Managing Event Stakeholders: Expect the Unexpected

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Introduction

The expectations of, and placed upon, event managers are often complex and frequently implicit. However, there is currently no overall template for determining professionalism within the sector, even though there are many examples of best practice in specific areas of work. Events of any form do not happen in isolation. Events, and event professionals, are mutually dependent upon clients, suppliers, venues, attendees, sponsors, and colleagues. Such relationships involve implicit expectations, relating to: communication; behaviour; decision-making; and collaboration. These are informed by a range of factors, such as: previous experiences; individual and organisational reputations; project constraints (e.g., time, cost and quality); evolving circumstances. The last of these indicates that expectations are not static and can change in response to developments in the client/supplier relationship, or because of any other environmental factor.

These issues can lead to misaligned expectations of the event manager's role or performance, and present challenges to managers of all types of event, regardless of scale or scope. If we can minimise either this misalignment, or the expectations themselves, then events will run more effectively, will be more likely to achieve their objectives, will make best use of the resources available, and will enable positive collaboration between stakeholders. Understanding and managing misaligned expectations is a key step in overcoming event failures, given the importance and complexity of stakeholders.

In this chapter, we will focus on stakeholder management from the service provider perspective to consider how poor client relationships can lead to event management failure. Many of the models and tools used here are more frequently applied to the customer relationship and within this chapter, we are focused on their application to the client-service provider relationship. This discussion utilises the cornerstone theories of stakeholder management (Mitchell et al, 2017; Savage et al, 1991; Rowley, 1997; Oliver, 2010; Wallace & Michopoulou, 2019; Van Niekerk, 2016; Van Niekerk & Getz, 2019) to evaluate the failures in expectation management as demonstrated in two case studies. By combining different expectation management models such as Expectation Disconfirmation Theory and Service Gap Analysis (Zeithaml et al, 1993), we can understand the root causes of these failures in order to address those issues in the development and delivery of future event projects.

To help do this, we will use a case study of a year-long engagement programme to explore the complexities of a public sector client's expectations from an agency perspective and how mistakes were made from the beginning. As a comparison, we will also look at the operational expectations for a corporate event project from the venue perspective, and how lack of explicit communication of expectations almost jeopardised the event.

Theoretical Perspectives

The events sector is vast and multi-faceted (Bowdin *et al*., 2011) and the process of event production and delivery is considered by some to be a dark art (Hearn, 2007). Event management is a professional service and, as articulated by Ojasalo (2001, p200), the customer expectations are therefore "fuzzy, implicit and unrealistic".

In this section, we will consider four primary theoretical perspectives that intertwine to inform our understanding of how failure to manage expectations underpins event mismanagement:

By considering expectation management through these theoretical perspectives, we will critically evaluate our case studies to help us learn from our mistakes.

Expectation theory

Expectation theory (also commonly known as Expectancy-Disconfirmation Theory) is the most widely accepted theoretical principle concerning customer satisfaction processes (Oliver, 1996; Ojasalo, 2001; Oliver, 2010; Huang, 2015; Tran et al, 2021). This theory posits that satisfaction/dissatisfaction results from a customer's comparison of performance (of a product or service) with predetermined standards of performance, which are the customer's predictive expectations.

Three possible outcomes of the comparison with the expectation disconfirmation model (EDM) are possible:

- **Positive disconfirmation,** which occurs when performance is perceived to be better than the predetermined expectations, so the customer is delighted.
- **Zero disconfirmation,** which occurs when performance is perceived to be exactly equal to expectations, and customers are likely to be satisfied.
- **Negative disconfirmation,** which occurs when performance is lower than expectations and, of course, leads to dissatisfied or unhappy customers.

There is currently limited academic consideration of this approach in relation to events but this concept is evident in every event evaluation. An event may be aiming for positive disconfirmation in all aspects but in order to achieve this, the event manager needs to understand what the predetermined expectations are. However, it is important to note that these expectations may be implicit, and therefore not immediately visible or understood. We need to consider how we can uncover these expectations and then evaluate our work, event concept, communications, and project management against them, in order to ascertain the likelihood of positive disconfirmation.

Uncovering expectations means addressing the ambiguity, implication, and lack of realism (Ojasalo, 2001) of customer perspectives and in doing this, we need to understand how those expectations are formed. Table 1 summarises some of the key literature which we can use to help with this understanding.

Author	**Expectations/comparison standards identified in the services context**
Groenroos, 1982	Expectations based on market communication, image (including former experiences), word-of-mouth and customer needs.
Bitner, 1990	Expectations based on pre-attitude and traditional marketing mix.
Zeithaml, Parasuraman and Berry, 1990	Expectations based on word-of-mouth, personal needs, past experiences and marketing communication.
Bolton and Drew, 1991	Expectations based on organizational attributes, engineering attributes, personal needs, word-of-mouth, and past experience.
Boulding, Kalra, Staelin, and Zeithaml, 1993	"Will'" expectations, referring to what will happen in the next service encounter. "Should" expectations, referring to what should happen in the service encounter.
Liljander and Strandvik, 1993	Ideal standard, referring to the subjective norm Industry standard, referring to the customer's perception of the brands in the market. Relationship standard, based on the overall experience a customer has of a particular service provider.
Oliver, 1996	Ideal expectations – what can be expected by the customer of the "best" brand. Predictive expectations – what can be expected by the customer from marketing communications, referrals and previous consumption of services.
Zeithaml, Berry and Parasuraman, 1993	Desired service, referring to the level of service the customer hopes to receive. Adequate service, referring to the level of service the customer will accept. Predicted service.

Table 1 Expectations and comparison standards identified in the services context
(Adapted from Ojasalo, 2001)

As Richards (2015, p58) articulates "there has been and probably always will be much talk about the importance of managing expectations, our own as well as those of others. This is so because it plays a key role in achieving progress in relationships. Indeed, effectively managing expectations lays the groundwork for a successful service relationship.". As well as considering how and why our customer and stakeholders have developed their expectations of the service provision and relationship, Richards (2015) identifies the importance of managing our own expectations within the process of developing and delivering professional services.

Stakeholder Management

Expectation management is an element of stakeholder management and can have a significant impact on the viability and success of an event project. Stakeholder management is widely considered to be one of the core elements of event management (Freeman, 2004; Mitchell et al, 2017; Savage et al, 1991; Rowley, 1997; Wallace & Michopoulou, 2019; Van Niekerk, 2016; Van Niekerk & Getz, 2019; Bowdin et al, 2011) with four main perspectives on the theoretical considerations (Van Niekerk & Getz, 2019):

- Descriptive - that is, exploring how organisations work in a stakeholder environment.
- Instrumental - determining how stakeholder relationships and their management affects the organisation and its outputs.
- Managerial - considering structures for management of stakeholders and the application of theory to articulate best practice.
- Normative - focusing on ethical organisational behaviour and the role of Corporate Social Responsibility.

Descriptive

An events-sector organisation has a plethora of stakeholders who are impacted by, involved in or have influence over the achievement of the organisation's goals and outputs. It is therefore useful to identify and categorise stakeholders in order to manage those relationships effectively, using appropriate strategies and approaches.

As considered by Van Niekerk & Getz (2019), Jepson et al (2014), Clarkson (Maines, 2018) and others, stakeholders can be clustered in the following groups (adapted from Getz and Paige, 2019):

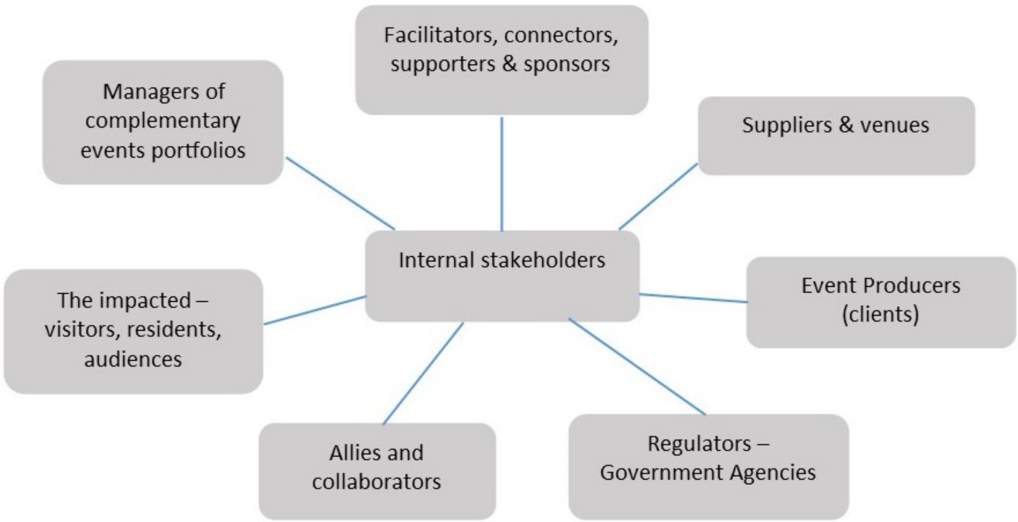

Figure 1. Stakeholders for events (Adapted from Getz and Paige, 2019)

For each of the stakeholder groups identified in Figure 1, we need to understand the type of relationship between the event, the event managers and the stakeholder group. For example, the relationship between the event client and the event manager is highly dependent on the types of organisations, and the rapport between individuals.

