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Little is known regarding organizations' high-level strategies toward social media. This research develops an empirically informed understanding of how organizations can engage in social media to accomplish their strategic goals. To develop an informed understanding, I conduct interpretive case research over a twenty-four month period on a single revelatory case. Based on the findings, I derive empirically and theoretically informed frameworks to describe how organizations can strategic engage in social media to motivate directed actions from others which are aligned with their own organizational goals.

STRATEGIC ORGANIZATIONAL ENGAGEMENT IN SOCIAL MEDIA TO

MOTIVATE DIRECTED ACTION

by

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To my family, whose encouragement and support made this work possible.

APPROVAL PAGE

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CHAPTER I

INTRODUCTION

Theories on the interplay between organization and environment have come to shape management thought regarding how organizations influence their markets, create demand for their products and services, manage perceptions of their brand, and marshal intelligence from the community. For example, resource dependency/mobilization, population/community ecology, network, organizational field, industry, and societal sector theories are each interested in organizational environments and the relations among the entities within them.

Social media are an increasingly important environment where organizations expect (and are expected) to engage. Their stakeholders are there. Recognizing the strategic importance of social media, organizations are investing heavily to create a presence in this increasingly competitive space. Worldwide social media advertising was $6 billion in 2011 - a 71% increase over 2010 (Williamson, 2012). However, organizations struggle to develop effective strategies for social media engagement – strategies which can motivate others in social media to take actions aligned with the organizations goals.

In traditional media, managements are accustomed to command and control of messaging around their brand. Social media breaks this. "This is a world in which customers are fully in control of their online experiences and where their motivations lead them to connect online with other consumers while they create and consume online content, much of it user- rather than marketer-generated" (Hoffman and Fodor, 2010). Not knowing how to strategically engage in this peer-to-peer communicative multiverse, many

organizations satisfice by re-purposing traditional advertising strategies to social media (Hoffman and Fodor, 2010). However, advertising strategies ignore the "social" essence of social media. They ignore the expectancy among organizations social media peers for engagement. In social media, one-way messaging by the brand is often viewed negatively, and is ineffective. Consider the recent announcement by General Motors that it would discontinue its $10 million dollar annual advertising campaign on Facebook after its marketing executives determined their paid ads had little impact on consumers (Terlep, Vranica, and Raice, 2012). This highlights the difficulties organizations face in developing effective social media strategies. How can organizations participate here in an effective and purposeful way?

Socio-economic theorists, such as Polyani, Smelser, Granovetter and others have long recognized the economic embeddedness of organizations in their social environment. Smesler, for example, writes that the economic activity of an organization is "situated in personal interaction, groups, social structures, and social controls (among which sanctions, norms, and values are central)" (Smelser, 1963). Organizations are socio-economically embedded in social media. The semi-transparency of social media allows individuals and groups to publicly scrutinize the behaviors of organizations. Social media provides a participatory structure with which individuals and groups can organize and exert influence for change. Consider the role of social media in the recent failure of the U.S. Congress to pass the SOPA/PIPA legislation, or in the online-only anti-sweatshop protests which caused Nike to adopt new employment policies in its Indonesian manufacturing facilities, or in the recent faculty uprisings against the publishing powerhouse Elsevier. In each of these examples, social media peers coalesced in social media around ideas or issues of shared interest and motivate target institutions and organizations to take directed actions

aligned with the goals of those demanding change. These, and other examples, make clear that motivating directed action in social media is possible.

The challenge for organizations is how they can flip the directionality of influence between themselves and their peers in social media. How can organizations pro-actively engage in social media to motivate others to take directed actions which advance the organizations' strategic goals? Directed actions, as used here, refer to those actions motivated by the organization, and taken by their peers in social media, which advance the strategic interests of the organization. To unlock social media strategies that motivate directed action, organizations must understand: Who should they engage?, What should they engage on?, and How can they motivate directed actions aligned with the goals of the organization through strategic engagement?

Regarding who to engage, stakeholder theory argues that organizations must "identify and invest in all relationships necessary to ensure the long-term survival of the enterprise" (Freeman and McVea, 2001, pp.1). They must engage "all and only those groups that have an interest in the business". Social media stakeholders can include current and potential customers, potential employees, shareholders, competitors, industry thought influencers and casual observers (Heath, Singh, and Ganesh, 2013). Organizations are challenged to know how to identify and engage in purposeful conversations with these stakeholders in social media. What should an organization engage their stakeholders on? Social media is a discursive and dialogic medium where participants engage in conversations around shared interest. Common interests are the locus of social media engagement. How can organizations learn the interests of their stakeholders in social media and use that knowledge to engage with them on the strategically important ideas associated with their interests? How can an organization engage them on the strategically important ideas

associated with their interests to motivate them to take directed actions aligned with the goals of the organization? The majority of contemporary IS literature around social media takes a social network approach to theorizing around social media. However, in its purest form, social network analysis is concerned only with the structure of relations among nodes rather than the attributes of individual nodes. This approach de-emphasizes the importance of social actors' individual characteristics as well as the underlying social and psychological processes which motivate their interactions within social media. Understanding motivation is critical to developing strategies to drive directed action.

Without theory to provide contextually appropriate conceptualizations and analytics, organizations are challenged to implement effective strategies for social media engagement. There remains a critical need for theorizing on the motivational, discursive, or other aspects of social media which could inform organizational strategies for social media engagement. This motivates us to propose case research to (1) "develop an empirically informed understanding of strategic organizational engagement in social media to motivate directed actions aligned with organizational goals" and (2) "theorize on analytics and conceptualizations useful to inform organizational strategies for engagement in social media". To accomplish this, we conduct an in-depth study of strategic social media engagement at Infosys, a successful multi-national business and IT consulting firm who routinely develops and deploys social media strategies in a business-to-business (B2B) context.

Based on their long history of strategic engagement in social media, Infosys is a revelatory case well-suited to developing an empirically-informed understanding of strategic social media engagement to motivate directed action. Yin (2009, p. 48) defines a revelatory case as one where the problems of the case are believed to be common to other

cases. Yin (2009) supports the sufficiency and appropriateness of a single-case design when that case is revelatory. Social media are increasingly an environment where organizations engage. Therefore, the understanding we develop researching the social media engagement strategies at Infosys has the potential to inform other organizations strategizing to pro-actively engage in social media. This satisfies Yin's requirement regarding a revelatory case. In this research, we develop thick description (Geertz, 1988) around Infosys'ss strategic social media initiatives as they expand their products and services into the retail banking sector. We seek to present a holistic view of social media organizational engagement to motivate strategic directed actions, understand how directed action can be achieved, and learn how organizations co-align the motivations of their social media peers with their own to realize their strategic objectives.

In this research, we adopt an analytic perspective of social media as open social systems, and draw on well-understood social theories sensitize us to the important issues of social media as social systems of human interaction. These theories provide an initial vocabulary with which to discuss and interpret our case data. We adopt an interpretive hermeneutic methodological approach to our case, and use texts which reflect the interviewees experiences to develop second-order theoretical understanding. We embrace the methodological guidelines summarized by Klein and Myers (1999) which recommend sense-making by interpreting data via the hermeneutic circle, where we use constant comparative analysis to tease out initial concepts, link evolving concepts to higher level categories, and to identify potential linkages between the categories themselves where appropriate.

The specific contribution of this research is to develop an empirically informed understanding of strategic organizational engagement in social media to motivate directed

actions aligned with organizational goals, and to theorize on social media analytics and conceptualizations useful to inform strategic organizational engagement. To accomplish this, we put forward a powerful socio-theoretic foundation to discuss motive, social structure and directed action in social media. We develop an analytic perspective of open social media as social systems based on strong theory. We present exemplar case research to empirically inform how organizations can strategize in social media, and offer well-grounded conceptualizations to inform analysis of those strategies. Our theorization offers organizations new insights, analytics and conceptualizations toward social media to allow them to conceive social media strategies to achieve their organizational goals. We think this study is an important complement to management theory on the relationships between organizations and their environment (Bourdieu and Thompson, 1991; Bourdieu and Wacquant, 1992; DiMaggio and Powell, 1983; Freeman and McVea, 2001; Granovetter, 1985; Teece, 2007). It is our hope that this work provides a foundation for further theoretic and practitioner work to situate extant organizational and management theory in the social media con text, based on the attributes and characteristics of social media discussed herein, which, to the best of the authors knowledge, have not been previously discussed in academic or practitioner literature.

The dissertation is organized as follows. Chapter two presents a theoretical foundation for discussing organizations and their environments, the configuration of social structures in social systems, motivations to act in social systems, and the interaction between social movements and organizations. Chapter three develops an analytic perspective of social media as open social systems, topical collectivities as cohesive communities in social media, and social movement framing as a discursive process to motivate directed action in social media. Chapter four presents our research plan. Chapter five presents published

research from this dissertation which presents a practitioner perspective on strategic engagement in social media to motivate directed action, and introduces a novel interest-based ontology view of audiences in social media based on the published research. Chapter six extends this work to theorize how framing strategies can be employed in social media to motivate directed action across our interest-based ontology. Chapter seven builds upon these ideas, and presents a reconsideration of our case through the lens of open innovation to offer an empirically and theoretically informed model of open innovation in social media. Lastly, we conclude by summarizing our contribution of this research, its limitations, and directions for future research.

CHAPTER II

THEORETIC FOUNDATION

In this chapter, we draw on management and sociological theories to develop a theoretically grounded vocabulary for discussing: the social environment of organizations, the socio-economically embeddedness of organizations, the motivational forces which induce or influence action in social systems, and the configuration of social structures in the environment. Lastly, we turn to social movement framing to inform our discussion of the discursive, strategic, and contested processes which take place in social systems which motivate directed actions aligned with movement goals. These theories provide an initial and potentially useful vocabulary to anchor our interpretation, and provide a theoretic lens with which to analyze our case. Borrowing from Kenneth Burke (1965), we introduce these theories to sensitize us to a way of seeing – to open our minds to ways of conceptualizing around our case.

2.1   Organizational Environment

Considerable management and organizational literature is dedicated to the inter-subjective relations between organizations and other entities within their environment. Organizational environment is often conceptualized as either field (i.e, organizational field, institutional field, relational field, etc.) or network (i.e,social network theory, actor network theory, etc.) of relations. The focus of this research is on the how organizations motivate directed action through social media engagement. Network analysis de-emphasizes the attributes and characteristics of the actors in favor of analyzing

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the edges that connect them. In this research, we are interested in the attributes and characteristics of actors – particularly how they are motivated. This favors our adopting a field-based perspective toward organizations' social environment. Secondly, social media is a peer-to-peer communicative environment where participants might observe, or comment on, organizational behavior without establishing a direct relationship with the organization. Therefore, network analysis would fail to capture the perceptions of non-networked actors within an organizations environment which could impact environmental munificence toward the organization. Thus, in selecting an appropriate analytic perspective toward environment to inform our analysis and theorization, we focus on those which embrace the notion of field.

2.1.1 Neo-Institutionalism and Organizational Fields

In management literature, institutionalism refers to "the emergence of orderly, stable, socially integrating patterns out of unstable, loosely organized, or narrowly technical activities" (Broom and Selznick, 1955, pp.238). Institutional theory "traces the emergence of distinctive forms, processes, strategies, outlooks, and competencies as they emerge as patterns of organizational interaction and adaptation" (Selznick, 1996). Zucker (1987) describes two views of institutionalism; one focused the organization as institution, and the second on environment as institution. The second view, often described as neo-institutionalism, is concerned with inter-subjective relations within the organization's environment and the forces in that environment which drive change. Neo-institutionalism proposes that organizations are driven by technical demands and resource dependencies, but are also shaped by institutional forces in their environment. The core idea of neo-institutionalism is that organizations are socially and politically embedded in their

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environments, and that organizational practices and structures exist within the context of the rules, beliefs, and conventions of their environment.

Seminal work by DiMaggio and Powell theorizes the coercive, normative, and mimetic processes of reproduction within organizational fields. They describe the ontology of organizational fields as "those organizations that, in aggregate, constitute a recognized area of institutional life: key suppliers, resource and product consumers, regulatory agencies, and other organizations that produce similar services and products" (DiMaggio and Powell, 1983, pp.148). They theorize that as organizational fields become institutionalized, they exert isomorphic pressure on their members toward homogeneity and conformity. Organizational isomorphism within a field will arise consequent to the rational decisions of members, which over time manifest certain path dependencies that constrain future actions. The mechanisms of isomorphic pressure within an organizational field are coercive, mimetic, and normative. Coercive isomorphic pressure arises from formal and informal pressures leveraged against an organization by other organizations on which it is dependent, or by the cultural norms of the society in which they exist. For example, coercive pressure might take the form of government mandate, or changing societal values regarding what constitutes acceptable or unacceptable behavior. Mimetic pressure encourages organizations to model the behavior of other organizations. This pressure is often experienced when organizations face market turbulence or uncertainty, but may also develop consequent to market demands on an organization to match the offerings of its competitors. Similarly, new organizations entering a market are motivated to adopt the behaviors of successful organizations in the same space. Normative pressures grow principally from the notion of professionalism among workers within an industry.

Professionals might, for example, possess similar formal education, or maintain memberships in professional or fraternal networks with normative rules and expectations.

2.1.2 *Ecological Perspective of Organizational Fields*

The population ecology and social ecology perspective toward organizational fields is derived from the ecological model of organizational research, which emphasizes the role of organizational environment in the Darwinian selection of the fittest organizational forms. In the population ecology view, clusters of similar organizations constitute single populations whose survival depends entirely on the munificence of their environment. Strategic choices made by management play little role in organizational outcomes. In the population ecology view, a simple environmental change can cause an entire population of organizations to instantly go extinct. A commonly used metaphor to demonstrate this effect is that of buggy-whip manufacturers. Though an individual buggy-whip manufacturer might make the best buggy-whips on the market, the rise of the automobile rendered all buggy-whip manufacturers obsolete.

The social ecology view argues that communal adaptations evolve among organizations which afford them the capacity to respond to population level environmental change. Astley and Fombrun (1983, pp.577) write:

> Instead of stressing the primacy of environmental forces in shaping
> organizational existence, social ecology draws attention to the proactive
> communal arrangements that organizations forge as they attempt to supplant
> the exogenous "natural" environment (stressed by population ecologists) by a
> collective constructed and controlled "social" environment.

Social ecology offers a useful conceptualization of inter-organizational collectives, where cooperation among organizations is a rational and evolved response to

environmental realities. It is based on the likelihood that communal cooperation and coordination among participants will increase their odds of survival (Astley and Fombrun, 1983). This view considers inter-organizational co-operation within organizational fields.

Neo-institutional theory, population ecology theory and social ecology theory each offer perspectives on the social and political processes that exist within organizational fields, and the inter-subjective relationships of members bound by them.

2.1.3   *Stakeholder Theory*

Stakeholder theory presents a different ontological perspective toward organizational fields, and aims to explain "who" within an organizations field, the organization must attend to. Freeman (1984) defines stakeholders as "any group or individual who is affected by or can affect the achievement of an organization's objectives". Stakeholder theory provides management a conceptualization from which to consider the appropriateness of demands placed upon it by various claimants, helping them identify those claimants whose demands must be attended, and those whose demands can be argued. Thus, stakeholder management is concerned with managing the myriad groups and relationships with whom the organization is engaged in a strategic manner, satisfying "all and only those groups who have an interest in the business" (Freeman and McVea, 2001, pp.1).

Freeman's early work regarding stakeholder theory (1984) develops the concept of stakeholders principally as a tool for examining the external environment of the organization; an exogenous rather than dyadic perspective, meant to inform strategy. However, his later work softens that perspective somewhat, suggesting the need for active management of relationships and the promotion of shared interests. While a subset of stakeholders might be understood to include shareholders, employees, customers,

suppliers, communities, etc., the more complete stakeholder population also includes those peers within the organizational environment which might affect the organization going forward. Therefore, stakeholder management requires both proactive and reactive management of extant and potential relationships.

Freeman and McVea (2001) argue the criticality of identifying and investing in all relationships necessary to ensure the long-term survival of the enterprise, and recognize the heightened importance of value-based management in developing shared values within the community of potential stakeholders. Freeman's later perspective toward stakeholder management emphasized the integration of economic, political, and moral analysis in the development of prescriptive and descriptive strategies on the part of organizations, such that stakeholder relations can be both created and influenced, not merely attended to.

Stakeholder theory contributes to our understanding of "who" within an organizational field an organization must engage, which actors have legitimate claim, and whose needs must be attended.

2.1.4   Socio-Economic Embeddedness

Socio-economic theorists, such as Polyani, Smelser, Granovetter and others have long recognized the economic embeddedness of organizations in their social environment. Smelser (1963), for example, writes that the economic activity of an organization is situated in personal interaction, groups, social structures, and social controls (among which sanctions, norms, and values are central).

The concept of embeddedness is generally credited to Polyani (1944), who first used the term in *The Great Transformation*, though other pillars of 20th century sociological thought, such as Weber, Schumpeter, Marx, and Parsons also sought more integrated

conceptualizations of economy and society than those offered by the classical political economists that preceded them. Talcott Parsons and Neil Smesler, (1956), were among the first to propose an integrated social and economic explanation of the role of social structure on economic behavior with their "sociology of markets" framework, which views market as a socially constructed and distinct social system. Central to their treatise was the notion that markets differ not only in the ways understood to classic economics, but also along sociological typologies. This conceptualization motivates a considerable stream of research which considers the implications of social structure on market making and market stabilization.

One example of research in this stream is the network approach to social structure developed by Mark Granovetter, who in his seminal work on socio-economic embeddedness (Granovetter, 1985) considered the extent to which economic behaviors and institutions are embedded in structures of social relations, and the influence of those structures on behaviors and institutions. Granovetter views embeddedness as arguing against the primacy of both individuals' attributes and aggregate outcomes, as well as antithetical to the role of self-interest as the sole guide for action (Dacin et al., 1999).

Embeddedness, in Granovetter's view, balances the under-socialized concept of man brought forth by classical economic theory against the over-socialized conceptualization of man argued by Wrong (1961), in which sensitivity to social norms is such that actor self-interest is sacrificed. Granovetter implies that over-socialization is to a large degree an over-reaction to Parsons work on structuration within the social system. The notion of socio-economic embeddedness is less sweeping than more atomic or system level conceptualizations of structure, since networks of relations rather than social norms (morality) or arrangements (contracts) are the structure from which order is constructed

(Granovetter, 1985). As networks of relations among membership in a social system are socially dynamic, embeddedness thus refers to the on-going contextualization of economic activity within the social systems (Dacin et al., 1999).

2.1.5   *Bourdieu on Fields and Figuration*

Like Granovetter, Bourdieu recognizes that relations among members in a social system socially dynamic. Bourdieu conceptualizes the dynamic distribution of power and position among members as a field. Bourdieu uses the term "field" to describe the configuration of relations and determinations between occupants, agents or institutions (Bourdieu and Wacquant, 1992, pp.72-72). To Bourdieu, field (champ) represent a "space of relations" in which contestation is temporarily manifest as hierarchical positions among actors within them (Bourdieu and Thompson, 1991, pp.232). Field describes the structure of a social setting. Fields represent the:

> Fields relations between positions, objectively defined, in their existence and in the determinations they impose on their occupants, agents or institutions, by their present and potential situation in the structure of the distribution of species of power (or capital) whose possession commands access to the specific profits that are at stake in the field, as well as by their objective relations to other positions (domination, subordination, homology, etc.) (Bourdieu and Wacquant, 1992, pp.97).

Fields denote arenas of production, circulation, and appropriation of goods, services, knowledge, or status (Swartz, 1997, pp.117). Configuration describes the competitive positions held by actors in their struggle to accumulate and monopolize these different kinds of capital.

Fields are bounded, including certain elements and excluding others. Relations and determinations within a field are expressed as capital, which is both product and process.

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Capital might be economic, cultural, or symbolic. The current configurations of capital within a field shape the social practice of its members.

Figuration describes the dynamic social structure within a field. Configurations are temporal, with subsequent reproductions following each other in chronology. Bourdieu's concept of figuration is drawn from the work of Norbert Elias, who was concerned with social structures established by mutually dependent humans, and their transformations consequent to increases or decreases in interdependencies among them and degrees of power. For Bourdieu, figuration is the product of contestation. In *The production of Belief: Contribution to an Economy of Symbolic Goods*, Bourdieu discusses contestation as the agent of change in the art world. He describes how the avant-garde act collectively to challenge the status quo. When successful, the avant-garde replaces the previous avant-garde. When this change is sanctified by those in the field, the previous avant-garde becomes the rear guard.

Within a field, at any given moment, there are elements which are impermanent, passing through quickly. Others hold an established, more permanent position. The rear-guard exemplifies an established element which is defined as such by their continuing participation. The more permanent elements, such as the rear-guard, provide continuity to a field.

Grenfell and James (2004, pp.514) note that an important aspect of Bourdieuian fields is that "competitors agree on the principles of verification of conformity – on the tacit contract, inseparably political and cognitive, which founds and governs the work of objectification". Field is a social construction.

Bourdieu's conceptualizations of field and figuration provide useful vocabulary to inform our discussion of social structure which aligns with managerial and organizational

theories on field without suffering the implication of consensus and lack of dynamism that is implied by institutionalism. Bourdieu's field preserves the conflictual essence of social interaction.

2.2   Collectivities as Social Structures

Collectivities are social structures which arise in fields within social systems around the common interests of their members. Wenger's (1998) communities of practice, communities of interest, communities of passion, etc., each describe various types of collectivities, which share repertoires of routines, artifacts, vocabularies and sensibilities. Collectivities emerge and have a reality that is partly independent of the interaction that gave rise to it (Morgeson and Hofmann, 1999). Giddens (1993, pp.128-129) calls this "duality of structure", where "social structure is both constituted by human agency and yet is at the same time the very medium of this construction".

An extensive body of organizational, Watson (1982); Weick (1979, 1987); Weick and Roberts (1993), sociological (Giddens, 1979; Parsons, 1937, 1951)), and social-psychological (Allport, 1967; Stogdill, 1959)) theory argues that collectives "can and should be studied as systems of interaction" (Giddens, 1993, pp.128). When the interests of a collectivity overlap those of an organization, they are co-located in the same Bourdieuian field.

2.2.1   *Homophily*

The cohesive agent that binds collectivities is homophily. Homophily embodies the principle that interaction occurs at a higher rate among people who are similar along some set of shared attributes (Rogers and Bhowmik, 1970). Homophily is a basic organizing principle in social systems, with structural implication. "Homophily implies that distance

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in terms of social characteristics translates into network distance, the number of relationships through which a piece of information must travel to connect two individuals" (McPherson, Smith-lovin, and Cook, 2001).

Lazerfeld and Merton (1954) identify two distinct types of homophily: status-based homophily, which is based on formal, informal, or ascribed status and value-based homophily, which is based on values, attitudes, and beliefs. Recent work by Brown, Broderick and Lee (2007) finds that value-based homophily is more useful to characterize homophily for on-line settings. They find that "shared group interests" and "group mind-set" drive value-based homophily. Brown et al. (2007) provide empirical evidence that topical interests are the germs around which on-line collectivities self-organize. The intersection of interests between organization and collectivity around a set of ideas forms a natural homophily – a commonality which invites co-engagement.

2.3   Motivations and Action

In this section, we seek a theoretically guided vocabulary with which to discuss how individuals and groups in social systems are motivated to act. We turn to Parsons, whose action theory provides a rich palette regarding motive, and to Jurgen Habermas, whose theory on communicative action describes communicative action as a specific type of action within a social system.

As our study is concerned with motivating directed action across a dialogic medium, we present the theoretical perspectives of Parsons and Habermas as oblique, rather than orthogonal. Each provides an ontological and epistemological perspective of social systems useful to consider organizational strategies aimed at motivating directed action from different target populations within a social system. Based on useful advice of Coser

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(1956), that sociological theories are "neither true nor false, apt or inept, clear or vague, fruitful or useless", we borrow these theoretical perspectives only to inform and enrich our analysis based upon their divergent perspectives.

2.3.1 Parsons on Motivation

Humans are self-aware social actors, cognizant of others and their social situation (Parsons, 1937). In social systems, actions undertaken by actors arise from, and are governed by, human motivations, orientations and ideas. Actions (unit-actions) are attributable to individuals or groups within the social system. That an actor has a plurality, of roles suggests any particular system isolated for analysis never stands alone, but is always articulated with a plurality of other systems in which the same actors have other roles. Individual and collectivity cross-cut one another, as "a collectivity is by definition composed of a plurality of members and the individual has a plurality of roles in different collectives" (Parsons, 1953, pp.93).

Relational orientation explains individuals' valence toward any given action. What motivates particular types of action in social systems? Social actions are goal-oriented, intended to satiate actor needs. Actions can be aided by socially-situated instruments, and are subjected to socially-situated constraints, particularly the standards and norms of the social context in which the action takes place and the mores of the actor. Parsons argues that through actions, individuals within a social system seek to fulfill their own needs, while the system must also have its own needs met in order to be perpetuated. He uses the term relational orientation to describe individuals' motivational and value-based orientation toward their situation (see figure 1).

