

Organizational Engagement in Social Media to Motivate Strategic Directed Action: A Revelatory Case

Completed Research Paper

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ABSTRACT

IS literature offers little theorizing on the attributes of social media useful to construct effective organizational strategy. Absent theory, there is little to guide organizations to discover the motivational, discursive, or other aspects of social media that can inform their strategy. This paper presents a revelatory case to develop an empirically-based understanding of organizational engagement in social media to motivate strategic directed actions aligned with organizational goals, and provides a strong socio-theoretic foundation for further work to integrate extant organizational and management theory with strategies attuned to specific attributes and characteristics of social media.

Keywords social media strategy, engagement, directed action, interpretive.

INTRODUCTION AND MOTIVATION

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. Social media are an increasingly important environment where organizations expect (*and are expected*) to engage. Their stakeholders are there. In social media, individuals and groups are engaging one another around issues and ideas of shared interests. 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, many organizations are challenged to implement effective strategies attuned to social media. Lacking understanding of how to strategically engage, organizations satisfice by repurposing advertising strategies (Hoffman and Fodor, 2010). These strategies fail to derive benefit from, the dialogic essence of social media. General Motors, for example, recently announced it would discontinue its \$10 million dollar annual advertising campaign on Facebook (Frier and Higgins, 2012). One-way messaging by the brand is often viewed negatively in social media - “*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 et al., 2010). This highlights the difficulties organizations face in developing effective strategies to leverage the opportunities in social media. The challenge for organizations is how to proactively engage in social media to motivate others to take actions which advance their goals and interests— directed actions. Directed actions describe those actions undertaken by an organization’s social media peers, and motivated by the organization, which advance the organization’s strategic goals.

IS literature is largely silent on the attributes of social media that could be useful to construct effective strategy. In searching for a vocabulary with which to interpret our case, we find that the much IS research on social media

adopts a social network approach. However, social network perspectives de-emphasize the important underlying social and psychological processes which motivate actors' interactions in a social media. Understanding motivations is critical to developing effective organizational strategies to drive directed action in social media. Engagement in social media involves consumption or dissemination of information. It might often be the case that consumers of information have no revealed relationship with the organization, and would be overlooked in social network analysis. Yet, organizations interested in fostering munificence in their social media environment must strategize toward both hidden and revealed relationships.

Absent theory, there is little to guide organizations to discover the motivational, discursive, or other aspects of social media that can inform their strategy. The objective of this study, then, is *“to develop an empirically based understanding of organizational engagement in social media to motivate strategic directed actions aligned with organizational goals”*. To this end, we conduct in-depth case research on the strategic social media engagement at Infosys, Ltd. Over a twenty-four month period, we examine Infosys' strategic social media initiatives as they expand their products and services into the retail banking sector. Our aim is to (1) present a holistic view of social media organizational engagement to motivate strategic directed actions, (2) understand how directed action can be achieved, and (3) to learn how organizations co-align the motivations of their social media peers with their own to realize their strategic objectives.

We discuss well-understood sociological theory to develop our pre-understanding of social media as social systems of human interaction. We describe our case organization, briefly discuss our methodology and interpret our results with regard to organizational engagement in social media to motivate directed actions, and discuss the limitations and key contributions of this research.

THEORETICAL FOUNDATIONS

Parsons (1951, p.6), defines a social system 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”*. This definition well-describes a community of users associated with, and interacting through, a social media platform. We take the analytic view that social media represent open social systems which support high levels of dialogic interaction among members.

We draw on sociological theories to develop a theoretic vocabulary to discuss the motivational forces which induce or influence actions in social media, and the social consequences of those actions in terms of structure. Social media framing informs our discussion of the discursive, strategic, and contested processes which take place in social media around focal ideas and issues, and how diagnostic, prognostic and motivational frames are negotiated leading to directed actions. Our pre-specification of these theories is intended to provide an initial and potentially useful vocabulary to anchor our interpretation, add clarity and sharpen our analytic focus.

Motivation of Action

Action theory (Parsons, 1937) describes how needs-based motivations and value-based orientations of individuals drive their actions in open social systems. 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. 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. Parsons describes relational orientation as an individual's motivational and value-based orientation toward their situation (see figure 2). Relational orientation explains an individual's valence toward any given action. 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.

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 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.

