

# Strategic Social Media Engagement

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# Strategic Social Media Engagement

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## ABSTRACT

Interactions between organizations and the community are different in social media. Firms no longer control their message and its permeation. Social media participants, including current and potential customers and collaborators, create and distribute content and manage its dispersion. Some proactive organizations have pioneered effective social media engagement strategy to engage stakeholders and manage their brand. Early adopter organizations in social media can benefit from these strategies of social media engagement. Successful strategies for social media engagement create rich opportunities for collaborative value creation and demand generation. In this paper, we address the research question: “*How can organizations strategically engage in social media to manage their brand and collaboratively generate insight with current and potential customers?*” This paper presents a theory-guided interpretive case study to identify potential answers and provide directions for researchers and practitioners.

## Keywords

Social Media, Engagement, Strategy, social action theory, framing processes

## INTRODUCTION

Social media derives power from its ability to create and leverage network effects by attracting participants into social clusters that form around common ‘ideas’. It is an increasingly important competitive space where organizations must adapt their interaction with stakeholder to flourish. Any modern, professionally run organization is expected to have a social media presence. While most organizations recognize the potential of social media, they struggle to develop strategies to effectively engage the organization with its key stakeholders in the social media. Many firms are discovering that the development of social media strategies that resonate with an audience and generate meaningful results is not as simple as creating a Facebook presence and waiting for customers to flock to them. This is a common first step for organizations that seek to manage brand awareness, generate new and repeat sales. However, this low-cost strategy is passive and depends on self-motivated engagement of social media participants. Social media engagement strategy for many organizations often stops here, unsure how to go further. Realization of returns from investments in social media requires the development of strategies that are specifically attuned to the characteristics of the media in order to be effective. The challenge becomes: *How do organizations strategically engage in social media to manage their brand and generate demand?* As with many emergent phenomena, some organizations work to proactively develop strategies for effective social media engagement while others wait for early adopters to pioneer feasible and effective strategies. While some exemplars in practitioner research provide guidance, the need to identify and describe successful strategies and lessons learnt to inform the development of social media engagement strategies remains. In this paper, we present a case-study with Org-A to identify exemplar social media engagement strategies for managing the brand in social media.

Many organizations invest significant energy and resources to develop or acquire actionable business intelligence to inform their positioning strategy for social media. However, traditional business intelligence typically revolves around demographics and consumer behavior, which have limited or questionable utility for social media engagement. However, unlike traditional media, social media is a dialogic medium organized around topics of common interest. Participants in social media expect bi-directional conversations, rather than be marketed to with broadcast advertising. Social media is highly interactive, peer to peer and is extremely efficient in electronically spreading word of mouth among participants – good or bad. A poorly formed or poorly executed engagement strategy can have significant repercussions, while a well formed and executed strategy can position the organization to reap significant benefits.

Our understanding of competitive positioning strategies for social media is in its infancy. Often, these strategies are extensions of traditional media strategies that do not reflect an accurate understanding of the nature of the medium. They marginalize social media as “*just another traditional marketing communications vehicle*” (Hoffman & Fodor, 2010). They are often applied in haste driven by the certainty that organizations can ill-afford to ignore social media in today’s environment. Many marketing managers treat social media as simply another traditional marketing communications vehicle. This fails to recognize that traditional rules of broadcast marketing do not apply in a medium where the customer chooses the

rules of interaction. Meaningful engagement is the consequence of strategic interaction in social media. Generating new and greater demand by managing relationships and collaboratively creating value with participants is the goals of successful strategic social media engagement.