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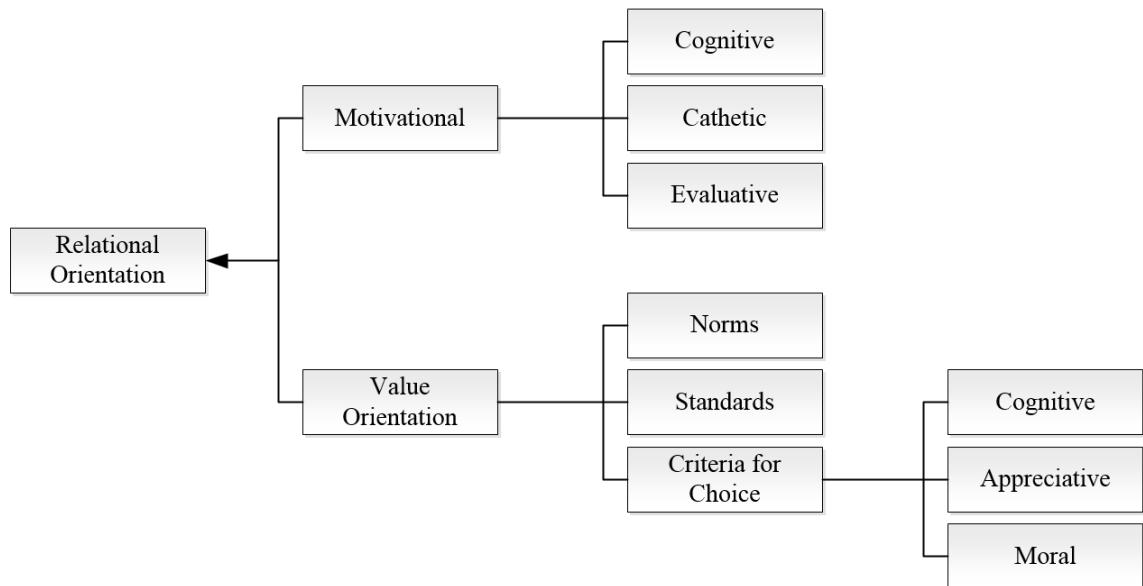
Figure 1. Parsons' Relational Orientation

Parsons describes three types of motivational orientation that shape our goal oriented actions; cognitive (*the need for information*), cathetic (*emotional need*) and evaluative (*need for assessment*). Cognitive motivation focuses on the patterns and ways in which an individual's orientation toward social phenomena are organized – what they mean to the individual, their properties and potential function. Cathetic orientation involves determining how much affective or emotional investment to make in social phenomena based on what might be gained from an action and its associated costs. Actions are not discrete, and are organized and integrated across motivational dimensions. Evaluative motivational orientation concerns the need to order various cognitive and cathetic considerations and select actions most likely to satisfy actor needs. In simpler terms, relational orientation offers insight into why individuals are motivated to engage in conversations with others with shared interests, and how they might be motivated to take specific directed actions.

Value orientation toward a particular situation is shaped by the norms and standards of the social system, and informed by the choice criteria of the actor regarding their situation. Norms arise as individuals within a social system share symbolic systems of meaning which themselves impose an element of order. Individuals hold a mutuality of expectation regarding that order. Similarly, culture provides standards to evaluate the universal logic or correctness of a given action. Thus, norms and standards form the underlayment against which the individual applies their own criteria for choice regarding their value-orientation toward a particular action. Three types of values are associated with the choice criteria of the individual: cognitive (objective evaluation), appreciative (aesthetic evaluation), and moral (evaluation based on personal moral strictures). Cognitive value orientation must evaluate the relative importance of the empirical, factual information being received. Appreciative value orientation is concerned with standards of beauty and art. Moral value orientation deals with the absolute standards of right and wrong.

Action theory proposes that four types of action might arise from various relational orientations (see table 1). That is, dominance of a certain motivation and value-orientation combination will preference a particular kind of action. For example, if cathectic motivation toward a situation is strong, and the appreciative value orientation most dominant, the corresponding voluntary action will most likely be expressive, though it will still be partially influenced by the other value-orientations. The various permutations of orientation and motivation will produce voluntary action predominantly corresponding to their associated type of action. Instrumental action is concerned with realization of explicit goals. Expressive action is intended to fulfill emotional goals. Moral action is concerned with satisfying moral strictures. Intellectual action seeks to achieve an informational or factual goal.

Table 1. Parsons' Four Types of Action within Social System

Type of Action	Motivation	Value Orientation
Intellectual	Cognitive Interests	Standards
Expressive	Cathectic	Appreciative
Moral	Evaluative	Moral
Instrumental	Cathectic	Cognitive

Parsons describes action as arising from actors who: (1) are goal seeking, (2) possess alternative means to achieve their goals, (3) are confronted with internal and external situational conditions which influence their goals and means (4) are governed by values, norms, and ideas such that ideas influence goal and means selection, (5) are making subjective decisions regarding goals and the means to achieve them, constrained by ideas and situational influences (Turner, 1993, pp.40). The actor subjectively orders the set of possible orientations, perspectives, judgments and interpretations toward a particular action, and selects from them to define what objects are in the social system, what they mean, and their potential value in relation to satisfying the needs of the actor.

Parsons work on actor motivation provides a rich vocabulary to inform our theorizing on the motivations of actors in social media, and how organizations strategically engage in social media to motivate directed actions.

2.3.2 *Habermas' Theory on Communicative Action*

Social media is a dialogic medium. Therefore, social media constitute a specific instance of social systems in which all actions and interactions among members are necessarily communicative. Habermas' (1981) theory of communicative action extends Parsons' conceptualization of action in social systems to consider communicative acts governed by practical rationality. For Habermas, communicative actions may be

instrumental, strategic, communicative, and discursive. Instrumental and strategic communicative actions are purposive, intended to achieve rational and measurable objectives. Instrumental acts are directed against inanimate constraints to manipulate them to advance goals. Strategic acts are directed against other rational opponents, either co-operative or conflictual. Communicative acts help define consensual norms and mutual expectations in the social system; while discursive action concerns co-operative search for truth, clarification and agreement. Collectively, these criteria establish the validity claim of a communicative act.

In Habermas' view, through communicative acts, differentiated lifeworlds evolve within super-ordinate social systems. Lifeworlds constitute an experiential realm of informal, culturally-informed meaning, understanding, and mutual accommodation manifest through cultural traditions, social groupings, institutions of socialization, etc. Practical rationality evolves within a social system as a product of discursive interaction. Shared understanding is achieved through a cooperative search for understanding, and is realized solely through the force of the "better argument" (Habermas, 1981, pp.25) freely expressed in a normatively regulated "Idea Speech Community" governed by dictum, such as: every individual who wishes to participate in the discourse is allowed to do so, every individual is allowed to offer any proposal, every individual is allowed to question any proposal, and no subject is coerced by forces either inside or outside the discourse with regard to any of these rights. Mutual understanding requires sufficient shared background knowledge and assumptions among the actors for communicative action to be normative.

Habermas' theory on communicative action provides a rich vocabulary with which to describe specific strategic communicative acts in social systems and their motivations.

2.4   Social Movement Strategies to Motivate Action

Recent scholarship on social movements and online activism has begun to attract the attention of management and IS scholars. There has been considerable research by organizational theorists on how social movement theory can provide insight into organizational change and the development of new organizational forms (Campbell, 2007; Davis and McAdam, 2000; Den Hond and De Bakker, 2007; Hargrave, Ven, Timothy, Ven, and Christian, 2012; Lounsbury, 2003; Rao, Morrill, and Zald, 2000; Sine and Lee, 2009). Campbell (2002) notes, organizations and social movements are both forms of coordinated collective action and, therefore, ought to be conducive to similar forms of analysis.

In this research, we turn to social movement literature on framing for collective action to ground our understanding on how organizations can strategically engage in social media and motivate directed actions to advance organizational goals. Social movements have demonstrated their ability to "frame" ideas or issues to motivate directed action from an audience in social media – action congruent with the framers' strategic goals. Social movements frame focal ideas/issues in a way which motivates their audience to take directed actions congruent with their goals. Their success provides a useful exemplar and demonstrates a path along which strategic frames for directed action might be leveraged by organizations in social media to coalesce audiences and motivate directed action.

Regarding social movement theories, McAdam et al.'s (1996) comparative framework considers three complimentary theoretical perspectives – political opportunity structures, mobilizing structures and framing processes. The political opportunity structure perspective models the political openness of the polity, stability of political alignments, the presence or absence of allies and support groups, divisions within the elites, and the policy-making capacity of the government as determinants of social action (Tarrow,

1988). By contrast, the resource mobilization perspective links social acts to participatory structures for action. It draws heavily upon Smelser's theory of collective behavior, which describes five explicitly-ordered "necessary conditions" antecedent to collective behavior (i.e,social movements): structural conduciveness, some sort of strain, emergence of a generalized belief, mobilization, and social control. The third perspective, the framing process conceptualization, considers the process by which social movements motivate directed action in social media. "Framing processes have come to be regarded, alongside resource mobilization and political opportunity processes, as a central dynamic in understanding the character and course of social movements" (Benford and Snow, 2000, pp.611). The framing process has utility to inform organizational strategy to motivate directed action in social media.

2.4.1   Frames for Directed Action

Social movement literature often conceptualizes social movement activity in terms of the collective framing of an idea or set of ideas in a way which embodies the values of the movement and resonates with the ideologies, identities and cultural beliefs of supporters. Framing seeks to co-align the attitudes and motivations of an audience with the goals of the movement, such that there is negotiated shared meaning (Benford and Snow, 2000) leading to mobilization, collaboration, and cohesion among adherents (Haan, Den Hond, and De Bakker, 2006). Social movements "frame" narratives around an idea or issue to mobilize public support for organizational goals, while inviting public scrutiny of contested behaviors or issues (McAdam, McCarthy, and Zald, 1996).

Campbell (2002, p.1) defines framing as "the strategic creation and manipulation of shared understandings and interpretations of the world, its problems, and viable courses of

action". He describes frames as cognitive mechanisms which impact how actors perceive their interests, identities, and possibility for change. Benford and Snow (2000), define framing as social construction of meaning. "Framing", in their view, denotes a dynamic and active process of reality construction which necessarily implies contention. It is contentious in the sense that the framers generate interpretive frames that not only differ from existing frames, but may challenge them as well. Framing involves producing narratives which links events and referent facts, drawn from the environment, with the perceptions and beliefs of the intended audience. The goal of framing is to create a perspective around an idea which incorporates the strategic goals of the framers and resonates with an intended audience. Frames provide grammar for action. Social movements create and propagate frames across social media as a means to mobilize adherents and attract resources, and to motivate directed action from their audience which advances the strategic goals of the movement (Carty, 2002; Deri, 2003; Garrett, 2006; Loudon, 2010). Smelser (1963) noted that collective action is contingent on structural conduciveness. Social media is structurally conducive to collective action with regard to social engagement on ideas or issues, providing a convenient participatory structure.

Framing aims to shape public opinion, which has demonstrable power to; moderate supply and demand of an institution's material-resource environment (Sine and Lee, 2009), create entrepreneurial markets for new products, attract new talent to favored institutions (Earl and Kimport, 2009), diminish markets for unfavorable existing products (Deri, 2003), or bring pressure for political change (Lounsbury, 2003). Considerable research has been done to explicate framing as a mechanism with which social movements bring about change in the behaviors of organizations. Often, this is described as a process of contestation and de-institutionalization of existing frames within the neo-institutional

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field of the organization, the embedding of movement values into the regulatory or economic structure of the field, and reconstitution of the field which now embodies those changed values (Lounsbury, 2003; Sine and Lee, 2009).

The scope of frames for directed action is typically limited to the interests of a particular group or set of inter-related ideas or issues (Benford and Snow, 2000). However, social movements sometimes develop a broad primary (organizational) frame which embodies the philosophies, values and beliefs of the organization. These primary frames can be movement-specific. It is important to note that all other frames that the organization produces are derived from and congruent to these primary umbrella frames.

2.4.2   Framing Tasks

Frame construction involves the movement adherents negotiating a shared understanding regarding a problematic condition in need for change, making attribution regarding causality or blame, articulating an alternate set of arrangements, and asking others to act to bring about the desired change. The ability to motivate directed action depends upon the resultant frame providing a compelling "rationale for engaging in ameliorative collective actions, including the construction of appropriate vocabularies of motive" (Benford and Snow, 2000, pp.617). Snow and Benford (1988) refer to the core framing tasks as diagnostic, prognostic, and motivational (i.e.,action mobilization) framing (see figure 2), and argue that by pursuing these core tasks, movement actors will attend to the interrelated problems of "consensus mobilization" and "action mobilization".

Diagnostic framing entails "diagnosing" the problem or issue, and attributing causality, while prognostic framing involves developing and articulating an intervention or remediation around the focal idea or issue around which there is need for change.
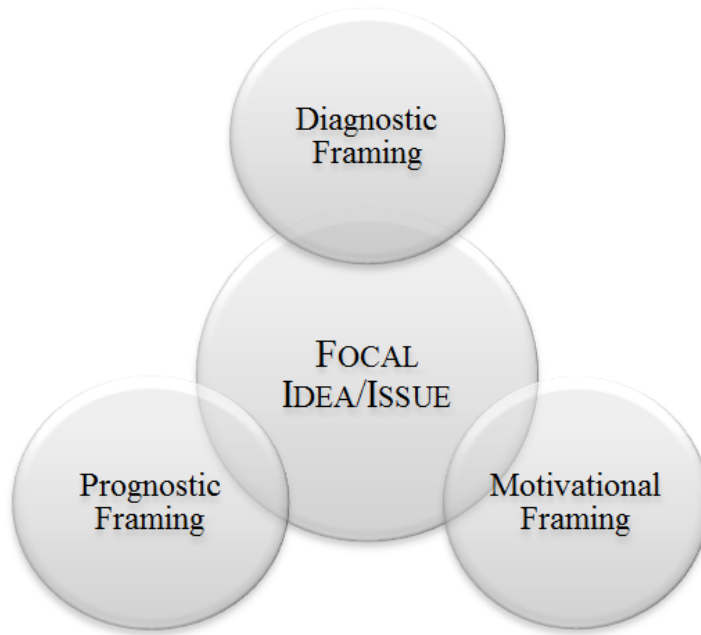
Figure 2. Framing Tasks

Motivational framing manifests a call to arms to enlist others to aid in the accomplishment of the desired change. Taken together, these tasks elaborate a shared understanding of "what the problem is", "what should be done about it", and a "call for action" to help bring about a proposed solution.

2.4.3   Framing Processes

Framing processes take place within multi-organizational fields comprised of other organizations, the intended audience, constituents, antagonists, media and bystanders. Frames are often contested by others who seek to refute the logic of a proposed frame or to counter-frame the idea/issue in a way that favors their own strategic goals. Thus, framing is processual, social and dynamic.

At each stage, framing involves overlapping processes of discourse, contestation and strategizing (Benford and Snow, 2000). Discursive processes involve conversations and

other communicative acts by the framers (i.e.,the organization and its adherents) around the focal idea or issue. Discursive processes are concerned with the articulation, amplification and diffusion of a frame. Framers work to spread the word, and propagate their frames to reach as much of their intended audience as possible. Through discourse, framers work to "amplify" the resonance of their frame, by strategically accentuating specific attributes within a frame through idealization, embellishment, clarification, or the reinforcement of existing beliefs. Frame amplification strategies seek to leverage existing cultural values, beliefs, and social knowledge to increase frame resonance.

Strategic processes associated with framing refer to those processes which are goal directed and deliberate. Strategic processes might aim to recruit new members, mobilize adherents, gather resources, etc. Social movements might, for example, work to link their frames with those of a potential audience or prospective resource provider.

Contested processes are processes which are challenged by other actors in the action arena. Frames are always contested to some degree, as framing always intends to supplant some existing perspective toward an idea or issue with an alternate view. Framers are necessarily engaged in the "politics of signification" (Benford and Snow, 2000). However, framers are not able to impose on their audience any vision of reality they would prefer. They are, in fact, constrained by numerous challenges, such as; counter-framing by others, frame disputes within the movement, or dialectics which put the narrative of a proposed frame at odds with new events or emergent facts. Framing is thus a necessarily dynamic process which, at each stage involves discursion, strategizing and contestation in order to maintain a compelling rationale for directed action.

Table 2. Framing Tasks

Diagnostic	Prognostic	Motivational
Diagnose key problem or issue	Articulate a proposed solution	Propagate motivational frame
Articulate problem, attribute causality	Develop plan of action, strategy	Motivate directed action

In the discursive peer-to-peer communicative environment of social media, organizations aiming to strategically motivate directed action to accomplish their goals must persuade their audience to adopt a view of the focal ideas or issues that motivates them to action congruent with the organization's goals. Here, framing provides an exemplar process model with which to understand how this might be accomplished.

Discursive processes involve conversations and other communications by framers around the focal idea or issue. Through discourse, framers are able to link the ideas, events, and experiences of their audience to articulate a cohesive frame which embodies their shared understanding toward the idea or issue. "What gives the resultant collective action frame its novelty is not so much the originality or newness of its ideational elements, but the manner in which they are spliced together and articulated, such that a new angle of vision, vantage point, and/or interpretation is provided" (Benford and Snow, 2000, pp.617). Access to information is foundational to the creation of an informed and cohesive frame that will resonate with the audience.

Frames represent a constructed perspective of reality that serves the interests of the framers. Frequently, frames are subject to contestation and/or counter-framing. Framing contests frequently occur within complex multi-organizational – and sometimes multi-institutional arenas (McAdam, McCarthy, and Zald, 1996). Contestation describes how individuals or groups contest the perspective captured in the frame and suggest

changes or present alternative views. Benford and Snow (2000) describes these types of challenge as frame resonance disputes, where contestation is focused on how frames might be (re-)presented to maximize mobilization. It is possible that events dis-confirm the ideas or beliefs that constituted the original frame. Frame contestation is a dynamic engine which drives continual reconceptualization to attune the frame with the environment and its target audience.

In their review of literature, Benford and Snow (2000) identify four basic processes accomplish frame alignment: frame bridging, frame amplification, frame extension, and frame transformation. Frame bridging is the linking of two ideologically compatible but structurally unconnected frames related to an idea or issue. Frame amplification strategically accentuates specific attributes within a frame through idealization, embellishment, clarification, or the reinforcement of existing beliefs. Frame amplification leverages the existing cultural values, beliefs, and social knowledge to increase frame resonance. Frame extension aims to extend the scope of an organizations existing frame to include additional issues that are believed to be of importance to adherents. Finally, frame transformation involves changing existing social knowledge by re-description and/or generating new understandings. Through these processes, social movements can strategically align their interests, operationalized and embodied within frames, with those of their intended audience.

Framing provides a robust vocabulary with which to consider how organizations can strategize to motivate directed action in social media, and describe a discursive process by which framers persuade others in an open social system to take directed actions.

CHAPTER III

THEORETIC FRAMEWORK

In chapter two, we introduced theories on organizational fields and figurations, collectivities, individual and group motivations in social systems, and social movement strategies for motivating directed action. In this chapter, we integrate those theoretic perspectives to build analytics and conceptualizations to sharpen our focus on the prerequisites for strategic organizational engagement in social media to motivate directed action which we identified in the introduction to this research, namely: *Who should an organization engage?, What should they engage on?, and How can they motivate directed actions aligned with the goals of the organization through strategic engagement?*

We begin by describing our analytic perspective toward social media as open social systems. We follow with a discussion on the motivations of participants to engage in the exchange of information around particular ideas in social media. This discussion is intended to help inform the question what an organization should engage on. Then, we describe our conceptualization of topical collectivities as idea-based social structures in social media, and describe how motivational forces induce the figuration of topical collectivities in social media around ideas and issues of common interest to their members. We discuss topical collectivities as a useful analytic to help inform the organization on whom to engage in social media. Lastly, we turn to social movement framing theory to describe framing as a discursive process by which framers transfer their objectives to topical collectivities in social media. Our discussion on framing theory intends to inform how organizations strategically engage in social media to motivate directed action.

That we have articulated our pre-understanding is not meant to imply that our pre-understanding will hold as we interpret the case, or that we will seek evidence to prove our concepts. Rather, this pre-understanding provides an initial set of theoretically-informed concepts and analytics with which to launch our interpretation.

3.1   Social Media

In simplest terms, social media are mediums for social exchange. An oft-cited definition of social media is one given by Kaplan and Haenlein (2010, p. 61), which describes social media as "a group of Internet-based applications that build on the ideological and technological foundations of Web 2.0, and that allow the creation and exchange of User Generated Content." Web 2.0 technologies, as used in their definition, are technologies that allow content and applications to be continuously modified by users in a participatory and collaborative fashion. Building on this definition, we take an analytic view of social media as Internet-based systems where participants can create and exchange information on ideas of shared interest. Parsons defines social systems as: "a plurality of individual actors interacting with each other in a situation which has at least a physical or environmental aspect, actors who are motivated in terms of a tendency to the optimization of gratification and whose relation to their situations, including each other, is mediated in terms of a system of culturally structured and shared symbols" (Parsons, 1951, pp.6). Social media are computer-mediated environments where pluralities of participants interact, motivated by their needs, through symbolic interaction. We extend our analytic view of social media to describe them as social systems.

In this study, social media engagement by organizations or individuals refers to the consumption, production or dissemination (e.g.,re-tweeting or mash-up) of information in

a social media environment. Engagement can be passive (e.g.,reading a blog) or overtly social (e.g., participating in a chat), with the active exchange of information between the consumer, producer and/or disseminator taking place around their convergent interests. Strategic engagement means to imply that engagement is goal-driven, drawing its intended inference to "strategy" from socio-psychological rather than organizational literature. Our functional definition of strategic organizational engagement in social media, then, is the consumption, production or dissemination of information by an organization in social media to advance their strategic goals.

In social media, information is the coin of the realm - the focus of engagement. Social media engagement is the means of its conveyance. Participants in social media are motivated to engage in the exchange of information around particular ideas or issues based on their needs (Giddens, 1979; Parsons, 1951). Knowing this has value to organizational strategists as strategic organizational engagement in social media must necessarily be concerned with how organizations can motivate or persuade others to take actions or adopt views that are congruent with the accomplishment of organizational goals. Social media participants are "fully in control of their on-line experiences" (Hoffman and Fodor, 2010)and motivated to engage around information which satiates their own needs (Burke, 1969; Giddens, 1979; Parsons, 1951). Participants' decisions to engage around certain ideas or issues are voluntary. Organizations can only attempt to influence others in social media by engaging around the ideas and issues important to themselves and to their intended audience. Thus, shared interests form the commonality around which the need-based motivations of organizations and audiences must converge in order for strategic engagement to be possible. Social media are dialogic social systems where convergent interests drive social engagement.

3.2 Motivations in Social Media

What should an organization hoping to motivate directed action through strategic engagement in social media engage on? Participants in social media are motivated to engage in the exchange of information around particular ideas based on their own needs, and their tendency to the optimization of gratification.

According to Parsons, we (humans) are self-aware social actors, cognizant of others and our social situation. Our social actions are goal-oriented, intended to satiate our needs. Our actions can be aided by socially-situated instruments and are subject to socially-situated constraints, particularly the standards and norms of the social context where the action takes place and the moral standards of the actor. The relational orientation of an individual, a combination of their motivational and value-based orientation toward their situation, explains their propensity toward any given action. Through their actions, individuals within social media seek to fulfill their own needs, while the social system must also have its own needs met in order to be perpetuated.

Parsons describes three types of motivational orientation that shape our goal oriented actions; cognitive (the need for information), cathetic (emotional need) and evaluative (need for assessment). Cognitive motivation focuses on the patterns and ways in which an individual's orientation toward social phenomena are organized–what they mean to the individual, their properties and potential function. Cathetic orientation involves determining how much affective or emotional investment to make in social phenomena based on what might be gained from an action, and its associated costs.

Actions are not discrete – they are organized and integrated across motivational dimensions. Evaluative motivational orientation concerns the need to order various cognitive and cathetic considerations to select the actions most likely to maximize gratification and minimizes deprivation relative to our needs.

Value orientation is shaped by the norms and standards of the social media, and informed by the choice criteria of the actor regarding their situation. Norms arise as individuals within social media share symbolic systems of meaning, which themselves impose an element of order. Individuals hold a mutuality of expectation regarding that order. Similarly, culture provides standards to evaluate the universal logic or correctness of a given action. Thus, norms and standards form the underlayment against which the individual applies their own criteria to choose their value-orientation toward a particular action.

Three types of values are associated with the choice criteria of the individual: cognitive (objective evaluation), appreciative (aesthetic evaluation), and moral (evaluation based on personal moral strictures). Cognitive value orientation must evaluate the relative importance of the empirical facts being received. Appreciative value orientation concerns standards of beauty and art. Moral value orientation deals with absolute standards of right and wrong.

Parsons describes four types of action arising from various relational orientations (see table 1). The dominance of certain motivations and value-orientations will preference particular actions. For example, if cathetic motivation toward a situation is strong and the appreciative value orientation most dominant, the corresponding voluntary action will most likely be expressive, while it will be partially influenced by other value-orientations. Instrumental action is concerned with realization of explicit goals. Expressive action is

intended to fulfill emotional goals. Moral action is concerned with satisfying moral

strictures. Intellectual action seeks to achieve an informational or factual goal. The

relational orientations of actors, in social media, motivate them to engage in the exchange

of information around particular ideas based on the relational orientation toward the idea

and their tendency to the optimization of gratification. The implication of this for

organizations hoping to motivate directed action through social media engagement is that

they can only engage their social media peers on ideas of shared interest – ideas of mutual

strategic interests to the actor and the organization. Ideas are the commonality on which

the need-based motivations of organizations, collectivities, and individuals can sometimes

converge.

