

Chapter 19

Audience-Centered Approaches to Strategic Planning: Accessing Social Capital Through Sharing Platforms on Social Media

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Abstract This chapter responds to the question “What are the strategic considerations in using social media platforms and open source practices such as crowdsourcing as tools in innovating organizations?” The following arguments are put forward in response to this question: (1) Organizations have moved from a learning to a sharing paradigm. (2) The most valuable organizational asset is social capital, accessible through social media and open source practices such as crowdsourcing. (3) Communicators have a role to play in accessing this social capital for purposes of innovation. (4) Changing conceptions of audiences underlie strategic communication planning. (5) Strategic planning for innovation must reflect the character of audiences fashioned by social media. In responding to this last question, the chapter explores seven characteristics of audiences that should be taken into account in planning for innovation and suggests theories that support a user orientation.

19.1 Introduction

Mired in an economic recession of yet unknown parameters, organizations face an unpredictable future. In an environment where the old paradigms have failed, innovation acquires a high value and the communication technologies undergirding innovation become critical organizational resources. In this environment, the users of Facebook, Twitter, Skype, blogs, wikis, Second Life, YouTube, Flickr, mobile technologies, LinkedIn, and other sharing platforms constitute the social capital of an information society (Bourdieu 1986; Coleman 1988; Frank et al. 2004); and practices such as crowdsourcing enable innovating organizations to access this social capital.

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tools in innovating organizations?” The following arguments are put forward in response to this question: (1) Organizations have moved from a learning to a sharing paradigm. (2) The most valuable organizational asset is social capital, accessible through social media and open source practices such as crowdsourcing. (3) Communicators have a role to play in accessing this social capital for purposes of innovation. (4) Changing conceptions of audiences underlie strategic communication planning. (5) Strategic planning for innovation must reflect the character of audiences fashioned by social media. In responding to this last question, the chapter explores seven characteristics of audiences that should be taken into account in planning for innovation and suggests theories that support a user orientation.

19.2 From Learning to Sharing Organizations

Fostering and sharing creative insights through group interactions or the idea of co-creation has a long history in the social sciences in the form of activities such as brainstorming and brainsketching, synectics, lateral thinking, fantasy chaining, and mind mapping. In the same way, businesses have long relied on Delphi and nominal group techniques for extracting knowledge from expert or other populations (Ferguson and Ferguson 1988). In the late 1980s, former General Electric President Jack Welch instituted “work-outs” (akin to New England town hall meetings) with employees, designed to elicit solutions to organizational problems (Krames 2002). Soon after, the innovation literature became peppered with talk of “boundaryless” and “learning” organizations—organizations with no clearly defined boundaries that engage in an ongoing quest for knowledge, value experimentation and improvisation, encourage critical thinking and risk-taking, tolerate mistakes, and value impermanence.

According to Redding and Catalanello (1994), the above characteristics enable the organization to innovate sufficiently fast to survive and prosper in a rapidly changing environment. The concept of the learning organization can be traced back to the double-loop learning advocated by Argyris and Schön (1974). So the movement in the direction of open source practices did not come from a conceptual vacuum. In fact, their main forerunner was open systems theory, which continues to influence scholarship across the spectrum of the social and physical sciences. Open innovation and open source approaches confirm the viability of the open systems model and the “boundaryless” organization, which is said to be characterized by speed, flexibility, and innovation.

Social media have further collapsed the boundaries between organizations and their publics and between content and technology. When we draw upon the collective intelligence through social media platforms and sharing practices, we are accessing what has come to be known as *social capital*. By *social capital*, we mean the value (economic or otherwise) that resides in social relationships and networks (Putnam 2002; Bourdieu 1986). Antikainen and Väättäjä (2010) agree that the new

age capital resides in people, not in material goods. Von Hippel (1994) explained the importance of social capital to innovating organizations in the following way:

An inherent tension that plagues knowledge utilization research is the fuzzy, informal, and context-dependent nature of much of the knowledge associated with organizational innovations. This knowledge is not easily transferable because it is often embodied as know-how or practical wisdom in the person or organization that has it (a phenomenon known as *stickiness*.) (cited in Greenhalgh et al. 2005, p. 426).