## THEORETICAL FOUNDATION

### Understanding Social Media

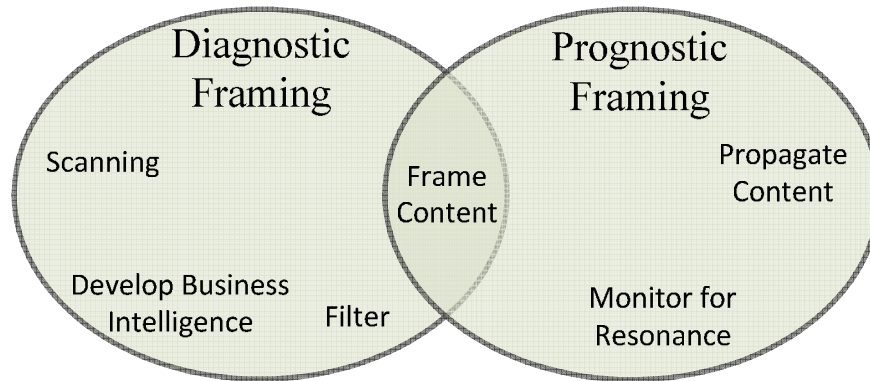
The transformative character of social media requires that organizations understand the unique expectations of its participants. Social media expects engaged interaction. The locus of engagement is *topic*, around which clusters of participation emerge. Social media clusters are never solely comprised of passive listeners. They are clusters of active participants who expect two-way exchange of information around the topic of interest. Organizations that approach social media clusters expecting to propagate one-way messages are routinely de-legitimized as participants in the social cluster, with all accompanying negative repercussions. However, effective social media engagement strategy embeds the organization as a legitimate collaborative partner in the social system. This positions the organization to reap the benefits of multiple engaged parties having active and meaningful conversations about topics of strategic interest to the organization.

Social media is a powerful medium to engage with strategically important partners. It is bi-directional and participative. This breaks the traditional paradigms of the organization's ability to 'command and control' interactions across a medium. In social media, the organization is a one peer among many, with each equally able to interact, create, and share content. Social media engagement requires that organizations *not simply speak, but also listen*. Strategic engagement in social media requires selecting and targeting the social clusters that are meaningful for the organization to engage in. To engage, organizations must become legitimate participants in the social clusters where they want to interact. Engagement requires informed interactions that *resonate* with the clusters while advancing organizational goals. Organizations are economic entities embedded in social media. They plan, implement and evaluate the effectiveness of social media strategy to gain social capital. Organizations seek to create munificent environments in social media so that they are viewed as legitimate participants in any conversation deemed to be of strategic importance.

### Lessons from Social Action Theory

Researchers across disciplines recognize that institutional activities are socially embedded. Economic activities of organizations are situated in personal interaction, groups, social structures, and social controls (Granovetter, 1985; Smelser, 1963). Recent successful Internet-only social movements, such as the movement to remove genetically-engineered foods from Trader Joe Grocery Chain (Deri, 2003), or the anti-sweatshop movement targeting Nike Corporation (Carty, 2002), highlight social movements' ability to leverage social media capabilities. Technology savvy activist groups recognize the potential of social media to cultivate engagement, mobilize adherents and impact organizational behavior. The experiences of social movements in leveraging social media can inform organizational strategy development for social media engagement.

The principle tactic of social movements is to frame a discussion in a way that resonates with potential adherence. Social action framing processes are useful to describe and analyze the character and dynamics of movements in social systems (Benford & Snow, 2000). The nucleus appears as a mobilizing idea around which groups are formed for social action—a *homophily*. Social action frames provide an appropriate analytical basis to understand the shared meaning that binds clusters within a social system as well as the processes that shape shared meaning and generate collective action. Social action framing processes are diagnostic and prognostic, seeking to understand social phenomena and develop prescriptive strategy to effect the desired change. Diagnostic framing identifies the core homophily around which a social cluster is formed. Prognostic framing deals with the development of strategies that resonate with the social clusters. Collectively these frames allow an organization to sense and respond to the social media environment.