3.3   Topical Collectivities

Whom can an organization engage with in social media to motivate directed actions

aligned with the organization's goals? Parsons suggests participants in social media are

motivated by their needs and their relational orientation toward an idea. Organizations

might benefit, then, by seeking an audience of social media peers whose interests are

similarly aligned with their strategic initiatives.

Topical collectivities, in social media, are self-organizing communities where

participants exchange information around the interrelated ideas which comprise a topic.

Topics are collections of inter-related ideas that hang together in a conceptually cohesive

way. Topical collectivities whose interests are aligned with those of an organization

represent a natural audience for the organization to engage with on ideas of shared interest.

Formation of topical collectivities occur consequent to the discovery of

inter-subjective commonalities among social media peers. Parsons' work on motivations

helps explain the figuration of topical collectivities. Social media is conversational, dialogic. The semi-transparent nature of social media allows participants to identify conversations whose topical content matches their own interests. Actors are motivated, "in terms of a tendency to the optimization of gratification" (Parsons, 1951, pp.6), to engage in conversations that match their needs. The need-based motivations of individual participants, organizations and collectivities can converge around topics of common interest.

Figuration of topical collectivities is an expression of homophily, which describes the principle that interaction occurs at a higher rate among people who are similar along some set of shared attributes (Rogers and Bhowmik, 1970). Homophily is a basic organizing principle in social systems, with structural implication. "Homophily implies that distance in terms of social characteristics translates into network distance, the number of relationships through which a piece of information must travel to connect two individuals" (McPherson et al., 2001). Lazerfeld and Merton (1954) identify two types of homophily. Status-based homophily is based on formal, informal, or ascribed status. Value-based homophily is based on values, attitudes, and beliefs. Brown et al. (2007) find that status-based homophily has little value in characterizing homophily in on-line settings. They find that shared group interests and group mind-set drive value-based homophily.

Value-based homophily around a topic of common interest is the cohesive force that motivates individuals, groups and organizations to self-organize into topical collectivities within the social media. Examples of these include: topical blogs, message boards, LinkedIn groups, forums, etc. Brown et al. (2007) offer empirical evidence that topical interests are foci around which topical collectivities form.

Topical collectivities have strategic potential for organizations as a means of identifying and engaging social media audiences with revealed interests which overlap their own.

Habermas argues that practical rationality evolves within collectivities as a product of discursive interaction. Shared understanding is achieved through the cooperative search for understanding. Collectivities are bound by consensual norms which set out expectations for the behavior between individuals. The validity of consensual norms is grounded in inter-subjective and mutual understanding of intentions.

We describe topical collectivities as an idea-based conceptualization to describe how shared interests manifest themselves as social structure in social media. They are a useful conceptualization to inform organizational strategy regarding whom to engage in social media.

3.4 Framing for Directed Action

How can an organization strategically engage in social media to motivate directed action? The discursive peer-to-peer nature of social media suggests that organizations aiming to motivate strategic directed action must persuade their peers through conversational engagement. They must engage their social media peers in conversations on ideas where their interests converge with those of the organization, and they must engage them in a way that motivates them to take actions aligned with organizational goals.

Here, social movement organizations provide a useful exemplar. They have demonstrated success in motivating strategic directed actions in social media.

We turn to theory on frames for directed action to pre-theorize a discursive process by which organizations can transfer their objectives to topical collectivities in social media and motivate directed actions congruent with organizational goals.

To motivate directed action, social movements strive to create frames to link referent facts, ideas, or beliefs from their environment to create a perspective around a focal idea or issue that resonates with their intended audience. Benford and Snow (2000) define framing as the social construction of meaning. Social movements effectively use framing to mobilize adherents, attract resources and motivate directed action from their audience to advance strategic goals.

Social movement literature identifies diagnostic, prognostic, and motivational framing as three principle framing tasks to accomplish directed action. The diagnostic task entails "diagnosing" the issue and attributing causality. Diagnostic framing involves sensing the environment to seize ideas, facts and the perspectives of others which might be useful to counter frame issues in a manner that is aligned with one's strategic objectives. The prognostic task involves developing and articulating a proposed solution to the problem at hand, in terms of strategy, tactics or plan of action. Prognosis is a strategic and collaborative process, where the new frame is negotiated such that it embodies the shared objectives of the framers. The motivational task manifests a call to arms to motivate directed actions that are congruent with the strategic goals of the framers. The elaboration of diagnostic, prognostic and motivational frames is the result of a set of overlapping social processes which can be conceptualized as discursive, contesting and strategic (Benford and Snow, 2000).

Framing for directed action provides a useful conceptualization of the discursive process by which framers transfer their objectives to topical collectivities in social media to motivate directed actions.

3.5 Conclusion

In this chapter, we have integrated the theoretic perspectives from chapter two to build analytics and conceptualizations to sharpen our focus on the prerequisites for strategic organizational engagement in social media to motivate directed action which we identified in the introduction to this research, namely: *Who should an organization engage?, What should they engage on?, and How can they motivate directed actions aligned with the goals of the organization through strategic engagement?*

We have described our analytic perspective of social media as dialogic social systems where peers engage one-another in the exchange of information around ideas of shared interest.

Regarding what to engage on, we have described how participants in social media are motivated to engage in the exchange of information around particular ideas based on their own needs, and their tendency to the optimization of gratification. Social media are dialogic social systems where peers engage one-another in the exchange of information around ideas of shared interest. Organizations hoping to motivate directed action through social media engagement must engage on ideas of mutual strategic interest to the actor and the organization. We have described how ideas are the commonality on which the need-based motivations of organizations, collectivities, and individuals can sometimes converge.

We have discussed topical collectivities as useful conceptualization to help inform the organizations on whom to engage in social media. Topical collectivities self-organize within fields of strategic interest to organizations. They cohere based on the shared interests of their members. Participants exchange information on the ideas mutually important to the collectivity. Topical collectivities whose interests are aligned with those of an organization represent a natural audience for the organization to engage with on ideas of shared interest.

We have described how the discursive peer-to-peer nature of social media suggests that organizations aiming to motivate strategic directed action must persuade their peers through conversational engagement. We have described theory on framing for directed action as means of understanding motivation for directed action in social media.

Collectively, these concepts and analytics help us describe our theoretically-informed pre-understanding on how organizations can motivate directed action through strategic engagement in social media. The balance of this research is dedicated to our case research to develop an empirically-informed understanding of strategic organizational engagement in social media to motivate directed actions aligned with organizational goals, and to theorize on social media analytics and conceptualizations useful to inform strategic organizational engagement.

CHAPTER IV

RESEARCH DESIGN AND METHODOLOGY

In this research, our aim is to (1) *"develop an empirically informed understanding of strategic organizational engagement in social media to motivate directed actions aligned with organizational goals"* and (2) *"theorize on analytics and conceptualizations useful to inform organizational strategies for engagement in social media".* This chapter is dedicated to introducing our case organization and describing the methodological approach we took to satisfying these goals.

4.1 Context:Case Background

Infosys is a global leader in information technology and consulting services with annual revenues exceeding $7 billion. It provides business consulting, technology, engineering and outsourcing services to Global 2000 clients in over 30 countries. Since 2006, Infosys has actively pursued strategic engagement in social media and is recognized as one of India's premier thought leaders. Infosys provides; business consulting, technology, engineering and outsourcing services to clients in over 30 countries. Infosys defines, designs, and delivers technology-enabled business solutions for Global 2000 companies and also provides a complete range of services by leveraging domain and business expertise and strategic alliances with leading technology providers.

Infosys employs approximately 150,000 people globally, with 64 offices and 68 development centers across the world in US, India, China, Australia, Japan, Middle East, UK, Germany, France, Switzerland, Netherlands, Poland, Canada and many other

countries. The company's offerings span business and technology consulting, application services, systems integration, product engineering, custom software development, maintenance, re-engineering, independent testing and validation services, IT infrastructure services and business process outsourcing.

Infosys was a pioneer of the Global Delivery Model (GDM), which emerged as a disruptive force in the industry leading to the rise of offshore outsourcing. The GDM is based on the principle of taking work to the location where the best talent is available, where it makes the best economic sense, with the least amount of acceptable risk. Infosys takes pride in building strategic long-term client relationships and 97.4% of its revenues come from existing customers. The company's vision is "We will be a globally respected corporation" and the mission is "To achieve our objectives in an environment of fairness, honesty, and courtesy towards our clients, employees, vendors and society at large."

Infosys is an early adopter of social media, and has strategically engaged in social media since 2006. It is committed to strategically engaging with its customers, partners, prospective employees and other key stakeholders in social media. Infosys is not just leveraging social media to engage stakeholders. It actively seeks and incorporates key market inputs through social media interactions. These influence corporate strategy and positioning in social media. Infosys actively engages its stakeholders through various social media destinations including corporate blogs, third-party hosted blogs, Facebook, Twitter, YouTube, Slideshare and LinkedIn. The list of links below is representative rather than exhaustive.

- `http://www.infosysblogs.com`

- `http://blogs.forbes.com/infosys/profile`

- `http://www.facebook.com/Infosys?v=app_124492937618557`

- `http://www.youtube.com/user/InfosysTechnologies`

- `http://www.slideshare.net/Infosys`

- `http://twitter.com/#!/infosys`

- `http://www.linkedin.com/company/infosys`

The broad objective of social media strategy at Infosys is to achieve an enhanced level of engagement with current and potential partners in the social media and further the positioning of Infosys as a thought leader. The company views social media as key to engagement with its stakeholder and plans to actively use various social media destinations going forward.

Based on their long history of strategic engagement in social media, Infosys is an excellent exemplar from which to glean an empirically-informed understanding of strategic social media engagement to motivate directed action.

4.2   Methodological Approach

To accomplish our aim of (1) *"developing an empirically informed understanding of strategic organizational engagement in social media to motivate directed actions aligned with organizational goals"* and (2) *"theorizing on analytics and conceptualizations useful to inform organizational strategies for engagement in social media"*, we employ case research methods to investigate the execution of social media strategy at Infosys, a single

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revelatory case. Yin (2009) observes that when researchers have the opportunity to investigate phenomena previously inaccessible to other researchers, such conditions justify the use of a single-case design. Other case study methodologists have insisted that a study involving just one case is acceptable provided there is substantive significance and theoretic relevance (Lee and Baskerville, 2003; Sarker, Xiao, and Beaulieu, 2013; Walsham, 1995). Little is known regarding high-level organizational strategies toward social media. As noted by Aral et al. (2013), this is one of the most under-researched areas "where our research community can produce much needed, high-impact work in years to come". We feel this case is valuable because of its descriptive information alone, and that the insights it generates can be revelatory. This is not to say that our case is unique, but rather that Infosys affords us a rich palette of strategies and experience with which to derive an empirically-informed understanding of how organizations develop and execute strategies for engagement in social media. Social media are increasingly competitive environments where organizations must engage. Therefore, the understanding we develop around the social media engagement strategies at Infosys has the potential to inform other organizations strategizing how to pro-actively engage in social media.

Over the last two years, we have collected thirty-four interviews with key staff, analyzed transcripts, and examined documentation from a variety of sources within and outside the organization. Specifically, we conducted multiple interviews with the Global Head of Digital Marketing, the Head of On-line Marketing In-Charge of Products, Platforms and Communities, the Head of Digital Marketing Strategy and a Principal Research Scientist. We have interviewed multiple practice leads for the Social Media and Technologies group, as well as multiple process specialists at Infosys, involved with their Social Media Command Center (SMCC). We also interviewed senior architects who work

with the SMCC on multiple internal social media efforts which interface with select clients. Two researchers have independently interviewed key social media practitioners and management within the organization.

Sampling for interviews was based on guidance from senior management and the snowball approach to identifying additional interviewees. Participants ranged from senior management to public-facing practice leads. The relative position of individuals within the organization can often reveal different perspectives on the intended and realized strategies of the firm. Interviewing across multiple layers within the organizational hierarchy allowed us to capture the full perspective of the organization toward strategic engagement in social media. Each interview followed an open-ended protocol with respect to organizational engagement in social media, with questions pertaining to overall and specific strategies for social media engagement. When possible, interviews were recorded, transcribed and interpreted by multiple researchers working independently to identify the tactics of social media engagement and to link them to the social media strategies which drive them. Interviewees involved in tactical engagement were asked open-ended questions around *"how"* they engage in social media on behalf of the firm, *"what"* they engage on, *"who"* they engage with, and the *"goal"* of their engagement. Mid-level and senior managers were invited to describe the organization's strategies for social media engagement, identify individuals and business units within the organization responsible for executing those strategies, and discuss how they were operationalized. This allowed us to link tactics and execution with the mid and high-level strategies for social media engagement of the organization. Senior managers were also invited to describe the processes by which strategies for social media are formulated, executed and evaluated – how they are selected and funded, how they are governed and the criteria by

which they are evaluated. This allowed us to conceptualize how social media strategies are understood by those within the firm who create and enact them.

Concurrent to our interview process we have been silent members in a private LinkedIn community entitled "Building Tomorrows' Bank" (`http://www.linkedin.com/groups/Building-Tomorrows-Bank-2409629/about`), which is sponsored by our case organization. Here, we have access to all messages exchanged between the organization and community members, as well as exchanges between the community members themselves. This on-line community is dominated by senior managers in the retail banking industry interested in discussing the future of retail banking. We have also episodically observed Infosys blog posts and interactions on external social media sites such as Finextra.com (`http://www.buildingtomorrowsbank.com/main/summary`, `http://www.buildingtomorrowsbank.com/beta/discussion/forums/173936/topics`) and InfosysVoice, a "BrandVoice" social media community hosted by Forbes.com (`http://blogs.forbes.com/infosys/profile/`). In each case, the goal of our observation was independently evaluate how the strategic initiatives of the organization were being translated into social media engagement.

4.3   Data Analysis

Our analytic approach is interpretive in the sense that it involves analyzing texts which reflect the interviewees' experiences in order to develop second-order theoretical understanding. We embrace the methodological guidelines summarized by Klein and Myers (1999a) which recommend sense-making by interpreting data via the hermeneutic circle, using constant comparative analysis to tease out initial concepts, linking evolving

concepts to higher level categories, and identifying potential linkages between the categories themselves where appropriate. As patterns emerged, every effort was made to situate them in the context of extant literature and to develop a conceptual framework appropriate to the research question. Our "experience-near" approach afforded us a contextually-rich understanding of how organizations can execute strategic organizational engagement in social media to advance their goals through the experiences and understandings of those enacting the strategies.

Over the last two years, we have spent several hundred hours interviewing key staff, analyzing transcripts, and examining documentation from a variety of sources within and outside the organization. Data from complementary interviews and external resources was collected to construct a suitable resource for interpretation. As we practiced sense-making and interpretation as prescribed by the hermeneutic circle articulated by Klein and Myer (1999), we verified our understandings and interpretations with those of our interviewees to determine their agreement with our conceptualizations and understanding.

In order to minimize researcher bias and assure inter-coder reliability, multiple researchers have interpreted each interview, and have purposefully raised alternate explanations and interpretations to challenge one-another's assumptions and interpretations. To the extent possible, we have situated our interpretation in existing literature.

4.4   Conclusion

The data which we developed from this research is the foundation for each of the studies we describe in the following chapters, each of which takes a different theoretic approach to understanding strategic organizational engagement in social media.

In chapter 5, we will present a practitioner view on how organizations can create dynamic capabilities in social media, based on our first published works from this dissertation, "Building Thought Leadership through Business-to-Business Social Media Engagement at Infosys" (Heath, Singh, Ganesh, and Taube, 2013a) and "Exploring Strategic Organizational Engagement in Social Media: A Revelatory Case" (Heath, Singh, Ganesh, and Taube, 2013b). In addition, we will offer a refined statement of our theoretic perspective on social media, informed by this work, which offers an ontological and dynamic capabilities perspective on social media engagement and describes how topical collectivities emerge around various topics or perspectives in social media comprised of stakeholders whose self-interests motivate them to engage on those topics.

In chapter 6, we re-imagine framing for directed action in the context of strategic organizational engagement in social media by firms. We employ the theoretic lens of social movement framing to consider the question: *"How can organizations pro-actively engage in social media to motivate others to take directed actions which advance the organization's strategic goals?"* We theorize on how organizations can frame organizational strategies to motivate directed action from topical collectivities in social media whose organizing foci are of strategic importance to the firm.

In chapter 7, we leverage the ontological and epistemological perspectives we develop in chapters 5 and 6 to theorize on how organizations can cultivate topical collectivities in social media around their strategic interests to drive open innovation. We ground this work in the literature of open innovation to demonstrate how topical collectivities as social structures can support organizations' open innovation initiatives in social media.

Taken as a whole, these chapters are meant to illustrate how frames for directed action can be applied to topical collectivities in social media to motivate directed action linked to the high-order strategies of organizations, such as social collaboration and open-innovation.

CHAPTER V

STRATEGIC ENGAGEMENT IN SOCIAL MEDIA

This chapter begins with a recently published paper drawn from this research entitled "Building Thought Leadership Through Business-to-Business Social Media Engagement at Infosys" (Heath, Singh, Ganesh, and Taube, 2013a). The paper was recently published in Management Information Systems Quarterly Executive, and takes a practitioner-oriented perspective toward strategic organizational engagement in social media. It is being reproduced here with the written permission of the publisher (see Appendix A). The paper introduces a framework for engagement with which organizations can build dynamic capabilities in social media. The nature of this work is practical rather than theoretic.

We follow the presentation of this paper with a refinement of our theoretic perspective on social media, informed by this work, which offers a dynamic capabilities perspective on social media engagement and develops an ontological perspective of how topical collectivities emerge around various topics or perspectives in social media and are comprised of stakeholders whose self-interests motivate them to engage on those topics.

5.1 Building Thought Leadership through Business-to-Business Social Media Engagement at Infosys

Social media are an increasingly important competitive space where organizations are expected to actively participate with key stakeholders. Recent studies demonstrate how organizations can benefit by engaging with consumers in social media in the Business to

Consumer (B-C) space. However, to date there is little guidance on how Business to Business (B-B) organizations can engage with stakeholders in social media to derive strategic benefit.

The B-B social media space contains multiple important stakeholders for the organization. Stakeholders include current and potential customers, potential employees, shareholders, competitors, industry thought influencers and casual observers. Purposeful conversations on ideas or issues of mutual interest to the organization and its stakeholders form the basis for strategic engagement. Organizations can engage stakeholders in a way that allows them to manage their brand and influence demand for their products and services, impact overall market directions and guide future strategy. Strategic engagement in social media affords organizations an opportunity to build thought leadership on ideas and issues important to them and their stakeholders. Prince and Rogers write: "A thought leader is an individual or firm that prospects, clients, referral sources, intermediaries and even competitors recognize as one of the foremost authorities in selected areas of specialization, resulting in its being the go-to individual or organization for said expertise. A thought leader is an individual or firm that significantly profits from being recognized as such". Thought leaders educate, innovate and influence.

While the advantages of thought leadership are known, knowing how to build thought leadership through social media engagement is less clear. To successfully pursue thought leadership in social media, organizations must sense and seize opportunities that reveal themselves, and engage the strategically important of these for the mutual benefit of themselves and their stakeholders. Given the size and dynamic nature of organizations' relevant social media environment, pursuing thought leadership is challenging.

Organizations must determine: Which ideas are strategically important?, How do we engage these to build thought leadership, and How do we evaluate our effort?

This paper examines how an organization can navigate these tasks to build thought leadership through effective social media engagement in a B-B context. We first provide a framework of 5 essential steps for building thought leadership through strategic engagement in social media. Then, we describe how Infosys, a global IT firm, builds and pursues thought leadership through strategic engagement with one group of stakeholders - its customers. We also provide examples of how Infosys has addressed two customer engagement challenges: converting critics to champions, and selective escalation of customer conversations that have the potential for co-creation of value. Based on the insights gained from the Infosys case study, as well as the authors' other research and practitioner experience, we then offer recommendations that other B-B organizations can use to pursue thought leadership through broader social media engagement with their stakeholders in general.

5.2 Framework for Building Thought Leadership with Stakeholders in Social Media

Social media is a dialogic medium where conversations take place among peers on ideas and issues of shared interest. The semi-transparent nature of social media affords organizations unprecedented access to key business intelligence regarding the ideas and issues being discussed by their stakeholders, shifts in stakeholder opinions or perceptions, and emerging ideas and trends. Attuning themselves to their social media environment, organizations can marshal this intelligence to identify strategically important ideas and issues and act on them to build thought leadership.
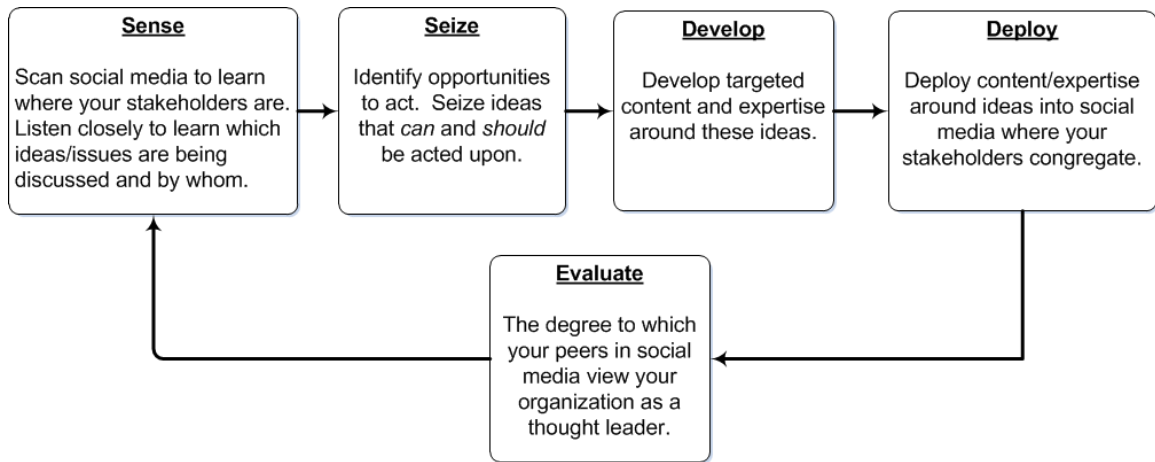
Figure 3. Building Thought Leadership Through Social Media Engagement

In the section that follows, we describe the 5 essential steps of sensing, seizing, developing, deploying and evaluating necessary to achieve thought leadership through social media engagement (see figure 3).

5.2.1   Sense

Organizations can sense what is taking place in social media by scanning and monitoring conversations interesting to them. Scanning is often performed around a list of keywords. Keywords might include the name of the firm, its brands or its competitors. Similarly, the organization might be interested in word associations, such as those between its brands and various positive or negative terms. Once potentially interesting conversations are identified, the organization must analyze what is being discussed, and by whom, to evaluate their potential strategic value. Often, the identity of the person discussing an idea is an important component in determining its value. Are the conversants current or potential customers? Are they thought influencers?

As the interests of an organization's stakeholders necessarily overlap their own, locating conversations which involve the ideas and issues important to the organization will lead the organization to the social media venues where their stakeholders are interacting. In the B-B context, organizations might already have strong inclination that their stakeholders frequent one or two already identified social media venues. On venues where stakeholders regularly interact, organizations must routinely monitor conversations to identify ideas and issues important to their stakeholders and learn their opinions and perceptions toward these. Sensing provides organizations insights into what is taking place in their social media environment – which ideas are gaining resonance, who's saying what, what the buzz is.

5.2.2 Seize

Of the ideas sensed in social media, management must determine which of these they can and should act upon to build thought leadership. Does the idea mesh well with organizational capabilities? Is it aligned with strategic goals? Is the idea one that must be engaged in order for the organization to be a thought leader? Are strategically important actors discussing the idea? Is the idea resonating with stakeholders? These are critical questions that an organization must answer to know which ideas to act on.

Knowing which ideas should be seized involves the filtering of technological, market and competitive information around the idea to understand the cost of engagement and its strategic implication. Management must react to strategic opportunities in social media to build thought leadership.

Social media's transparency allows peers to observe which ideas an organization engages, and which they ignore. The choice to ignore certain ideas conveys as much about the organization's values as does the choice to engage certain others.

5.2.3 Develop

Once the decision has been made to act on an idea, the organization must develop content or expertise around the idea to pursue thought leadership. This might involve committing internal or external resources and talent to research and development, or making available existing proprietary content on the idea or issue being engaged. Flexibility to invest in research and development is characteristic of thought leaders, and part of a larger business strategy that values innovation.

5.2.4 Deploy

Content must be deployed into social media to build thought leadership regarding important ideas or issues. Content must be deployed back into the social media where it originated, as well as other relevant social media. Deployment of knowledge, insights and expertise to social media is a strategic act which must be informed by the overall market strategy of the organization, including thought leadership.

Deployment might involve positioning new knowledge or expertise around an idea to attract potential customers, collaborators, talent, etc. Alternately, deployment might involve positioning knowledge, insights and expertise to seed invited blogs, or to execute other strategies which create opportunities to directly engage stakeholders and perpetuate the organization as a thought leader.

5.2.5   Evaluate

Evaluation involves assessing the degree to which an organization's peers in social media turn to the organization for information and insight regarding a particular idea. To evaluate the success of thought leadership, an organization can measure: the number of requests for information they receive regarding an idea, the number of downloads of whitepapers or the number of views of a relevant pages or PDFs, the number of comments to a blog, the number of visits, etc. Evaluation also involves scanning the target social media to learn the strength of association between the organization's brand and an idea, as well as the context of that association. Through these and similar measures, the organization can evaluate the impact of their efforts to build thought leadership in social media.