Using this descriptive approach, we can also consider how each stakeholder group interacts with each other, as an adaptation of network theory (Rowley, 1997). For example, consider the potential relationship between the event client and the host community for an event taking place in the public domain. If this relationship is generally supportive and positive, the event manager can utilise that support to overcome operational on-site challenges effectively. If the relationship is more antagonistic, the event manager may find themselves in the middle of a more challenging environment which may hinder the effective delivery of the event.

Instrumental

As described in Figure 1, the breadth of stakeholders for event projects means that stakeholders have varying degrees of influence over the success of an event and/or an organisation. Mapping these stakeholders is a first step in understanding the role they each play in achieving the goals and how they interact. It is important to note that the breadth and complexity of stakeholder relationships for festivals and events means that their impact and influence on the organisation, and subsequently on the event, is both significant and constantly changing.

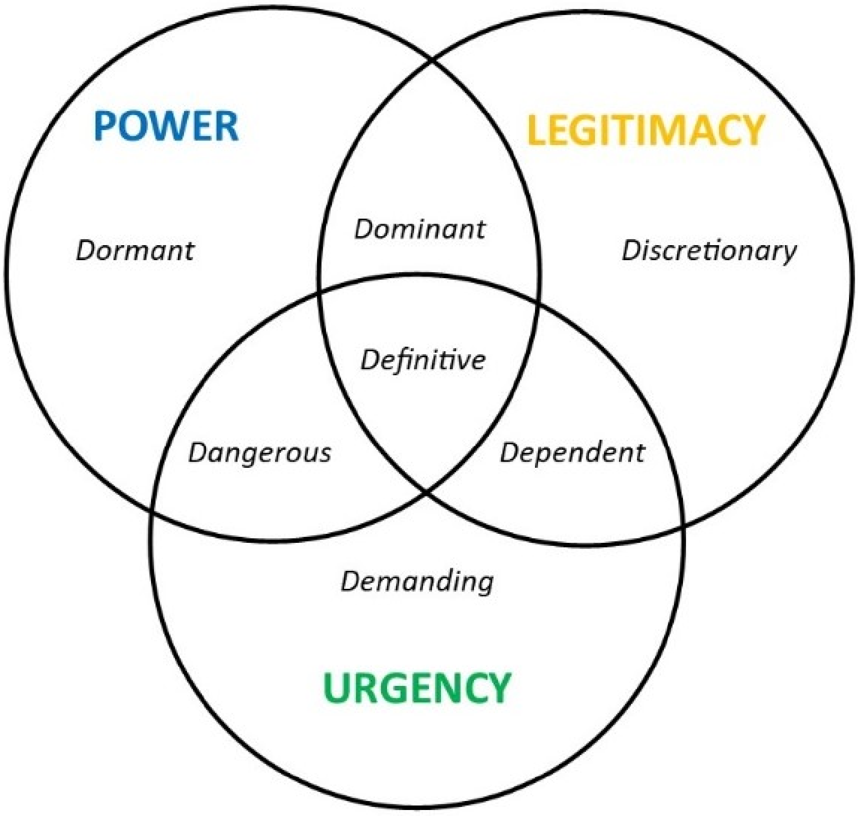

Figure 2: The Salience Model (Adapted from Mitchell et al, 1997)

Mitchell et al (2017) developed the Salience Model (Figure 2) which is widely used to evaluate the power, urgency, and legitimacy of stakeholders. The model provides a means to map stakeholders and categorise them using the 7D's (Dormant, Dominant, Discretionary, Definitive, Dependent, Dangerous and Demanding) to identify their behaviours in relation to the project. As an event manager, we can use these categories to consider how we need and want to engage with each stakeholder group, to achieve the event objectives.

Wallace and Michopoulou (2019) propose a development of the Salience model in the Stakeholder Sandwich Model (Figure 3) that is focused on the complexity of stakeholder management for festivals and events where greater flexibility and fluidity is required. They recognised that stakeholders for events rarely stay in one of the states identified in the Salience model. Wallace & Michopoulou sought to articulate the power, urgency and legitimacy of stakeholders in terms of their affecting or being affected by the event, which enables the event manager to consider the most effective strategies to engage those stakeholders. Figure 3 illustrates how the Stakeholder Sandwich Model can be applied to a music festival:

Stakeholder Type	Primary Interests	
	Outputs	Outcomes
Affectors (stakeholders which can affect the activity)	**Local Authority** – licensing, health & safety	**Venue** – profile, audience
Place	3 day music festival, greenfield site, September	
Affectees (stakeholders affected by the activity)	**Residents** – noise, traffic	**Attendees** – experience, social

Figure 3: The Stakeholder Sandwich Model

(Adapted from Wallace & Michopoulou, 2019)

The Stakeholder Sandwich Model provides a useful tool, to help us specifically consider the impacts of event activity in relation to a range of stakeholders. Event managers can then curate management strategies that reflect the priorities and needs of each of the stakeholder groups. For example, considering the residents in Figure 3, the event manager might choose a collaborative approach with local residents ensuring that they have accurate and timely information about the event. This communication may be dependent on the event client and venue relationships with the local community, so the event manager needs to consider the context for their chosen stakeholder engagement strategies.

Managerial

In developing management strategies for our stakeholders, the dominant model is the stakeholder strategy matrix. Developed by Savage et al (1991), this enables us to map stakeholders in relation to their high/low threatening or co-operative potential. Similarly, Winch (2017), developed the power-interest matrix as a means to categorise management strategies for stakeholders, in accordance with their degree of influence over the organisation. Within her analysis of the stakeholder strategy matrix, customers are identified as having high threatening potential and high cooperative potential and the study therefore proposes a strategy of collaborating with these stakeholders. Van Niekerk

& Getz (2019) drew on both Savage et al (1991) and Winch (2017) to create a blended stakeholder strategy model for events and tourism:

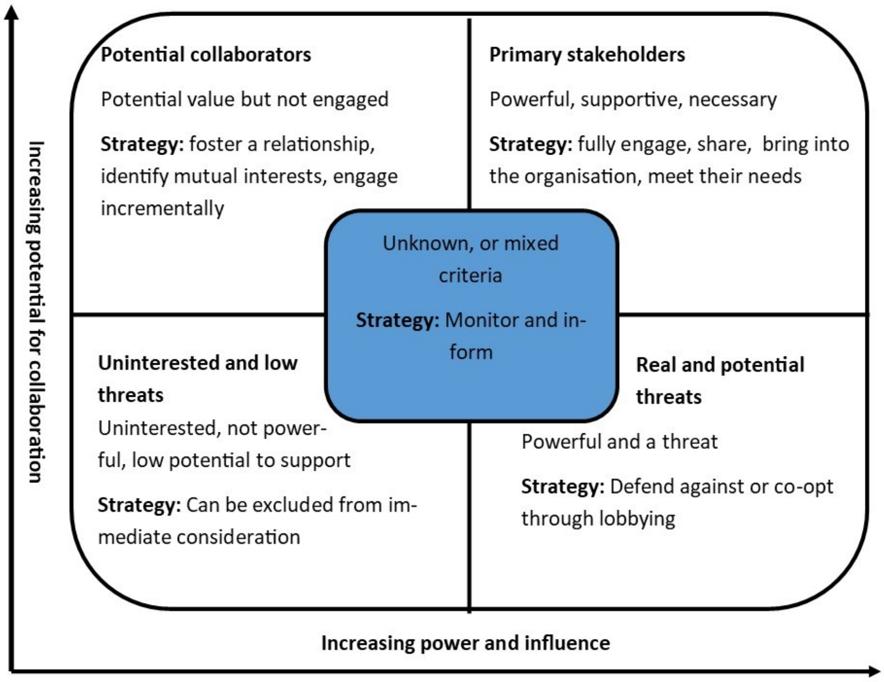

Figure 4: Blended stakeholder strategy model (Van Niekerk & Getz, 2019)

If we now consider our stakeholder groups from Figure 1 and map them onto this model, we can identify appropriate strategies for engaging with each group. These strategies will more effectively reflect the degree of power, influence and potential for collaboration which each stakeholder group has, and which needs to be managed in order to deliver an event successfully.

Normative

The normative perspective considers the organisational culture and ethos of the event. That is, what is the "normal" way of managing stakeholders for the event or organisation. Whichever approach the organisation follows reflects their strategic priorities and thereby influences the likelihood of success in achieving their objectives.