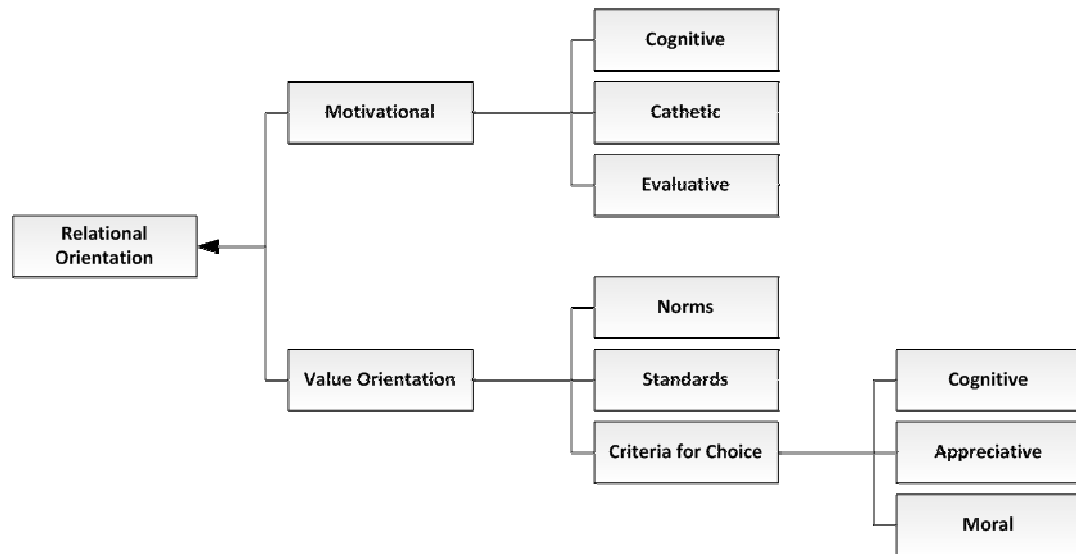


Figure 1 – Parsons’ Relational Orientation Schema

Value orientation 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. 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.

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

Table 1. Parsons’ Action Types

Action theory proposes 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.

Parsons' action theory provides an appropriate theoretical perspective to inform discussion of actions in social media, motivated by the need-based dispositions of the actor. The relational orientations of peers in social media motivate them to engage in conversations around certain ideas and issues. A topic is the commonality on which the need-based motivations of organizations, collectivities, and individual participants' converge.

Topical Collectivities

Topical collectivities in social media are self-organized communities of interest which arise around topics of common interests of their members. Topical collectivities emerge consequent to discovery of intersubjective commonalities among social media peers. The transparency in social media affords individuals means to identify and engage others with similar interests in conversation. Evolution 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 & 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*" (Mepherston, Smith-lovin, & Cook, 2001).

Lazerfeld & 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. (2008) find that status-based homophily has little value in characterizing homophily in online 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 and organizations to self-organize into topical collectivities within the social media, such as topical blogs, message boards, networks of practice, and LinkedIn groups. Brown et al. (2008) offer empirical evidence that topical interests are foci around which online collectivities can form. Topical collectivities have strategic potential for organizations as a means of identifying social media audiences with *revealed interests* overlapping their own.

Jürgen Habermas' theory of communicative action (1981) provides a strong and useful theoretic foundation to understand the role of communicative acts in open social systems. Communicative acts are governed by practical rationality and influence the evolution of social structures and the production of knowledge. Ideation of topical collectivities is achieved through communicative action. Practical rationality evolves within social systems as a product of discursive interaction. Shared understanding is achieved through cooperative search for understanding. It is realized solely through the "force of the better argument" (Habermas, 1981, p.25) freely expressed in a normatively regulated "Ideal Speech Community". For Habermas, social knowledge is bound by consensual norms which set out expectations for the behavior between individuals. The validity of consensual norms is grounded in intersubjective and mutual understanding of intentions.