Rass et al. (2013) argue that open innovation practices generate not only new ideas and concepts for products and services, but also allow the organization to accrue social capital upon which it can draw when needed. Olson and Trimi (2012) attach the term *co-innovation* to this process of value creation through convergence, collaboration, and co-creation with stakeholders.

19.3 Accessing Social Capital Through Social Media

This new age capital can be most easily located in the rapidly developing Web 2.0 phenomenon, first named by Tim Reilly in 2005 (Everitt and Mills 2009). Between 2005 and 2012, the percentage of Internet users with a social media profile catapulted from less than 8–72%—a ninefold increase (Pew Internet 2013). According to the Paris-based analytics firm SemioCast (2013), Twitter had over 500 million members by 2012, up from 27 million in 2009 (Patton 2009). About three million were active tweeters in 2009 (Rose 2009); by 2013, 170 million were active tweeters (SemioCast 2013). Pew Internet (2013) reported that 18% of all Internet users were tweeting by 2012. Skype ended 2010 with 663 million users. BBC statistics (2010) suggested that 450,000 new blogs appear each day.

More than one billion unique users sign into YouTube each month (2013). As of January 9, 2013, LinkedIn counted more than 200 million users (Nishar 2013), up from 55 million in 2010 (Baker 2010). In 2013, Facebook reported 1.11 billion active users, up from one million in 2004. MySpace registered over 33 million unique visitors in the first 6 months of 2013 (Weismann 2013). Constantly in flux, these statistics change minute by minute in an upward direction. The likelihood that social media will further extend their influence into all areas of our lives (business, interpersonal, health, and other) drives the present need to understand the potential contributions of the new communication technologies.

Social media differ from earlier efforts at gathering collective intelligence in terms of quantity of contributions, the uncontrolled nature of the input, and the often anonymous and voluntary nature of the sources—the essence of a phenomenon called *crowdsourcing* (Hudson-Smith et al. 2009). The term *crowdsourcing* (coined in 2006 by *Wired* magazine contributing editor Howe 2008) refers to open source methods of data creation where large groups of users generate content that is shared. The organization makes a deliberate effort through an open call to outsource a task to a community or group (Ekins and Williams 2010;

Tapscott and Williams 2006; Seltzer and Mahmoudi 2012). Others, however, view crowdsourcing as a less centralized happening, where the content appears spontaneously in the form of videos, blogs, wikis, or other sharing platforms. In the context of innovation, this mega trend implies “opening the door to allow more people—your customers, your employees or the public at large—into your innovation process to help improve your products, services, Web site or marketing efforts with the idea that two heads—or 2000 or 20,000—are better than one” (Sullivan 2010).

Applying the potential in crowdsourcing to innovation, Chesbrough and Appleyard (2007) summarized four requirements for using open source practices such as crowdsourcing: the need to engage a broad range of stakeholders over a sustained period of time, to compete effectively for these limited resources, to provide leadership and agendas capable of setting the tone and establishing expectations for meaningful participation, and to identify ways to profit from these policies. Despite its potential for garnering interest and ideas, scholars such as Brabham (2013) urge that organizations should consider open source practices such as crowdsourcing as one (not the only) means to engage or gather ideas for innovation.

In discussing the role of open source practices in innovating organizations, is useful to recognize that *innovation* as a term comes with different definitions in different disciplines and different contexts—sometimes implying products, at other times processes. Sometimes the term suggests recent developments; at other times, it implies new awareness of existing developments. In the same way, adoption of an innovation has a range of meanings, which can relate to individuals or organizations. In terms of corporate or business entities, the concept of adoption can imply full-scale adoption, contracting out the development of an innovation, or purchasing another company with the required innovative skills (Rye and Kimberly 2007). Kastle and Steen (2011) argue that innovation is more about the managing than the creation of ideas. In other words, any discussion of communication of innovations can have a range of interpretations and implications.

