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## Social media and the emergence of *reflexiveness* as a new capability for open strategy

### Abstract

Social media increases *transparency* and *inclusiveness* in organizational strategizing by widening engagement with strategy content and participants. However, our study shows that just relying on the feedback features of social media is not sufficient for an open strategy approach. Instead, emergent feedback from social media use leads to tensions initially between the participatory nature of the technology and extant management practices. Ultimately, these tensions encourage the development of new internal capabilities to appropriate feedback structurally into the organization. We conceptualize the emergence of this new organizational capability as *reflexiveness*. Further, we suggest that it is the development of this capability that, along with *transparency* and *inclusiveness*, explain the shift towards more open forms of strategizing and the potential to move organizations towards *stewardship*, as a governance model more consistent with open strategizing practices in organizations.

### Introduction

Strategy is both a statement of intent and a process by which that intent is formed and performed by members of organizations. The ownership of these two aspects of strategy has traditionally been with elite groups within organizations (Hambrick, 2007, Pettigrew, 1992). However, the rise of social media as a platform for open communication and wider engagement in organizational discourse has shifted attention to more collective views of strategy (Seidl and Whittington, 2014, Whittington, 2006).

Formalized strategy may still be managed from the top in many organizations but social media is adding pressure to make this process more porous and open to informal activity at the grassroots level and throughout (and even beyond) individual organizations. This is particularly relevant as the younger generation of “digital natives” (Helsper and Eynon, 2009) become more dominant given their aptitude to use social media to engage and interact with others (Vodanovich *et al.*, 2010; Tams *et al.*, 2014) and share knowledge (Morton *et al.*, 2015).

The participative nature of social media changes the distribution of rhetorical resources and reshapes patterns of communication from univocal into multivocal organizational environments (Huang *et al.*, 2014, 2015). Social media is intrinsic to knowledge management (von Krogh, 2012), knowledge reuse (Majchrzak *et al.*, 2013), distributed leadership (Sutanto *et al.*, 2011), and in facilitating interaction and internal collaboration (Razmerita *et al.*, 2014). However, it is the increased visibility of what others know through social media that creates conditions to leverage knowledge in new ways and promotes learning as a process that operates vicariously rather than through interpersonal experience (Leonardi, 2014). This is significant to strategy because of how social media accentuates the role and voice of every member of the organization by providing a platform for engagement and participation, as well as a more visible line of sight to strategy (Haeffliger *et al.* 2011). Social media can have therefore the ability to extend reach and richness in the making and ‘doing’ of strategy. In particular, social media has the potential to modify ‘how much’

strategy is visible, and when and how individuals are able to participate in creating and shaping practices and content of strategic significance. It adds reach and volume of feedback ex-ante, but often also replaces traditional forms of communication of extant strategy.

It is therefore appropriate to broaden our view of strategy to include a wider set of activities with strategic impact within organizations, some of which have not been recognized as being sufficiently close to the practice of strategy (Bechky 2011). This broader view of strategy reflects the growing number of modern work environments where strategy practice is shifting from being “exclusive and secretive” to becoming more “inclusive and transparent” (Whittington *et al.*, 2011 p. 538). The issue is then how increasing *inclusiveness* (broader involvement of stakeholders) and *transparency* (wider access to content and information) interferes with established conventions around *who* should be involved in strategy and *how*, and the extent of *what* should be shared. For example, becoming more inclusive can challenge established hierarchical structures within organizations (Collier *et al.*, 2004) and break with established conventions on strategy being the domain of a restricted group of top managers (Pettigrew, 1992, Hambrick, 2007) by opening-up the potential involvement to other echelons in the organization, notably middle managers (Floyd and Wooldridge, 1994, Wooldridge and Floyd, 1990). Adding transparency can also be problematic because it creates conditions for equal voice and access to rhetorical resources by all members of the organization (Huang *et al.*, 2013), challenging for example the status of middle management because they no longer moderate and intermediate knowledge exchanges. This echoes Bruhn and Ahlers (2013) who note the importance of integrating and embedding new communication channels in existing organizational and strategizing practices and processes.