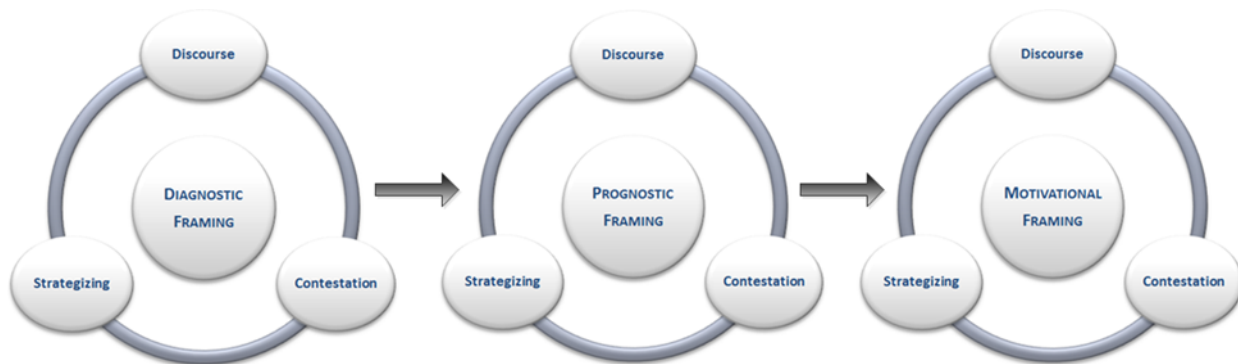
Topical collectivities are social systems which embody these essential tendencies--where peers interact freely and voluntarily to exchange ideas and information. In topical collectivities, members express their opinions, offer knowledge, and share insights and perspectives through intersubjective discourse. Over time, group perspective toward new issues settles. While individual opinions within a collectivity still diverge, the arguments which support or refute those opinions become well-established, and interest in re-litigating them diminishes. Group consensus determines what counts as social knowledge. Habermas suggests that, absent coercive forces, the better argument will prevail. Group consensus decides which argument is best. We pre-theorize that topical collectivities are open social systems within the larger social media, where consensual norms and social knowledge evolve consequent to the communicative acts, which are the source of their entelechy.

Social Movement Framing for Directed Action

The discursive peer-to-peer nature of social media suggests that organizations aiming to motivating strategic directed action must persuade their peers through conversational engagement. Here, social movement organizations provide a useful exemplar. They have demonstrated success in motivating strategic directed actions in social media. We turn to social movement framing theory to provide a theoretic pre-text to our interpretation of how organizations communicatively engage in social media to motivate directed action.

Social movements strive to create frames to link referent facts, ideas, or beliefs from their environment and create a perspective around a focal idea or issue that resonates with their intended audience and motivates them to actions aligned with strategic goals. 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 their 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.



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

Table 2. Framing Tasks and Processes

The elaboration of diagnostic, prognostic and motivational frames is the result of a set of overlapping social processes which can be conceptualized as discursive, contestation and strategic (Benford & Snow, 2000). Social movement framing provides a useful vocabulary to discuss directed action in open social systems such as social media.

CONTEXT OF STUDY AND METHODOLOGICAL OVERVIEW

The Case

In this study we research the external social media strategies of Infosys, Ltd., a multi-national business and IT consulting firm. Infosys, Ltd. routinely develops and deploys social media strategies in a business-to-business (B2B) context. Infosys Ltd. was started in 1981, with current revenues in excess of US\$ 6.825 billion. Infosys is an early adopter of social media and has been actively leveraging their engagement since 2006. Infosys actively seeks key market inputs through social media interactions and incorporates them into corporate strategy and social media positioning. Infosys actively engages its stakeholders through various social media including corporate blogs, third-party hosted blogs, Facebook, Twitter, YouTube, Slideshare and LinkedIn. The broad objective of social media strategy is to achieve an enhanced level of engagement with current and potential partners and further the positioning of Infosys as a thought leader.

Methodology

Recognizing the deficiency of research regarding organizational strategies for proactive social media engagement, our strategy is to conduct in-depth case research on one revelatory case. Based on their long history of strategic engagement in social media, we selected a well-suited exemplar for our study. Yin (2009, p. 48) argues that a single-case design is appropriate when a case is revelatory. He defines a revelatory case as a case where the problems of the case believed to be common to other cases. Social media is becoming a de facto environment where organizations must engage. Therefore, understanding the social media engagement strategies employed in our case easily rises to the challenge of Yin's revelatory case definition. Our methodological perspective may be classified as interpretive, in that it uses texts reflecting the subjects' experiences to develop a second-order theoretical understanding of the phenomenon. Overall, we employed methodological guidelines summarized by Klein and Myers (1999). Sense-making involved interpreting data via the hermeneutic circle, with constant comparative analysis used to tease out initial concepts, link evolving concepts to higher level categories, and to identify potential linkages between the categories themselves where appropriate. We interviewed key staff and analyzed documentation from various sources within the organization over a period of two years. Specifically, we held multiple interviews with the Global Head of Digital Marketing, the Head of the Online Marketing in-charge of Products, Platforms and Communities and the Head of Digital Marketing Strategy. We interviewed the Practice lead for the Social Media and Technologies group, as well as process specialists at Infosys organization involved with the Social Media Command Center. We also interviewed senior architects who work with the social media command center and multiple internal social media efforts which also interface with select clients. Data from complementary interviews was triangulated to develop a suitable resource for interpretation. In this research, we situate our interpretation in existing literature.