5.3   Pursuing Thought Leadership through Strategic Social Media Engagement at Infosys

Infosys Ltd. is a global leader in information technology and consulting services with annual revenues exceeding $7 billion (US). They provide business consulting, technology, engineering, and outsourcing services to clients in over 30 countries. Infosys has actively pursued strategic engagement in social media to build thought leadership since 2006, and is recognized as one of India's premier thought leaders. Our case study of social media engagement at Infosys Ltd. which follows is an example of an organization building thought leadership by engaging its customers as stakeholders.

Infosys defines thought leadership as "the ability to understand customers' business and provide genuine insights on how technology can be used for competitive advantage in the customer's business in the immediate and long-term". Strategic engagement with

customers in social media is a key aspect of their thought leadership strategy. According to the Global Head of Digital Marketing at Infosys:

> The big umbrella message in social media is to establish awareness of Infosys as a thought leader. This is pursued to manage our relationships with customers – current and future. We use social media to generate and manage awareness of Infosys for the various market segments.

> When a customer buys from us, the key differentiator is opinion. Every competitor has similar services and offerings. So technology is not the differentiator. The main issue is - "What is the experience of the customer?" That is what positioning as a thought leader is all about.

Infosys identifies and engages the ideas in social media most important to its customers, and develops expertise around them. As a thought leader, Infosys positions itself to participate in meaningful conversations about these ideas with interested customers. Management selectively escalates important conversations and dedicates internal expertise to engage in them. This helps Infosys manage the scope and scale of their social media engagement, narrowing the breadth of their potential engagement down from all of social media to a subset of conversations important to its relevant stakeholders.

Social media is highly dynamic. Its ideas and membership are constantly in flux. To leverage social media's potential organizations must match its dynamism with their own dynamic capabilities. For Infosys, this involves sensing and seizing opportunities in social media, developing and deploying expertise around ideas and evaluating the success of their efforts (see figure 3).

5.3.1   Sense - Identify Strategic Opportunities

Infosys "holds its ear to the ground" to sense opportunities in social media. For example, digital marketing at Infosys routinely scans "VP hangouts" such as Forbes.com, for conversations about ideas and issues related to their core competencies. Their sensing strategy targets specific social media platforms "where these people hang out – you go where they are".

> Infosys groups listen to the buzz on the social media and evaluate the content from two perspectives: Does this have value for marketing; and is there an opportunity to interact? We keep an eye on who is talking and what is being talked about. (Head of Digital Strategy)

Once Infosys learns where important conversations are taking place, it listens to these conversations to understand their context and import. The aim of sensing is to increase the organization's understanding of the ideas that shape its social media ecosystem.

Infosys uses a combination of external agencies as well as its own Social Media Command Center (SMCC) to regularly identify issues in social media that warrant action. Practice leads and architects in the SMCC observe:

> Issues come in from social media firms on a daily basis and we make decisions on whether the issue requires a response. For ones that re-quire a response, we find the right subject expert and the interaction is initiated.

> Weekly reports focus on categories [concepts] that we are tracking the momentum of. Monthly reports focus on key parameters and concepts including positive and negative conversations. Every two to three months, we scan our presence and perceptions vis-a-vis key competitors.

Table 3. The When, What, How and Why of Sensing Social Media at Infosys

When	What	How	Why
Real Time	Phrase or keyword associations that require rapid response	Scan and identify issues that the organization must have an immediate response to	To ensure that positive messages propagate
	Broad scan of small list of keywords	Assign threat levels to individual topics and react immediately	To ensure that negative messages about the organization do not resonate
Daily/Weekly	Track social clusters and communities	Identify topics and their prevalence in communities of interest	To identify topics and clusters of interest in the relevant social media
	Scan known clusters and communities	Identify the relative importance of the conversations and longevity of topics and ideas – Identify momentum shifts in conversations and important stakeholders to further engage	Develop plans for engagement
Monthly	Brand Audit	Generate 'heat map' around the brand and topics of strategic interest	Measure the effectiveness of positioning strategies
Quarterly	Assess success of competitors in the social media	Compare brand perceptions of Infosys vs. competitors in social clusters around topics of strategic interest	Develop performance assessment of competitive positions/inform strategy

5.3.2   Seize - Determine Opportunities for Action

Selecting which content to engage is critical to the success of meaningful and manageable thought leadership. "Any organization, including Infosys, has to figure out which conversations to be engaged in and how much it should be engaged",(Global Head - Digital Marketing). Infosys actively senses and seizes opportunities for engagement in social media that promote its efforts to be recognized as a thought leader.

> Groups of potential customers may engage in conversation with other customers when they are assessing us. The groups that subscribe to the notion of Infosys as a thought leader may be more engaged for the long-term and organized around the common areas of interest. Both of these influence demand generation–through word of mouth or more directly. (Head - Digital Marketing Strategy)

At Infosys, the decision to act on a particular idea or issue is contingent on criteria that elevate its importance. Are negative comments being made toward the brand that requires a response? Is the issue directly aligned with a strategic objective at Infosys? Is the issue being raised by one or more Infosys customers? Is the idea strategically important to the target audience? Each of these motivates the organization to seize an idea as an opportunity for engagement.

> We listen for the key words associated with Infosys such as fairness. We need to know of these very fast and respond immediately to manage the momentum. The traditional way was to create the content in house and do one-way communication - now you cannot do that. You have to participate back in the social media where your voice is also heard. (Global Head - Digital Marketing)

Infosys extracts actionable intelligence by sensing dynamic conversations in social media around key words, stakeholders or ideas. They seize opportunities to engage which

promote their position as a thought leader. Actionable intelligence can also reveal the need

for immediate response to negative messages that have the potential to resonate and cause

damage to the brand. Sometimes, Infosys propagates positive messages regarding the

brand by cross-pollinating messages across multiple social media platforms including

Infosys blogs, third party blogs, Twitter, and other events' social media.

When seizing is proactive, rather than reactive, management examines the ideas

extracted through sensing to select those with strategic potential.

> When you are discussing things around what you can do or are doing for the
> customer – customers have issues, we have a solution. You discuss those
> things and they take the message forward.

> Second is content – if you have strong content on subject matter and you get
> subject matter experts aligned to that content participating – you will get
> customers to engage with you. People engage around an idea ... It [Social
> Media] is a huge market research vehicle with very fast timing and requires
> transparency. (Head - On-line Marketing: Products, Platforms and
> Communities)

5.3.3   Develop - Internal and External Resources for Engagement

At Infosys, development involves marshaling internal and external expertise to create

content which can foster long-term and meaningful co-engagement with social media

peers and further thought leadership.

> Content is developed by designated internal competence centers and R & D at
> Infosys to manage awareness of our competencies. Content is co-created with
> existing partners and customers as blogs and white-papers to highlight success
> stories and relevant competence. These are shared with stakeholders using
> LinkedIn or other social media. (Practice Lead - Social Media at Infosys)

Development requires that ideas be matched with talent capable of acting successfully upon them. Development around strategically important ideas and issues furthers Infosys' position as a thought leader. It involves committing organizational resources to advance knowledge through active research.

> Today my blogger is not a spokesperson. He is a content expert – when a journalist wants to talk to the content expert – it cannot be handled by PR. That is a very big challenge. People [developers and content experts] have to learn new responsibilities – sometimes there are policies or guidelines ... but right now it is a chaotic time. (Global Head - Digital Marketing)

While thought leaders are not expected to offer solutions to unsolvable problems, they must actively engage in advancing the ideas and issues important to their stakeholders in social media.

5.3.4 Deploy - Content and Expertise to Social Media

Infosys deploys the content it develops around strategically important ideas back into social media to foster meaningful engagement with its stakeholders.

> In social media, you have to formulate and position the message differently for each group. So – if you are targeting C-level executives, you will focus on company strategy and fit. If you are targeting line of business executives or IT managers you will develop content that will be valuable for issues they deal with daily. You then position the content on social media avenues where these groups 'hang-out'. (Global Head - Digital Marketing)

Along with content, deployment often involves deploying content experts to particular social media venues.

> People need to see your face – they don't want to talk to an intermediary – you have to be there. The client takes a firsthand feel of things. People do not

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take collateral on face value. There is an expectation that you are there - transparently and directly, not just on your site, but on topical sites also – if you say you are a thought leader, then you need to be on the topic's SM. (Head of Digital Marketing)

Infosys makes their expertise, engagement and accomplishments visible to their stakeholders in social media. They provide evidence of thought leadership.

Engaged customers offer their experience to others as part of the positioning strategy for thought leadership – this helps our positioning and perception as thought leader. (Head of Digital Marketing)

The challenge is to continually deploy fresh and relevant content to keep stakeholders engaged. Infosys strategically deploys content on social media such as LinkedIn, where they create and moderate multiple communities dedicated to specific topics. Here, like-minded peers (including Infosys) co-engage to build new knowledge regarding key issues. This reinforces Infosys' role as a thought leader.

Strategic deployment allows Infosys to match the intensity of its resource commitment to the potential value of each engagement.

Blogs reinforce the thought leadership perceptions, particularly for the BPO community. Creating a following is not a challenge – the challenge is meaningful engagement to generate insight. (Practice Lead - Social Media at Infosys)

5.3.5 Evaluate - Outcomes of Engagement

Infosys recognizes that measuring return-on-investment (ROI) in social media is difficult. Customer interaction occurs across multiple channels. Strategic engagement in social media is driven by senior management's belief that anything less than full-throated participation is not optional. Stakeholders expect to find them here.

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Infosys is more concerned with their Return on Engagement (ROE). Hoffman and Fodor suggest ROE as an appropriate measure of the success of social media strategy, describing ROE as the social media investment one's customers make as they engage with the marketers' brands. Infosys measures engagement in terms of the number of queries, mentions, reference-ability, mash-ups, downloads of white papers, and requests for information it receives. Infosys uses ROE to assess the efficacy of their strategic social media engagement, believing it is a good indicator of long-term benefit. At Infosys, engagement which originated in social media has led to engagement in other channels, and ultimately to sales for the organization. The management at Infosys believes positive relationships with current and potential customers ease the resistance to sales. Evaluation of their thought leadership is an exercise in sensing how engaged their stakeholders are with the content they've deployed in social media.

> We look at a wide range of things – visits from the target audience, visits from companies in our target market, repeat visits we get, are they downloading whitepapers? Are they contributing content, opinions, issues? The kinds of queries coming in based on content distributed? Are they identifying themselves and their willingness to talk to us or about us to others?

> We position content to the sites and track views and responses. We mine visits and see how many people are listening to our message. If there are visits, we assume they are listening. For example, we look at RSS consumption – what feeds are consumed? Are they being mashed into other content? We look at visits from social media to our blogs and track repeat visits. This helps us figure out who is listening and what they are listening to.

> We have had a lot of success with Blogs. We use Twitter and Facebook and LinkedIn and Slideshare to supplement. We are experimenting with Google+. Other blogs mention [our] analysts' opinions and best practices. (Global Head - Digital Marketing)

Conversations may center on technical competencies within Infosys or on areas where Infosys is developing competencies to position itself as a thought leader. Measurement evaluates whether Infosys has provided sufficient evidence to demonstrate its position as a thought leader. Are participants looking to Infosys for answers? Social media transparency benefits the organization in evaluating the efficacy of its thought leadership strategy. The overall perceptions of the organization result from the interactions in social media between participants, including the organization. This interaction is in sharp contrast to the control organizations are accustomed to exercising over their messaging in traditional media.

> We measure the perceptions shifts on-line. The changes in the conversations in clusters that we monitor or participate in and the time duration for the perception shift provides an indication of the perception shift momentum.

> Everything we measure is participation, the number of people that are looking at your content, the likes and 'Thumbs Up or Down' – it is not difficult to assess the awareness. The overall 'following' of content is tracked to measure 'awareness generated'. Responses are read to understand the awareness and perceptions in terms of our perceptions as a thought leader. (Head - On-line Marketing: Products, Platforms and Communities)

At Infosys, Digital Marketing is charged with managing the overall social media presence of the brand. Additionally, they serve the specific needs of various business units in the organization (verticals) through their Social Media Command Center (SMCC). Inquiries received from social media are seized by the SMCC and appropriate expertise is garnered from the verticals to develop content and engage, as described in our framework. Strategic initiatives can also originate from the verticals. In these cases the SMCC facilitates, while the vertical takes partial responsibility for scanning. In each case, the

SMCC depends on the internal customer (vertical) or the external customer to decide what is important. Governance of the social media engagement efforts are shared between the leaderships of Digital Marketing Strategy, the Verticals and the On-line Marketing for Products, Platforms and Communities.

5.4 Executing Customer Engagement Strategies

Thought leadership strategy at Infosys strives to create a fully engaged customer who values Infosys as a thought leader. The global head of digital marketing at Infosys explains that "the overall marketing effort centers around four main objectives: managing awareness, managing perceptions, customer engagement and demand generation".

We offer two specific examples to illustrate how Infosys executes social media engagement to build thought leadership. The first, converting critics to champions, describes how Infosys responds to negative comments in social media to foster positive social media perceptions of the brand. The second, selective escalation of meaningful conversations, describes how Infosys matches the intensity of their engagement with its potential value. In each of these examples, Infosys intends to fosters relationship-building and advance their position as a thought leader.

5.4.1 Converting Critics to Champions

> A potential client visited Infosys headquarters for a sales meeting about a product. After the meeting, she tweeted her negative impression of some functionality in the product. The tweet was picked up by the social media command center and passed on to appropriate personnel in the related vertical, and to digital marketing and customer relations. We take this very seriously - it represents a core aspect of our strategic business. We seized the opportunity to develop targeted content and contacted the potential customer to get feedback on potential improvements <u>within hours</u> - before she got on the plane. We worked with her on how to improve and deliver the functionality

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she needed. We were able to meet her needs and change her opinion. She talked about her experience on the social media. (Head of Digital Marketing)

Social media engagement strategy at Infosys attempts to manage perceptions of participants such that they become champions of the brand. This is not always possible. At a minimum, Infosys seeks to actively address issues raised by critics and increase positive perceptions of the brand.

We monitor analyst interactions, media relations, message development, position development and solution development. It is a huge market research vehicle with lots of opportunity – but it requires very fast timing and requires us to commit to transparency. We need to be ready to act as soon as possible. These are the core parts of the overall strategy. (Principal Architect)

Interviews with Process Specialists and Practice Leads at the SMCC reveal multiple strategies to sense social media activity around relevant topics. Infosys develops a "heat-map" of strategically important topics. They monitor the ideas, the stakeholders discussing the ideas, and the platforms where the topics are gaining traction. Upon sensing activity around a topic by key stakeholders, Infosys works to actively seize opportunities in social media platforms. Relevant content is developed and deployed on appropriate social media platforms, including Infosys-owned and third-party platforms. The efficacies of these efforts are systematically evaluated.

In social media, the organization is one among many peers – an equal. Through proactive engagement, Infosys can exercise some control towards managing perceptions of their brand among strategically important stakeholders on strategically important ideas. Regardless of where stakeholder perceptions lie on the continuum from critics to champions, Infosys' social media engagement strategy seeks to advance them along the continuum towards championing the brand (see Figure 4).

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> If you [a participant] like something, you broadcast – if you don't like
> something you broadcast – the middle space is usually vacant. No one owns
> the social media. Clients may complain about products and services. We have
> to be on top of that. It's not about 'doing social media'. Organizations are
> typically not geared up for the participation that social media demands –
> specially a large enterprise. An organization is used to command and
> control-but social media breaks this. The people create the voice not the
> brand. (Global Head - Digital Marketing)

Ardent critics or champions are motivated to be vocal and highly engaged. They influence momentum regarding perception of the organization through their conversations in social media. By contrast, people who are dispassionate or unaware regarding the organization display low levels of engagement and hold neutral perceptions of Infosys, if any. The most engaged champions hold high perceptions of Infosys as a thought leader.

Active sensing informs Infosys of activity that can have direct and rapid impact on how the organization is perceived in social media.

> We break up the topics of the conversations around different dimensions and
> see how we should respond based on what the conversation is about, who is
> talking and what they are saying.

> Longer-term issues are evaluated on their business value. We look at who in
> Infosys can use this and what can they do with this information. We could
> have done this earlier too, but social media makes this real-time. I can do
> brand audits monthly and actually see the brand imaging and its impact and
> how it is playing out in the media every day. (Practice Lead - Social Media at
> Infosys)
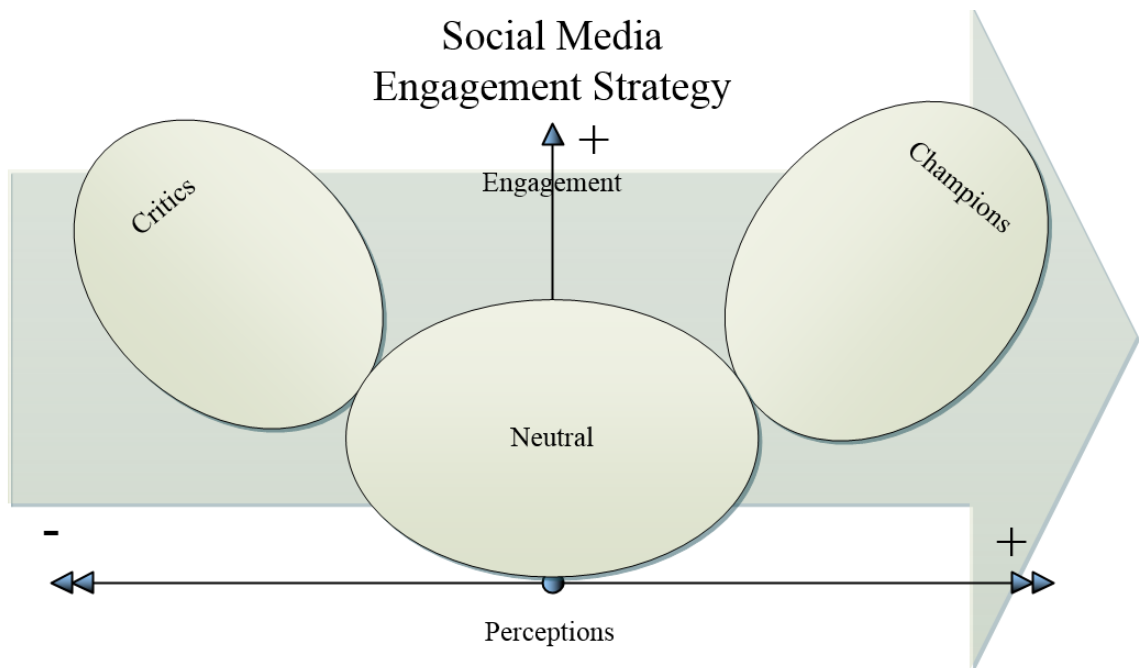
Figure 4. Managing Perceptions Through Social Media Engagement

An on-going challenge is to ensure that the organization reacts very quickly to any negative conversations associated with the brand to stop mis-perceptions from gathering momentum. Pre-defined key terms are examined through the SMCC on a continual basis. These terms are assigned threat levels and are immediately flagged for action when encountered. Infosys reacts very quickly to terms such as "unfair" or other negative connotations associated with the organization. Infosys identifies the conversants and addresses their concerns, working to convert critics to champions.

5.4.2   *Selective Escalation of Meaningful Conversations*

Social media provides B-B organizations the opportunity to participate in meaningful conversations with important stakeholders for mutual benefit. The challenge is to engage the brand as a legitimate conversant in meaningful conversations and exchange value

through content and expertise. This involves commitment of organizational knowledge and expertise to strategic social media engagement. Selectivity in the choice of the conversations to escalate to higher levels of engagement is critical to efficient stewardship of organizational resources committed to the effort. "The challenge is meaningful engagement to generate insight"(Practice Lead - Social Media at Infosys).

> You have to engage in social media directly – that is where people are. The challenge is how, and how much, to engage and participate – should it be structured or un-structured; how much structure; who in the organization should engage and how. (Head - Digital Marketing Strategy)

The overall strategy of social media engagement at Infosys is to purposefully and selectively escalate the intensity of engagement with select stakeholders.

Strategic engagement positively impacts the munificence of Infosys' social media environment, making it more conducive to the pursuit of thought leadership. Through strategic engagement, Infosys garners new insights from its peers and collaborates to solve problems. This, in turn, increases perceptions of the brand and its offerings.

> In the long-term, it is the relationship that matters. The thought leadership position helps develop and nurture relationships. For members, the most beneficial [take away] is validated information because a dedicated community of your peers who "know", endorse the information [or not] – they give you information with context and perspective that is useful. In our [social media] communities, value information is filtered, endorsed and validated across the borders. When the perspective is shared, it has substance. (Head - On-line Marketing: Products, Platforms and Communities)

Infosys senses conversations and conversants, on social media platforms frequented by executives, to identify ideas of strategic interest.

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We realize this is important. It can be in any context – let's talk about 'Building tomorrow's enterprise'. Who are the stakeholders? Who are the decision makers? Who are the CXOs and the C-1's? We can get an ear into a group and learn what is important ... the micro-trends. There is no discussion about selling. They are talking about their pain points. (Global Head - Digital Marketing)

Current and potential customers, along with internal and external content experts, are appropriated to engage and generate new insights and solutions on these platforms. Infosys deploys the content it develops on its own blogs, in addition to the source social media.

You engage in discussion, give your perspective and share that perspective along with research and recommendations to inform the conversation. Then you will see the value coming out of it. That is how Infosys as a thought leader can move forward. (Process Specialist at Infosys)

Stakeholders from other social media are invited to converse on Infosys platforms.

We want the outside to know what the community is doing We effectively use LinkedIn groups to give a broad sense of what is happening in communities ... social media becomes the medium ... we get participation.

We don't want the size to increase - participation is not a problem, it can easily get too much. We look at how active the members are and try to give them value. It is important to invest time and effort ... that is a challenge and we are trying to achieve that. (Principal Architect)

Once the conversations progress, strategically valuable conversations may be escalated to private communities. Infosys and its peers in the private community exercise a greater degree of control over the focus of the conversations.

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Information is huge and time is less; we have to focus on 1 or 2 things. Focus on where the value is through very focused and niche communities where we can create value. It is about tapping interested people's knowledge, knowing the pulse of the clients and subscribers. There is a wealth of information. If you can do that in a community, the potential is phenomenal. For example - What is the spend level in individual channels ... I can get that kind of information in the community. (Principal Architect)

For example, Infosys founded a Banking Innovation group using LinkedIn to focus on the specific needs of the retail banking community.

We opened this for the CXO levels and let this become the breeding ground for conversations on how to build the banking industry of tomorrow. The group is not Infosys branded and not overtly promoted. There are over 600 members in the group; there are over 400 members in the Infosys BPO community on LinkedIn. (Principal Architect)

Participants in these communities engage in focused or general discussions. Infosys senses and seizes key topics from community discussions and develops insights toward them that are useful to the whole community. "We do surveys on Infosys BPO community and the results are published only to the community. It is important to know what your peers are thinking"(Principal Architect).

Community members, along with experts from Infosys, develop content that is then deployed back to the community. In this manner, Infosys can engage with potential customers and engaged peers using private social media platforms to collaboratively improve their products and services through insights generated and knowledge gained.

Sometimes, we ask members from the community to co-develop with an Infosys person and Infosys branding and then publish this to the community – members and peers participate. (Practice Lead - Social Media at Infosys)

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Additional relationships may develop at multiple levels between Infosys and its organizational partners. Mature relationships with potential customers and engaged conversants across Infosys' product and service offerings provide tangible and tacit benefits of co-creation. The relationship development which arises from co-creation benefits both Infosys and its strategically important stakeholders. The behavior of the participant influences the level of engagement. "Behavior is the differentiator – if there is co-creation and engagement with the customers, then it makes sense to move to a co-creation mode of engagement"(Global Head - Digital Marketing).

This stage-wise selection strategy allows the filtering of contributors based on their potential and keeps engagement manageable.

> The challenge is to continually push fresh and relevant content for engagement. Careful selection is made to identify content and related internal and external experts. This is a very focused effort ... we have over 35 internal blogs and invest over 500 bloggers from all over the company to populate content. (Principal Architect)

Table 4 summarizes the levels of engagement in social media and the potential benefits to an organization.

In summary, Infosys' strategy for thought leadership through strategic social media engagement intends to influence its demand pipeline. Through strategic engagement, Infosys raises awareness of its brand, generates insights, and identifies opportunities to co-create innovative content and solutions.

Table 4. Types of Engagement in Social Media and Benefits

Types of Engagement	Description	Example	Benefit to Organization
Brand Awareness	Transformative extensions of traditional strategies to social media engagement	Facebook "likes", downloads of white papers from blogs, twitter followers, traffic to web presence, repeat visits	Maintain positive engagement in social media
	Participants engaged through technology with other social media actors	The organization must react quickly to quench negative resonance or promote positive perceptions of thought leadership	Reputation building along with brand awareness of thought leadership
Insight Generation	Two-way conversation with engaged participants	Engaged customers generate insights (comments, questions and suggestions) for innovation	Treat engaged SM communities across common ideas as focus groups
	Dialogic interaction	Comments on blogs, slide share, direct contact, public fora	Reinforce thought leadership of organization
Value Co-creation	Managed and focused engagement	Private groups formed based on previous collaboration or strategic importance co-create content on specific topics	Enhanced business intelligence and support for thought leadership
	Internal and external content experts and current or potential customers	Collaboration to solve problems, generate insights	Create thought leadership through improve capabilities – network effect

Their strategy involves sensing ideas and issues in social media, and seizing those with strategic value. They develop content and expertise around these and deploy it back to social media to engage key stakeholders in conversations with the brand. They escalate conversations when the potential exists to convert critics to champions, or to partner in meaningful co-creation and innovation. This fosters relationship-building and advances Infosys' position as a thought leader. Effectiveness is evaluated in the short term by measuring return on engagement; and in the long-term by the nature and strength of the organization's relationships with key stakeholders.