This is causing significant changes to strategy as conventionally described; changes that go deep into the praxis of strategy, its norms and artefacts, as well as who is involved in formal and informal strategic activity in organizations (Whittington, 2006, Whittington *et al.*, 2006, 2011). With further ramifications on the democratisation of strategy by establishing agile, responsive and capable organizations (Doz and Kosonen, 2008 a,b), crowdsourcing strategy dialogues (Stieger *et al.*, 2012) and more democratized forms of strategy (Dobusch and Mueller-Seitz, 2012, Stieger *et al.*, 2012, Matzler *et al.*, 2014).

This paper focuses on social media as a platform for participation (Cotton *et al.*, 1988) and considers its role in shaping and forming strategy within organizations (Mantere and Vaara, 2008). We pose the following guiding research question to deepen our understanding of this research puzzle: *How is the adoption of social media changing the nature of organizational strategizing?*

The paper is structured as follows. In this section we motivated the study by highlighting the role of social media in shaping strategic activity in organizations. Next we show how social media is changing the nature and dynamics of processes of strategizing in organizations and identify the research gap in our current understanding that we aim to address. The section that follows outlines our methodological approach to the empirical work by explaining the two stages undertaken to gather and analyse secondary and primary data. This two-pronged approach allowed us to intertwine a wide range of data from multiple sources with the

concepts of open participation in organizational strategizing. We then report on our main findings, providing evidence of tensions and capability development in the organizations studied. In our analysis section we then review and conceptualize the dynamic nature of capability development by adding *reflexiveness* as a third dimension to Whittington *et al.*'s (2011) model of open strategy. Drawing on Gorli *et al.* (2015), we suggest that this capability embodies the process of integrating open and emergent feedback into the structural arrangements of organizations. Our conceptualization of the *reflexiveness* capability is a key contribution of our study. Lastly, we reflect on the potential for this capability to shift the governance of the organization towards *stewardship* as an overall organizational arrangement that is consistent with open-strategizing practices in organizations.

### ***Social Media Expansion into Processes of Strategizing***

We commenced with a systematic and comprehensive review of case material publicly available such as blog posts, online magazines, news, industry reports, company reports, white papers, etc. This gave us a broad basis to understand the emerging use of social media in organizations. More particularly, the aim was to capture salient, current examples of the expansion of social media into processes of strategizing. This was achieved by analysing the social media features used (column 1) and their specific strategic use (column 2) and to capture the effect on strategic activity (column 3). Table 1 shows a selection of representative examples of our initial analysis:

Social media features	Examples: strategic use	Effects on strategic activity
<i>Interaction with management</i>  Blogs, commenting, video casting, discussion forums, online communities, real time online Q&As, social network updates, internal twitter	Dow Chemical, Lloyds Bank, ING, Nokia, Lloyd's Bank, Linden Labs, Alcatel-Lucent  CEO at Dow Chemical was an early adopter of internal blog since 2007 called "Access Andrew". Received 24,000 visits per blog post and up to 50 comments. Employees are encouraged to leave comments, which are moderated but the CEO personally authors the blog and deals with hot topics himself. At Deutsche Bank some managers host "Ask Me Anything" sessions online where questions on any topic can be freely asked by any employee in the company.	Active use of social media to make the vision of senior management more transparent and gather support and feedback from employees. In some cases, this is used to define new strategic initiatives and support decision making. It also provides a view on employee sentiment for senior management.
<i>Extension of closed management meetings</i>  Real-time and post commenting on topics from management meetings, live updates on social networks, event blogs	Philips, Unilever, PwC, Dollar Financial, Grant Thornton  Dollar Financial, the UK operations of US-based DFC Global Corp, a diversified financial services company, regularly film board meetings and post the videos on the intranet for employees to view. At Grant Thornton there is live blogging of senior management meetings.	Strategy meetings which were previously closed become more open, allowing more employees to engage and discuss strategic issues.
<i>Employee listening programme</i>  Community groups, online portal for sharing feedback,	HSBC, Virgin Media  HSBC have a structured Employee Listening programme for employees to talk about anything, these sessions are facilitated by managers. Managers then use a custom	Employees' concerns and issues are listened to and recorded, acting as a data input into strategic decision-making