19.4 Role of Communicators in Strategic Planning for Innovation

Both academics and practitioners agree that strategic planning is necessary for the successful integration of new technologies into a corporate vision (Nambisan and Sawhney 2010; Barnes 2010; Sullivan 2010). They also agree communicators have a significant role to play in these strategic processes. Seltzer and Mahmoudi (2012), for example, reference the collaborative planning literature in claiming that “the most active territory for planning theorizing today is ‘communicative planning’” (p. 4).

How then can communicators contribute to these strategic planning processes? The communicator looks for ways to support the corporate mission, mandate, and objectives through the framing of communication goals, messages, strategies, and tactics. Without reference to the larger strategic plan, communication planning loses focus; and without a supporting communication plan, the organization has no coordinated way to convey its mission, mandate, or vision or to promote its programs, products, and services.

Despite the importance of including a communication element in strategic planning for innovation, a survey involving 1087 PR practitioners in 22 European countries found that communication personnel are rarely involved in planning for innovation within their organizations. Only one out of every three PR professionals, for example, has any involvement with innovation in their companies; and only one in five communication managers considers innovation to be a strategic issue for communicators (Zerfass et al. 2007).

Cook (2008) proposed a communication model with applications specific to social media and also applicable to innovating organizations. He said that social media perform four functions of relevance to organizations: communication, cooperation, collaboration, and connection. Some argue the need to hire a social media administrator to coordinate these functions (Bradley 2008).

19.5 Changing Conceptions of Audiences

The starting point for any strategic communication plan must be the analysis of audience needs and expectations—a dedicated area of research in communication studies. In the context of this discussion, the term *audiences* will refer to employees, as well as external publics, as social capital resides in both groups.

Following World War II, four major changes occurred in how psychologists, political scientists, and communicators viewed audiences. First, communication studies moved from an emphasis on audiences as passive recipients of information to audiences as active processors of information. The limited effects and two flow models of opinion leadership, which stressed human agency, replaced the hypodermic needle model, which saw audiences as passive and highly susceptible to persuasion (Lazarsfeld et al. 1968).

Much like the early communication models, one of the most popular early innovation models—the Innovation-Decision Process, for example—portrayed “adopters” as passive recipients, who could choose to act or not act on information. This classic model involved five steps: knowledge, persuasion, decision, implementation, and confirmation (Rogers 1995)—none of which required an active contribution to the direction of change. According to Haider and Kreps (2004), over 5000 articles focusing on the distribution process had been published by the 40th anniversary of diffusion research. Nonetheless, as happened in the field of communication, innovation studies have shifted over time to a new and more participatory view of consumers and contributors.

Second, communication theorists began to see senders and receivers as constantly exchanging roles; and the Aristotelian model, which depicted communication flow as one-way and linear, fell into disuse. One of the most popular replacements was the transactional model, which sees communication as a dynamic process, involving continuous changes in the communicators and in the environment in which they operate (Barnlund 1970).

Third, the new models saw audiences as culturally diverse, active, and individualistic in their responses. Talk of *the public* yielded to discussion of *publics*. Uses and gratifications theory (Katz et al. 1974; McQuail 1983) attributed even higher levels of initiative to audiences. This theory argues that audiences actively select media that meet their need for information, entertainment, social interaction, or recognition, among others. Applying these ideas to open innovation, Antikainen et al. (2010) add categories such as personal learning, knowledge exchange, social capital, and enhancement of professional status.

Finally, post-war models moved from views of communicators as conveyers of information (e.g., Hovland et al. 1953) to communicators as builders of social relationships (e.g., Grunig 1992). In support of this view, Paulini et al. (2011) note that social communication increases credibility for organizations when it shows sensitivity to user needs. This idea of building collaborative relationships becomes extremely important when we move into the area of innovation, where motivation to participate becomes extremely important (Antikainen et al. 2010).

19.6 Seven Trends with Implications for Communication Planning for Innovation

The development of social media has further changed and elevated the status of audiences. Thus, this final section of the chapter seeks to identify how social media have influenced the character of twenty-first century audiences and established their status as significant sources of social capital in an information society (see Mandarano et al. 2010). More specifically, I will identify seven trends with the potential to impact upon strategic planning for innovation.

