Collective engagement - four thought-shackles and how to escape them:
An invited Commentary on Kleinaltenkamp, Karpen, Plewa, Jaakkola & Conduit (2019) and Storbacka (2019)

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In practitioner circles, engagement was prominent as a concept and as a measurement challenge from the early 2000s, as consumer marketers struggled to manage the explosion of opportunities for consumers to interact with brands online. Scholars eventually caught up, and we now have a substantial literature. Work on engagement in B2B contexts has been slower to mature, whether because there is as yet less practitioner demand or simply, perhaps, because B2B research is globally underrepresented relative to its importance in the economy. There has nonetheless now been sufficient work to deserve synthesis and reflection.

This special issue does just that. I focus here on two valuable and wide-ranging articles within it. First, Kleinaltenkamp, Karpen, Plewa, Jaakkola and Conduit (this issue; hereafter KKPJ&C) introduce the concept of collective engagement, motivated by the challenge of understanding the dispositions and behaviors of a *group* of buyers or users within a business customer – though their definition equally applies to other groups. They propose that collective engagement, like the engagement of an individual (Brodie et al. 2011), has cognitive and emotional components and not just behavioral ones. In the second article, Kaj Storbacka (this issue; hereafter KS) concurs that engagement is a property of collectives as well as individuals. He also argues that 'actor engagement' is not limited to buyer-supplier relationships, but equally can occur when no commercial exchange is involved. Both articles then look beyond the dyad, exploring the two-way relationship between an actor's engagement and the actor's wider market or institutional context.

These articles take us a long way from the early work on engagement in the marketing literature (Calder, Malthouse & Schaedel 2009; Mollen & Wilson 2010; Brodie et al. 2011). They take us even further from the behavioral school which followed (Vivek, Dalela & Beatty 2016; Reinartz & Berkmann 2017). Below, I reflect on four areas where this examination of engagement in B2B is illuminating. As often happens, each theme has lessons equally for B2C contexts. One of these themes expands on KS's observations on the "shackles of the dyad". I agree, and would like to extend his metaphor to four shackles that can constrain our thinking about engagement.

The shackle of the purchase moment

Engagement research began precisely because the purchase moment isn't the only customer action that matters. So just as practitioners and scholars track antecedents to purchase such as awareness, consideration and so on, we sought antecedents to other active encounters with the firm. Work on the customer's value to the firm has long acknowledged that suppliers can gain in multiple ways from the customer's help, from learning and innovation to recommendation and peer-to-peer service. Much of the early B2C engagement work examined engagement in the absence of any purchase, on free media websites for example (Calder et al. 2009). Yet, at KS points out, much B2B research assumes that the two (or more) parties are involved in an exchange relationship. By contrast, he identifies two categories of engagement, those where exchange is involved and those where it is not. His resulting definition of actor engagement – like KKPJ&C's definition of collective engagement – applies equally to relationships whether or not an exchange of property rights is involved.

If the purchase moment is no longer privileged, one interesting implication is that we can – and probably should - equally examine the engagement of the supplier with the customer. That raises many questions. What engagement behaviors by the supplier are relevant? Helping the customer with their usage processes, for example, or taking an interest in the value-in-use that a customer has gained (Macdonald, Kleinaltenkamp & Wilson 2016)? And who are the relevant supply-side individual actors making up the equivalent of the customer's usage center? The solution center? Or do we need more symmetric vocabulary for both parties – the engagement center, perhaps? A term such as this might also help in generalizing the concept of collective engagement towards business relationships where neither party can reasonably be identified as the (current or prospective) customer, such as some innovation partnerships. KS rightly points out that that literature already refers to 'stakeholder engagement' (Watson, Wilson & Macdonald 2017).

I also wonder if we should go further and re-examine our definition of business relationships. Most scholars regard a relationship as a series of exchange transactions. But the touchpoint perspective on customer experience (Baxendale, Macdonald & Wilson 2016) is able to view a purchase as just another active touchpoint – or just another engagement behavior, in the language of the engagement literature. What might we gain – and lose – if we define a relationship as a mutual engagement over time?