In considering the normative aspects of stakeholder management, we can consider the Clarkson Principles of Stakeholder Management (Maines, 2018) which provide core principles that are of relevance to events as public domain activities that are frequently delivering a public service. These principles include: acknowledging and actively monitoring stakeholders; listening to, and communicating with stakeholders; adapting behaviours sensitively to stakeholder needs; recognising the interdependence and value of co-operative working.

Client management

Whilst there is relatively little academic literature discussing the management of event clients, there is extensive consideration of Customer/Client Relationship Management (CRM) in more generalised business and marketing literature (Knox & Gruar, 2007, Payne & Frow, 2013). The concept of a CRM system is based on sales principles and follows the customer lifecycle (Buttle, 2009) as shown in Figure 5 below:

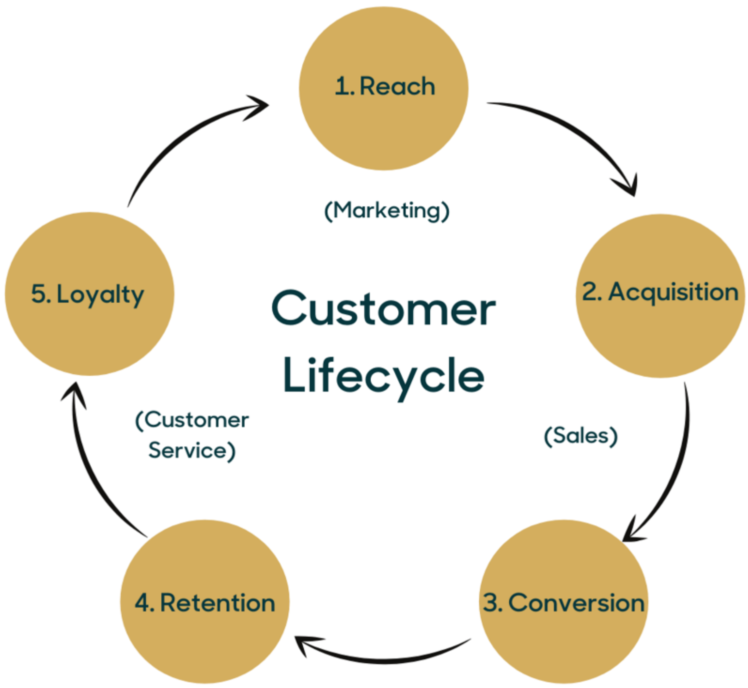

Figure 5: The Customer Lifecycle (Source: Buttle, 2009)

From the event manager's perspective, this lifecycle model applies both to the event client relationship and to the event customer/consumer relationship, which, using the blended stakeholder strategy model shown in Figure 3 are both primary stakeholder groups. The strategy to manage these stakeholder relationships is therefore to "fully engage, share, bring into the organisation, meet their needs" (Van Niekerk & Getz, 2019, pg 74). Although it is important to note that this does not mean that we treat the event client and the event customers in the same way.

Applying the customer lifecycle model requires careful management as, for all stakeholder groups, there is usually interference at each stage of its stages (Buttle, 2009), such as: stakeholder expectations; competitors; the external environment; and the constant adaptation required as we deliver event activity. The challenge with applying generic CRM practice to events is that the stakeholder matrix for events is more complex and implicit than direct sales, marketing and customer service, which is where the development of the Stakeholder Sandwich Model (Wallace and Michopoulou, 2019) creates a potentially more flexible approach.

Zone of Tolerance

In 1993, Zeithaml *et al* developed the concept of a Zone of Tolerance with regard to the management of customer expectations, defined as the gap between two levels of customer expectations: adequate service level (ASL) and desired service level (DSL). From Zeithaml et al's perspective, the formation of expectations is driven by: word-of-mouth; personal needs; past experiences; and marketing communication.

This applies directly to events and their various stakeholder groups, where it can be assumed that the same principles apply to the formation of their expectations of the event experience. In particular, we need to understand how our client expectations are formed in order to manage the stakeholder relationship and manage the project to fulfil those expectations. In delivering client event projects, our services are defined as "professional services" (Ng *et al*, 2007, pg 471) and Ho *et al* (2014) built on the work by Zeithaml *et al* (1993) to apply it to professional services as shown in Figure 6 below.

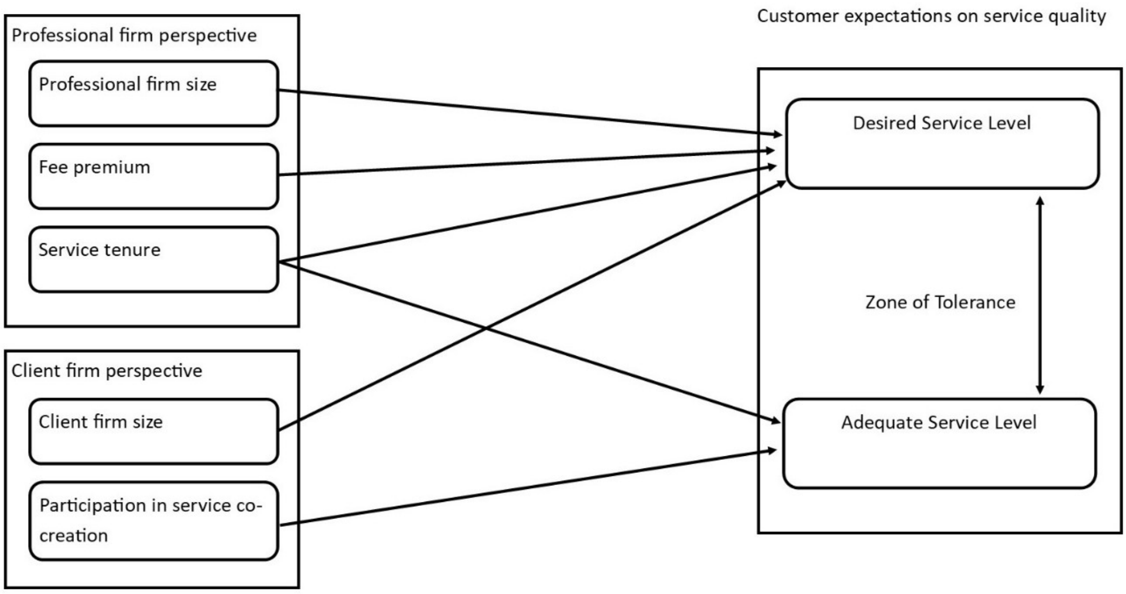

Figure 6: Zone of Tolerance model (Source: Ho et al, 2014)

In their research, Ho et al (2014) identified 5 factors that impacted on the customer (event client) expectations of service quality:

- **Professional firm size:** that is, the size of the event management organisation
- **Fee premium:** the pricing strategy of the event management organisation
- **Service tenure:** have the client and event manager worked together before?
- **Client firm size:** the size of the commissioning/client organisation
- **Participation in service co-creation:** how involved is the client in designing, developing and delivering the event project?

Applying this model to event projects, it can be concluded that Ho et al (2014) posit that in order to achieve the Desired Service Level (equating to client and attendee satisfaction or positive disconfirmation), the client and professional firm sizes need to be similar, that the firms need to have collaborated previously, and that there is a fee premium charged.

Later in this chapter, we will explore how this could apply in the context of our case studies and how this might influence our stakeholder management strategies to achieve the Desired Service Level.

Service Gaps Analysis

In our case studies, we will consider two circumstances where expectations have not been fulfilled. To understand where in the process this dissonance has specifically occurred, we need to understand event and venue management as service provision. Applying Service Gap Theory (Zeithaml et al, 1993) can help to narrow down exactly what has caused service failure, including mismanagement of expectations.

Parasuraman et al (1985) used the Service Gaps Theory model (shown below in Figure 7) to identify where gaps could arise in the provision of services. According to them, there are five particular areas where we can see a service shortfall or gap, any of which can lead to customer dissatisfaction.

Gap 1: Expected service and Management perceptions of the consumer expectations
Gap 2: Management perceptions and translation into service quality specifications
Gap 3: Service quality specifications and service delivery
Gap 4: Service delivery and communications with consumers
Gap 5: Perceived service and expected service

This theoretical approach is intended to enable service providers to evaluate service failures to understand the causal factors. In reality, Gap 5 is the one seen through the eyes of the customer, namely, a service failure. However, the model is useful to help us find the root cause of this perceived failure, which may be based on issues with one gap or several.