**Figure 1. Diagnostic and Prognostic Analytical Framing in Social Media – A Sense and Respond strategy of legitimation.**

Organizations need the ability to *Sense and Respond* to their environment. Diagnostic and prognostic framing provides the mechanisms by which organizations understand how to sense and respond in a social media environment. Sensing is informed by the analytics developed through diagnostic framing, while appropriate responses are developed through prognostic framing. Sensing is the process of scanning the environment to identify concepts of interest to the organization. Additionally, scanning may identify segments of the environment that are of strategic or competitive interest to the organization. Once identified, organizations will develop business intelligence around those segments and develop positioning strategies to respond in the social media. This allows the organization to position itself by developing specific content that is framed to establish itself as a legitimate participant. When the framed content is inserted into the conversation, it influences the organization's positioning the perceptions of other participants with regard to the organization. The framed content may seek to counter-frame positions and perceptions of the organization, or seek to reinforce positive perceptions and move to further engagement. Once the message is propagated in appropriate social clusters, the cluster is monitored to determine the resonance of the framed content.

We present the case of successful social media engagement strategy at Org-A guided by the diagnostic and prognostic framing of homophilic values for directed action in social media. We present the background of Org-A and its social media engagement strategy and discuss the development of social media engagement strategy for brand management and demand generation. We present conclusions as propositions that require empirical testing and offer some directions for future research.

## **SOCIAL MEDIA ENGAGEMENT AT ORG-A**

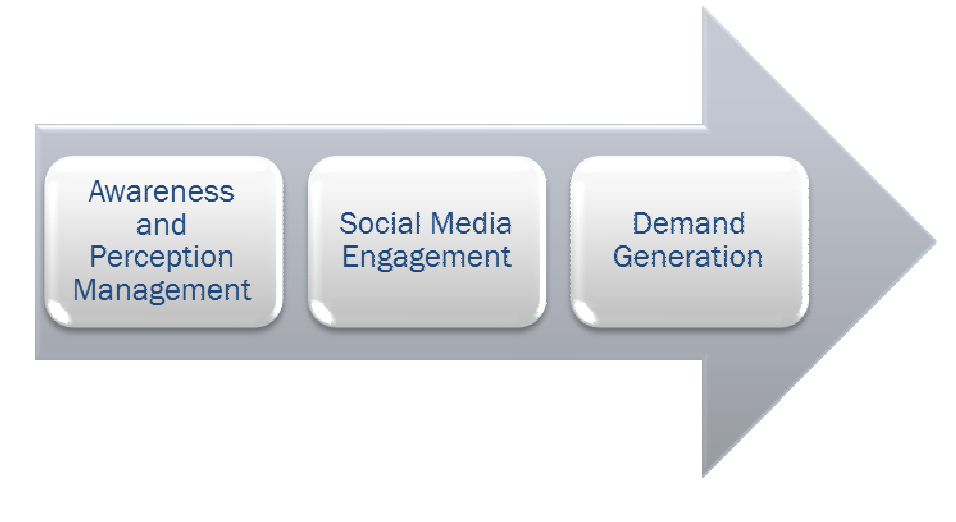
### **Background**

Org-A is a leader in business consulting, technology, engineering and outsourcing services. Org-A defines, designs and delivers technology-enabled business solutions for global companies and also provides a complete range of services by leveraging domain and business expertise and strategic alliances with leading technology providers. Org-A has been an early adopter of online and Social Media. The company has been actively leveraging Social Media since 2006-2007 and is strategically committed to involving its customers, partners, prospective employees and other key stakeholders in the process. Org-A is not just leveraging social media for engaging the stakeholders, it is taking key inputs from the market based on social media interactions, which go into influencing its corporate strategy. Org-A is engaging its stakeholders through various social media destinations including Company blogs, Third Party hosted blogs, Facebook, Twitter, YouTube, SlideShare and LinkedIn. The broad objective is to achieve enhanced partner engagement and the positioning of Org-A as a thought leader. Org-A understands the importance of social media as a key tool to gain strategic advantage. The company has adopted social media as a key means to achieve stakeholder engagement and plans to actively use various social media destinations going forward.