One might object that from the supplier's perspective, the purchase moment is overridingly critical to revenue and profits. This is not always the case, however. My current and former business schools (engagement center: my colleagues Emma Macdonald, Shane Baxendale and I) have engaged with a market research firm called MESH Experience – the firm which invented the 'real-time experience tracking' method we used in the touchpoint research referred to above – for ten years or so. During this time we have advised their clients, joined their CEO in presentations to prospective clients, and written Harvard Business Review articles about their method, among many other engagement behaviors. MESH, in turn, has hired our students, introduced us to clients, and supported student projects. This relationship has been valuable to both parties, but it involves no exchange of property rights. Plenty of resource contributions (Alexander et al. 2018) are in evidence, though, consistent with KS's carefully-argued definition of actor engagement.

The shackle of rational choice

Both KKPJ&C and KS argue that cognitions and emotions are *dimensions* of engagement along with engagement behaviors, and not just *precursors* of engagement as proposed by Kumar and Pansari (2017) among others. In support of this position, we know that the relationship between cognitions and actions is not always a straightforward cause and effect. As just one example, the engagement behavior of filling in a customer survey can affect brand attitudes and, thereby, future behaviors (Chandon, Morwitz & Reinartz, 2005). Similarly, the relationship between cognitions and emotions is deeply intertwined (Baumeister et al. 2007). A three-dimensional view on engagement, with interactions between the dimensions, therefore makes sense.

Does the same apply in a B2B context? In particular, are emotions still relevant? KKPJ&C quote Vivek, Dalela and Beatty's (2016, p. 54/55) assumption that "B2B markets are inhabited by more rational buyers with less emphasis on the emotional dimension." I have to say that rational buying was never my experience in my time as a practitioner with IBM, Xerox and others. I remember well an occasion at NCR when my impeccably-researched multiple-criteria spreadsheet recommending a software supplier was overruled by the marketing director. (Thankfully, I've forgotten his name; I'll call him Neil.) Neil didn't argue with a single number; I just didn't recommend the supplier he always wanted. There was plenty of emotion in our conversation. His choice prevailed, and before long the project collapsed spectacularly. There is plenty of less anecdotal support for the role of emotions in all forms of B2B decision-making, and KKPJ&C persuasively lay out some of it. Another example is our elicitation in Kleinaltenkamp, Macdonald and Wilson (2016) of emotional dimensions of value such as social comfort and pressure reduction within a B2B usage center.

The shackle of the individual

If a firm rather than an individual is doing the engaging, however, how (if at all) can that collective actor be said to have cognitions and emotions? Both KKPJ&C and KS wrestle with this question, which has significant implications for B2B firms' customer insight processes: if we want to assess a customer's engagement, who do we ask and how? Several perspectives or lenses would seem to be possible for this construction of collective engagement:

1. *Selection lens*: choosing one individual actor to represent the collective actor. One could assume that my former marketing director Neil's view of software suppliers was the same as the firm's, and just survey him with an engagement scale. In that particular case, the assumption might have been reasonable in predicting my firm's engagement behaviors, including purchase. For better or worse, this simplification is the most common choice by scholars and practitioners in the parallel case of such constructs as purchase commitment, trust and satisfaction. It is also the approach adopted by an overwhelming majority of both academics and practitioners in B2C research: after all, many of our purchases and other engagement behaviors are undertaken on behalf of a collective such as a family, yet it is rare for market researchers to solicit the view of more than one member of that usage center. Even in B2C contexts, therefore, having such a single respondent can have severe drawbacks, as Epp and Price's (2011) exploration of family decision-making on vacation illustrates.

2. *Consolidation lens*: regarding collective engagement as a function of the engagement of the various individuals within the engagement center. KKPJ&C explore this perspective in depth, positing that "collective engagement consists of some minimum level of collective cognitive, emotional, and behavioral dispositions, as well as collective behaviors by the actors". There is an assumption here that what matters in conceiving of collective engagement are the dispositions and behaviors that are *shared* in the engagement center. Many other potential functions of the individual actors' engagements are possible, of course: an average, for example, or some kind of synthesis based on power or influence (after all, Neil's individual engagement trumped mine). KKPJ&C discuss several such ideas, concluding (perhaps contrary to the quotation above) in their proposition 4 that collective engagement is a "multiplicative rather than a summative aggregation of individuals' engagements". These are valuable thought-experiments, but to make this consolidation lens precise and usable requires more work, conceptually and empirically.