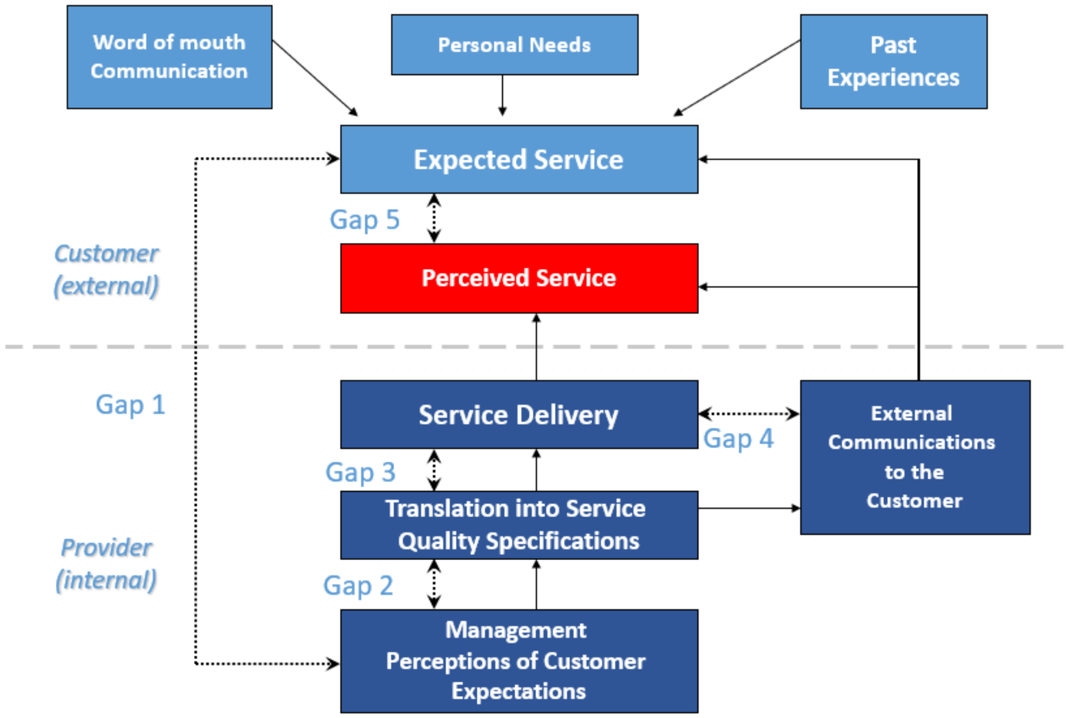

Figure 7: Service Gaps Theory (Source: Parasuraman et al, 1985 and Zeithaml et al, 1993)

As previously identified, management of events is classified as a "professional service" (Ng *et al*, 2007, p471) and we can therefore apply this model to the provision of our services to understand where there may be gaps impacting on client expectations and on the stakeholder management strategy. In considering failures in expectation management, this model helps us to identify the causes of such failures and therefore how we can avoid those issues in the future. Later in this chapter, we will apply this model to our case studies to understand how the projects failed due to stakeholder expectations not being met.

Social Identity Theory

Event attendance is strongly connected to individual and collective social identity (Chiang et al, 2017; and Delbosc, 2008). Within the study of social identity theory, participation in group activities is based on a three-step psychological process: social categorization, social identification, and social comparison. An individual's assessment of these three elements is based on cognitive or functional aspects and on affective or hedonic aspects (Joseph-Matthews & Bonn 2009, Lee, Lee & Choi 2010, Vinerean 2013, Karasawa 1991), which therefore informs their expectations of the event experience, irrespective of their stakeholder type. This principle also informs the client expectations of the event as the event objectives and outcomes will be based upon engaging with the individual and collective social identities.

Andersson & Getz (2008) identify that festivals fulfil social and cultural roles within communities, and therefore balance both stakeholder management and resource dependency to be sustainable. They also articulate the action of non-profit and service organisations in sustaining their core beliefs and identities through co-operation which carries the least risk to the organisation. This reflects the Normative approach within stakeholder management.

Olander and Thogersen's (1995) Motivation-Opportunity-Ability model (MOA) (Figure 8), gives another socially driven consideration of stakeholder behaviour and subsequently the development of expectations.

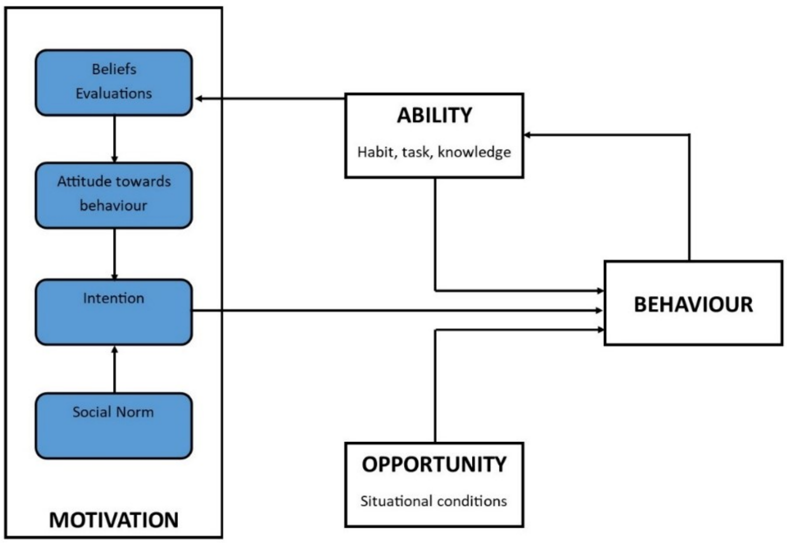

Figure 8: The Motivation-Opportunity-Ability model (Source: Olander & Thogerson, 1995)

This model provides a framework to consider the behaviour of others in the context of their motivations, ability and opportunity, and thereby understand what expectations they have formed, and their likely responses to circumstances. As Jepson et al (2014) propose, in applying this model to festivals and events, there is evidence of improved outcomes where there is inclusive (stakeholder) participation within the planning and decision-making process, and thereby clearer and more collaborative stakeholder expectations.

In using this model to consider our client stakeholder relationships, we need to consider the **motivation** factors on both an individual and corporate level. For example, an event manager might have a highly effective relationship with the contract manager in the client organisation but the values and ethos of each organisation may be very different, leading to conflicting and unclear expectations for any collaboration between them. The MOA model also highlights the impact of **opportunity** on behaviour and therefore event managers need to be able to expect the unexpected to take advantage of opportunities or address challenges in managing their stakeholder relationships. Similarly, any mismatch in the **abilities, or valuing of abilities,** of or by each party in the stakeholder relationship, may lead to a mismatch of expectations and subsequent damaging behaviours and communication.

Case Studies

The two case studies presented below were based on the author's first-hand experience as Executive Producer for her own U.K. events agency, between 2007 and 2018. The first examines an events agency's perspective on (what became) a difficult client relationship. The second considers a challenging client relationship from a venue perspective.

Case study 1: Public sector engagement programme

Evaluating and bidding for tenders is a normal part of day-to-day sales activity for any events agency (Salama, 2021). In 2016 the agency team submitted a creative proposal to a public sector client, which had tendered for an events programme to promote sustainable travel activities for a small town in the Southwest of England. This was aimed at engaging the wider population in sustainable travel initiatives and changing behaviour. The programme included provision for themed cycle events, promotional activity and site-specific events with a wider range of partners. Following an invitation to a contract negotiation meeting to discuss their bid further, the agency was offered the contract.

The overview objectives of the programme were:

- To promote sustainable travel by bicycle in and around the town through a programme of events throughout the year.
- To engage with businesses and families as priority groups.
- To get more people on their bikes, leading healthier lifestyles and reducing their carbon footprint.

Up to this point, everything seemed to be part of a standard process. However, shortly after the contract negotiation meeting, the team began to realise that they were in a situation where the client was expecting a programme that was of greater scope than had been put forward, although still to be delivered within or under the budget that had been agreed. It also became clear that the cycle routes and facilities that were being promoted within the events programme had not yet been built.

Over the 12-month period of the contract, the client's expectations continued to build as their team were allowed to change whatever they wanted, at any time, whilst at the same time restricting flexibility for the event management agency. Whilst it is not unusual within the events industry for clients to change elements of a brief post-contract, the volume and volatility of the constant changes were not consistent with how the agency usually operated, as it compromised creativity and created unnecessary additional pressure on the events process and team. The result was a challenging dynamic, where agency team requests to change process or requirements were refused, whilst the client expected that specific contract clauses be honoured exactly as written. The client also expected the numerous changes to event content or design which they requested, to be addressed and covered by the agency, within the same event budget. From the agency's perspective it seemed that the client acted as though they were always right, and the agency's job was just to deliver.

It is entirely right that the clients should hold an agency accountable for every penny spent on the contract, particularly given the constraints of public sector funding. This was managed through regular reporting within the public sector structures. However, this became highly restrictive when the events agency felt the need to request adaptations to the programme in order to accommodate challenges in the supply chain, or due to the venue requirements or to develop the events programme. This situation was made more frustrating for the agency when the client team implemented changes to the programme without consultation. These frequently resulted in cost implications which were impossible to reconcile within the agreed budget because of constraints imposed by the client's contracting process.

This meant that there was no scope for re-allocating budget between different events within the programme. The agency team were also restricted in its ability to offset budgetary constraints by generating additional income for the project, e.g., through selling trading spaces, attracting sponsorship or negotiating in-kind support.