custom-built forms for input of data, voting systems	portal to record issues raised which is then analysed to provide information to advise management on decision making.	
<i>Ideation programmes, managed input and consultation on specific initiatives</i>  Innovation Jam, ideation platforms, Wikis, voting systems, community groups, discussion forum, social network updates, microblogging and instant messaging	Avery Dennison, HCT Technologies, IBM, Grant Thornton, Red Hat, Luxottica Sanofi Aventis, ATOS, BNP Paribas, Virgin Media  Within Sanofi Pasteur, Yammer was used as a community site for its "Women in Sanofi Pasteur" (WiSP) network. The network helps to promote gender balance in a company where women were originally only 20% of the workforce. Pressure from the group helped to change company policy and also meant the company won the Apec (French executive employment association) Gender Parity prize.	Specific initiatives which ask for input into a strategic level campaign or objective such as a values programme. Gradual formation of incentives and measurement to recognize contributions from employee and management. Structured approaches to facilitate innovation. Recognition of issue-led communities leading to changes within company.
<i>Open HR-related processes including peer recognition</i>  Badges and recognition, ratings, peer recognition systems, gamification	HCL Technologies, Xchanging  At HCL Technologies the appraisal system is open so that management appraisal feedback is visible to all. Employees give feedback on managers. This helps to establish an open culture, which has resulted in further structured approaches to crowdsourcing strategy among employees.	Peer to peer recognition on employees and managers can identify issues, influence behaviours and also guide strategy as feedback cascades upwards
<i>Analysis of employee sentiment and social dynamics</i>  Polls and surveys; Analysis of community groups; Discussion groups; Social networks	HSBC, Nationwide Insurance, Philips  Nationwide Insurance (USA) experimented with an app to identify employee sentiment on its Yammer social network, which was then used to help management make decisions. At Philips KPIs show strategic contribution of ESN to interaction between different groups.	Analysis of employee sentiment and relative identification of trends to inform and feed into strategy

Table 1: Examples showing social media influence over strategic activity in their organizations (full sources and coding available from the authors)

Our analysis revealed various ways in which particular social media features are being used in strategizing. It also revealed that social media were used in combination or at times were replacing traditional approaches to strategy development that had often been based previously on paper communication and face-to-face meetings. This analysis showed a wide range of social media features being used within organizations such as blogging platforms, commenting, activity streaming, social networking, internal twitter, videocasting, online forums and chats, wiki editing, voting systems, ideation and collaborative platforms. It showed that these online services were increasingly used to engage employees in organizational activity and decision making (Razmerita et al., 2014). In certain cases, social media were more deeply embedded, and effectively replaced traditional forms of organizational participation, and in this way social media became a significant influencing factor over the strategic outlook of these organizations (Haeffliger et al., 2011).

In these organizations, strategic activity was shifting from "analogue" processes based on traditional tools, such as work-shopping, stakeholder meetings, corporate events and

sharing documents (Whittington, 2006; Whittington *et al.*, 2006), towards new “digital” forms of strategic engagement and participation based on social media (Stieger *et al.*, 2012). Figure 1 captures this finding by showing the increasing influence of social media over traditional approaches to managing strategy (Whittington 2006, Whittington *et al.* 2011, Jarzabkowski and Kaplan 2014, Haefliger *et al.* 2011). The concentric circles represent this gradual integration and often replacing in the use of social media in strategic activity in organizations. As per the examples shown in in Table 1, the figure also highlights the way in which social media shifts attention from an approach to strategizing focused on tools and outcomes, towards an approach more based on strategy conversations, connectedness and engagement.