First, the dominant characteristic of all social media is their potential for—and encouragement of—audience participation. An audience member climbs onstage at a Bourbon Street establishment to become a part of the entertainment. Contestants on *American Idol* and *Dancing with the Stars* plead for audience votes that will enable them to continue in the competition. CNN and Deutsche Well invite and publish feedback on online news articles generated by staff members. Artists gain acclaim on the basis of number of YouTube views. Court TV shows and crime stopper infomercials invite questions and feedback from viewers. Citizen journalists and I-reporters publish photographs of tsunamis, tornados, and volcano eruptions; and best-selling author James Patterson invited fledgling writers to pen most of the chapters for his book *Airborne*.

In short, the boundaries between senders and receivers of messages and content and technology have becoming increasingly blurred as audiences demand an active, participative role in the communication process. Recognizing the new user-generated and reflexive technoculture (Han 2010), *Time* magazine named “You” the “Person of the Year” in 2006. Citing Lev Grossman, author of the article accompanying the *Time* cover, Han explains that “the Internet that has allowed ‘You’ to win the recognition ... does not resemble the Internet of the 1990s dot-com boom nor the ARPANET developed by the U.S. Department of Defence 20 years before that” (pp. 200–201). In other words, Web 2.0 is a radical innovation in itself, leaving disruptive change in its wake but creating an environment for “radical inclusion” (Han 2010, p. 201).

Second, social media have encouraged audiences to become active seekers of information. An orthopedic patient arrives at the surgeon’s office, armed with information on the latest procedure for resurfacing the hip joint. Potential buyers turn to online reviews in researching the latest innovations in hybrid cars. Interested individuals go to *Britannica Online* to learn more about recent developments in DNA research. The increasing fragmentation and difficulty of using mass media to reach twenty-first century audiences is a well-established finding in communication research (e.g., Webster 2006). For that reason, organizations should not ignore the potential in open source platforms, which allow audiences to seek out the organization.

Third, social media have encouraged a critical mindset in audiences. Users have come to expect a feedback option with every communication. So the possibility to provide critiques of people, organizations, and ideas appears across the spectrum—in online journalism, Twitter, blogs, TV news and entertainment features, and print media.

Whereas the top-down flow of information, dominating the years preceding the development of satellite TV, nurtured a mindset that did not encourage criticism of authority figures in organizations or government, the current flow of information in every direction (upward, sideways, and downward) encourages people to express their points of view and to challenge authority. Even a cursory look at feedback links confirms the critical and cynical nature of much of this feedback (Rice 2010). As a consequence, many organizations have instituted a policy of pulling objectionable comments from the dialog; and some kinds of software allow users to bring unacceptable responses to the attention of the host organization. The struggle of countries such as China to maintain control over social media has led to even stronger policies and practices, such as the demand to censor access points on foreign search engines—an action that caused Google to withdraw services from that country. As illustrated above, the censorship may be initiated at the point of the user, the host organization, or even a national entity.

Fourth, social media draw audiences who seek attention and recognition. As one blogger noted, “There’s not a lot I won’t put on there” because “I love to be the center of attention” (Miller and Shepherd n.d.). Some studies have demonstrated that audiences stop using sites that fail to acknowledge their presence (Huberman et al. 2009). For that reason, organizations offer a variety of monetary and

non-monetary rewards to motivate users to participate in open innovation communities. Common non-monetary techniques include allotting points for valued contributions, listing top innovators on the websites, acknowledging the most active members, and introducing active community members (Antikainen and Vääätäjä 2010). Other websites offer financial compensation for ideas; however, people are often willing to forego financial gain to obtain notice from peers or a firm (Huberman et al. 2009).

Fifth, social media encourage audiences to disclose freely, and audiences expect similar levels of openness and transparency in others. High levels of personal disclosure on Facebook, blogs, and websites such as Postsecret.com have created a generation of consumers who expect the same high levels of disclosure from others, including celebrities, politicians, and corporate leaders (Miller and Shepherd n.d.). In the last several years, a number of American and Canadian politicians and generals have resigned from public office after having affairs exposed in the national media and widely discussed on social media. Those facing public demands for accountability not infrequently go on national television to apologize to family, supporters, and a largely anonymous public.