5.5 Recommendations for Building Thought Leadership through B-B Social Media Engagement

The following insights are offered to B- B organizations that seek to build thought leadership in social media through strategic engagement.

5.5.1 *Make Thought Leadership an Umbrella Goal for the Entire Organization*

To create a culture of thought leadership throughout the organization:

– Make social media engagement a dynamic capability of the whole organization. Integrate social media expectations, capabilities and strategies into your people and their daily routines.

– Establish governance to allow proper flow of information to the right functional areas.

– Facilitate strategizing by functional areas to build thought leadership around their competencies.

– Cultivate R & D capabilities sufficient to engage important ideas with important stakeholders in areas of strategic interest. This may involve learning or hiring new technical competencies.

5.5.2 *Understand Your Organization's Social Media Ecosystem*

Determine strategically important stakeholders and ideas or issues for engagement:

– Learn which social media venues your stakeholders frequent – where they hang out. Knowing where to scan will reduce cost and increases the relevance of information gathered.

– Issues which require a timely response arise frequently in social media, so sensing must be frequent and routine.

– For issues related to your core competencies, consider establishing topical communities in social media.

– When feasible, bring sensing in-house. Routinize sensing so that your engagement remains attuned to your strategic interests.

– Focus your strategic engagement efforts on the ideas that have the greatest potential. You cannot be a thought leader in everything.

– Systematically sense and seize the right opportunities by involving informed management. This is an institutional capability required of thought leaders in social media.

5.5.3 *Select Ideas and Opportunities with Strategic Short- and Long-Term Potential*

– Involve appropriate management to identify which ideas *can* and *should* be acted upon.

– Engage individuals within your organization who are capable of judging the market potential of an idea in relationship to your products and services, as well as individuals with sufficient authority to allocate the resources necessary to ensure success.

– Strategically partner with select stakeholders to co-create valuable content or solutions.

5.5.4 *Purposefully and Selectively Engage with Stakeholders for Mutual Benefit*

– Match the intensity of your engagement with its potential value.

– Choose the right talent from your organization to engage. In the case of Infosys, much of their engagement is accomplished by internal content experts, who fill the role of bloggers to represent the public face of the organization in social media. Individuals filling these dual roles sometimes need training to learn the new responsibilities of interacting directly with stakeholders.

5.5.5 *Evaluate Your Thought Leadership*

– Assess ROE by counting the number of requests for information received by your organization, the number of downloads of whitepapers, the number of views of a particular page or PDF, the number of comments to a blog, etc. before and after the deployment to evaluate success of thought leadership on an idea.

– Assess the intensity of association between your organization and the focal idea – their nature and frequency. This can reveal new social media venues where your thought leadership can provide currency.

5.5.6   Concluding Comments

Organizations interested in pro-actively engaging in social media to build thought leadership should consider the 5 step framework and strategic examples provided in this study to inform their strategies. With this framework, an organization can visibly engage relevant stakeholders on ideas critical to their field to manage their brand, impact overall market directions, and guide future strategy. They can sense and seize ideas that can and should be acted upon to build thought leadership. They can demonstrate thought leadership by developing and deploying innovative content around important ideas, and evaluate ROE to measure success. Through these steps, they can build thought leadership with their most important audience – their stakeholders.

5.6   Conclusion

In the prior section, we discussed the means by which our case organization identified participants in social media whose interests matched their own. We also described how the organization was able to build a topical collectivity around the revealed interests (i.e., banking innovation) of participants and interact with them in the collectivity around their shared interests. Interest-based clustering of audiences in social media around shared topical interests forms the basis for our ontological view of social media, which we present in the following section.

We carry forward our previously stated analytic view that social media are social systems. Also, that social media are dialogic systems, where peers engage one-another in

the exchange of information around ideas of shared interest. Engagement in social media is goal-oriented, intended to satiate actor needs. In social media, as information is the coin of the realm, individuals are motivated to engage in the exchange of information around their own interest with others who share that interest. Convergent interests among social media participants drive social engagement.

5.7   Revised Analytic and Ontological Perspective

A key insight which emerged in the research in the prior section involved the case organization's focus on ideas or issues as the means by which they could attract and engage an audience. This was clearly demonstrated in the discussion around their community-building strategies toward the field of retail banking. We begin this section by describing a theoretically-informed interest-based ontology of social media to make explicit the relationship between audience and interests. At the most macro layer in this ontology, organizations and stakeholders are situated in Bourdieuian fields of production within the larger social system (see figure 5). Members of Bourdieuian fields share domains of interest. Bourdieuian fields are manifest in social media to the degree that members of the domain of interest engage there in the exchange of information. Topical collectivities reside within these Bourdieuian fields in social media, where specific topical interests are shared by members. Lastly, stakeholders associated with ideas/issues can independently engage in the exchange of information around those foci.
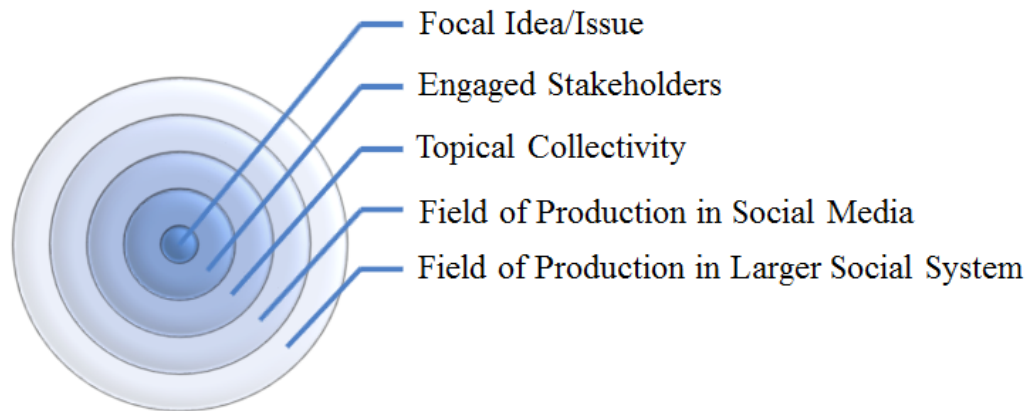
Figure 5. Ontology of Interests

The ontological perspective we describe here establishes a way of conceptualizing social media audiences based on the needs-based motivations of participants toward information. This ontological perspective provides a means for organizations to understand the appropriate scope of social media engagement based on their strategic goals and distill their engagement down to the stakeholders most closely associated with those strategic interests.

5.7.1   The Relationship Between Ideas/Issues and Their Stakeholders

Social media are mediums for social exchange. (Kaplan and Haenlein, 2010, pp.61) describe social media as "a group of Internet-based applications that build on the ideological and technological foundations of Web 2.0, and that allow the creation and exchange of User Generated Content." In social media, ideas/issues are the coin of the realm – the focus of engagement and the principal unit of exchange.

Participants in social media are engaged stakeholders in particular ideas or issues in the sense that these ideas or issues match their own needs and motivations. They self-select ideas or issues to engage which match their own needs (Brown, Broderick, and

Lee, 2007; Giddens, 1979; Heath, Singh, Ganesh, and Taube, 2013a; Parsons, 1951).

Action theory describes how needs-based motivations and value-based orientations of individuals drive their actions in open social systems such as social media. According to Action theory, we (humans) are self-aware social actors, cognizant of others and our social situation. Our social actions are goal-oriented, intended to satiate our needs. Parsons argues that, through their actions, individuals within a social system seek to fulfill their own needs, while the system must also have its own needs met in order to be perpetuated.

The needs of social media participants motivate them to engage in the exchange of information around shared interest with others in social media. Convergent interests among social media participants drive social engagement.

We take the view that by focusing on ideas/issues as the most granular element of our ontology, we can conceive interest based ontologies around specific ideas/issues which help conceptually segment audiences in social media based on members association with, and motivation toward, those ideas or issues. Parsons (1951), Giddens (1979), and others, have noted that humans are motivated by their own self-interests to pursue paths of activity that satiate those interests. Brown et al. (2007) find "shared group interests" and "group mind-set" drives engagement in social media. This matches our own observations drawn from the practitioner research presented earlier in this chapter, and shapes our view that ideas/issues are an organizing characteristic of audiences in social media, which forms the basis for our ontological perspective.

5.7.2 Bourdieuian Fields

At its outermost ring, our ontological perspective is derived from Bourdieu's concept of fields within the larger social system. Bourdieuian fields are social arenas of

production, circulation, and appropriation of goods, services, knowledge, or status (Schwartz, 1997). Fields are spaces of relations in which contestation is temporarily manifest as hierarchical positions among actors within them (Bourdieu and Thompson, 1991). Fields traverse the boundary from the larger social system to social media which is a sub-ordinate system populated by a subset of members of the larger system.

To the degree that members of a Bourdieuian field participate in social media, the field is also manifest within social media. The subset of members from the larger social system participating in social media at any point in time is dynamic, with different members participating at different times. However, this transience does not suggest that participants' association with the ideas and issues important to the field is in flux. It merely reflects the notion that social media are open social systems exchanging members with their external environment (i.e,the larger social system), and that engagement in social media is voluntary.

Within a field, the competitive positions held by actors in their struggle to accumulate and monopolize different kinds of capital are expressed as both product and process. Capital might be economic, cultural, or symbolic. The current configurations of capital within a field shape the social practice of its members. For Bourdieu, "figurations" embody the current relational positions and determinations within a field. This concept of figuration is drawn from the work of Norbert Elias, who was concerned with social structures established by mutually dependent actors, and their transformations consequent to increases or decreases in interdependencies among them and degrees of power. For Elias and Bourdieu, figurations are metaphorical lava lamps, always in the process of becoming something else.

Figuration is the product of contestation. In "The production of Belief: Contribution to an Economy of Symbolic Goods", Bourdieu discusses contestation as the agent of change in the art world. He describes how the avant-garde act collectively to challenge the status quo within the art field. When successful, the avant-garde replaces the previous avant-garde. When this change is sanctified by those in the art field, the previous avant-garde becomes the rear guard.

Within a field, at any given moment, there are ideas and actors which are impermanent, passing through quickly. Others hold an established, more permanent position. The rear-guard exemplifies an established element, which is defined as such by their continuing participation. The more permanent elements, such as the rear-guard, provide continuity to a field. Grenfell and James (2004, pp. 509) note that an important aspect of Bourdieu's field is that "competitors agree on the principles of verification of conformity – on the tacit contract, inseparably political and cognitive, which founds and governs the work of objectification". Field is a social construction.

We hold the view that social media are petri dishes of temporal and overlapping fields and figurations. Bourdieuian fields are dynamic, and aren't constrained by the implication of consensus necessary in the neo-institutionalist perspective. They preserve the conflictual essence of social interaction.

5.7.3   Topical Collectivities

Within Bourdieuian fields, collectivities (e.g.,the avant-garde) self-organize around the shared interests or perspectives of members. Collectivities self-organize around topics of shared interests and/or shared group mindsets. Collectivities emerge and have a reality that is partly independent of the interaction that gives rise to them (Morgeson and

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Hofmann, 1999). Giddens (1993) refers to this as duality of structure, where social structure is both constituted by human agency and yet is at the same time the very medium of this construction.

The term "topical collectivities" describes the self-organizing communities in social media where members exchange information with one-another around topics of shared interest. Topic, as used here, refers to a set of conceptually interrelated ideas which hang together in a cohesive way. We situate topical collectivities within Bourdieuian fields (i.e,social arenas of production, circulation, and appropriation of goods, services, knowledge, or status).

Topical collectivities manifest themselves consequent to the discovery of inter-subjective commonalities among social media peers. Parsons work on actor motivation helps explain the figuration of topical collectivities. Social media is conversational – dialogic. The semi-transparent nature of social media allows participants to identify conversations whose topical content matches their own interests. Actors are motivated, in terms of a tendency to the optimization of gratification, to engage in conversations that match their needs. The need-based motivations of individual participants, organizations and collectivities can converge around topics of common interest.

Topical collectivities are an expression of homophily, which describes the principle that interaction occurs at a higher rate among people who are similar along some set of shared attributes (Rogers and Bhowmik, 1970). Homophily is a basic organizing principle in social systems, with structural implication.

"Homophily implies that distance in terms of social characteristics translates into network distance, the number of relationships through which a piece of information must travel to connect two individuals" (McPherson, Smith-lovin, and Cook, 2001, pp.416).

Lazerfeld and Merton (1954) identify two types of homophily. Status-based homophily is based on formal, informal, or ascribed status. Value-based homophily is based on values, attitudes, and beliefs. Brown et al. (2007) find that status-based homophily has little value in characterizing homophily in on-line settings. They find that shared group interests and group mind-set drive value-based homophily. Value-based homophily around a topic of common interest is the cohesive force that motivates individuals, groups and organizations to self-organize into topical collectivities within the social media. Examples of these include: topical blogs, message boards, LinkedIn groups, forums, etc. Brown et al. (2007) offer empirical evidence that topical interests are foci around which topical collectivities form.

Practical rationality evolves within topical collectivities as a product of discursive interaction (Habermas, 1981). Shared understanding is achieved through cooperative search for understanding. The validity of consensual norms and shared social knowledge is grounded in inter-subjective and mutual understanding of intentions. These shape the perspective held by a topical collectivity toward its foci. Bourdieuas Avant-Garde art collective example, as well as the findings of Brown et al. (2007) that topical collectivities in social media can self-organize around group mindset, make apparent that members of a topical collectivity can hold a shared perspective toward the collectivity's foci. In this study, we describe the shared perspective of a topical collectivity as a frame. Frames, as used here, are of the variety discussed in social movement literature. Frames are a social construction of reality (Benford and Snow, 2000); shaped by referent facts and events, and

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drawing on the experience of the members of the topical collectivity. They embody the shared beliefs, superstitions, misconceptions and strategic motivations of the topical collectivity.

Frames are dynamic, subject to changing environmental realities and changing member opinion. Over time, as members express their opinions, offer knowledge, and share insights and perspectives, frames settle. While individual opinions within a collectivity may still diverge, the arguments which support or refute those opinions become entrenched, and interest in re-litigating them diminishes. Group consensus determines what counts as social knowledge, and what constitutes the group's frame.

Topical collectivities are self-organizing social structures in social media, situated within Bourdieuian fields. They organize around the need-based motivations of actors toward a topic. Their foci are shared group interest and/or shared group mindset. We describe the mindset of the topical collectivity as a frame which represents the topical collectivity's perspective toward their focal interest. Stakeholder theory argues that organizations must attend to "all and only those groups who have an interest in the business" (Freeman and McVea, 2001). We put forward topical collectivities as idea-based analytic conceptualizations useful to inform organizations regarding which groups (who) they must engage with in social media and what to engage on, based on the convergent interests of the organization and the engaged stakeholders within the topical collectivity around the ideas and issues which are its organizing foci.

5.7.4   *Dynamic Capabilities in Social Media*

In the case presented earlier in this chapter, there was an implicit connection between our framework for building thought leadership in social media and theory on dynamic

capabilities view of the firm. We identified, in the study, the micro-foundations of dynamic capabilities by which the organization sensed, seized and repositioned assets within the organization to respond to the opportunities and threats it identified in its social media environment and the tactics employed to make those capabilities operational in social media. We linked these capabilities to the strategic efforts of the organization to motivate their social media audience to take directed actions congruent with the organization's strategic goals (i.e.,adopting the view that Infosys is a thought leader). In this section, we refine our analytic perspective to include the theory of dynamic capability as necessary to complete our theoretic foundation.

A key challenge for organizations is to generate capital in social media which can be leveraged to execute strategy. One highly active area of research on the relationship between organizations, environments and strategy is the resource-based view (RBV)(Barney, 1991). A central tenet of the RBV is that organizations derive sustained competitive advantage from their endowment of assets which are simultaneously valuable, rare, inimitable and non-substitutable (VRIN). However, a central criticism of the RBV is its inability to explain how organizations can create or refresh VRIN resources in response to the dynamics of their environments (Priem and Butler, 2001; Teece, 2007). The dynamic capabilities perspective extends the RBV in this regard, describing how organizations adapt their resource base in response to their changing environment (Teece, 2007). The dynamic capabilities view argues the abilities of organizations to acquire and deploy resources in response to the dynamics of their environment are themselves a source of sustained competitive advantage.

Dynamic capabilities are organizational processes intended to "impact on the firm's extant resource base and transform it in such a way that a new bundle or configuration of

resources is created so that the firm can sustain or enhance its competitive advantage" (Ambrosini and Bowman, 2009, pp.9). Teece argues that dynamic capabilities enable new organizational strategies in response to changing market conditions by reconfiguring organizational resources in new and different ways. The reconstitution of organizational assets in response to new opportunities or changing market conditions can involve reconfiguration of organizational processes, resource allocation and/or resource utilization. Resources can include human capital, technological capital, knowledge capital, and tangible-asset-based capital within an organization. In the case of strategic organizational engagement in social media, dynamic capabilities enable or improve organizational strategies to generate economic, cultural, or symbolic capital held by the organization in the current figuration of their Bourdieuian field. Accumulation or monopolization of this capital enriches the strategic palette of the organization. For example, an organization might inculcate dynamic capabilities which generate social capital with key stakeholders in social media. The benefit of this might be to increase environmental munificence in order to positively affect the likelihood of success around the organization's marketing objectives.

Teece argues that dynamic capabilities are contingent on the existence of three fundamental component capabilities: "the capacity (1) to sense and shape opportunities and threats, (2) to seize opportunities, and (3) to maintain competitiveness through enhancing, combining, protecting, and when necessary, reconfiguring the business enterprise's intangible and tangible assets" (2007, p. 1319). Organizations aiming to strategically engage in social media must inculcate these micro-foundational capabilities to manifest dynamic capabilities toward their social media environment.

In the practitioner study presented in the previous section, we illustrated how our case organization operationalizes and executes on these micro-foundational capabilities to build thought leadership. Their dynamic capability to generate thought leadership increases the attractiveness of the organization to others as a target for engagement and increases the munificence of their social media environment toward the organization.

We demonstrated how our case organization scanned social media around ideas and issues important to the firm to sense and shape opportunities and threats. We described how the organization seize ideas and issues which provided them the opportunity to create thought leadership, a form of capital recognizable within Bourdieuian fields of production, We illustrated how they maintained competitiveness by enhancing, combining and reconfiguring their internal expertise and capabilities around the ideas and issues they engaged. We have demonstrated how the organization can link that capital to the execution of strategies in social media to manage their brand and influence demand for their products and services, impact overall market directions and guide future strategy

5.7.5   Conclusion

In the previous section, we describe our theoretically-informed ontological perspective of social media where, at the most macro layer, organizations and stakeholders are situated in Bourdieuian fields of production within the larger social system. Members of Bourdieuian fields share domains of interest. Bourdieuian fields are manifest in social media to the degree that members of the domain of interest engage there in the exchange of information. Topical collectivities exist within these Bourdieuian fields in social media, where specific topical interests are shared by members.

The ontological perspective we describe here establishes a way of conceptualizing an interest-based audience structure in social media based on the needs-based motivations of participants toward information.

We have also described how dynamic capabilities can be realized in social media based upon common interests of the organization and other stakeholders in social media associated with those same interests. This establishes a common link between our ontological perspective and dynamic organizational capabilities in social media. As demonstrated in our case, sensing around ideas and issues in social media is the means by which information-based ontologies in social media might be revealed.

Having described our interest-based ontological perspective toward social media, we build on that work in the following chapters and introduce theory on how to motivate directed action at multiple layers of our ontology. We re-imagine our case research through the theoretic lens of frames for directed action to consider the question: "How can organizations leverage frames for directed action to execute strategy in social media?"

CHAPTER VI

STRATEGIC FRAMING IN SOCIAL MEDIA

In the introduction to this research, we posed the question "How can organizations pro-actively engage in social media to motivate others to take directed actions which advance the organization's strategic goals?" We observed that to unlock social media strategies that motivate directed action, organizations must understand: Who should they engage?, What should they engage on?, and How can they motivate directed actions aligned with the goals of the organization through strategic engagement? The interest-based ontology of social media audiences we introduced in the previous chapter help inform the questions who to engage and what to engage on. When an organization strategically selects certain ideas or issues in social media to engage, they also nominate a potential audience comprised of those stakeholders who associate themselves with the ideas or issues being engaged. However, the question of how to motivate directed actions from those stakeholders remains unresolved.

Participants in social media are motivated to engage around particular ideas or issues based on their own needs and motivations. Engagement is voluntary. Therefore, organizational strategies to motivate directed action in social media must necessarily be concerned with how organizations can persuade others to take actions or adopt views that are congruent with the accomplishment of organizational goals. The discursive essence of social media suggests that, to motivate directed action, organizations must persuade their peers through conversational engagement.

They must engage their social media peers on ideas where their interests converge with those of the organization, and they must engage them in a way that motivates them to take actions aligned with organizational goals.

There has been considerable research by organizational theorists on how social movement theory can provide insight into organizational change and the development of new organizational forms (Campbell, 2007; Davis and McAdam, 2000; Den Hond and De Bakker, 2007; Hargrave, Ven, Timothy, Ven, and Christian, 2012; Lounsbury, 2003; Rao, Morrill, and Zald, 2000; Sine and Lee, 2009). In this research, we turn to social movement literature on framing to consider discursive processes by which organizations might transfer their objectives to a social media audience and motivate directed actions congruent with organizational goals. Campbell (2002) notes, organizations and social movements are both forms of coordinated collective action and, therefore, ought to be conducive to similar forms of analysis.

Social movements have demonstrated their ability to "frame" ideas or issues to motivate directed action from an audience in social media – action congruent with the framer's strategic goals. Consider, for example, the role of social movement activists in the recent failure of the U.S. Congress to pass the SOPA/PIPA legislation (Farrell, 2012), or in the on-line anti-sweatshop protests which caused Nike to adopt new employment policies toward its manufacturing facilities in Indonesia (Carty, 2002), or in the recent social media uprising against Trader Joe's regarding the sale of genetically modified foods (Deri, 2003). In each of these examples, social movements framed their focal ideas/issues in a way which motivated their audience to take directed actions congruent with their goals. These, and other examples, demonstrate a path along which strategic framing can be leveraged to coalesce audiences and motivate collective and directed action in social

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media. The challenge to organizations, then, is to flip the directionality of influence along this path such that they can themselves leverage framing strategies to mobilize audiences around the ideas and issues important to the organization, and motivate directed actions from them that are aligned with the organization's goals. In this chapter, we re-imagine our case through the theoretic lens of social movement framing to conceptualize a process model to explain "How organizations can pro-actively engage in social media to motivate others to take directed actions which advance the organization's strategic goals?".

6.1   Frames for Directed Action

Social movement literature often conceptualizes social movement activity in terms of the collective framing of an idea or set of ideas in a way which embodies the values of the movement and resonates with the ideologies, identities and cultural beliefs of supporters. Framing seeks to co-align the attitudes and motivations of an audience with the goals of the movement, such that there is negotiated shared meaning (Benford and Snow, 2000) leading to mobilization, collaboration, and cohesion among adherents (Haan, Den Hond, and De Bakker, 2006). Social movements "frame" narratives around an idea or issue to mobilize public support for organizational goals, while inviting public scrutiny of contested behaviors or issues (McAdam, McCarthy, and Zald, 1996). Campbell (2002, p.1) defines framing as "the strategic creation and manipulation of shared understandings and interpretations of the world, its problems, and viable courses of action". He describes frames as cognitive mechanisms which impact how actors perceive their interests, identities, and possibility for change. Benford and Snow (2000), define the production of frames as social construction of meaning.

"Framing", is a dynamic and active process of reality construction which necessarily implies contention. It is contentious in the sense that the framers generate interpretive frames that not only differ from existing frames, but may challenge them as well. Framing involves producing narratives which links events and referent facts, drawn from the environment, with the perceptions and beliefs of the intended audience. The goal of framing is to create a perspective around an idea which incorporates the strategic goals of the framers and resonates with an intended audience. Frames provide grammar for action. Social movements create and propagate frames across social media as a means to mobilize adherents and attract resources, and to motivate directed action from their audience which advances the strategic goals of the movement (Carty, 2002; Deri, 2003; Garrett, 2006; Loudon, 2010). Smelser (1963) noted that collective action is contingent on structural conduciveness. Social media is structurally conducive to collective action with regard to social engagement on ideas or issues, providing a convenient participatory structure to support collective action. It also affords framers a powerful platform on which to propagate frames to motivate and direct that action.

Framing aims to shape audience opinion, which has demonstrable power to; moderate supply and demand of an institution's material-resource environment (Sine and Lee, 2009), create entrepreneurial markets for new products, attract new talent to favored institutions (Earl and Kimport, 2009), diminish markets for unfavorable existing products (Deri, 2003), or bring pressure for political change (Lounsbury, 2003). Considerable research has been done to explicate framing as a mechanism with which social movements bring about change in the behaviors of organizations.