To further complicate the contract, the agency felt it was important to evolve the programme of events throughout the year, so the overall objectives could be met. However, this seemed to be undermined by the client's poor understanding of how to work with a creative events agency, exacerbated by both a restrictive bureaucracy, and a lack of meaningful and effective communication.

Nonetheless, the programme of 15 events over 12 months was delivered within their budget, albeit it at the cost of any profit for the events agency, which barely covered its delivery costs. For example, the client expected the agency to provide a large team of stewards for every event and that the primary contacts would constantly be available to them, even though this requirement was not in the original brief nor contract. In addition, the agency incurred a number of opportunity costs, due to team members working exclusively on this client's programme, and therefore being unable to work on, or bid for, other projects.

The agency also felt it suffered from other, non-financial costs. Whilst the audience and participant feedback from the events was positive, and programme objectives were (at least partially) achieved over the year, the project caused a significant emotional drain on the event agency team. Whilst the team felt they acted professionally and diligently throughout the contract, motivation and morale plummeted as team members derived little satisfaction from their work. This was only exacerbated when the events failed to achieve the overall impact that had been hoped for in the beginning. When all funding for the project was withdrawn at the end of the events programme, even the prospect of future benefit was lost. This meant that the work put in to build an audience, and develop positive relationships and profiles (for both client and the agency) would not leave the desired lasting legacy of a positive impact on sustainable travel.

Case study 2: Cultural Venue for Technology Product Launch

After a long selection process in Autumn 2019, the new facilities of a cultural organisation in London were chosen as the venue for a new product launch by a well renowned technology brand. The project was managed by an international events agency and was operating on a very tight timeframe, with only two months from selection to delivery.

The event was to run over two days, attended by various stakeholder groups, including: product users; developers; sales and marketing teams; journalists; and buyers. These were to be, invited to various sections of each day, so that they could learn about the product and it could raise profile, leading to end-user sales. The client also wanted to use the event to create promotional material (photographs, video, quotes, interviews) which could be used for both internal training activities and external media campaigns. The event was to utilise ten different spaces over five floors, as well as catering for around 700 people each day.

The overview objectives of the programme were:

- To publicly launch a new technology product with increased profile for the end-consumer.
- To generate media coverage and create media materials for promoting the new product.

- To train the wider company team and associates in using the new product, enabling them to promote it to end-consumers.

The facilities had recently been opened for public hire but the cultural organisation which owned them needed to continue to operate (that is, normal business operations, which included small-scale performance rehearsals). As the facilities had never been used in this way previously, the in-house team were still developing the standard operating procedures for the building, both for their own use and for prospective hirers.

The venue spaces were quoted for and booked out for the event, and the production schedule was started. As usual, the schedule went through many iterations but the event agency didn't share this with the venue until the week before the event. The venue team raised many queries and issues but had no response so it had to plan as flexibly as possible. This was particularly challenging as the host organisation was touring elsewhere in the UK over the period of the hire, with their technical team on the road supporting other performances, which were the core product of the organisation and therefore a priority over supporting the venue hire.

During pre-event preparation in the facility, numerous problems and complications began to arise. Firstly, it became apparent that the event technical team's rehearsals were not going well. To overcome this, the event managers asked the venue if they could carry on working overnight. This was problematic as the venue had no staff scheduled for overnight working, so they scrambled to get additional people onsite to accommodate the request. Although they were only charged extra at-cost, the event managers initially refused to pay the additional charges requested to facilitate the overnight working. They had failed to include contingencies in their initial budget, in case of any additional costs for such last-minute requests. Equally, , the venue team had failed to anticipate that overnight working might be required, and had not factored the cost of extra staffing levels into their initial cost quote. The event team offered to compromise by only working until the early hours, to give them some more time but at a lower cost. This meant that they could resolve the technical problems and they were ready to go the following day.

However, the consequence of this mismatch of expectations was that the production schedule was again re-shuffled. This meant rehearsals for the event were running up to the very last minute, even as attendees began to arrive. As time raced by, the relationship between event and venue teams became fraught, especially as technical issues seemed to mount up. Firstly, the agency technical team had taken more time than scheduled for the initial rigging of the main presentation space. Even more pressure came as technical work in some of the break-out rooms was not completed until the event had started. To make matters worse, on their arrival the caterers found they needed more power than was available in their preparation space. Without consultation they relocated to the venue's artists' Green Room, meaning the latter had nowhere to assemble prior to performance which were unrelated to the event. This was only resolved after the venue's HR team stepped in to negotiate a compromise which enabled both the venue and the event to operate simultaneously.

Notwithstanding these issues, the event achieved its objectives, successfully launching the client's product across its own organisation and to the public. However, the chaos behind the scenes caused unnecessary stress and frustration, particularly for the venue staff who were adversely impacted even after the event. On its close-down.it was found that the agency technical team had left the facility without clearing its rubbish, or numerous marks on doors, floors and windows. In addition, the facility had to deal with many annoyed artists who felt that they weren't adequately prioritised in their own building. This was particularly challenging given that commercial hires were to form part of the cultural organisation's new business model. As a result, lengthy discussions followed this event, exploring the viability of the intended hire capacity, its operating procedures, and rates charged for its services.

Analysis

These case studies provide useful examples of events have suffered from issues around expectation management. Regardless of whether these issues have resulted in failed event objectives, or in problems for event providers, there is much to be learned by event managers. In order to do this, we can now compare and contrast the two situations, and by utilising the theoretical perspectives addressed above, understand how we can avoid expectation mismanagement in the future.

Case Study Comparison

In reviewing these case studies, we can identify common themes for both:

	CASE STUDY 1 (AGENCY)	**CASE STUDY 2 (VENUE)**
Type of client	Public sector organisation	International events agency for a global technology company
Culture of client	Highly bureaucratic, focused on contractual detail	Last minute approach, assumptions being made without clarification
Project Objectives	Public engagement in sustainable travel Influencing travel behaviours	Generate profile & sales for new product. Train wider staff team in the product
Contracting	Tender process but only one bid, formal public sector contract issued by client	Discursive with some documentation, hire contract issued by venue
Communication	Conflicting – commissioning the events before the routes were built, formal approach	Rushed, pressurised, unclear, and inconsistent
Flexibility	Inflexible re contract; constantly moving the goalposts	Expected maximum flexibility but without the resources to enable it
Costs of switching supplier	Significant as a new procurement process would be required and no other interested parties. Time pressure to deliver programme.	Moderate as end-client had gone through detailed selection process so there were other options but time was limited.
Outcomes of collaboration	Lack of focus on impact or longer-term behavioural change. Lacked passion or enthusiasm	Lower quality service provision Communication breakdown
Timeframe of activity / contract	12 months	2 months

Table 2: Case Study Comparison

We could consider these two case studies as being at each end of a client spectrum with very different sets of expectations and approaches, but both resulting in the same outcome of negative disconfirmation and unhappy clients.

Applying the work of Huang (2015), this spectrum gives rise to the following normal distribution where the middle ground results in positive disconfirmation. In these scenarios, that middle ground might look like:

	CASE STUDY 1 (AGENCY)	MIDDLE GROUND (positive disconfirmation)	CASE STUDY 2 (VENUE)
Type of client	Public sector organisation	Any	International events agency for a technology company
Culture of client	Highly bureaucratic, focused on contractual detail	Organised, focused on goals, clear structure	Last minute approach, assumptions being made without clarification
Project Objectives	Public engagement in sustainable travel Influencing travel behaviours	Generate profile & sales for new product Train wider staff team in the product	Generate profile & sales for new product Train wider staff team in the product
Contracting	Tender process but only one bid, formal public sector contract issued by client	Structured, two-way, mutual agreement with clear terms of reference	Discursive with some documentation, hire contract issued by venue
Communication	Conflicting – commissioning the events before the routes were built, formal approach	Clear, well structured, timely, recognises inconsistencies and responds	Rushed, pressurised, unclear and inconsistent
Flexibility	Inflexible re contract; constantly moving the goalposts	Adaptable, recognises changes taking place and responds	Expected maximum flexibility but without the resources to enable it
Costs of switching supplier	Significant as a new procurement process would be required and time pressure to deliver programme.	Moderate – ideally, the client has other options and the supplier is not dependent but both are invested in their working together.	Moderate as end-client had gone through detailed selection process so there were other options but time was limited.
Outcomes of collaboration	Lack of focus on impact or longer-term behavioural change Lacked passion or enthusiasm	Exceeds expectations, positive impact, ongoing relationship	Lower quality service provision Communication breakdown
Timeframe	12 months	6 months	2 months

Table 3: Case Study Comparison with middle ground representing positive disconfirmation

Applying this comparison to a normal distribution bell curve, as proposed by Huang (2015), we can represent Table 3 in Figure 9 below:

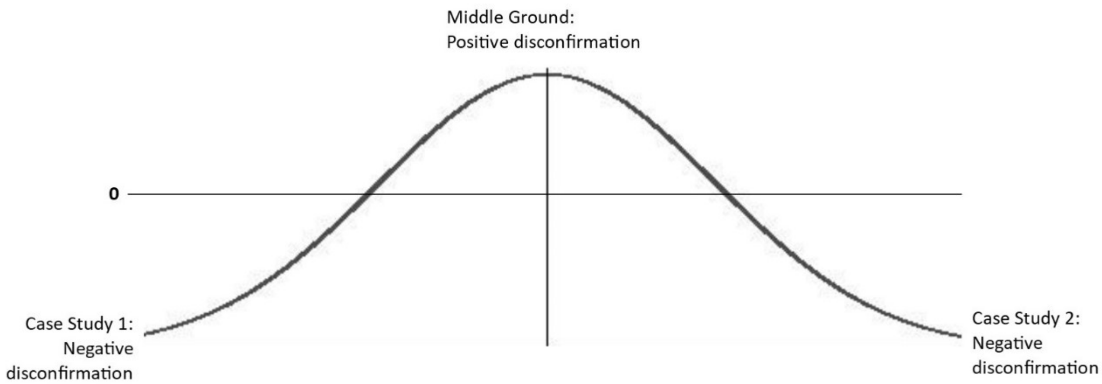

Figure 9: The Probability Model of Expectation Disconfirmation. Adapted from Huang (2015), applied to the case studies

This model suggests that in order to achieve optimum outcomes and exceed client expectations (middle ground), we need to understand our clients better. That is, if the agency or venue had considered the type of client, communications, and the way the relationships worked in advance of the contracts, they might have been able to recognise the conflict of approach in advance and either ended the contract or adapted to more effectively meet their needs.

It is perhaps also useful to consider the rising levels of resentment between the parties in both case studies as the costs of switching increased as the event delivery dates came closer. Ideally, we are seeking client-supplier relationships where both parties are getting what they need from the collaboration, that is, positive disconfirmation. This analysis suggests that uncovering those implicit, ambiguous and unrealistic expectations (Ojasalo, 2001) would be the first step towards their achievement.

This gives rise to consideration of the return on investment (ROI) of contracts for both the agency and the venue in these scenarios. There were wider reasons for accepting those contracts than simply delivering an event. For example: the financial value of the contract; the profile of the events; and the potential market development opportunity that each presented. With the perfect clarity of hindsight, these elements of ROI were not sufficient to overcome the challenges, stresses, and lack of financial benefits from these contracts.

Stakeholder management

If either the agency or the venue had explicitly identified the stakeholders involved in each project, then there would have been less likelihood of mismatched expectations. Specifically, such action would have been an opportunity to fully uncover those expectations, identify potential challenges in advance, and develop approaches needed for their effective management.

As noted previously, negative disconfirmation can apply across the stakeholder network as our expectations are confronted and unfulfilled. Consider Case Study 1 - in bidding for the work, the focus was on generating revenue, working on an exciting and impactful project, and presenting a positive and dynamic offer to the client. As with the start of any new project, the mindset is positive and ambitious but in this case study, that mindset blinded the agency team to the challenges of the working relationship with the major project stakeholder.

For both case studies, there was little consideration of the management approaches to be used across the stakeholder map, based on a general culture in both the agency and venue of 'getting on with it'. There may have been some intuitive application of management models but clearly, this was ineffective. Using a stakeholder map, the agency or venue team could have then applied the blended stakeholder strategy model (Van Niekerk & Getz, 2019) to understand the relationship of the stakeholder to the project and the team and the subsequent management strategy:

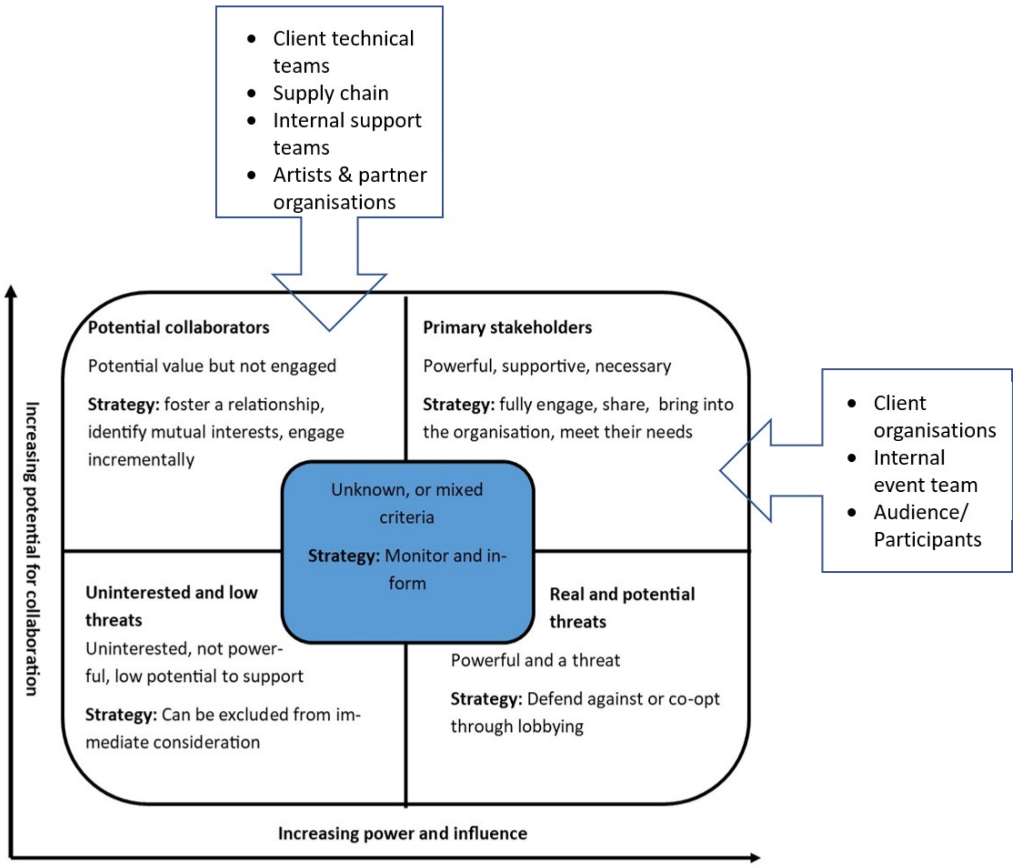

Figure 10: The blended stakeholder strategy model (Van Niekerk & Getz, 2019) applied to the case studies

Figure 10 demonstrates the importance of the relationship with the client organisation and how this needed to be a priority for the agency and venue in fulfilling the contract and their expectations. In considering this analysis, they could have developed a stakeholder communications plan to manage these relationships. In Case Study 2, this communications plan needed to include the internal team and artists at the venue, as well as the wider supply chain. This would encourage a shared understanding of the potential impact on usual operations, and a strategic rationale for the activity that aligned with the organisation's objectives.

Considering the Real and Potential Threats quadrant in Figure 10, it is clear that a more collaborative approach needed to be taken with the clients and their internal and technical teams to mitigate their ability to threaten the relationship. In Case Study 2, recognising the high interdependency between the venue and the agency, it would have been more effective for both parties to have been clear and open in their communication from the beginning, even though the timescales were pressurised.

With both examples, expectations were not clear, shared nor understood by all parties before the contract started, leading to all stakeholders having different views on what should or should not be happening, and no clear communication to align those viewpoints. The mismatch of expectations was the cause of the negative disconfirmation and logically therefore, if the mismatch can be addressed then the result would be zero or even positive disconfirmation. Considering Figure 10, this mismatch of expectations in both cases could be mitigated with collaborative and communicative stakeholder management strategy, keeping them fully engaged.

Customer lifecycle

In applying the customer lifecycle (shown in Figure 5) to our case studies, it is important to note that these were both brand new client relationships for the agency and venue respectively, as shown in Table 4:

Customer Lifecycle	**Public sector programme (Case Study 1)**	**Technology launch event (Case Study 2)**
Reach	The contract was identified via public call for expressions of interest.	The venue was approached following their listing on a venue networks website.
Acquisition	The agency applied for the contract via a public sector tender process.	The venue hosted two site visits plus numerous emails, quotes etc.
Conversion	The agency was selected within the tender process on the basis of their submission and invited to a contract meeting.	The venue was selected by the client from the information provided and the approach demonstrated.
Retention	The contract was for a 12-month period to the end of the project. There was no opportunity for retention.	With the event agency being based in Europe, but with limited activity in the UK, there would have been some benefit to retaining them as clients for the venue.

Loyalty	As public sector clients, there would have been word of mouth and referral benefits.	As a global business, there would have been benefits in building a longer-term relationship with the tech client to gain repeat bookings and the sponsorship team were keen to discuss potential donations to the cultural organisation's core activity.

Table 4: Customer lifecycle (Adapted from Buttle, 2009)

After the red line, both case studies stopped their progress through the customer lifecycle. The agency and the venue succeeded in their marketing and sales but failed in their customer service, thereby losing the customer lifetime value (Gupta et al, 2006).