The new level of interconnectedness, offered by social media, has nurtured a culture of voyeurism and incursions into the lives of others. More importantly for organizations, however, the connections do not stop with the personal. Publics expect corporate entities and their leaders to share knowledge and information, including the negative, and to conduct business in the most transparent fashion. In other words, they demand reciprocity: we will share with you, but you must also share with us. As Crescenzo (2010) observed, “Corporate communication—that whitewashed, sterilized, sanitized form of communicating that so many organizations rely on—doesn’t really work in the SM space” (p. 11).

Like many other ideas, the recognition of the importance of transparency in communication is not a novel concept. Cleveland wrote an article in 1985 titled “The Twilight of Hierarchy: Speculations on the Global Information Society,” in which he discussed the leakiness of information and its impact on hierarchy. In 1988, Ferguson and Ferguson discussed the futility of talking about organizational boundaries and introduced the simultaneous access model as a replacement for the top-down communication model; and in 2001, former GE President Welch (2001) observed:

Hierarchy is dead. The organization of the future will be virtually layerless and increasingly boundaryless, a series of information networks in which more electrons and fewer people will manage processes. Information will become transparent. No leader will be able to hoard the facts that once made the corner office so powerful. (p. 433)

Sixth, social media have created audiences who expect responses in real time. Instant conversations and instant updates typify interactions on social media. Whereas consumers used to be satisfied with a letter received three or four weeks after an inquiry, they now expect a response within 24 h of receipt of an email. No place or time is sacred space, and meeting the needs of contemporary audiences

means accepting their terms of engagement. Yet few organizations are equipped to handle the demands:

As traditional business intelligence systems and technology intersect with new systems such as Facebook, Twitter, and Google Wave, a conflict arises between traditional information retrieval and discovery of new information available via newsfeeds, blog articles, short text messages from Twitter users, and user-generated videos posted to sites such as YouTube and Vimeo. Most business intelligence systems are not well-equipped to handle real-time information. The future of real time lies in creating applications that require no searching. (Arnold 2009, p. 40)

For governments and organizations that require multiple levels of approval for responses or revelation of information, the problem is serious—and still further aggravated in countries like Canada with requirements for bilingual communications. In speaking of organizational uses of ICTs, Sørnes et al. (2005) note “Given the apparent significance of time in structuring organizational reality, future research should examine more thoroughly the temporal elements that affect members’ sensemaking, their communication with one another” (p. 137).

Seventh, social media require a mix of language competencies in audiences, as well as in those who seek to interact with them. Transliteracy is “the ability to read, write and interact across a range of platforms, tools and media from signing and orality through handwriting, print, TV, radio and film, to digital social networks” (Thomas et al. 2007). In response to Twitter’s demand for 140 word messages, microbloggers employ a vocabulary of acronyms, abbreviations, and icons to offer brief and to-the-point information to their audiences (DeFebbo et al. 2009). The website blog, on the other hand, encourages a different form of literacy, more akin to the traditional essay or diary. On Instant Messenger, the conversations proceed through the use of multiple and often discontinuous threads. The Social Media Release (SMR), a new public relations tool, provides content to bloggers and other social media users, who may or may not publish or transmit the information to their personal network of friends and acquaintances (Steyn et al. 2010). Even if bloggers choose to share the SMR, they may repackage it or add comments or links to other sources (Bradley 2008).

19.7 Toward a New Paradigm: Connecting Audiences, Social Media, Open Source Policies, and Innovation

The proliferation of social media in the new century has fueled the need for a new paradigm to guide innovation studies and practices—one that sees audiences as participative, active, critical, open, attention-seeking and self-aware, time-sensitive, and transliterate. Some of the theories and concepts relevant to an audience or user orientation include open innovation, symbiosis, social constructionism (also social constructivism), sensemaking, and reflexive modernity. Others (already mentioned)

include open systems theory, uses and gratifications, and social influence models such as opinion leadership.