Often, this is described as a process of contestation and de-institutionalization of existing frames within the field of the organization, the embedding of movement values into the regulatory or economic structure of the field, and reconstitution of the field which now embodies those changed values (Lounsbury, 2003; Sine and Lee, 2009).

6.1.1 Framing Tasks

The scope of frames are typically limited to the interests of a particular group or set of inter-related ideas or issues (Benford and Snow, 2000). However, social movements sometimes develop a broad primary frame which embodies the philosophies, values and beliefs of the movement. These primary frames can be movement-specific. It is important to note that all other frames that the movement produces are derived from and congruent to these primary umbrella frames.

Frame construction involves the movement adherents negotiating a shared understanding regarding a problematic condition in need for change, making attribution regarding causality or blame, articulating an alternate set of arrangements, and asking others to act to bring about the desired change. The ability to motivate directed action depends upon the resultant frame providing a compelling "rationale for engaging in ameliorative collective actions, including the construction of appropriate vocabularies of motive" (Benford and Snow, 2000, pp.617). Snow and Benford (1988) refer to the core framing tasks as diagnostic, prognostic, and motivational (i.e. action mobilization) framing, and argue that by pursuing these core tasks, movement actors will attend to the interrelated problems of "consensus mobilization" and "action mobilization".

Diagnostic framing entails "diagnosing" the problem or issue, and attributing causality, while prognostic framing involves developing and articulating an intervention or

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remediation around the focal idea or issue around which there is need for change, in terms of strategies, tactics or plans of action. Motivational framing manifests a call to arms to enlist others to aid in the accomplishment of the desired change. Taken together, these tasks elaborate a shared understanding of "what the problem is", "what should be done about it", and a "call for action" to help bring about a proposed solution.

6.1.2   Framing Processes

Framing processes take place within fields or collectivities comprised of the intended audience, constituents, antagonists, media, organizations and bystanders. Frames are often contested by others who seek to refute the logic of a proposed frame or to counter-frame the ideas/issues in a way that favors their own strategic goals. Thus, framing is social and dynamic, and involves persuading members of the intended audience to adopt the frames' perspective toward the ideas or issues which are the intended foci.

At each stage, framing involves overlapping processes of discourse, contestation and strategizing (Benford and Snow, 2000). Discursive processes involve conversations and other communicative acts by the framers (i.e.,the organization and its adherents) around the focal idea or issue. Discursive processes are concerned with the articulation, amplification and diffusion of a frame. Framers work to spread the word, and propagate their frames to reach as much of their intended audience as possible. Through discourse, framers work to amplify the resonance of their frame, by strategically accentuating specific attributes within a frame through idealization, embellishment, clarification, or the reinforcement of existing beliefs. Frame amplification strategies seek to leverage existing cultural values, beliefs, and social knowledge to increase frame resonance.

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Strategic processes associated with framing refer to those processes which are goal directed and deliberate. Strategic processes might aim to recruit new members, mobilize adherents, gather resources, etc. Social movements might, for example, work to link their frames with those of a potential audience or prospective resource provider.

Contested processes are processes which are challenged by other actors in the action arena. Frames are always contested to some degree, as framing always intends to supplant some existing perspective toward an idea or issue with an alternate view. Framers are necessarily engaged in the "politics of signification" (Benford and Snow, 2000). However, framers are not able to impose on their audience any vision of reality they would prefer. They are, in fact, constrained by numerous challenges, such as; counter-framing by others, frame disputes within the movement, or dialectics which put the narrative of a proposed frame at odds with new events or emergent facts. Framing is thus a necessarily dynamic process which, at each stage involves discursion, strategizing and contestation in order to maintain a compelling rationale for directed action.

In the discursive peer-to-peer communicative environment of social media, organizations aiming to strategically motivate directed action to accomplish their goals must persuade their audience to adopt a view of the focal ideas or issues that motivates them to action congruent with the organization's goals. Here, framing provides framework with which to understand how this might be accomplished.

6.2   Framing to Motivate Directed Action in Social Media

In this section, we consider Infosys' strategies for engaging in social media through the lens of social movement framing to motivate directed action from topical collectivities in areas of their strategic interest.
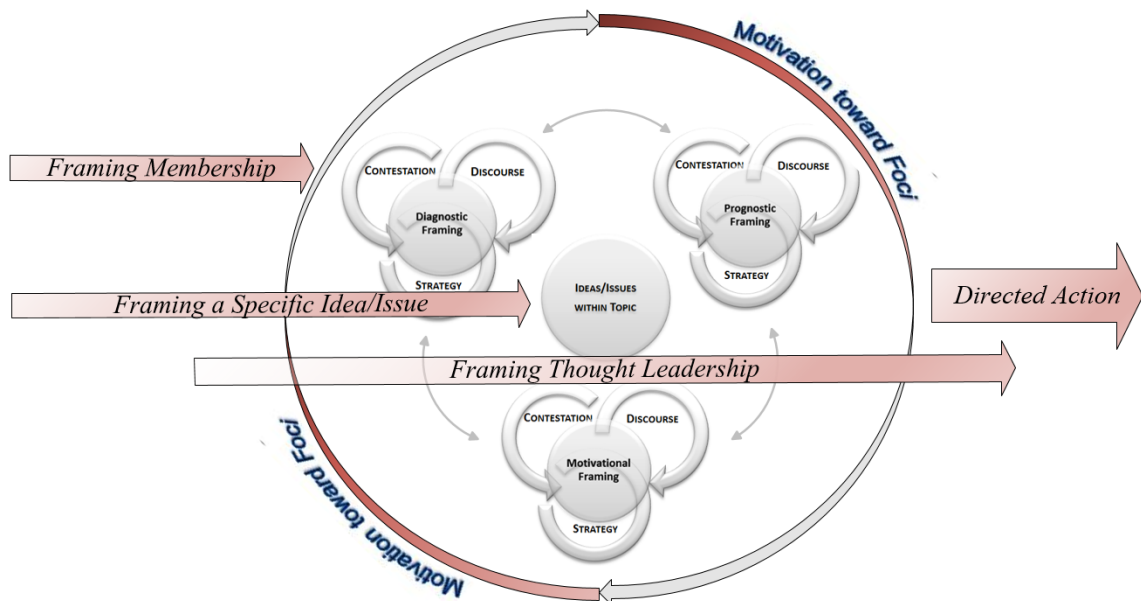
Figure 6. Framing to Motivate Directed Action from Topical Collectivities

We adopt Campbell's (2002) position that "organizations and social movements are both forms of coordinated collective action and, therefore, ought to be conducive to similar forms of analysis." While we recognize that there are often considerable differences between social movements and for-profit organizations in terms of organizational attributes such as governance and centralized authority, the focus of our analysis is on the mechanisms by which both organizational forms operationalize the goal driven behavior of motivating directed action from an audience in social media. We situate our case analysis in social movement theory on framing, and ascribe to our case organization the same strategic processes afforded social movements with regard to articulating and amplifying frames for directed action intended to advance the strategic goals of the organization.

We first describe the primary frame of the organization to understand their umbrella strategy for engaging in social media. The primary frame guides other engagement,

including the development of topical collectivities in social media to distill their engagement down to the set of actors they hope to engage around strategically important ideas or issues. We develop theoretic and conceptual insight into how actor motivations can be leveraged to create these interests-based communities. We describe how organizations can re-purpose framing mechanisms to motivate directed action in social media aligned with their strategic objectives. We describe in detail the efforts of the organization to create and identify topical collectivities, and frame directed actions through the delineation of the strategic, discursive and contested processes that the organization engages in to achieve their organizational goals.

6.2.1 Case Organization's Primary Frame

Our initial investigation of our case organization's social media engagement efforts began with an interview of the Global Head of Digital Marketing. During this interview, he described the broad strategy of social media engagement at Infosys as one of positioning the organization as a thought leader around the important ideas and issues within areas of current or future strategic interests. Prince and Rogers (2012) write: "A thought leader is an individual or firm that prospects, clients, referral sources, intermediaries and even competitors recognize as one of the foremost authorities in selected areas of specialization, resulting in its being the go-to individual or organization for said expertise". Regarding thought leadership at Infosys, the Global Head of Digital Marketing offered the following:

> The big umbrella message in social media is to establish awareness of Infosys
> as a thought leader ... thought leadership is the ability to understand
> customers' business and provide genuine insights on how technology can be
> used for competitive advantage in the customer's business in the immediate
> and long-term.

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> This is pursued to manage our relationships with customers – current and future. We use social media to generate and manage awareness of Infosys for the various market segments.

"Thought leadership" is the primary organizational frame for Infosys and embodies the organization's core philosophy, values, beliefs and identity. All other frames for directed action are derived from this primary frame.

To build thought leadership, Infosys identifies and visibly engages ideas mutually important to themselves and their audience in social media. They develop internal expertise and topical content around ideas or issues important to key and potential stakeholders in social media, and position that content back into social media to demonstrate their thought leadership. Positioning valuable content back into social media around key ideas and issues is a discursive process intended to articulate and amplify the view that Infosys is a thought leader. Thought leadership is a strategy for attraction, and helps the organization attract audiences that are strategically important to the organization.

Directed action frames are necessarily concerned with building and motivating an audience. Execution of thought leadership is the strategic process which the organization employs to link their interests to their potential audience – to attract new followers to the brand, mobilize adherents and motivate co-engagement, brand awareness, and a positive perception of the brand which will foster environmental munificence. Construction of this primary frame involves linking important ideas and issues drawn from the conversations taking place in social media with the perceptions and beliefs of the focal audience around these ideas and issues in a way which incorporates Infosys' strategic goals and resonates with the intended audience, namely that Infosys is a thought leader with regard to these important ideas and issues.

Contestation around Infosys' primary frame involves counter-framing by others in social media, or events which erode the value of Infosys' knowledge contribution. For example, the Head of On-line Marketing in-charge of Products observed:

> A potential client visited Infosys headquarters for a sales meeting about a product. After the meeting, she tweeted her negative impression of some functionality in the product. The tweet was picked up by the social media command center and passed on to appropriate personnel in the related vertical, and to digital marketing and customer relations. We take this very seriously – it represents a core aspect of our strategic business. We seized the opportunity to develop targeted content and contacted the potential customer to get feedback on potential improvements within hours – before she got on the plane. We worked with her on how to improve and deliver the functionality she needed. We were able to meet her needs and change her opinion. She talked about her experience on the social media.
> Someone can go in and put up their voice on the day of a new product launch that 'it doesn't work' and it goes viral – you are dead – what can you do? How do you counter that? You have to participate back in the social media where in your voice is also heard.

Evaluating the efficacy of the primary frame is an exercise in assessing how engaged the intended audience in social media is with the content which the organization has developed and deployed. Here, Infosys is interested in measuring return on engagement (Heath, Singh, Ganesh, and Taube, 2013a).

> We look at a wide range of things – visits from the target audience, visits from companies in our target market, repeat visits we get, are they downloading whitepapers? Are they contributing content, opinions, issues? The kinds of queries coming in based on content distributed? Are they identifying themselves and their willingness to talk to us or about us to others?

> We position content to the sites and track views and responses. We mine visits and see how many people are listening to our message. If there are visits, we assume they are listening. For example, we look at RSS consumption – what

feeds are consumed? Are they being mashed into other content? We look at visits from social media to our blogs and track repeat visits. This helps us figure out who is listening and what they are listening to.

We have had a lot of success with Blogs. We use Twitter and Facebook and LinkedIn and Slideshare to supplement. Today my blogger is not a spokesperson. He is a content expert. When a journalist wants to talk to the content expert, it cannot be handled by PR. That is a very big challenge. People [developers and content experts] have to learn new responsibilities – sometimes there are policies or guidelines ... but right now it is a chaotic time. Other blogs mention [our] analysts' opinions and best practices. (Global Head - Digital Marketing)

The strategic processes which drive diagnostic, prognostic and motivational framing around this primary frame are: identifying ideas and issues which are important to the intended audience (i.e., what is the problem), engaging in intellectual work to demonstrate "how" the ideas/issues can be advanced (i.e., what should we do about it). The organization is challenged to enlist others to co-engage and/or hold a favorable view of them as thought leaders on those ideas/issues (i.e., call to action).

6.2.2   *Sensing to Inform Motivational Frames*

At Infosys, central responsibility for managing the social media presence of the brand belongs to Digital Marketing, which operationalizes the organization's social media engagement via its Social Media Command Center (SMCC). The SMCC is a research vehicle with which Digital Marketing generates insights to inform their social media strategies.

Within the Social Media Command Center (SMCC), resources are invested to "identify and follow key communities (in social media) and what they are talking about" (Global Head of Digital Marketing). Recognizing the relationship between information

and audience, workers at the SMCC routinely scan various social media venues around keywords to determine where, in social media, conversations that match the strategic interests of the firm are taking place. These keywords might include the name of the firm, its products, its' competitors, etc. They might also include emerging ideas or terms associated with an area of strategic interest to the organization. The SMCC "holds its ear to the ground" to learn what is being said, by whom, and which ideas are gaining resonance (Head of Digital Marketing Strategy). Once potentially important conversations have been identified, Infosys listens closely to learn:

> Who are the stakeholders? Who are the decision makers? Who are the CxOs and the C-minus-1s? We can get an ear into this group and learn what is important ... he micro-trends. (Global Head of Digital Marketing).

> [We listen to see] who is talking and what they are saying? Longer-term issues are evaluated on their business value. We look at who in Infosys can use this and what can they do with this information. We could have done this earlier, but social media makes this real-time. (Practice Lead, Social Media and Technologies)

We observe that social media engagement by the organization is focused towards topical collectives whose stakeholders and topical interests are of strategic important to the organization.

6.2.3   Framing to Motivate Membership in a Topical Collectivity

In this section, we describe how our case organization employs a frame to motivate membership in a topical collectivity within an area of strategic interest. Our research at Infosys was coincident to their roll-out of a strategic social media initiative aimed at supporting the company's products and services in the field of retail banking. In particular,

Infosys strategized to engage C-level and C-minus-1 executives in the retail banking industry in conversations about the future of retail banking as a means to build relational and intellectual capital in the field and gather business intelligence which could inform; product development, marketing focus and management perspective toward the ideas and issues important to the members of this field.

To operationalize their strategy toward the future of retail banking, Infosys launched an on-line venue entitled Building Tomorrows Bank (BTB) as a topical collectivity where industry executives could share insights and talk about the future of retail banking.

> We opened this (BTB) for the CxO levels and let this become the breeding ground for conversations on how to build the banking industry of tomorrow. The group is not Infosys branded and not overtly promoted. There are over 600 members in the group. (Principal Architect)

> We bring together like minded people and engage them in discussions. This way, we can get an ear into a group and learn what is important ... the micro-trends. There is no discussion about selling Infosys' products or solutions. They are talking about their pain points and giving Infosys a platform. It's about changing the dynamics of the industry. (Global Head - Digital Marketing)

Coincident to the launch of this topical collectivity, the organization developed a motivational frame to encourage their intended audience to join and participate. At the earliest stage of its' endeavor to build this topical collectivity, Infosys strategized a frame to motivate C-level executives in the retail banking industry to participate. In the beginning, the organization was the only adherent to the frame, and was solely responsible for diagnosing, prognosticating, and creating a motivational frame to link the needs-based motivations of their intended audience to referent facts, ideas and beliefs drawn from the environment to induce their intended audience to join the topical collectivity. Thus, the

initial framing processes were internal to the organization, and the production of this motivational frame was the result of discursive, strategic and motivational processes which played out within the management of the organization.

The narrative of the motivational frame positioned the topical collectivity as an important resource for professionals in the field of retail banking.

> We want the outside to know what the community is doing – others need to know that this is a "happening place". So, that is where we use social media. We very effectively use LinkedIn groups to give a broad sense of what is happening in these communities ... social media becomes the medium ... we get 'follows' and participation. (Principal Architect)

> Participation is not a problem. We can easily get too much. We look at how active the members are and try to give them value. Why would you spend time here? We have to understand what is different? What kind of consumption? What behavior? What topic is being discussed? It is important to invest time and effort ... that is a challenge and we are trying to achieve that. (Practice Lead - Social Media at Infosys)

6.2.4   Framing Specific Ideas/Issues

Once the topical collectivity was established, Infosys focused its framing efforts on the ideas and issues which were strategically important to the members, including themselves. The goal of the frames produced in this manner was to encourage directed action in the form of collaboration, co-innovation and co-engagement.

> You provide content valuable to them (the collectivity). You build and give them the platform and engage with this community – the brand becomes part of the community. Their needs are fulfilled through the content provided by members of the community including the brand.

The thought leader can fulfill needs by providing knowledge or engaged peer discussions with the group. Then your marketing objectives are transferred to the community and they can provide recommendation. (Practice Lead - Social Media at Infosys)

Sometimes, we ask members from the community to co-develop with an Infosys person and Infosys branding and then publish this to the community – members and peers participate. (Practice Lead - Social Media at Infosys)

Behavior is the differentiator – if there is co-creation and engagement with the customers, then it makes sense to
move to a co-creation mode of engagement. (Global Head - Digital Marketing)

Information is huge and time is less; we have to focus on 1 or 2 things. Focus on where the value is through very focused and niche communities where we can create value. It is about tapping interested people's knowledge, knowing the pulse of the clients and subscribers. There is a wealth of information. If you can do that in a community, the potential is phenomenal. For example – What is the spend level in individual channels ... I can get that kind of information in the community. (Principal Architect)

Expressed in terms of framing, Infosys' strategy regarding the BTB topical collectivity is concerned with diagnosing the primary issues within the BTB which are important to its stakeholders, prognosticating on strategies congruent with the collectivity and the organization's goals, and motivating the collectivity to take directed actions on their shared vision. Successful frame execution would enable the accomplishment of Infosys' high-level strategies of building various capitals in the field of retail banking. Moreover, stakeholders in the topical collectivity benefit through co-innovation and co-creation, where the collectivity is able to influence markets and create new demand for their future products and services by marshaling their collective resources and intelligence.

The elaboration of diagnostic, prognostic and motivational frames is the result of a set of iterative and overlapping processes of strategizing, discourse, and contestation. Here, we elaborate these in the context of the organization's strategic engagement with the BTB topical collectivity.

6.2.5 *Strategic Framing Processes*

Strategic framing processes involve an organization strategizing on how to align a frame with their strategic objectives such that the frame will resonate with members of the topical collectivity. Strategic framing is goal directed. It intends to achieve particular strategic outcomes, such as to influence an organization's markets, create demand for their products and services, manage perceptions of their brand, and marshal intelligence from the community. Organizations can link their strategic interests to the current frame of the topical collectivity through frame alignment to produce a resultant frame for collective action that will meet their strategic objectives. Frame resonance is an expression of the success of the organization's frame alignment as part of the strategic framing process.

> When you are discussing things around what you can do or are doing for the customer – customers have issues, we have a solution. You discuss those things and take the message forward. If you have strong content and you get subject matter experts aligned to that content participating – you will get customers to engage with you. (Head - On-line Marketing: Products, Platforms and Communities)

The organization is interested in engaging ideas and issues within the topical collectivity. Management engages in a process to determine which of the ideas and issues in the topical collectivity they *can* and *should* act upon. Does the idea mesh well with organizational capabilities? Is it aligned with strategic goals? Is the idea one that must be

engaged in order for the organization to be a thought leader? Are strategically important actors discussing the idea? These are critical questions that upper management involved in social media strategy at Infosys must answer to direct strategic action. Management examines ideas from the topical collectivity and selects those with strategic potential.

6.2.6   Discursive Framing Processes

Discursive processes involve conversations and other communications by members including the organization around the focal idea or issue. Through discourse, engaged members within a topical collectivity are able to connect the ideas, events, and experiences of members to articulate a cohesive frame which embodies their shared understanding toward the idea or issue. "What gives the resultant collective action frame its novelty is not so much the originality or newness of its ideational elements, but the manner in which they are spliced together and articulated, such that a new angle of vision, vantage point, and/or interpretation is provided" (Benford and Snow, 2000, pp.621). Social media represents a transparent and "increasingly information-rich and communication-intensive environment" (Bimber, 2001), from which frames can be produced or evaluated. Organizations can observe the existing frame of the topical collectivity and observe the interests of stakeholders and other influential peers within the collectivity.

Infosys invites participation in the BTB topical collectivities for banking executives to share ideas around retail banking and share their thoughts with their peers. Discursive processes to articulate and amplify the proposed frame are observed in the topical collectivity. As the BTB community started to develop, Infosys began positioning topical content useful to them based on their revealed interests, as a discursive process.

Infosys routinely surveys members of the BTB to gather information around the ideas and issues important to them and their individual perspectives toward these issues. They distribute the results back to members, providing them inimitable insights on the perspectives of their peers. This helps build the value of the community. Members are incented to continue their engagement based on the opportunity to accumulate informational capital (i.e., peer-validated insights and information) and relational capital consequent to their social contribution within the collectivity.

> For members, the most beneficial [take away] is validated information because a dedicated community of your peers who "know" endorse the information [or not] – and they give you information with context and perspective that is useful for you. This is more powerful than just news. When the perspective is shared, it has substance. In our [social media] communities, value information is filtered, endorsed and validated across the borders. It simulates community and extends over a time period where people remain engaged. This has a lot of value beyond what you can get from branding and marketing. (Head - On-line Marketing: Products, Platforms and Communities)

Selectivity in the choice of ideas or issues on which to commit resources for internal R & D is critical to efficient stewardship of organizational resources. Infosys strategically selects and invites members from the community to co-develop content with an internal expert or engineer and publish the resulting innovative content back to the topical collectivity, inviting members and peers to participate. On occasion, Infosys invites industry experts to evaluate specific ideas or innovations and comment.

6.2.7 *Contested Framing Processes*

Frames represent a constructed perspective of reality that serves the interests of the topical collectivity members, including the organization. Frequently, frames are subject to contestation and/or counter-framing. Framing contests frequently occur within complex

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multi-organizational – and sometimes multi-institutional arenas (McAdam, McCarthy, and Zald, 1996). Contestation describes how members of the collectivity contest the perspective captured in the frame and present alternative frames. It is possible that external events and/or alternative frames disconfirm the ideas or beliefs that constituted the original frame. Frame contestation is a dynamic engine which drives continual reconceptualization and co-alignment.

> If you [a participant] like something, you broadcast – if you don't like something, you broadcast. The middle space is usually vacant. No one owns the social media. Clients may complain about products and services. We have to be on top of that. It's not about 'doing social media'. Organizations are typically not geared up for the participation that social media demands – especially a large enterprise. An organization is used to command and control – but social media breaks this. The people create the voice not the brand. (Global Head - Digital Marketing)

> We monitor analyst interactions, media relations, message development, position development and solution development. It is a huge market research vehicle with lots of opportunity, but it requires very fast timing and requires us to commit to transparency. We need to be ready to act as soon as possible. These are the core parts of the overall strategy. (Principal Architect)

To the degree that competition and conflict exist within topical collectivities where organizations are strategically engaged, strategies of compliance, contestation and contention are appropriate. However, it is important to note that the strategy for engagement an organization might employ toward their potential customers is likely different than the strategy for engagement an organization might employ toward competitors in an inter-organizational setting. This is an area that warrants investigation by researchers, particularly the power relations among members of topical collectivities in social media.

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6.3 Conclusion

In this chapter, we have re-imagine our case through the theoretic lens of social movement framing to conceptualize a process model to explain "How organizations can pro-actively engage in social media to motivate others to take directed actions which advance the organization's strategic goals?". We articulated our theoretically informed and empirically derived process model, based on social movement framing literature and our own observations, to describe how organizations can develop frames to motivate directed actions congruent with the organization's goals. In particular, we have described how organizations can employ frames to motivate membership in topical collectivities, and how they can frame around strategically important ideas and issues within those collectivities to motivate directed action in the form of co-engagement, co-innovation and collaboration.

Reanalyzing our case through this lens, we learned that organizations can leverage frames by developing motivational frames which linking their strategic interests to the inherent motivations of an audience toward a set of focal ideas and issues where their interests and those of the organization overlap. This is the case with Infosys' strategy for thought leadership, as well as its strategy for building the BTB community. Each is based on attracting an audience to ideas and issues within the areas of Infosys' strategic interest and persuading them to co-engage.

Without theory that provides contextually appropriate conceptualizations and analytics, organizations are challenged to implement effective strategies for social media. Good theorization creates new and useful ways of seeing concepts and relationships in a problem domain. The theorizations offered in this chapter provide organizations new insight into social media which allows them to conceive strategies for social media

engagement which motivates collective actions from others in social media congruent with the organization's strategic objectives. We build on the ontological model articulated in the previous chapter to offer conceptual insight into strategic action in social media and show how social movement framing can be re-imagined to allow organizations to pro-actively engage important stakeholders in social media to motivate collective action. Through our case research, we have described how organizations can create and/or strategically engage topical collectivities in social media to influence markets, create demand for their products and services, manage perceptions of their brand, or marshal intelligence in social media.

In the chapter which follows, we leverage the ontological and epistemological perspectives develop in chapters 5 and 6 to theorize on how organizations can cultivate topical collectivities in social media around their strategic interests to drive open innovation. We ground this work in the literature of open innovation to demonstrate how topical collectivities, as social structures, can support organizations' open innovation initiatives in social media.

