mind of the attendees. Proactive behavior in this case was necessary for an efficient program.

### ***Areas for Risk & Ethical Concerns***

There are several risks involved when working on a program where alcohol is involved. When a DMC is involved in contracting the event, they are assuming a certain extent of liability when the contract is signed. In this case, the DMC is protected because they are providing transportation for the attendees. In this way, they are also protecting the host organization (the client) from potential claims filed by their at-

tendees. However, when guests decide to stay at an establishment after an event closes as they did in this case, the lines of liability can become blurred. Who would be responsible if those guests get injured, after the program has ended? The answer to that question depends on terms and conditions in the contract(s). It is important to consult with legal counsel to ensure company coverage from any claim that results from a tortious act or negligence by the client, attendees, employees, agents, and/or contractors (Allen, 2002). A sample liability statement that could be relevant to this case to share with the class might include the following:

- “The client shall indemnify and hold harmless, the DMC and its subsidiaries, affiliates, officers, directors, shareholders, agents and employees free, clear and harmless, from and against any and all losses, liabilities, costs, expenses (including amounts paid in settlements and reasonable attorney’s fees), claims, penalties, judgments and damages, resulting from or arising out of, by any reason of any act, omission or negligence of the client or its respective agents, employees or contractors in any way connected with or arising out of any accident, injury or damage – and these can include and be detailed – any breach of representation, injury to person or property, any activity conducted or action taken by the DMC, directly or indirectly, in conjunction with the agreement” (Allen, 2002, p. 178).

There could also be incidents of violence or subsequent illegal activity as a result of the intoxication. Thus, it is always important to consult with legal counsel prior to contracting to account for any legal repercussions that could be taken on the company and/or individual agents of the company. Building these safeguards into company protocol for employees to sign is a critical step to ensuring company protection. In cases where alcohol is served, the more control a supplier has over the process of serving alcohol, the better. For instance in this case, TBDM could have worked with the client and the venue to only serve guests who had drink tickets. However, since this venue was open to the public at the same time as the event, the venue would likely not refuse service to guests who would be willing to pay cash, which could pose an additional challenge.

It is not acceptable to drink with a client on a program, even if the client is offering. If Hannah were to take advantage of the drink offer on the program, she would not only be putting herself at risk, but also TBDM and the client. Companies should establish a formal policy and protocol for ethical behavior on events and executed (signed) by all employees. The policies should be reiterated at pre and post event meetings as a means of follow through and implementation. (Allen, 2009b)

According to Allen (2009a), event risks should be assessed prior to the event occurring and include, but are not limited to: bad weather, company emergencies, preparation of evacuation and emergency procedures, verified and up-to-date licenses and certificates, safety and security, financial issues, issues related to contract clauses like liability

and insurance, and etc. According to the Convention Industry Council manual (2014), an event/meeting professional has three choices when it comes to risk. They can accept or ignore the risk, manage or mitigate the risk (i.e. transfer the risk to another party through liability clauses in a contract), or avoid the risk altogether. To reduce the probability of the risk occurring, a risk management plan should be incorporated into the planning process. Some elements of a risk management plan include, but are not limited to: assigning an appropriate chain of command and who is in charge under what circumstances, develop emergency and control procedures, identify a spokesperson for the organization, and implement the strategies to carry out the plan. When risk is unavoidable, the contract becomes the go-to for liability purposes. Therefore, it is important to make sure that the appropriate waivers for liability are included, insurance requirements and indemnification clauses, and that clauses for consequences like cancellation, force majeure are included in the terms and conditions. (McIlwraith, 2014).

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