The research into opinion leadership may have new applications in a Web 2.0 world. Jeppesen and Laursen (2009) found that “lead users” (the most active contributors) in online communities possess more relevant solution knowledge than others; and Parvanta et al. (2013) warn that organizations need to identify the most motivated, expert, and creative users to obtain full benefits from crowdsourcing. They claim that only 9% of contributors have the motivation and experience and only 1% the creativity to make a meaningful contribution. Saxton et al. (2013) also point to the importance of identifying “wise” sources.

The extent to which organizations can engage these more sophisticated and “lead users” could also influence commitment to diffuse the innovations.

Christensen (1997) described the reasons that “great firms” fail when faced with disruptive technologies. Unlike sustaining technologies, which involve incremental improvement of established technologies, disruptive innovations typically call for new ways of thinking about products, services, and markets. In these circumstances, large firms rarely cope well, as illustrated by the case of social media:

The socially transformative innovations in information technology such as email, the World-wide Web, Google, e-commerce, Linux, and eBay have emerged not from the traditional powerhouses of IT innovation such as IBM, Intel, Bell Labs, or Microsoft, but from users of their technologies—business innovators, user groups, and communities of practice outside of the original centers of innovation. (Bers 2005, p. 3)

Accepting that knowledge no longer resides in a few large organizations, Chesbrough (2003) introduced the term *open innovation*, which stresses the importance of going outside the boundaries of the organization to harvest and—and in some cases—develop or out-license innovative ideas and intellectual property. Open innovation theory assumes that knowledge no longer resides in a few large organizations. According to Christensen and Overdorf (2000), viable options for improving the coping potential of larger firms include creating new structures within the corporation, birthing an independent organization that comes from the parent, or acquiring a new company whose processes and values mesh with the demands of the new task. Symbiotic models build on the open innovation concept (Yang and Shyu 2009; Castiaux 2007).

Social constructionist and social constructivist theories also offer user-oriented ways of thinking about social media and innovation (Berger and Luckmann 1966; Bers 2005). In the spirit of postmodernism, social constructionists argue that media technologies have created the reality in which contemporary society moves; however, these scholars do not distinguish between developers and users of the technologies. As in the case of the Linux open source movement, the users are also the developers of the technology, and no one person or organization holds the rights to Linux. In this sense, individuals and groups participate in co-creation of their perceived social realities. Social constructionists such as Bers (2005) argue that recombining and identifying new social ends for existing products and services should be the emphasis of open source innovation research. Even if not applied to

every organization, this approach would seem to fit well with large companies that experience difficulty in coping with disruptive innovations.

A psychologically based variation of *social constructionism*, *social constructivism* asserts that we create our own social reality through interaction with the media. Similarly, sensemaking models (Weick et al. 2005; Dervin 1992) are concerned with how we reduce uncertainty and make sense out of our experiences. Moved into the organizational sphere, sensemaking models incorporate concepts related to attribution of meaning in shared and collaborative contexts and help us to understand what motivates people. Theories of reflexive modernity propose that, over time, people become more self-aware and reflective. The focus on “YOU” in modern society would seem to validate the presence of reflexivity in contemporary society, along with its relevance for innovating organizations. Citing Lane (2005), Seltzer and Mahmoudi (2012) assert that all modern schools of thought about planning for innovation regard stakeholder engagement as “a fundamental characteristic of the planning process, not just an adjunct to decision making” (p. 4).

19.8 Conclusion

All of the above models and theories place an important emphasis on audiences—their needs, expectations, and potential to contribute to the collective intelligence through crowdsourcing. Key words in any formula for success will be trust, respect, transparency, openness, sharing, recognition, and timeliness. With the proliferation of related practices such as crowdfunding of business enterprises and even health care (see organizations such as WATSI), little doubt remains that open source platforms and practices will characterize the operations of many different organizations in the coming years; and organizations (innovating or otherwise) risk joining the ranks of endangered species if they do not compete for the new age social capital. In brief, strategic planning for communication of innovations must build on existing knowledge of audiences, social media, crowdsourcing, communication theories, and innovation theories.

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