### **Objectives**

Social media engagement strategy at Org-A has multiple objectives. Principal among these is to promote brand awareness and manage perceptions of Org-A as a 'thought leader'. Social media strategy at Org-A is also concerned with leveraging

social media to generate new insights that are valuable to both Org-A and its current and potential customers. Ultimately, these strategies seek to generate demand from current and potential customers for Org-A products and services. This is depicted in the schematic shown in figure 2.



**Figure 2. Social Media Engagement Objectives.**

Organizations are motivated to harvest the bountiful opportunity presented by social media. The approach often taken is to employ online media to reinforce brand awareness among consumers. This is a logical extension of marketing strategies applied in traditional broadcast media. Management instinctually recognizes brand awareness as fundamental to engaging with the customer.

### **Managing Awareness and Perceptions**

Managing the awareness and perceptions of the organization in the eyes of current and potential customers is a primitive goal of the social media engagement strategy. It is a means to position the organization to successfully pursue social media engagement strategies in select social clusters around topics of strategic interest.

*“Awareness is a qualifier, not a guarantee of customer engagement. Getting followers or ‘likes’ on Facebook are not enough. You have to look at content – who is developing it, who is using it and how; How is it helping us provide what customers want from us? How does it help us improve offerings and does it reduce resistance to sale?”*

Management of awareness becomes an exercise in selective involvement of the organization with topics that promote the perception of the organization as a thought leader.

*Currently, we use social media to generate and manage awareness of Org-A for the various segments of markets –current and future target customers and potential talent for talent management. The big umbrella message in social media is to establish awareness that Org-A is a thought leader. This is pursued for talent management and customers – current and future.*

To position itself as a *thought leader*, Org-A routinely scans relevant social media to identify conversations of interest. These conversations may center on existing technical competencies within Org-A, or on areas where Org-A is working to develop competency and hopes to position itself as a thought leader.

*We use tools to position content to the sites and track views and responses. We mine the visits and 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 in to other content? We look at visits from the social media to our blogs and track if they are repeat visits? This helps us figure out who is listening and what they are listening to.*

Selecting the content that is meaningful for the organization to engage in and is manageable amongst the myriad conversations taking place is critical to the success of this stratagem.

*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."*

Individual conversations collectively indicate the perceptions and permeation of the overall corporate message.

#### **Permeating social media for strategic positioning**

It entails pursuing a positioning strategy to manage how the organization is perceived with regard to the organization's overarching corporate message - to be a *thought leader* in its core competencies.

*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 about. Experience – that is where Social Media is useful because it allows us to directly showcase the experience. We use Blogs and we have had a lot of success with that. We use Twitter and Facebook and LinkedIn and Slideshare to supplement. We are experimenting with Google+*

Strategic positioning defines the persona of the organization. It is the position the organization takes in the competitive environment. In social media, the competitive positioning frames what the organization wants to be perceived as to others in the social system. Org-A actively uses social media to create awareness with current and potential customers as well as with other relevant thought leaders in conversations on topics to strategically position itself as a thought leader.

#### **Managing perceptions without command and control**

While organizations continually work to manage others' perceptions of themselves in social media, traditional mechanisms of command and control no longer hold. Awareness of the organization and its perceptions are no longer under the direct purview and control of the organization in the social media. The organization's perceptions are framed as a result of interactions in the social media, where the organization is merely one participant among other peers.