INTERPRETATION AND RESULTS

In this abridged presentation of our research, we consider a single strategic social media initiative at Infosys where the organization seeks to enter the retail banking space and position itself as a thought leader, engaged in delivering the products and services to help shape the future of retail banking. The initial thrust is to identify peers in social media whose topical interests overlap those of the organization. This is accomplished by scanning social media for keywords and phrases to learn who is speaking about the topic and where. The organization "holds its ear to the ground" to gather information from social media. Here, Infosys is principally interested in engaging with "*business executives at the C, C-1, C-2 and VP levels*" (Global Head – Digital Marketing) interested in the future of retail banking. The organization is searching social media for peers whose topical interests converge with theirs, and who hold similar relational orientations (Parsons, 1937) toward the topic. For a more detailed discussion of social media engagement around this case, see Heath, Singh, Ganesh and Taube (2013).

Early investigation by Infosys found that conversations were taking place around the future of retail banking with considerable interest among important stakeholders in social media. To engage this community, Infosys founded the

Retail Banking Innovation (RBI) group using LinkedIn as the social media platform to focus on the specific needs of this community.

One community - RBI, talks about retail banking in general. We opened this group, it is not even Infosys branded and it is not overtly promoted. The conversations go on and every now and then we intervene as a moderator to generate discussion. If there is any new relevant blog, we post it – it is very lively. We bring together like minded people and engage them in discussions in communities that we build and provide for them. 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. How you should be attuned to building tomorrow's enterprise and what the next steps should look like for you. It's about changing the dynamics of the industry. (Global Head - Digital Marketing)

Based upon their relational orientations and topical homophily, social media peers with interests converging around retail banking join this topical collectivity. Within the collectivity, consensual norms and shared social knowledge arise through communicative actions. Infosys legitimates itself as a social peer within this topical collectivity by behaving in a way that matches the behavioral expectations for members (Habermas, 1981). Engagement in this topical collective allows Infosys to learn which ideas and issues are important to their peers, and how they think about them. Though Infosys sponsors the RBI group, they remain one peer among many.

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- it is not 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 - Online Marketing: Products, Platforms and Communities)

On learning the ideas and issues of concern to the topical collective, Infosys positions topical content that is useful to their needs-based motivations. This strengthens group cohesion and perpetuates the topical collective, allowing consensual norms, mutual expectations and shared social knowledge to evolve. Infosys invests over 600 bloggers to populate content to the topical collectivities it is engaged in.

You gather group of like-minded people with like interests and provide content directed toward them and valuable to them. You build and give them the platform. You can then engage with this community and 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)

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

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)

By creating messaging to reinforce the idea that this topical collectivity is a “happening place”, Infosys appeals to the relational orientations of other social media peers outside the collectivity which are most likely to produce the type of directed action the organization desires—following or joining the group.

From here, additional relationships may develop at multiple levels across Infosys and the conversants’ organizations.

We don’t want the size to increase - participation is not a problem, it can easily get too much. We look at how active are the members 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 poll is doing well? What topic is being discussed? It is important to invest time and effort ... that is a challenge and we are trying to achieve that. (Head - Online Marketing: Products, Platforms and Communities)

They invite key stakeholders to speak to the topical collective on issues important to them and give them a voice in their community of like-minded social media peers.

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

Through engagement in the topical collectivity, Infosys is able to identify potential partners to collaborate with to develop products, services or content related to creating the future retail banking industry. Content experts from Infosys are selected to interact with potential partners within the topical collectivity to further engagement.

Careful selection is made to identify content and related experts [within the topical collectivity] that are then moved to private platforms. The differentiator is their behavior. If there is interest in co-creation and engagement, then you move them to the private platforms (Head of Online Marketing: Products, Platforms and Communities).

Through internal discourse, contestation and strategizing, Infosys develops a diagnostic frame to identify which content (ideas or issues) to address. In collaboration with similarly motivated peers from the topical collectivity, Infosys partners to cultivate a prognostic frame which articulates their proposed solution. Often, this collaboration involves “co-creation of content with partners and customers in the form of blogs and white-papers to highlight success stories and relevant competence” (Head of Online Marketing: Products, Platforms and Communities). Other times, it may be actual products and services which serve the interests of the topical collectivity. The partners co-develop a motivational frame which is deployed back into the topical collectivity to motivate their peers to take directed actions aligned with the strategic goals of the framing partners (see figure 2). Directed actions here might involve mobilization to co-engagement, contribution of resources, adoption of the frames’ perspective, adoption of products and services co-developed by partners, or other actions which advance the strategic interests of the partnership. Determining the efficacy of a motivational frame involves monitoring, to see changes in perceptions and engagement by peers from the topical collective.