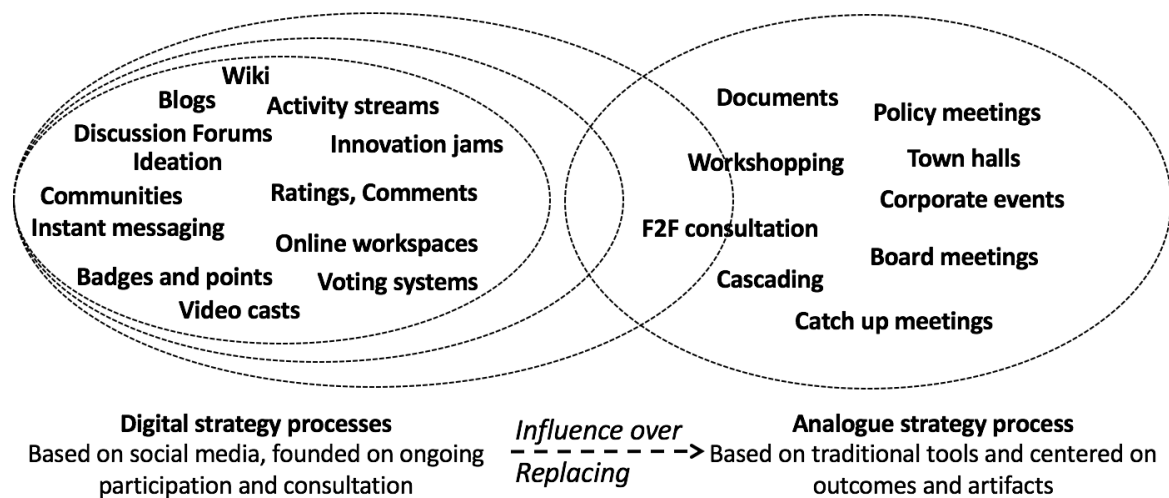


Figure 1: Digital and analogue strategy processes; social media expansion into processes of strategizing

These findings motivated us to analyse the effects of participation through social media on organizational strategizing. In other words, to explore further this shift towards more participative forms of engagement and its potential to open-up strategy content and modify strategy practices in organizations. This led us to explore how social media created new dynamics of interaction and placed pressure on organizations to manage emergent feedback from a much greater number stakeholders and media (Hienerth *et al.*, 2011, Aral *et al.*, 2013) with regard to strategic issues. In our study, we found different approaches to managing feedback. The emergence of new capabilities to manage new forms of participation and openness seemed to be a dominant theme across the case material.

### Social media and the emergence of *reflexiveness*

To understand this phenomenon it is essential to define and interpret the inherent characteristics of social media. Social media is not a singular technology. Rather, it is a broad category that includes various types of online services that add the ability for interactive and participative communication within social settings that form organizations. They are inherently contextual and become embedded in the practices and norms of these social groups. Social media are therefore better described as an emergent ensemble of features that forms context for social interactions (Spagnioletti *et al.*, 2015), the shape of which is the result of the unique interplay with the context of use of each organization (Baptista 2009). Other types of ICTs such as email are inherently more closed, transactional, and centred on

individuals, whereas the essence of social media is based on providing high visibility and open participation. At the practical level, social media add features that enable for example the seamless sharing, commenting, responding, syndicating and interacting with content (text, voice and video) and connecting with others, and follow and interacting with their activity streams (Kaplan and Haenlein 2010, Kietzmann *et al.*, 2011) – see Table 1. Social media therefore provide a malleable platform, which is inherently organic, free-flowing and built to support dynamic and emergent feedback loops of communication within a social group.

Within organizations social media afford new types and patterns of communication and interactions, and have the potential to impact on its structure, governance and organizing principles (Leonardi *et al.*, 2013, Vaast and Kaganer 2013, Treem and Leonardi 2012). The dynamic feedback loops that emerge through wider participation in strategic activity via social media can initially be in tension with extant formal structures and norms within organizations. However, organizations learn to manage and harness feedback as a useful resource. In so doing they become inherently more *reflexive* and able to move towards an organizational environment where there is wider participation and engagement in the shape of and direction of the strategy. Gorli *et al.* (2015, p.3) suggest that the environment within an organization is reflexive when it gives “*managers and practitioners occasions to reflect on their systems of action, so that their imagination, inventiveness and enterprise can take wing.*” Social media stimulates this reflexivity as a new capability in organizations. The embedding of social media in the functioning of organizations means that feedback and participation is structurally part of the organization. Denyer *et al.* (2011, p. 393) reflect on the long term effects of social media adoption within organizations, they suggest that social media have the potential for “*reconfiguration and redesign of the whole socio-technical and managerial system*” with the potential to contribute for strategy practice to be inherently more reflexive (Wilson and Jarzabkowski 2004, p. 15).