CHAPTER VII

COLLECTIVITIES TO DRIVE OPEN INNOVATION

In the previous chapter, we focused on how organizations can strategize frames to motivate directed action, and described how they could create frames to build membership in topical collectivities and to motivate directed action within them. Our case research also reveals that organizations can strategize to motivate collaboration and co-innovation between themselves and their stakeholders in social media. The semi-transparent nature of social media affords organizations unprecedented access to key business intelligence regarding the ideas and issues being discussed by their stakeholders, shifts in stakeholder opinions or perceptions, and emerging ideas or issues foundational to the process of innovation. In this chapter, we leverage our information-based ontology of audience, and framing to motivate directed action, to reinterpret our case through the lens of open innovation theory and consider how organizations can avail themselves of social media's bounty through co-engagement within topical collectivities on ideas and issues of mutual importance to drive open innovation.

The open innovation view advanced by Chesborough (2003) and others argues that useful knowledge is widely and externally distributed – that even the most capable R&D organizations must identify, connect to, and leverage external knowledge sources as a core process in innovation. Open innovation advocates the use of "purposive inflows and outflows of knowledge to accelerate internal innovation, and expand the markets for external use of innovation, respectively" (Chesborough, 2003).

Despite this prescription, many organizations are challenged to develop strategy to identify, connect to and leverage the knowledge available in social media as core processes in their pursuit of open innovation.

Successful open innovation in social media requires that organizations develop business models which manage the purposive inflows and outflows of knowledge between organizations and their social media environments in a way which causes value to flow to the organization. Chesborough (2006) speaks to derivable value of open innovation in terms of value creation and value capture. Value creation concerns the value added through an open innovation initiative across the industry value chain, including the organization and its stakeholders. Value capture, on the other hand, is concerned with how internal value is realized by the organization, enabling the organization to sustain or advance its competitive position. How can organizations interact in social media to foster open innovation to create and capture value? Value capture is contingent on the organization inculcating processes for selecting which external ideas and innovations to engage and to what degree, selecting stakeholders in social media with which to exchange knowledge to fuel open innovation and expand markets, and capturing value from the inventive output of internal research and development (R & D) motivated by these activities. It is in strategizing these processes for social media that organizations struggle. Social media have fundamentally changed the communicative relationships among organizations and their stakeholders. There is little theorizing in Information Systems (IS) research to inform organizational strategies on how to manage the inflows and outflows of knowledge in the peer-to-peer communicative environment of social media in a way that causes value to flow to the organization. Aral et al. (2013) note the current lack of understanding with respect to the best ways in which organizations should organize and

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manage social media, suggesting that organization must learn how to optimally use this new set of tools to meet their objectives. A recent call for papers by the *Journal of the Association for Information Systems* notes that "as open innovation rapidly gains importance, new questions and challenges arise which require a deeper understanding" (Whelan, Conboy, Crowston, Morgan, and Rossi, 2014, pp.2). They observe, "While open innovation may be a growing trend, it is clear that better theory is needed in order to extract the potential value it offers".

Chesborough (2003) makes the compelling argument to organizations that "not all the smart people work for you". Knowledge can grow in a variety of settings. Ubiquitous connectivity, globalization and the rise of social media have transformed the way in which knowledge can be produced and shared. Web 2.0 technologies allow knowledge content in social media to be continuously modified by all users in a participatory and collaborative fashion. Social media are peer-to-peer communicative environments where social media participants are "fully in control of their on-line experiences and where their motivations lead them to connect on-line with other consumers while they create and consume on-line content, much of it user – rather than marketer-generated" (Hoffman and Fodor, 2010). Prahalad and Ramaswamy (2003) presciently suggested over a decade ago that next practices of innovation must shift the focus away from products and services and onto experience environments supported by a network of companies and consumer communities – to co-create unique value for individual customers.

Literature recognizes the importance of stakeholder/organization collaborations as the next practice engine of open innovation (Heath, Singh, Ganesh, and Taube, 2013a; Nambiisan, 2002; Sawhney, Verona, and Prandelli, 2005). In this research, we describe topical collectivities as communities of interest in social media where organizations can

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collaborate with stakeholders to induce open innovation. We present an empirically and theoretically informed framework to explain how organizations cultivate topical collectivities in social media to drive open innovation, and present an in-depth explanatory case to illustrate its operationalization. We describe how topical collectivities supported by organizations form experience environments to foster open innovation. We employ frames for directed action to describe how organizations can motivate stakeholder participation in strategically important topical collectivities, and how they can motivate open innovations within those topical collectivities. We situate our theorizing on open innovation in social media within Bourdieuian fields, providing a referent link between the social media strategy of the organization and their larger social environment.

In the sections which follow, we: discuss the background literature on open innovation and introduce our theoretic perspective and framework for open innovation in social media. This is followed by a discussion on our theoretic model, which is informed by our case. We conclude with the implications of our study for the theory and practice of open innovation in social media.

7.1 Theoretic Foundations for Open Innovation

Open innovation is a theory of organization and environment which theorizes that ideas and innovations in the external environment can drive internal innovation which creates value for the firm. Open innovation is an open systems theory on organizational R & D which advocates that organizations manage the purposive inflows and outflows of knowledge between themselves and their external environment to fuel internal innovation and create new paths to market. The open innovation paradigm holds that "firms can and should use external ideas as well as internal ideas, and internal and external paths to

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market, as they look to advance their technology" (Chesborough, 2006, pp.3). The utility of open innovation rests on the business logic described in table 5.

Open innovation takes the view that useful knowledge is widely distributed – that valuable ideas can come from inside or outside the organization and the inventive output that results from internal processing of that knowledge can go to market through internal or external channels as well. Equal weight is given to internal and external knowledge. The open innovation view stands in contrast to the proprietary, or closed, view of organizational innovation where internal R & D and the organization's protected intellectual property generate returns to the organization. In the closed view, external knowledge plays a supplemental role, however the firm remains the locus of innovation. Consequently, the internal activities of the firm are the focus of organizational strategy. Open innovation shifts the locus of innovation outward to incorporate ideas and innovation from the organization's external environment.

As open innovation theory treats organizations' R & D as open systems, the business models play a critical role as both the source of value creation and value capture. Chesborough (2003) describes the open innovation business model as the cognitive device which filters in projects that fit with the strategy of the model and selects against those that do not. External ideas and external R & D affect the internal R & D of the firm. Ideas are actively selected from the external and/or internal environment, and transformed through internal R & D into products, services or knowledge which is exported back into the environment in a way that captures value for the firm. Feedback on the quality of the inventive output is evaluated by management to inform organizational strategy.

Table 5. Logic of Open Innovation (adapted Chesborough 2003)

1.	Not all smart people work for the organization. There is benefit in working with smart people inside and outside the organization.
2.	External R & D can create significant value; internal R & D is needed to claim some portion of that value.
3.	Organizations need not originate research to profit from it.
4.	Building a better business model is better than getting to market first.
5.	Organizations should profit from others' use of their IP whenever it advances their own business model.

7.1.1 The Private-Collective Model of Open Innovation

Hippel and Krogh (2003) identify two prevalent models of innovation in literature, the "private investment" model and the "collective action" model. The private investment model concerns closed innovation, where private investment in R & D to develop inventive content results in returns to the private investor consequent to the production of private goods and efficient intellectual property protection. In contrast, the "collective action" model is one of open innovation where, under conditions of market failure, innovators collaborate to produce inventive content for the public good. A key distinction between these models is, of course, participant motivation. In the private investment model, motivation is clearly pecuniary, while in the collective action model the motivation is less clear. When grappling to establish the rational economic basis for peer participation in the development of open source software, Hippel and Krogh (2003) argued that participants' motivation might be explained by their self-provisioning of private rewards consequent to their contribution to the public good (i.e.,learning, personal enjoyment, sense of community). Based on the mixed motivations of for-profit organizations and altruistic individuals participating in the development of open source software, Von Hippel

et al. propose that open innovation in this context reflects a hybrid "private-collective" model where organizations and individuals participate based on differing motivations. Organizations invest capital and internal R & D to generate returns, while individuals invest sweat equity to generate social benefit and to self-provisioned private returns. In their words, the private-collective model represents a "very rich and fertile middle ground where incentives for private investment and collective action can coexist, and where a 'private-collective' innovation model can flourish" (Hippel and Krogh, 2003, pp.213).

The private-collective model offers support for our view that organizations can motivate collective action in social media to foment external innovation and create value for the participants while executing a private investment model to capture some portion of that value for the organization – a win-win proposition for the stakeholders and the organization. This is a necessary condition for developing a successful business model for open innovation in social media.

7.1.2   *Strategizing Open Innovation in Social Media*

In order to execute open innovation in social media, organizations are tasked with strategizing the requisite processes to operationalize their business model. To create and capture value, they must conceive processes for selecting which ideas and innovations in social media to engage. They must strategize processes to identify social media stakeholders associated with the ideas they engage in order to participate in the exchange (purposive inflows and outflows) of knowledge to fuel external innovation and expand their paths to market. They must strategize how to best capture value from the inventive output that results from internal R & D around the ideas or innovations they engage.

How can organizations accomplish these contingent processes on which open innovation depends? Social media are communicative multiverses – open systems where search costs are high and organizations can easily overlook strategically valuable ideas and innovation information. How might organizations accomplish productive inquiry to locate what they need in order to do what they want to do (Dewey, 1922)? How can organizations identify appropriate audiences in social media with which to engage in the exchange of information to drive external innovation and expand markets for the organization's inventive products?

7.1.3   *Topical Collectivities in Social Media*

In the previous chapters, we have described topical collectivities as interest-based communities which arise (or are created) in social media around the common interests of participants. We have described them as a useful analytic with which organizations might identify the stakeholders in social media associated with certain ideas or issues where collaboration to drive open innovation might be most fruitful.

Topical collectivities cohere around shared group interest and/or shared group mindset. To the degree that the shared group interests and/or shared group mindset of the topical collectivity is congruent with the interests of an organization, the membership of a topical collectivity represent the stakeholders of the organization and a potential audience with whom to exchange of information to drive external innovation and expand markets for the organization's inventive products. By collaborating in open innovation around the ideas and issues within the focal interests of a topical collective, organizations establish a relational link between themselves and their potential audience. In this way, the organization builds the relational capital between itself and its stakeholders in social

media necessary to expand the paths to market for its inventive output. The ability of topical collectives to attract audiences and concentrate ideas and innovations from the larger social media around a particular topic reduces the search cost for organizations in their quest to drive open innovation in social media.

Hardy and Phillips (1998), in their examination of the discursive nature of collaborations consider asymmetrical power relations and control of capital in inter-organizational collaborations. They recommend the need to extend beyond the individual instances of inter-organizational collaboration to the inter-organizational domain of interaction. They offer the conceptualization of inter-organizational domains as discursive communities with generalized membership to facilitate discourse around issues of common interest as a collective, while accounting for asymmetry in power relations and diversity in strategic objectives in the membership (Hardy et al., 2005). In our work, we offer topical collectivities as collectives that exist in the inter-organization domain (or field) of interaction where membership is generalized, as in an open system. Here members engage in communicative discourse on topics of specific interest to facilitate open innovation in the communities. Thus, we position topical collectivities and the open innovation in topical collectivities in social media as a special case of inter-organizational domains of interactions as envisioned in the multiple research papers in Hardy's work.

Hardy et al. (2005) note that these communities and stakeholders operate in a larger discursive setting which influences the relevant ideas and issues as well as the nature of conversations among stakeholders. They note the existence of patterns in these discursive communities based on the ideas, thoughts and conversations of participants. Also, they note that these patterns of ideas and thoughts are transient – subject to change by new ideas and thoughts through discursive processes of members. The notion of the

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collectivities put forth by Hardy in her work on inter-organizational domains has a strong conceptual link to our theorization of topical collectivities as natural social structures for innovation that organizations can cultivate in social media to develop open innovation communities. We build upon the well-respected theorizations offered by Bourdieu, Chesborough, Hardy and Parsons to ground our theorization of topical collectivities and their utility to organizations seeking to pursue open innovation in social media.

7.2   A Private-Collective Model for Open Innovation in Social Media

Innovation in topical collectivities centers on the ideas, issues and concerns of shared interest to members. Members, including supporting organizations, collaborate motivated by their own tendency toward optimization of gratification (Burke, 1969; Giddens, 1979; Parsons and Smelser, 1956). For example, a sponsor organization might facilitate and promote a topical collective for the purpose of gathering state-of-the-art market intelligence around the prominent ideas and issues of its members. We have seen in our own research that organizations might invest resources to address ideas and issues important to a topical collectivity in order to build reputation, promote the brand, or encourage future collaboration. Each of these outcomes is intended to result in financial gain for the firm.

The motivation to incentivize the private investment model of innovation is pecuniary. In contrast, Hippel and Krogh (2003) argue that a rational economic basis to motivate participation in a collective action model of innovation might be participants' self-provisioning of private rewards consequent to their contribution to the public good (e.g.,learning, personal enjoyment, sense of community). A seminal study by Wasko and Faraj (2005) extends that explanation to consider the promise of accruing various kinds of

social capital is motivation for participation in innovative collective action. Importantly for this study, they situate their research in a computer-mediated discussion forum (i.e.,social media) sponsored by the national legal profession association where participants from the legal profession (i.e.,topical collectivity) could discuss ideas and issues related to the field of law. Their work provides empirical support that individuals engage in innovative collective actions in topical collectivities in social media in order to accrue structural, cognitive and relational capital. This is consistent with Bourdieu's view that within a field, actors compete and struggle to accumulate and monopolize different kinds of capital (Bourdieu and Wacquant, 1992). What is not considered in the explanations given by Hippel and Krogh (2003)or Wasko and Faraj (2005) is how knowledge capital accumulated in social media provides participants an advantage, however brief, over non-participants in the larger Bourdieuian field. Perhaps additional study would be useful here.

Organizational scholars suggest the convergence of the open source communities and inter-organizational ecosystems has led to blurring of the private/collective models for innovation (Nambisan and Sawhney, 2011; Sawhney et al., 2005). "On the one hand, companies are seeking out open source communities and other communities of creation (for example, customer communities and inventor communities) as partners in innovation. On the other hand, innovations that have emerged in the open source communities are transitioning into the commercial world (for example, commercial open source)" (Sawhney, Verona, and Prandelli, 2005, pp.6). This convergence is creating a more complex and nuanced landscape. In this research, we take the "very rich and fertile middle ground where incentives for private investment and collective action can coexist" offered by Hippel and Krogh (2003) to consider how organizations cultivate topical collectivities.

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The task of cultivating and perpetuating topical collectivities in social media requires that organizations motivate membership in the topical collectivity and induce open innovation which creates value for the members. They must motivate directed action. We will demonstrate through our case how this is accomplished.

7.3   Theoretic Framework to Drive Open Innovation in Social Media

Open innovation perspective advocates that organizations engage in the "purposive inflows and outflows of knowledge to accelerate internal innovation, and expand the markets for external use of innovation, respectively" (Chesborough, 2003, [pp.83]. In the previous section, we presented a theoretically-informed framework (see figure 7) describing how organizations can accomplish this in social media.

In the section which follows, we present a theoretically-grounded and empirically informed framework for open innovation in social media through collaborative engagement with topical collectivities, which concentrate the exchange of ideas and innovation around a particular topic and reduce the search cost for organizations as they seek to identify and select ideas and innovations to fuel internal R & D. We describe topical collectivities as audiences of stakeholders in social media whose interests in a particular ideas or issue are congruent with those of the organization. We describe how organizations can engage these stakeholders in the purposive exchange of knowledge to motivate open innovation and expand external paths to market. We describe how, through framing, organizations motivate membership in topical collectivities from the broader social media around topics within the areas of strategic interest to the firm.
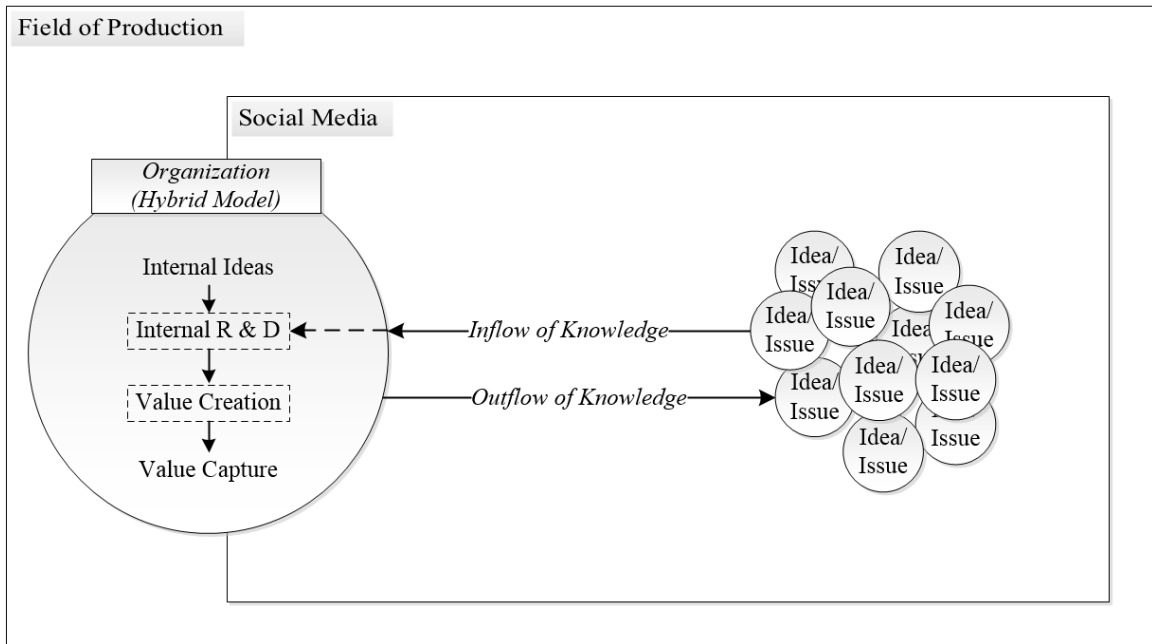
Figure 7. A Conceptual Model of Open Innovation in Social Media

We describe how, through framing, organizations induce open innovation around focal ideas within the topical collectivity. We situate the actions of the organization within the private investment model of innovation, and the collaborative innovation within the topical collectivity in the private/collective model described by Hippel and Krogh (2003).

7.4 Exemplar Model for Open Innovation in Social Media

Infosys strategy toward open innovation in social media is to pair the ideas and insights gleaned through strategic engagement within topical collectivities in social media with the organization's internal R & D capabilities to inform their products, services and strategies, and demonstrate thought leadership in their field.
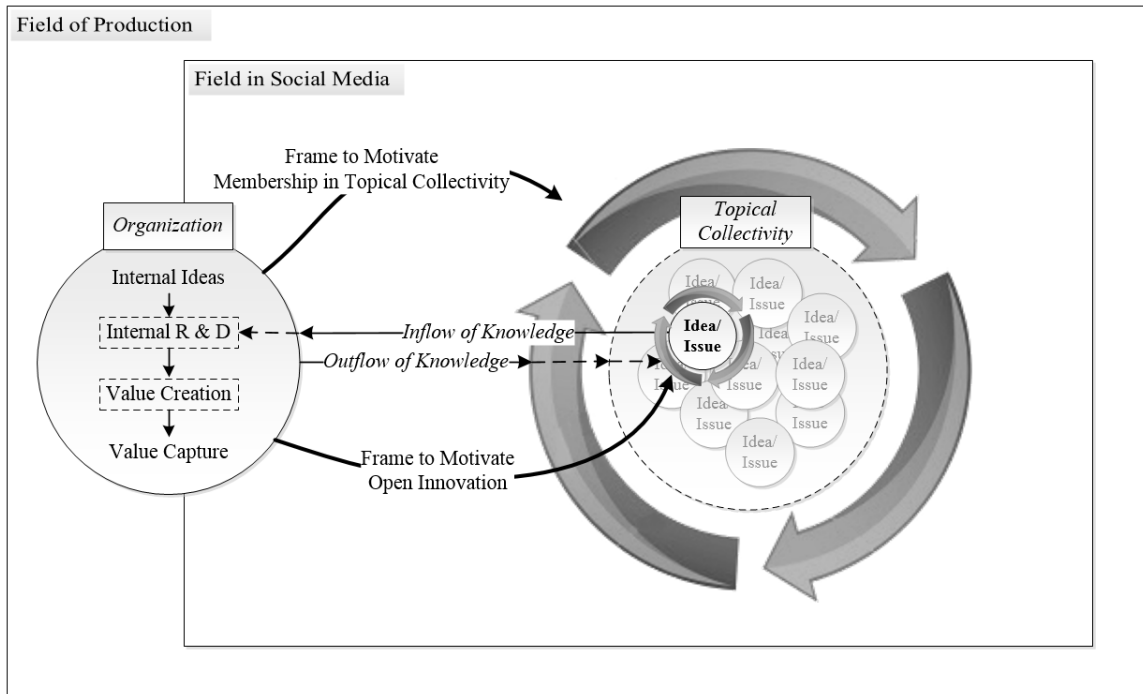
Figure 8. Framework for Motivating Open Innovation in Social Media

The Global Head of Digital Marketing describes thought leadership as the ability "to understand customers' business and provide genuine insights on how technology can be used for competitive advantage in the customer's business in the immediate and long-term". To build thought leadership, Infosys selects and visibly innovates around the ideas and issues in social media most important to themselves and the stakeholders with whom they hope to engage.

Central responsibility for managing the social media presence of the brand belongs to Digital Marketing, which operationalizes the organization's social media strategies via its Social Media Command Center (SMCC). The SMCC is a research vehicle intended to generate insights and inform product development, message development and positioning strategies for the organization. Social media initiatives taken up by the SMCC can

originate within the SMCC or within other of the organization's functional units. When originating in other units, the SMCC facilitates the social media initiatives while the originating unit assumes partial financial and staffing responsibility associated with executing the initiative. In each case, the SMCC depends on its internal stakeholders (other business units) or the intelligence it gleans from the organization's external stakeholder in social media to select which ideas or issues warrant consideration.

Workers at the SMCC routinely scan social media around lists of keywords. These lists might include: the name of the organization, its offerings, its competitors, emerging ideas, or terms associated with topics of strategic interest to other business units within the organization. The SMCC "holds its ear to the ground to learn what is being said, by whom, and which ideas are gaining resonance" (Head of Digital Marketing Strategy). The decision to act on a particular idea or issue is contingent on various criteria that elevate its importance. Is the idea or issue directly aligned with a strategic interest of an internal business unit? Is the idea/issue being raised by one or more key customers? Are key competitors or thought influencers interested in the idea? Each of these motivates the organization to evaluate the technological, market and competitive implication of "filtering in" an idea for internal R & D. Knowledge inflows selected from social media by the SMCC are escalated to appropriate decision-making authorities within the organization to assess their strategic potential.

When Infosys makes the decision to act on a particular idea, they dedicate the necessary internal R & D to develop content and expertise around the idea that can create value for the organization and its stakeholders in social media, foster long-term and meaningful co-engagement with social media peers, and capture value for the organization. Internal R& D, fueled with ideas drawn from social media, shapes the

products, services and strategies of the firm. Often, ideas are "filtered in" with the intention of developing inventive output to position back into social media as evidence of Infosys' thought leadership. The value which is captured by the firm consequent to this purposive outflow of knowledge takes the form of social, relational or structural capital with social media stakeholders. In this way, the firm participates in innovative engagement with focal ideas in collaboration with others in social media. The social capital they generate by innovating around the ideas and issues which challenge or excite their stakeholders helps raise awareness of the organization and create munificence in social media environment toward the firm. In the words of the Head of On-line Marketing: Products, Platforms and Communities, "In the long term, it is the relationship that matters. The thought leadership position helps develop and nurture relationships."

Infosys evaluates the efficacy of its strategy to build thought leadership in social media in terms of return on engagement. They assess the number or requests for information they receive from social media on an idea, the number of whitepapers viewed, the numbers of PDF views, and the number of comments to a blog, etc. They monitor social media for conversations which link the organization to the referent idea to see what is being said. In this way, they quantify the results of their engagement.

7.4.1   *Framing to Motivate Membership in Topical Collectivities in Social Media*

Currently, Infosys has cultivated and supports three topical collectivities in social media, each with different topical foci and unique memberships. These collectivities provide an audience with whom the SMCC can interact to drive open innovation for the benefit of members and the organization. These collectivities are a fountain of ideas which help the firm develop state-of-the-art intelligence regarding the issues important to

stakeholders and fuel internal R & D to create and capture value. The organization
participates in these collectivities to build thought leadership. While these topical
collectivities are not overtly branded by the organization, the organization's sponsorship
of them is known to the members.

Infosys brings together people with convergent interests around a topic and engages
them in discussion. In this way, they get an "ear into a group and learn what is important",
(Global Head - Digital Marketing). The utility of these topical collectivities to members,
including the organization, depends on the degree to which there are active discussion and
innovation on the ideas and issues valuable to the members. To help create and encourage
this utility, Infosys engages in purposive outflows of knowledge to the collectivities. For
example, in one topical collectivity, Infosys invests over 500 part-time bloggers from the
organization to populate content useful to the members. The bloggers are content experts
drawn from the technical and engineering staff of the organization, who publicly engage
the ideas and issues important to the community.

> You provide content valuable to them (the topical collectivity). You build and
> give them the platform and engage with this community – the brand becomes
> part of the community. Their needs are fulfilled through the content provided
> by members of the community including the brand. The thought leader can
> fulfill needs by providing knowledge or engaged peer discussions with the
> group. Then your marketing objectives are transferred to the community and
> they can provide recommendation. (Practice Lead - Social Media at Infosys)

Infosys develops motivational frames to encourage membership and participation in
the topical collectivities they sponsor. These frames link the needs-based motivations of
their intended audience to referent facts, ideas and beliefs drawn from the environment to
induce potential stakeholders to join and contribute. They develop narratives which
describe the benefits of membership in terms of the quality of insights generated and

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quality of membership of the topical collectivity. Infosys often invites key participants from industry to speak to the topical collectivities on issues important to them, providing them a voice with their like-minded peers in social media. Infosys propagates frames to motivate membership across the social media venues where they participate.