We measure the perceptions shifts online. The changes in the conversations in groups that we monitor or participate in and the time duration for the perception shift provides an indication of the perception shift momentum. 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? At the end of the day, my resistance to sale has to go down. If a normal sale took 6 months, does participation in the community bring it down? Do we have an advantage because of participation in Social Media?

Can we close the deal faster? Any type of marketing boils down to this: Can I sell more services or sell it more quickly? Does the community help us to do this? (Global Head – Digital Marketing)

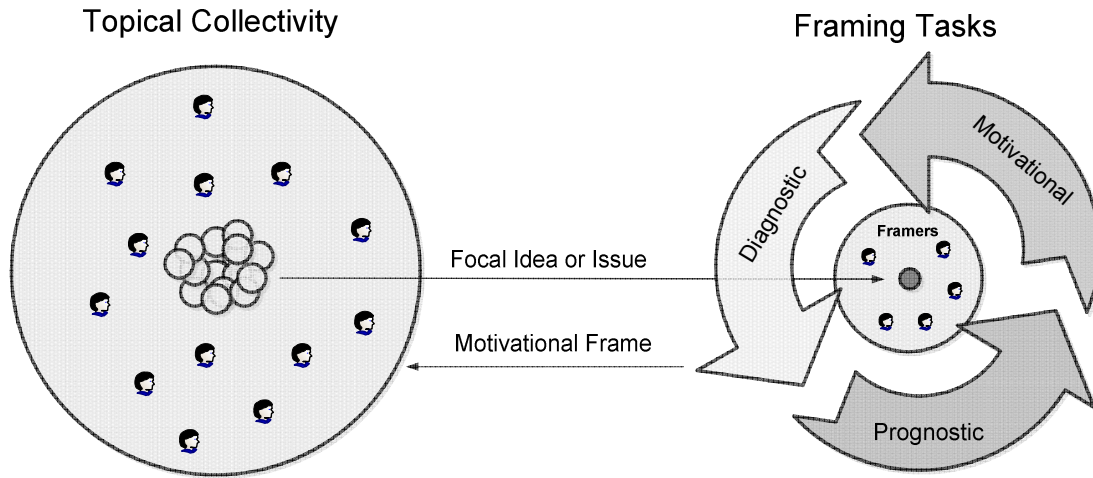


Figure 2. Motivating directed action in topical collectives

DISCUSSION

Through strategic engagement in social media, Infosys has learned to motivate directed actions from their peers within social media. They identify potential partners from social media who share their interest and needs-based motivations toward a particular topic. They participate in conversations around the topic. They join (or organize when necessary) topical collectivities germane to their strategic interests to persist topical conversations. Rather than advertise to social media, they co-engage around common issues and ideas within the topical collectivity as peers. The organization behaves as a cooperative partner engaged in problem-solving around shared interests. As their motives become known, their marketing objectives are transferred to the collectivity. They partner with peers within the topical collectivity whose motivational needs can drive co-engagement to develop solutions, products or content aligned with strategic interests. Through the social processes of discursion, contestation and strategizing, they produce motivational frames to place back into the topical collectivity.

Through their engagement in social media, Infosys is increasingly viewed as a partner in the topical collectivity, working to solve common problems. This gives them a voice within the topical collectivity to help shape its direction. Through engagement, the organization works to foster munificence from its environment—to create champions and sideline critics. Infosys' engagement in social media allows them to marshal intelligence from strategically important stakeholders in social media and attune their strategic focus to their ideas, issues and perspectives. In this way they are better able to situate their products and services, manage perceptions of their brand, and foster long-term relationships with strategically important partners to help cement their relevance to the community in the future.

CONCLUSION

This study addresses theoretical and empirical gaps around organizational engagement in social media. We put forward a powerful socio-theoretic foundation to discuss motive, structure and directed action in social media. We develop an analytic perspective of social media as social systems based on strong theory. We present an exemplar case to reveal how organizations can strategize in social media, and offer well-grounded conceptualizations to inform those strategies. It is our hope that this work provides a foundation for further theoretic and practitioner work to integrate extant organizational and management theory, 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.

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