Reflexiveness – the ability to be reflexive – is a social concept that refers to the ability to integrate analysis of ourselves in thinking and action. At the individual level it means self-introspection and self-awareness but, in social settings, it involves interaction with others in the context of established norms within a social group. Thus, within organizations this capability requires feedback systems and refers to the ability of employees to apply practical reflexivity (Cunliffe, A., 2002) to give them structural conditions to be authors of their own workplace and play an active role in the daily “*production, reproduction and transformation of their work processes*” (Gorli *et al.*, 2015, p.3). Accordingly, organizations with low reflexivity only allow for low levels of agency in changing established social structure. In contrast, organizations with high reflexivity allow for high levels of agency and give individuals better ability to shape norms and structures of their own environment - which is what Gorli *et al.* (2015) say develops the ability for individual and collective authorship or in other words “*make sense of, and shape their organizational practices*”. This then gives individuals an opportunity “*to perceive and pursue specific opportunities for influencing organizations and their contexts*” which is a shift from conventional approaches to strategy and organizing. It is this thread and link between social media use and the structural conditions for participation in organizational strategizing that is the focus of this study. We now review the research methods used to support this aim.

## Research Approach and Methodology

To find evidence of social media use in organizational activity with strategic reach we started with a wide review of industry reports by systematically collecting any source of case material reported in the press as noted above. Our efforts were strengthened by one of the co-authors who is immersed in the social media field and is well informed of its practices. Our aim was to gain a rich insight into the possible practices across as many organizations as possible of social media used in strategic activity. Therefore, to address this recent and emerging phenomenon, our research adopted an exploratory design (Stebbins, 2001) combining two research methods to help gain breadth and depth. The study began with an extensive search and analysis of secondary data to build a broad understanding of how organizations use social media in open strategy initiatives. The second round of data collection gathered primary data and used semi-structured interviews. Informants were selected as they were responsible for, and embedded-in, the running of social media driven open initiatives. Informants were drawn from seven organizations spanning different sectors.

In the first phase, the collection and analysis of secondary data focused on consultancy and management reports, company press releases, the business press and corporate blogs – all of which were deemed to be a rich source of data (Easterby-Smith *et al.*, 2012) and give good coverage of organization's social media-led initiatives. Our initial search revealed data on 50 cases of organizations using social media in support of strategic initiatives. Following initial coding of these data, we identified 35 cases across 29 organizations which met the twofold criteria of social media use in our context: 1) being in-use (cases were rejected if they were using 'primitive' technologies (Whittington *et al.*, 2011)), and 2) were serving as the driver for open strategy (i.e. social media were aimed at increasing inclusion and transparency). These 35 cases were coded further to identify the social media tools and features employed, the intended effect on strategizing, the nature of emergent capabilities and the tensions encountered. This phase of the study provided the basis for our analysis of features of social media used to drive open strategy and enabled the synthesis of tensions between established ways of working user expectations and the configuration of openness achieved. These were written-up as vignettes to provide "systematically elaborated descriptions of concrete situations" (Schoenberg and Ravdal, 2000) which enabled us to collate and contrast different approaches to open strategy. The aim was to capture existing practices across the industry from secondary data using short vignettes (Friesl and Silberzahn, 2012) and then use this to conduct extended interviews with a smaller group of organizations for richer and deeper understanding of social media use in this context

The second phase of data collection drew on interviews as a method to access rich, experiential accounts of social media technologies in-use and open strategy initiatives. Our aim was to gain first-hand, experiential accounts of how social media are deployed in support of open strategizing. We conducted extended, semi-structured interviews with 10 respondents from 7 different organizations (around 30 hours of audio recording were transcribed verbatim). The 7 organizations were selected from the pool of cases gathered in the first phase of the empirical work. The transcripts were analysed first independently and then jointly by the authors to capture the themes and experiences shared by our respondents. The themes were used as first order codes, which were subsequently used to recode interview data in order to capture quotations and evidence of how social media is



being used in open strategy contexts. Table 2 summarizes the seven organizations studied and explains the selection criteria for each. Some of these organizations are also listed and feature in our preliminary findings in Table 1. However, in table 2, we analyse new field work based on interviews, going beyond the public material covered earlier that led us to consider these organizations in greater depth.