*It is not about 'doing social media'. Social media is 2-way and bi-directional. It is participative and multi-directional – unlike traditional media – that creates the challenge. Organizations are typically not geared up for the participation that social media demands – specially a large enterprise. An organization is used to a command and control - but social media breaks this. In social media, the brand is no longer creating content - people are creating. People read other people's content and they listen to other people's voice. The brand is at a differential – it is just participating – people create the voice not the brand.*

*For example, 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. The traditional way was to create the content in house and do one-way communication - now you cannot do that.*

#### **Transparency and direct interaction**

Social media makes the organization and its behaviors increasingly transparent and visible to the world. In addition, it makes the perceptions of thought influencing participants about the organizations equally visible to the world *immediately*. Customers actively assess the nature and degree of involvement of the organization in social media. They are able to transparently observe the behavior and gravitas of the organization related a particular topic or issue. The overall perceptions of the organization are resultant of the interactions in the social media between participants, including the organization itself. This is in contrast to the more controlled perceptions that organizations could position in the one-way communication of traditional media.

*There is extreme transparency [in social media] - there is a lot of challenge and risk. People need to see your face. They don't want [to interact with] an intermediary. Customers and potential customers expect to see you directly. They expect a two-way exchange with you - not just your marketing materials. Today my blogger is not a spokesperson, he is a content expert –that is a big challenge. Your People have to learn the responsibilities – in some cases there are policies, some cases there are guidelines ... but right now it is a chaotic time.*

The organization has to react to threats and opportunities in the short-term while managing the overall perceptions in the longer-term as a participant in the clusters with high engagement valence. This presents significant challenges for the organization and requires re-thinking of positioning strategy in terms of managing its perceptions.

**Create and manage active presence**

The need to have an active presence on social media cannot be denied. Customers want to talk to the organization. Moreover, current and potential customers will talk about the organization, irrespective of whether the organization is engaged as a participant in the conversation or not. These conversations take place on the organization’s social media platforms as well as other social media venue where the organization can choose to be a participant, lest it become the topic of the conversation.

*The target audience is there [in social media] – so, you have to be there. It is very efficient in spreading word of mouth. They evaluate how you are present on the social media and where you are - not just on your site, but also on topical sites where you are the professed thought leader. So, you also need to be on the topic’s social media.”*

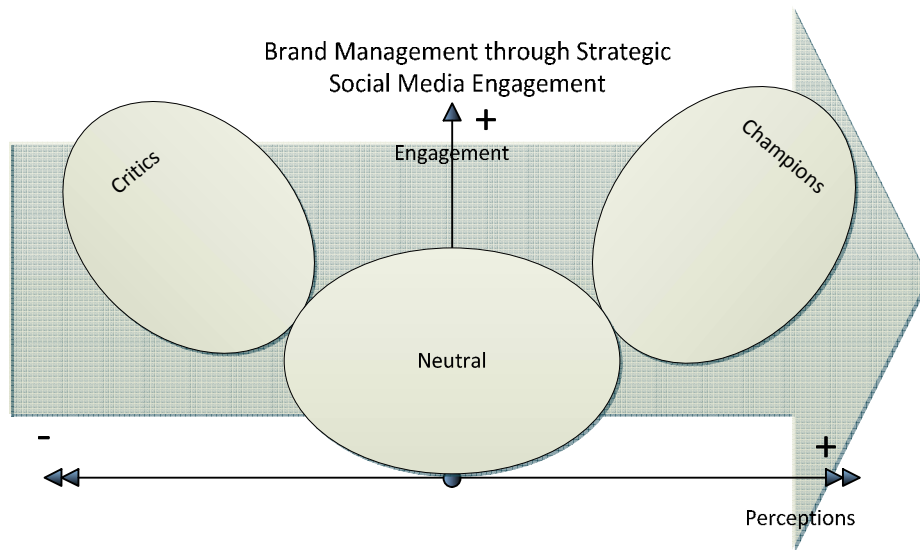
To legitimate itself as a worthy conversant and attract and engage in conversations, Org-A allows its content experts to develop and strategically insert content around the topic of interest in to the social media. This strategy achieves multiple goals. It successfully positions Org-A as a thought leader around the topic and increases brand awareness of Org-A regarding the while paving the way for further engagement. This is not a passive positioning strategy. Here, Org-A actively works to involve itself in conversations of interest to create the potential for future engagement.