3. *Practice lens*: regarding collective engagement as a set of social practices, rather than as a consolidation of individual dispositions and behaviors. KS insightfully discusses how the

resource contributions comprising engagement behaviors can be viewed as such a set of practices. This raises the question how cognitions and emotions fit in. A great strength of the practice lens here is that practices encompass not just what people *do*, but also the *meanings* they attach to these behaviors – "the normative, telic and affective dimensions of a practice that those who are involved in it experience and report" (Nicolini 2013, 84-85). A pure practice view of collective engagement would therefore seem to be possible. KS hints at more of a bridge between meso and micro levels in defining actor engagement as "an actor's…resource contributions, *that are facilitated by dispositions*" (my emphasis). Just as in Kelleher, Wilson, Macdonald and Peppard (2019) we constructed a theoretical and empirical bridge between the meso layer of social practices and the micro layer of (individually perceived) value, future research might similarly bridge between collective engagement practices and the engagement of the individuals involved. Another meso-level lens on engagement is a capability approach, which we used in the context of stakeholder engagement for innovation in Watson, Wilson and Macdonald (2017); however, bridging capabilities to individual engagement might prove harder, as practices are situated further along a continuum from collective to individual perspectives (Warde 2005).

4. *External lens*: measuring engagement as perceived by another party, such as the engagement object (for example, the supplier in the case of customer engagement). Interestingly, the legal system has long imputed a personality to organizations (Smith 1928). Consumers, too, construct a personality for the companies they deal with, which influences their decisions (Aaker 1997). If we anthropomorphically perceive our engagement partner to have a personality, it seems likely that we might also infer their disposition towards us. For example, as consumers we care deeply about a firm's authenticity in their relationship with us (as we perceive it) (Napoli et al. 2014). So *perceived* engagement (as perceived by a customer or another relevant stakeholder) is probably a meaningful notion which may well prove to have predictive power. KKPJ&C themselves propose a way around the measurement quandary of the consolidation lens by proposing a hybrid of consolidation and external lenses, in their proposition 3 that "Collective engagement reflects an *individual's perception of* the degree to which engagement is shared across actors" (my emphasis). This might work if we are interested in, for example, a consumer's perception of a firm's engagement with her. However, if the actor doing the perceiving is itself a collective, such as a business, we have the same problem again, of course: whose perception matters?

A priori, each of these lenses would seem to have advantages. The jury is still out on which works best – in explaining and predicting engagement behaviors, for example – or whether they have complementary roles.

The shackle of the dyad

Both KKPJ&C and KC have substantial sections on the two-way interaction between collective engagement and the wider context within which this engagement occurs – whether this context is viewed as ecosystems, markets or institutions. Here, the two papers converge less, KKPJ&C broadly focusing on contextual drivers of engagement, and KS exploring the role of engagement in shaping this wider context. I have chosen to focus primarily on the nature of collective engagement, so I do not endeavor to comment thoroughly on these extensive, fascinating sections. Together, though, they reveal a number of important research directions, of which I highlight just two.

First, what is the relationship between institutional logics and collective engagement? Institutional logics carry "assumptions, values, and beliefs by which individuals and organizations provide meaning to their daily activity" (Thornton, Ocasio, & Lounsbury, 2012, p.2). Their close alignment with practices is evident – note the 'meaning' reference in this quotation; so the practice view of collective engagement favored by KS might well suit exploration of how it shaped by institutional logics, and potentially how it shapes them. A particular challenge we explored in Watson, Wilson and Macdonald (2019) is how B2B engagement works when the parties have different institutional heritages and therefore divergent logics.

Second, what is the relationship between engagement and resource integration in a multi-party setting? KS intriguingly proposes how focal actors can shape markets by orchestrating not just their own resources but those of multiple market players by engaging with each. In multi-party contexts such as an innovation consortium, should we speak less of resource integration and more of resource orchestration? And if resource integration is itself a *joint* process in solution contexts, as we reported in Macdonald, Kleinaltenkamp and Wilson (2016), is resource orchestration truly the job of one actor who can thereby profit from it, as suggested by KS, or is it a collective process or capability?

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