In order to create value for the topical collectivities and encourage active participation, Infosys routinely surveys members to gather the opinions of the membership. They distribute the results of these surveys back to the topical collectivity to provide insights on peer perspectives. These purposive inflows and outflows of knowledge create value for the topical collectivity and the organization. For members, the benefit is peer-validated knowledge.

Infosys invests in creating vibrant topical communities in social media around topics of strategic interest to the firm. They engage in purposive inflows and outflows of knowledge with these collectivities to fuel open innovation and create value, a portion of which they capture for the organization. They motivate participation in topical collectivities they sponsor by creating and propagating frames for collective action which links the needs-based motivations of their intended audience to referent facts, ideas and beliefs drawn from the environment to induce potential stakeholders to join the topical collectivity. The motivational frames speak to the needs of potential stakeholders to accumulate and monopolize various kinds of capital (e.g.,social, structural, relational, knowledge-based capital). For example, a member who gains insight on a new innovation in their industry through participation in the topical collectivity might have an advantage with his or her employer. Similarly, the organization benefits by establishing a relationship with important stakeholders in social media around topics of strategic interest to the firm.

7.4.2 *Motivating Innovation around an Idea or Issue within a Topical Collectivity*

At a more granular level, it is often the case that Infosys is interested in motivating innovation around focal ideas or issues where they have capability and capacity, through internal R & D, to collaborate to create value and capture some portion of that value. Selectivity in the choice of ideas or issues on which to commit resources for internal R & D is critical to efficient stewardship of organizational resources. Governance of the social media engagement efforts are shared between the leaderships of Digital Marketing Strategy, the Verticals and the On-line Marketing for Products, Platforms and Communities. The decision regarding which ideas or issues to engage is escalated through the SMCC to the right management within the organization to make a determination regarding the strategic value of that engagement.

> If you look at what Infosys [redacted] division has done, they have this community called [redacted]. So that's all partners, prospects, customers. The object out there is to demonstrate thought leadership. That's a place where you have the right stakeholders who would be open to new ideas. Because these are senior people from client organizational prospects who are looking at what a [redacted] product can actually provide. That's where we would basically put out our ideas and get this community to critique it as well. And if the CFO of a large company says "oh this is a great idea but my biggest pain point is something else" it's a lead for me. So as long as I'm able to get a community of people who are able to exhibit certain business challenges I think I am getting my value out there. Everybody is looking at community for that same reason, right? How do I get either customer insights or product inventions inputs, and ideas of business needs? (New Global Head of Digital Marketing)

This sort of insight is critical to management of which ideas or issues to "filter in" for internal R & D. Knowledge of this kind is difficult to glean from the broader social media. To motivate innovation around a specific idea or issue, Infosys links the specific

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needs-based motivations of the members to a narrative that describes the capital their participation will create.

> I look at my own self as a customer. If I look at what vendors are doing today, their own product road-maps sometimes do not fall in line with what our real business needs are. They again have a product managers looking at certain perspectives of market of what he's understood or some data points that he's been given. Because he had to internally go and sell a business case. So he's sold that and he's basically developing it. It might not be in line with what is really required for me next quarter which I'm willing to actually spend money on. If it's a requirement for me next quarter (I'm just taking an example of [redacted] itself), as a regulatory requirement which comes in ... which [redacted] division says co-develop with me and you'll have it and be compliant next quarter, every client organization [in the topical collectivity] will jump at it. It's a small investment for them to actually be getting that head-start. Not only participating but investing, I'm sure they'd be open. I'm pretty open to investing in a vendor if he lines up with my business interests. (New Global Head of Digital Marketing)

The innovative output from the collaborative R & D around an idea important to the topical collectivity benefits the collectivity in the same way that a rising tide lifts all boats. Open innovation is a collaborative endeavor and Infosys is partnered in collaboration in the topical collectivities it sponsors. Framing to motivate co-engagement, collaboration and co-innovation is logically grounded in the commonality of topical interest between the organization and the stakeholders within a topical collectivity.

7.5 Conclusion

In this chapter, we have developed a theoretically and empirically informed model of how, through the production and propagation of motivational frames, organizations can cultivate topical collectivities in social media whose interests are aligned with the strategic interests of the firm. We believe this is an important contribution, as it is a real attempt to

empirically examine the means by which organizations can execute open innovation in the peer-to-peer environment of social media. We build on our previous theorization on framing for directed action to consider how organizations can strategically engage in social media to drive open innovation. Our framework is situated in strong theory, and advances the utility of our novel ontological perspective toward social media and our theorization on how directed action can be motivated in this discursive environment through the persuasive art of framing.

We describe how organizations are situated in Bourdieuian fields of production which are also represented in social media, where participants, motivated by their own needs compete to accumulate and monopolize capital. We offer topical collectivities as theory-driven cohesive interest-based communities situated within the Bourdieuian fields of interest to the organization. Topical collectivities represent audiences with whom the audience can engage in the purposive exchange of knowledge to fuel open innovation. Lastly, we describe framing theory as a process which organizations can motivate membership in topical collectivities around their focal interests, and how they can motivate innovation around specific ideas and issues within the topical collectivity. Through our case research, we show how our theoretic framework is operationalized.

It is our hope that the insights on open innovation in social media discussed in this research will provide managers with the vocabulary and conceptualizations to cultivate topical collectivities in social media to drive open innovation. Given that open innovation has value to the stakeholders in topical collectivities, including the organization, open innovation in topical collectivities provides the chance for powerful and lasting collaboration.

Lastly, we believe the case narrative itself is an important contribution to practice, as it highlights the business model of an exemplary organization that has demonstrated their ability to reach out to audiences in social media and foster an environment for open innovation and demonstrate how it is motivated to co-engage.

CHAPTER VIII

CONCLUSIONS

The introduction to this dissertation raised the question: How can organizations pro-actively engage in social media to motivate others to take directed actions which advance the organization's strategic goals? We noted that unlocking social media strategies to motivate directed action was contingent on organizations knowing: Who should they engage?, What should they engage on?, and How can they motivate directed actions aligned with the goals of the organization through strategic engagement? In order to address these challenges, we proposed interpretive case research to (1) develop an empirically informed understanding of strategic organizational engagement in social media to motivate directed actions aligned with organizational goals" and to (2) "theorize on analytics and conceptualizations useful to inform organizational strategies for engagement in social media".

Aral et al. (2013) describe high-level strategies toward social media as one of the most under-researched areas where our research community can produce much needed, high-impact work in years to come. Over the last two and one-half years, we have employed interpretive case research methods to investigate the execution of social media strategy at Infosys, a global leader in information technology and consulting services with a long history of strategic engagement in social media. This case afforded us a rich palette of strategies and experience with which to derive an empirically-informed understanding of how organizations develop and execute strategies for engagement in social media. The findings and contributions of this work are summarized in the section which follows.
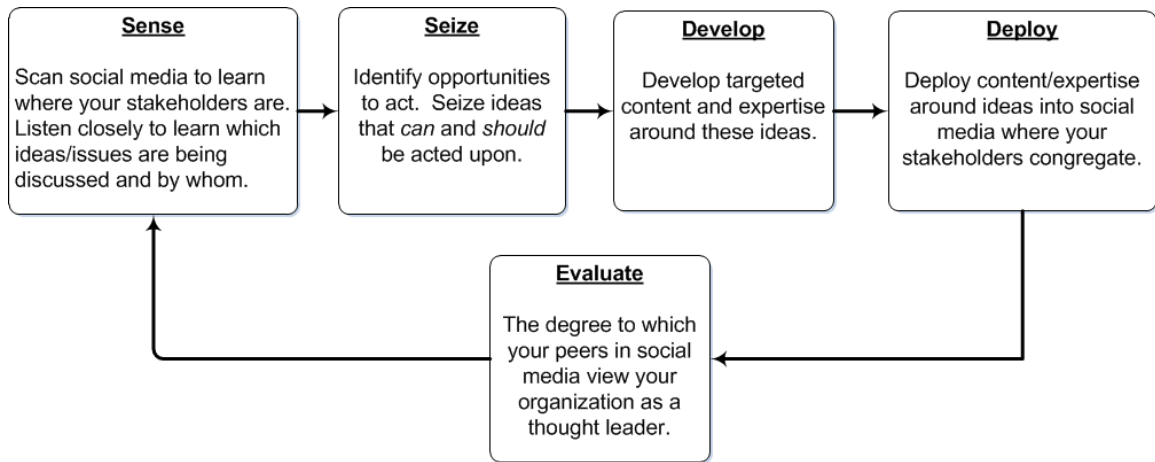
Figure 9. Building Thought Leadership Through Social Media Engagement

8.1 Findings and Contributions

Our first interpretation of the case involved developing a practitioner's perspective on how organizations can build thought leadership through strategic engagement in social media. We presented this analysis in chapter five, where we explicated the tactical strategies and mechanisms by which our case organization operationalized its strategic engagement in social media. In addition, we discussed the governance strategies and mechanisms within the organization which allowed them to identify and selectively escalate important ideas and issues percolating in social media. This chapter speaks directly to our stated goals of "developing an empirically informed understanding of strategic organizational engagement in social media to motivate directed actions aligned with organizational goals."

We identified the micro-foundations of dynamic capabilities by which the organization sensed, seized and repositioned its assets to respond to the opportunities and threats it identified in its social media environment and the tactics employed to make those capabilities operational in social media.

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Focal Idea/Issue

Engaged Stakeholders

Topical Collectivity

Field of Production in Social Media

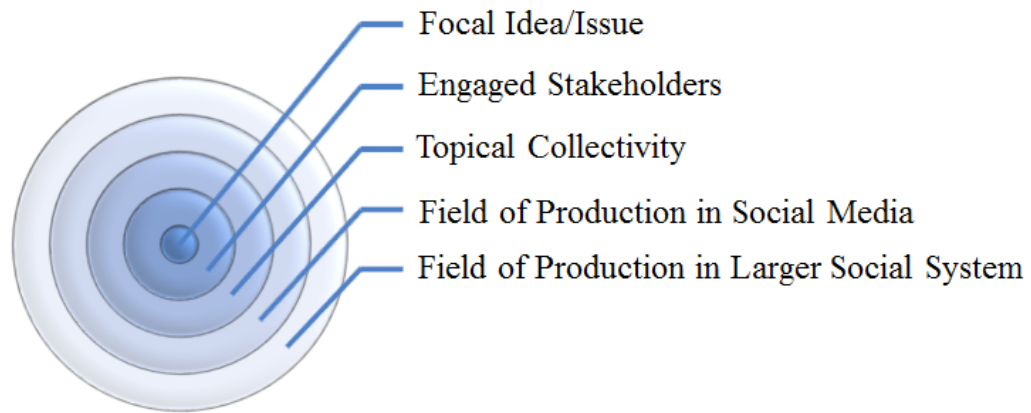Field of Production in Larger Social System

Figure 10. Interest-based Ontology of Social Media Audience

We linked these capabilities to the strategic efforts of the organization to motivate their social media audience to take directed actions congruent with the organization's strategic goals (i.e.,adopting the view that Infosys is a thought leader). We derived a theoretically and empirically informed framework to describe how organizations can strategically engage in social media to build thought leadership.

A key insight which emerged in this study involved the case organization's focus on ideas or issues as the means by which they could attract and engage an audience. This was clearly demonstrated in the discussion around their community-building strategies toward the field of retail banking. Based on insights we gleaned from our case regarding observed strategies for social media engagement, we conceived an empirically and theoretically informed interest-based ontology of audiences in social media.

Based on our observations, we derived topical collectivities as strategically valuable analytic elements of our ontological structure. While considerable literature exists regarding on-line communities, taking an information-based perspective toward social media cleavages allowed us to link topical collectivities to strong social theory on actor motivations, fields and figuration, and social interaction.
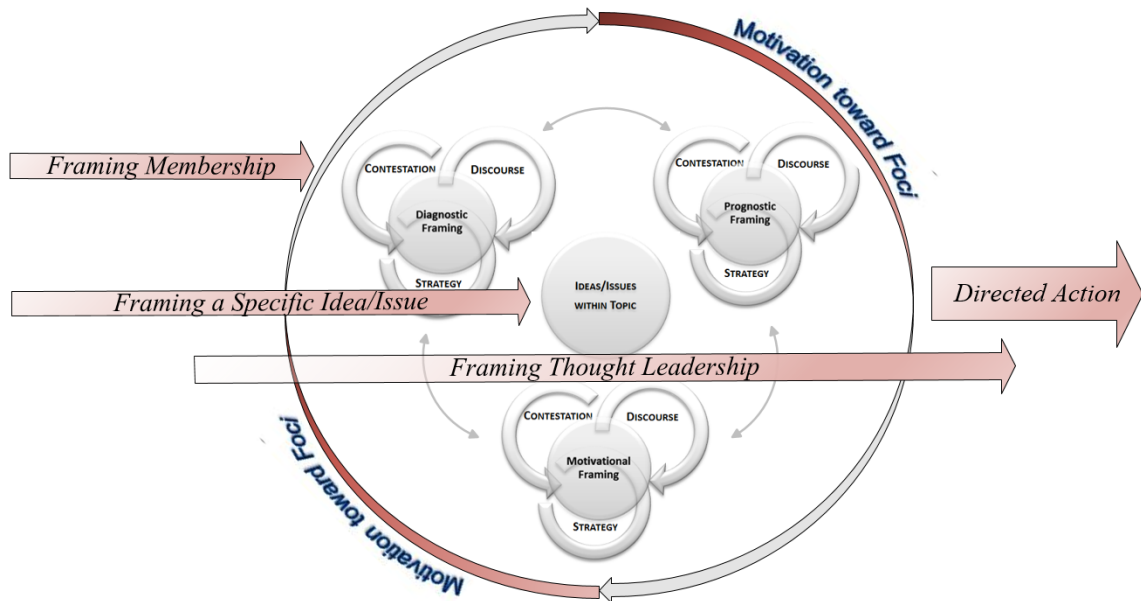
Figure 11. Motivating Directed Action from Topical Collectivities

These conceptualizations and analytics help meet our second objective of this dissertation to theorize on analytics and conceptualizations useful to inform organizational strategies for engagement in social media. They afford theorists and practitioners a novel way of identifying structures of strategic opportunity in social media.

In chapter 6, we leveraged our ontological view of social media to reanalyze our case using the theoretic lens of social movement framing. We re-imagined social movement framing in the context of strategic organizational engagement in social media to consider the question: How can organizations pro-actively engage in social media to motivate others to take directed actions which advance the organization's strategic goals?

We articulated our theoretically informed and empirically derived process model, based on social movement framing literature and our own observations, to describe how organizations can develop frames to motivate directed actions congruent with the organization's goals. In particular, we have described how organizations can employ

frames to motivate membership in topical collectivities, and how they can frame around strategically important ideas and issues within those collectivities to motivate directed action in the form of co-engagement, co-innovation and collaboration.

Reanalyzing our case through this lens, we learned that organizations can leverage frames by developing motivational frames which link their strategic interests to the inherent motivations of an audience toward a set of focal ideas and issues where their interests and those of the organization overlap. This is the case with Infosys' strategy for thought leadership, as well as its strategy for building the BTB community. Each is based on attracting an audience to ideas and issues within the areas of Infosys' strategic interest and persuading them to co-engage.

In chapter 7, we leverage the ontological and epistemological perspectives we developed in the earlier chapters to theorize on how organizations can cultivate topical collectivities in social media around their strategic interests to drive open innovation. We grounded this theorizing in our case research and in the literature of open innovation to demonstrate how topical collectivities as social structures can support organizations' open innovation initiatives in social media.

This work, developed using the theoretic lens of open innovation, introduces a theoretically-grounded and empirically informed framework for open innovation in social media through collaborative engagement with topical collectivities, which concentrate the exchange of ideas and innovation around a particular topic and reduce the search cost for organizations as they seek to identify and select ideas and innovations to fuel internal R & D. We describe how organizations can engage the stakeholders within strategically important topical collectivities in the purposive exchange of knowledge to motivate open innovation and expand external paths to market.
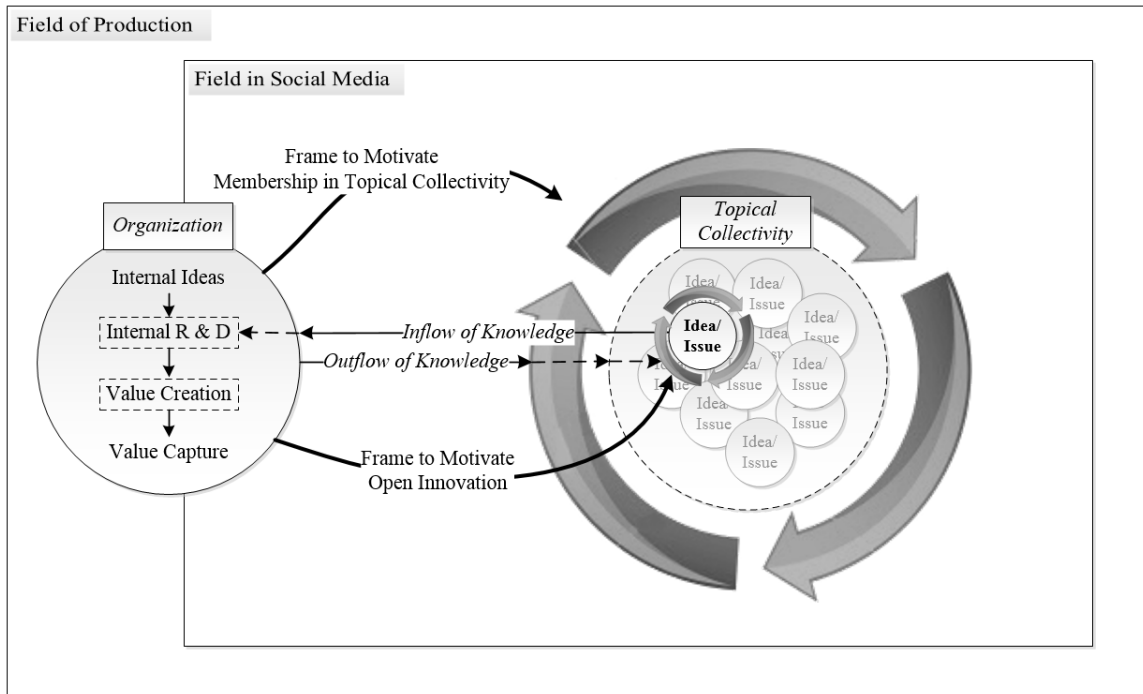
141

Figure 12. Motivating Open Innovation in Social Media

We describe how, through framing, organizations can motivate membership in topical collectivities from the broader social media and induce open innovation around focal ideas within the topical collectivity.

This framework fulfills the promise of the analytics and conceptualizations we developed in this research regarding their utility to link extant management and IS theory to the social media environment. It speaks directly to the central question: How can organizations pro-actively engage in social media to motivate others to take directed actions which advance the organization's strategic goals?

This dissertation has (1) developed an empirically informed understanding of strategic organizational engagement in social media to motivate directed actions aligned with organizational goals and to (2) theorized on analytics and conceptualizations useful to inform organizational strategies for engagement in social media.

Through our case research, conceptualization and theorizing, we have provided one theoretically and empirically informed set of answers to the questions Who an organization should engage in social media?, What should they engage on?, and How can they motivate directed actions aligned with the goals of the organization through strategic engagement? We have described how the dynamic capabilities view can be operationalized in social media to provide organizations insights regarding which ideas or issues to engage on. Our information-based ontological perspective of audience provides insight on who to engage with, by describing how organizations nominate the potential set of stakeholders in social media with whom the might engage when they select the ideas/issues to engage on. Lastly, recognizing that social media is a discursive environment where organizations lack command and control, and where discursive persuasion is the means to motivate directed action, we have presented a theoretic framework on how organizations can employ motivational framing as a means to achieve directed action in social media, answering the question: How can organizations pro-actively engage in social media to motivate others to take directed actions which advance the organization's strategic goals?

We present exemplar case research to empirically inform how organizations can strategize in social media, and offer well-grounded conceptualizations to inform cultivation of those strategies. Our theorizing offers organizations new insights, analytics and conceptualizations toward social media to allow them to conceive social media

strategies to achieve their organizational goals. We think this study is an important complement to management theory on the relationships between organizations and their environment (Bourdieu, 1983; Bourdieu and Thompson, 1991; Bourdieu and Wacquant, 1992; Freeman and McVea, 2001; Granovetter, 1985; Teece et al., 2007). It is our hope that this work provides a foundation for further theoretic and practitioner work to situate extant organizational and management theory in the social media context, based on the attributes and characteristics of social media discussed herein, which, to the best of the author's knowledge, have not been previously discussed in academic or practitioner literature.

8.2 Limitations

Burke (1965) once observed that every way of seeing is a way of not seeing. Our interpretive view is a product of the features of the data, our own experiences and biases, and those of the interviewees with whom we interacted. While every effort was made to present a robust theoretically and empirically informed view of strategic organizational engagement in social media to motivate directed action, this research presents a view. It does not portend to present *the* view.

Decisions were made at many crossroads during the development of this work. For example, it is often the case in information systems (IS) research that social media strategies are considered from a social network perspective (Kane, Alavi, Labianca, and Borgatti, 2013). However, as it relates to strategic organizational engagement in social media, there are three challenges to network analysis that limit its utility. First, network analysis is primarily concerned with the structure of the network and the implication of that structure on individual nodes. Consequently, network analysis de-emphasizes the

underlying individual social and psychological processes which motivate participants in social media to take actions, such as recommending an organization to others, co-creating content with the organization, or myriad other goals the organization might intend to achieve through strategic engagement. Social media are discursive environments where actions are voluntary. Here, understanding participant motivations and social interactions is critical to the organization enlisting others to aid them in accomplishing their strategic goals.

Secondly, network analysis is concerned with revealed relationships. However, social media engagement can involve the unobserved passive consumption of information, such as anonymously browsing a website or reading messages. Fostering environmental munificence is often an important goal of strategic organizational engagement in social media (Wade and Hulland, 2004). An organization concerned with managing perceptions toward its brand must strategize toward its entire audience rather than only those with whom it has a revealed relationship.

Borgatti et al. (2009) speak to the notion of an unrevealed audience with their conceptualization of proximal ties, which are concerned with the potential relations between nodes consequent to proximity to one another in a shared social or physical space. However, as participants on various social media likely have multiple citizenships and participate on many social media platforms, the shared social space of proximal relations in social media is larger than any single social media platform. A member who is a co-member, along with an organization, in one social media platform can cross-pollinate information to participants across multiple other social media platforms. Identifying all proximal ties of participants across all relevant social media becomes an infinite regress. Adopting a fields-based approach to conceptualizing the inter-subjective relations of the

organization and other participants in social media allows us to focus on shared interests as the grouping variable which defines an organization's strategically important audiences. An organization's 'field' represents and helps establish the conceptual boundary which delineates that which is of strategic interest to the organization.

The third challenge regarding the network analytic approach to organizational strategy toward social media lies in its local characterization of the interrelationships. Social media do not fully reflect the complexity of relations which exist in the larger fields of production in which organizations are socio-economically embedded. Other conceptualizations of organization and environment better reflect the complex stakeholder relationships with which organizational strategists must be concerned.

However, this discussion is not meant to diminish the importance of social network modeling, but rather to suggest that based on the strategic approach taken by our case organization, we deemed this path was inappropriate.

Another limitation of this research is that it is based on observations within a single organization. The benefits and limitations of single-case design are well known, and there is little value in litigating them here. However, it is important to say that this work represents a set of theorizations and conceptualizations, and does not present them as the only, or even the best set. It is our belief the utility of the conceptualizations, analytics and theorizations presented here will be tested by others and ourselves in future work.

Similarly, our limited theoretic application of the interest-based ontology of audience and framing for directed action is not exhaustive, but is illustrative. There are likely many more theories on organization and environment which might yield additional concepts not represented in this work.

Lastly, we note that this research favors the organizational view taken in management and IS literature, and does not explore other potential perspectives, such as those that might exist in marketing, psychology or other similarly related fields.

8.3   Future Research

A logical extension of this work is to investigate the attributes and characteristics of topical collectivities to develop social media analytics to understand the correlation between various attributes of the collectivity and efficacy of the strategic initiatives of organizations engaging in social media. To accomplish this, and to obviate the challenge associated with identifying and gaining access to other revelatory case organizations, a suitable approach would be to be to conduct action research to create topical collectivities in partnership with host organizations. This would facilitate experimentation, and the development of target interventions around multiple kinds of engagement.

It is my best hope that this dissertation proves valuable to the research community and that it adds to the collective practitioner and researcher thought on how organizations can strategically engage in social media to motivate directed actions congruent with their goals.

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Dear Alan,

I published a paper in the June 2013 (12:2) issue of MIS Quarterly Executive entitled "Building Thought Leadership Through Business-to-Business Social Media Engagement at Infosys". This work was part of my dissertation research. I am writing now to learn whether I can include this paper in its entirety as a chapter in my dissertation with credit to the journal. Is this possible?

Best regards,
Don Heath