The case studies demonstrate that there is a missing stage within this version of the customer lifecycle of 'Service Delivery' that would not be relevant within product manufacture but is central to the expectations of our customers, the success of our organisations and the fulfilment of our contracts. If we were to include this, there would perhaps be differing views on whether the services had been delivered to meet the brief depending on the stakeholder.

In addition to the customer lifecycle, we can consider the customer ladder model developed by Christopher *et al* (1991) which charts the engagement of a customer through stages. These are from Prospect, i.e. a potential customer who has yet to have a relationship with the brand, through to an Advocate, who is a customer and partner who is fully engaged with the brand, and actively promotes the brand to others within their network.

Customer expectations adapt at each rung of the ladder according to their relationship with the organisation or the individuals representing that organisation. In our case studies both sets of customers progressed up the ladder to become clients but due to the negative disconfirmation, could not progress any further to become advocates. Had the two projects in the case studies achieved zero or positive disconfirmation, the agency and venue would have benefited from the referral business and word of mouth endorsement from the client organisations. Whilst this did not directly impact negatively on the agency or venue, it represents a missed opportunity to build the business and generate potential future contracts.

Within the convention of customer relationship management, we talk of under-promise and over-deliver (Horth, Miller & Mount, 2018) to achieve positive disconfirmation, The same can be applied in opposite as a cause of negative disconfirmation: over-promise and under-deliver. In these case studies, we can recognise that this is what happened, but we also need to consider the cause of the over-promising.

Zone of Tolerance

The different variables within the adapted version of the Zone of Tolerance (Angus et al, 2014) are shown in the table below for each of the two case studies

VARIABLE	**CASE STUDY 1 – public engagement programme**	**CASE STUDY 2 – Tech product launch**
Professional firm size	The agency was small – turnover of less than £1m, staff cohort of 10.	Large cultural organisation – turnover of £18m, staff cohort of 300.
Fee premium	No premium, fee was reduced in order to win the work.	First event hire contract in new venue, pricing was deemed competitive.
Service tenure	New contract, the agency had not previously worked with the client.	New contract as a brand new venue.
Client firm size	Large public sector body – approx. £50m turnover, staff cohort of approx. 1500.	International events agency – turnover approx. £3m, staff cohort of 100.
Participation in service co-creation	The client was very heavily involved with developing concepts and plans although none of the client team had done anything like it previously.	The end-client had created a venue specification which was fulfilled. There was little consideration of co-creation of the venue service.
Challenges	- Routes not built prior to events programme starting - Weather impacts - Lack of integration within the local authority - Timeframe for delivery	- Timeframe for delivery - Language barriers - Lack of established operating protocols at the venue
Result	Adequate Service Level	Adequate Service Level

Table 5: Zone of Tolerance variables applied to the case studies

The table demonstrates a mismatch between the professional firm size and the client firm size which, according to the model, will reduce the ability to achieve the Desired Service Level so, at best, these two cases would be within the Zone of Tolerance. Both the agency in Case study 1 and the venue in Case study 2 set very high standards for themselves and were seeking excellence in their service delivery in all scenarios. The outcome of these two cases were challenging for the professional firms involved as they failed to achieve their own standards of service delivery. If we correlate this to the disconfirmation curve, shown in Figure 11 below, we can see the connection between disconfirmation and perceptions of service level.

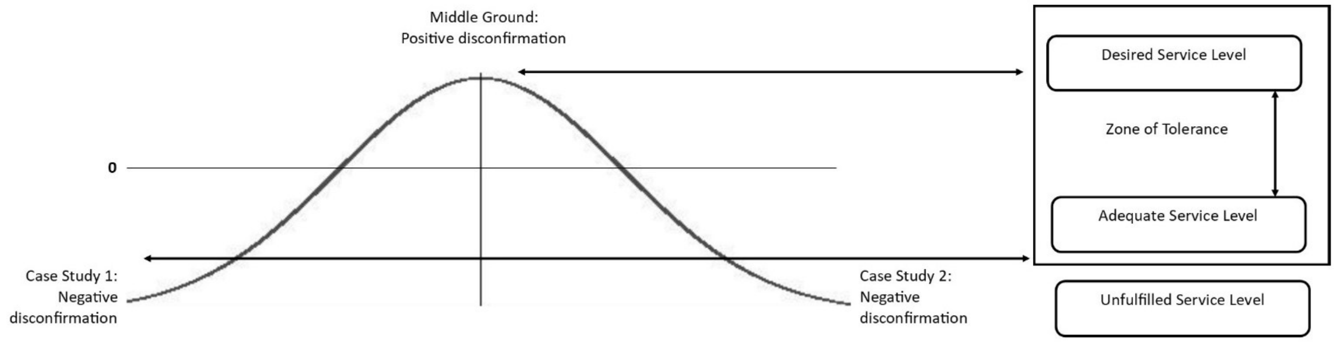

Figure 11: The Probability Model of Expectation Disconfirmation. Adapted from Huang (2015), correlated to the Zone of Tolerance model (Ho et al, 2015)

As noted previously, one of the criticisms of the Zone of Tolerance model in relation to its application for events management contracts is that it fails to take account of the wider and external factors that impact on the ability of the agency or venue to exceed expectations. In these cases, there were certainly other factors that contributed to the failure of each of these projects so a further adaptation of the model could be to introduce two further variables – internal challenges and external challenges – which act as functions of the Zone of Tolerance model.

If we consider each of the variables in the Zone of Tolerance model and include the additional variables of internal and external challenges, we can create an equation for how to achieve positive disconfirmation at the Desired Service Level. That is, the ability of a professional firm to achieve the Desired Service Level (DSL) could be understood as:

$$X \times ((I \times (A + B + C)) + (I \times (D + E))) + F = S$$

Where:

A = professional firm size
B = fee premium
C = service tenure
D = client firm size
E = participation in co-creation
F = A—D = the difference in size of the client and service provider

S = Service Level

X = External challenges
I = Internal challenges

Equation 1: The ability of a professional services firm to achieve the Desired Service Level

The elements in brackets reflect the delineation within the Zone of Tolerance model where A, B and C are grouped together and D and E are grouped together. The additional element of F representing the size of the difference between the organisational sizes gives a weighting to ensure that the equation is scalable.

In their analysis of the Zone of Tolerance model, Ho et al (2015) identified that:

- professional firm size and fee premium have a positive effect on DSL;
- service tenure positively influences both DSL and ASL;
- client firm size has a negative effect on DSL;
- both client and service firm sizes positively moderate each other's influence on the DSL; and
- DSL positively influences ASL

Service Gap Theory

In this section, we will apply the Service Gap Theory model (figure 7) to the case studies, referring to the client organisation as the customer in each case. This will enable us to begin to identify potential root causes for the overall service failure. For example, in the first case study, the overall client perception was that event agency had failed to provide the service promised and expected. However, a detailed 'drill-down' of the whole service process reveals this was due to several reasons or gaps. In the consideration of each gap, we have identified additional or more specific considerations in that area, arising from the experiences of the case studies, which could also be contributory factors to the service failure:

Gap	Case Study 1: Public Engagement Programme	Subsequent gaps/ Contributory factors
Gap 1: Expected service and management perceptions of the client expectations	The tender documentation and initial meetings informed agency management perceptions of what the client wanted, although the client requirements kept changing.	Gap 1.1: Client expected rigid compliance but with changing service requirements. Gap 1.2: Agency expected flexible service delivery within parameters.
Gap 2: Management perceptions and translation into service quality specifications	Based on management perceptions, the agency wrote and won the tender and started to develop a plan for delivery with the client. Given Gap 1, the agency contract manager may have mis-communicated the service requirements and approach to the wider team leading to different understandings of the planning, goals and operating procedures.	Gap 2.1 Impact of different approaches to communication and collaboration
Gap 3: Service quality specifications and service delivery	Although the plan was agreed, it didn't translate into implementation effectively as the resources were not yet built and the plan spread agency resources too thinly so didn't achieve the desired impact. The plan evolved as directed by the client with limited input from the agency. The agency had none of the power but all of the responsibility for the project.	Gap 3.1 Being set up to fail
Gap 4: Service delivery and communications with client	The culture of the relationship between the agency and the client deteriorated over the 12 months of the project and became very functional (Kumar & Reinartz, 2012). This, as well as the tender documentation and agency promotional material, impacted on perceptions of service delivery, even though the activity was delivered.	Gap 4.1 Overcoming poor performance/service delivery, particularly when caused by factors outside the agency's control
Gap 5: Perceived service and expected service	The expected service was based on the tender document and the perceived service (from client feedback) was that the agency had failed to deliver what was expected.	Gap 5.1 Who has responsibility for setting and managing expectations?