**Of Champions and Critics**

Customers expect transparency and direct engagement with the organization. This presents both risks and challenges for the organization as well as a significant opportunity for the organization to directly engage with its customer base and co-create value with them. The scanning strategy helps to manage awareness and perceptions of Org-A. This is implemented through employment of social media firms that scan and identify clusters of interest. This provides a cost effective mechanism to scan the large volume of conversations taking place in social media and identify specific clusters with high engagement valence.

The best customers will help reinforce perceptions of Org-A as a thought leader – *becoming champions of the brand*. Social media is very efficient in virally propagating network externalities – positive or negative. Conversations about Org-A originate with perceptions among the conversants. The most negative perceptions will be held by critics of Org-A while the most positive are held by champions of the brand. Org-A social media engagement strategy attempts to manage the perceptions of all conversants such that they become champions of the brand. Though not always possible, at a minimum it seeks to address issues raised by critics and increase positive perceptions of the brand.

*It is ‘far more’ efficient when you are looking at the thought leadership program – but there is a lot of challenge and risk. It is very efficient in spreading word of mouth. If you [a participant] don’t like something, you broadcast – if you don’t like something you broadcast - you are expressing yourself. If you are happy or unhappy, you will create content - The middle space is usually vacant – people who love you will review, people who hate you will review ... nothing in between.*



**Figure 3: Managing perceptions and selecting engagement strategies for critics and champions.**

One aspect of the social media engagement strategy is to ensure that any negative conversations associated with the brand is dealt with immediately to ensure that it does not gather momentum.

*We measure the perceptions shifts online. 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.*

Org-A reacts very quickly to identify these conversants and address their concerns outside the social media. In this way, negative perceptions do not propagate in the social media. An ultimate goal or ideal situation is to cultivate passion for the brand ...

*Everything we measure is awareness ... you look at 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. What we don't know how to look at is love of the brand – how do you measure passion? There is no metric, if I have a blog post and someone posts something against Org-A, is there a community that counters the position? And who does that? Employees? Someone from outside? Passion is something we have to look at as number of communications, and their frequency. Don't know is there is a forum where this is happening ...*

The most ardent critic of any organization is motivated to be vocal and engaged in their criticism of the organization. They influence momentum regarding perception of the organization within the social media. These critics display a high level of engagement in conversations regarding the organization. By contrast, people who are dispassionate or unaware regarding the organization typically display low level of engagement in the social media regarding the organization. They hold neutral perceptions of Org-A, if any. The most engaged champions for the organization hold high perceptions of Org-A as a thought leader. This may be informed by their previous engagements with Org-A, co-developing content with Org-A, or through the influence of their peers. Regardless of where conversants perceptions are positioned on the continuum between critic and champion, Org-A social media engagement strategy seeks to transition conversants along that continuum towards champions of the brand.

### **Monitor and Assess effectiveness**

Managing awareness is the necessary, but not sufficient, first step in the pursuit of successful social media engagement strategy.

*We look at a wide range of things – what kind of visits we get from the target audience? Are the visits from companies that are in our target market? What kind of repeat visits do we get? Are they downloading whitepapers? Are they contributing content, opinions, issues? What kinds of queries are coming in based framed content distributed through Twitter or SlideShare? Are they identifying themselves and their willingness to talk to us or about us to others? These moves are toward engagement.*

Org-A's strategy of actively managing awareness in social media allows it to position itself to invite two-way communications and subsequent engagement. For example, the head of online marketing for Org-A is notified of primary concepts around which conversations about Org-A are centered:

*Issues come in from the social media firms on a daily basis and we make decisions on whether the issue requires a response. For ones that require response, we find the right subject expert and the interaction is initiated. There are some things that we cannot do with external agencies. Weekly reports focus on categories [concepts] that we are tracking the movement of and the momentum of the conversation. For example, we want to manage the association of key words associated with Org-A such as fairness. We need to know of these very fast and respond immediately to manage the momentum. Monthly reports focus on key parameters and concepts including positive and negative conversations. Every two to three months, we also scan our presence and perceptions vis-à-vis key competitors.*

The overall positioning strategy of the organization is perpetuated through the social media using means that are both extensions of traditional media strategies, as well as unique strategies that seek to engage the organization with its core customer segments- both current and potential. The primary purpose of awareness management is brand awareness and managing perceptions of the Org-A with respect to its core positioning strategy. A desirable outcome of the awareness management is that Org-A gains intelligence on relevant conversations taking place in the social media and their nature. The



relevance of conversations to strategic priorities of the organization, as well as the nature of the conversation, guide the allocation of organizational resources to the conversation and inform the decision to further engage and how.

**Table 1** below summarizes the when, what, how and why of social media monitoring at Org-A.

When	What	How	Why?
Real Time	Phrase associations that require rapid response. Broad scan of small list of 'keywords'	Scan and identify issues that the organization must have immediate response to. This is done very quickly. 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.  Scan known clusters and communities.  Track social clusters and communities	<i>Who is talking</i> - Identifies thought leaders for further engagement; <i>What are they talking about</i> - Identifies topics to engage with communities about.  Identify the relative importance and longevity of topics and ideas.  Identify momentum shifts in conversations	Identify – the who and what - topics and clusters of interest  Develop engagement plans and pursue further engagement
Monthly	Brand audit monthly	Generate 'heatmap' around the brand	Understand longer-term brand positioning
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 competitive positions performance assessment and inform business strategy.

To position itself as a *thought* leader, Org-A routinely scans relevant social media to identify conversations of interest. These conversations may center on existing technical competencies within Org-A, or on areas where Org-A is working to develop competency and hopes to position itself as a thought leader. To legitimate itself as a worthy conversant and attract and engage in conversations, Org-A's content experts develop and strategically insert content around the topic of interest in to the social media. This strategy achieves multiple goals. It successfully positions Org-A as a thought leader around the topic and increases brand awareness of Org-A regarding the topic while paving the way for further engagement. This is not a passive positioning strategy. Here, Org-A actively works to involve itself in conversations of interest to create the potential for future engagement.

The strategic objective of demand generation is pursued through social media engagement with both current and potential customers. Org-A engages these customers using the social media channels that are natural to them using social media clusters that are *discovered or cultivated* around topics of interest. For engagement to occur, Org-A generates customer awareness to the organization and manages the perceptions of the organization in the venues where the engagement occurs. Strategy is formulated, implemented and then its implementation is monitored and adjustments are made. The effectiveness of the social media strategy is monitored by measuring awareness.

**CONCLUSIONS**

The need to understand organizational engagement in the social media requires diagnostic analysis and development of appropriate analytics to inform the development of strategic position. When mature observations with sufficient richness in breadth are not available, it is useful to apply interpretive approaches that highlight exemplar techniques and lessons learned in social media engagement strategy. The researchers interviewed key members from the organization and analyzed documentation from a variety of sources within the organization over a period of two years. Findings were presented back to the interviewees in follow-up sessions that focused on obtaining feedback on results and conclusions from multiple points of view.

A primary purpose of the awareness management is to manage the perceptions of the organization with respect to its core positioning strategy. The overall positioning strategy of the organization is perpetuated through the social media using means that are both similar to the means used in traditional media as well as unique strategies that see to engage the organization with its core customer segments- both current and potential. The objective of the social media engagement strategy is to align the engagement valence of social media conversations in a way that is favorable to the objectives of the organization. Social media platforms provide the bi-directional structure of opportunity that allows Org-A to engage in meaningful conversations with social media participants for mutual benefit. We recognize the risks in single-case research with regard to generalizability, and invite future researcher to pursue this important topic.

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