Table 8: Service Gap Analysis of Case Study 1

Gap	Case Study 2: Tech Product Launch	Subsequent gaps / Contributory factors
Gap 1: Expected service and management perceptions of the consumer expectations	The requirements of the service kept changing so the management perceptions of expectations were not fully formed. The contract was constantly going out of date with the pace of changes being made.	Gap 1.3: Timeframe for developing perceptions
Gap 2: Management perceptions and translation into service quality specifications	From the agency requirements, the venue developed a proposal to fulfil the requirements and this went through several iterations before contracting and implementation. Given Gap 1, the venue lead could have mis-communicated the	Gap 2.2 Constantly changing requirements making it impossible to fulfil completely or communicate consistently

	service requirements to the wider team leading to different understandings of what was required of the venue.	
Gap 3: Service quality specifications and service delivery	There wasn't a point where the service requirement was finalised as the needs kept changing. The venue lacked the ability to keep up with those changes to fulfil the expectations. As a brand new space, the limitations of the service provision were not yet known.	Gap 3.2 Not knowing the limits of the service provision GAP 3.3 Not building in the slack to accommodate the changes
Gap 4: Service delivery and communications with client	With the majority of the agency having English as a second language, the quality of communication deteriorated as the time and financial pressures grew. It became increasingly difficult to communicate effectively.	Gap 4.2. Cultural differences between supplier and client GAP 4.3 Impact of time and money pressurising communications
Gap 5: Perceived service and expected service	The expected service differed according to who on the team one spoke to. The perceived service (in general) was that the venue was very helpful and had fantastic facilities but that they weren't very flexible.	Gap 5.2 Whose perception and expectation are we considering?

Table 9: Service Gap Analysis of Case Study 2

In applying the model to the case studies, we can identify further areas where there are gaps in expectation or impacts on fulfilling such expectations, that are contributory factors to the service failure. In considering this analysis, it is proposed that these gaps and the subsequent causal effects are the source of the over-promising identified earlier in our customer lifecycle (Figure 5).

As event organisers then, we can utilise Service Gap Theory (Parasuraman et al, 1985; Zeithaml et al, 1993) to identify the perceived and expected gaps in provision, in order to identify how we can improve our service delivery. However, it is important to appreciate that the events environment is a perhaps a more complex picture. As we potentially go into a project, we therefore need to consider which of the gaps and the additional considerations are within our control and which are beyond our influence. By taking the time to consider this in advance, both the agency and the venue may have had the ability to change the outcome of the case studies.

Social Identity

Building on the previous section, we need to consider what informs the expectations of our clients so that we can go into projects being able to anticipate more accurately what those expectations might be, and thus accommodate differences between them. According to Parasuraman (1988) it is word of mouth, personal needs, and past experience. However, if we consider the Motivation – Opportunity – Ability model (Olander & Thogersen, 1995), elements that inform behaviour and thereby our expectations include: Beliefs; Evaluations; Attitudes towards Behaviour; Social Norm; Situational Conditions; Habits; Knowledge; and the Task itself.

Our social identity, both individually and collectively, is also important in developing our expectations and subsequent actions. As Chiang et al (2017) posit, the three stages of social categorization, social identification and social comparison are based on functional and hedonic aspects which inform our expectations of the event, irrespective of our stakeholder relationship to it. Therefore, social identity theory can be useful in understanding our client relationships and the formation of expectations. From our analysis in this chapter, we could consider all of the elements in Figure 13 below:

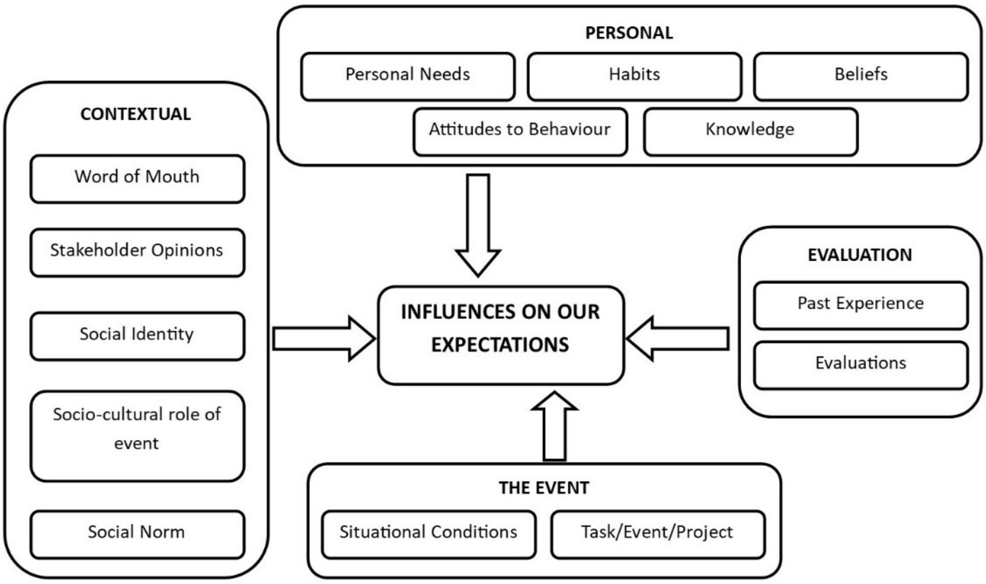

Figure 13: Summary of influences on our expectations

In gathering the elements that influence our expectations together, and having considered their application within two case studies, we can identify 4 primary factors for consideration: Contextual, Personal, Evaluation and The Event. In considering these 4 groups, we can begin to understand where client expectations might be influenced and where we need to delve deeper in the client-supplier relationship, in order to avoid the issues experienced in our case studies.

Summary

In this chapter we have explored the challenges of managing expectations using two case studies and, utilised a range of theoretical perspectives, adapted to the client-service provider relationship. In both cases, we identified the vital importance of taking the time to map stakeholders and articulate their relationship to the organisation or project. We noted that this could be undertaken using a number of models including the blended stakeholder strategy model (Van Niekerk & Getz, 2019).

We also discussed the Clarkson Principles (Maines, 2018) and the role of Corporate Social Responsibility in an ethical approach to managing stakeholders, which is particularly relevant given the socio-cultural role that events and festivals play in our communities. In addition, we have explored how predictive expectations lead to disconfirmation and expanded this to correlate against the Zone of Tolerance model (Ho et al, 2015). Subsequently we developed a methodology to score relevant variables into an equation to understand the causal factors behind achievement of the Desired Service Level. From this analysis, it was clear that both case studies delivered at an Adequate Service Level at best.

In discussing the customer lifecycle, we identified that both case studies failed to retain their clients. Whilst this hasn't had a long-term impact, there has been a significant opportunity cost in building those businesses further by developing those clients as advocates, and generating valuable word of mouth promotion. The Service Gaps analysis identified a secondary layer of additional considerations for service quality derived from our case studies, based on a more detailed root cause analysis of service process failures.

Drawing all of this together, both theoretical underpinning and case study analysis, we have compiled a list of best practices in managing client expectations:

- Make the time to map stakeholders and identify their relationship to the event organisation.

- Be alert to mismatches from the beginning – communication, cultural, contextual.
- Keep on managing the process so you can keep on top of the changes.
- Be prepared and able to adapt – build in the flexibility from the start.
- Make sure you are clear about who has the responsibility and the power and if it's not the right balance, then maybe it's not the right project for you to be delivering?
- Align communication and collaboration approaches.
- Consider the context, personal, event itself and evaluation influences on client expectations.
- Reflect on your own expectations and assumptions; try to step back to gain perspective or get feedback from someone outside the situation.
- Understand the strengths and weaknesses of the organisation, the team, the project and manage and mitigate where possible.
- Know the limits of what is feasible, viable and sustainable for you to deliver (don't over-promise!).
- Consider the external and internal factors that could derail the stakeholder relationship.
- Focus on long-term quality to develop long-term customer relationships.

Any consideration of effective stakeholder management needs to do so within the specific context of the organisation or project, and consider the systems or networks that it influences or is influenced by. Similarly, our social identity both as individuals and collectively, can be considered through the MOA model (Olander & Thogersen, 1995), and more broadly in the discussion on expectation theory. This is an important part of how we interact with each other, why we attend events and how our expectations are formed.

You might think these are obvious but consider how many projects and events fail to achieve their potential and how many stakeholders are disappointed. As an Executive Producer, I have been known to comment that "nobody will die of disappointment" and, although cynical, it is true. However, the impacts of stakeholder disappointment are far more significant in the longer term: undermining the agency or venue brand; reducing the client base; and damaging the team's effectiveness. In extreme cases, such as the Fyre Festival (Ohlheiser, 2017), disappointment has led to physical harm, legal proceedings and financial ruin.

Given that the Fyre Festival is now used to typify disastrous stakeholder management (Rampell, 2020, Knowles, 2019), we, as a whole sector, need to strive for this best practice and generate positive disconfirmation throughout our stakeholder relationships. Perhaps that is the real lesson to be learned from these case studies in event mismanagement.

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