Organization	Characteristics	Salient insights of social media influence on strategic activity	Interviewee
Xchanging	9,000 employees in 12 global locations, Technology services	Known to have recently implemented social media with significant impact on the practices and culture of the organization.	Global Head of Internal Communications
Virgin Media	14,000 employees, UK-based Telecommunications	Reported as a case study for having an advanced online community-based customer service.	Director of Technical Services, Head of eCustomer Care
HSBC	265,000 employees, Global with UK HQ, Financial services	Widely reported listening in programme encouraging employees to voice concerns and open up to senior management	Global Head of Insight, Culture and Group CEO communications
Grant Thornton	5,000 employees, UK-based Accountancy. Partnership moving to shared ownership	Known case of a new CEO active on social media internally, with an open style of communication. Moving from partnership to shared ownership.	Senior Manager for National Communications
IBM Studio	Several hubs in large cities, operates as subsidiary of IBM, Global IT and consulting services company.	Notorious for being the “agile” arm of larger IBM to allow employees to execute projects differently.	CIO Lead, Project Manager, Senior Manager
Atos	93,000 employees, Global with headquarters in France, IT services	Very present in the press as a case of banning email internally. Very ambitious in social media.	Group Chief Change Officer
Philips	105,000, Global with headquarters in Netherlands, Electronics	Known to have advanced metrics to capture social media collaboration and exchanges globally	Digital Communications Manager

Table 2: Details of semi-structured interviews, firm characteristics, and selection criteria

The interviews revealed how social media are used, and how gradually they contribute to substantively opening approaches to strategic activity in each case. The experience of organizational actors tells us how particular tensions were played-out, what capabilities had developed, and whether the organization concerned had adapted its governance stance in response to, or in concert with, open strategy initiatives.

This dual method approach enabled us to gain insight into the variety of ways social media are used in open strategy as well as providing a window into the ways such ICT is shaping and challenging management practices. Our aim was to span meso-level patterns of ICT use in firms (cases drawn from secondary data) as well as granular examples anchored in strategic praxis (interviews). This approach enabled us to give situated accounts of organizational practices positioned in a broader context of social media usage. We investigated multiple cases, using complementary methods of data collection, seeking to identify common features of strategizing and strategic praxis supported by social media. The approach leads to the identification of common understandings, teleologies and rules

driving the adoption of social media, each of which contributes to constellations of practices and material arrangements of open strategy (Schatzki, 2002, Seidl and Whittington, 2014).

## **FINDINGS AND ANALYSIS: BECOMING STRUCTURALLY OPEN**

We now present and discuss our findings. We first review key initiatives related to social media use with impact on strategic practice. We analyse how this stimulated the emergence of feedback loops, and their gradual embedding in significant aspects of organizations. We pay particular attention to the emergence of new ways of engaging employees in shaping the functioning of the environment that they belong to, which leads to tensions between new forms of participation and established structures and norms in the organization. Our findings suggest that organizations develop new capabilities in response to these tensions. We conceptualize these tensions and related capabilities and reflect on how they ultimately move strategic processes and thinking to become more distributed: seen as something shared, jointly achieved and enacted within organizations – a characteristic of organizations that have developed *reflexiveness* as a new capability.

### ***Emergent feedback loops***

The growing adoption of social media within the organizations studied created new and often unexpected forms of interaction and feedback. These new forms of managed and unmoderated communication underpinned changes across all organizations.

For example, the CEO and CFO of Xchanging held regular online chats with the employees. The questions posed by employees were unmoderated and responded to “on the spot” by them. This feedback feature was associated with a new culture of interaction between senior leaders and employees, and both the content and interaction were gradually more deeply embedded in the culture and processes of Xchanging as mentioned by the Global Head of Internal Communications

*" We had some live chats which we'd never been able to do before, so it was really interesting. We'd get the CEO and the CFO doing a live chat, so people could literally pile in and ask them questions. They were very open questions that they were expected to respond to on the spot, so a completely different culture, and really showing people that the C suite are accessible."*

Feedback was also becoming part of the way of working among employees through the adoption of social networking, instant messaging and activity streaming. For example, the Digital Communications Manager at Philips highlighted how social media stimulated feedback and connected employees

*"It's totally synchronized so every follower of me will see my intranet article. All my followers will be notified that I've been interactive with this article. This is really interesting because normally I would never go to the IT intranet but now I follow people from IT and they interact with IT intranet articles and then I go to the IT intranet as well to read those articles because they are of interest to me"*

Social media channels delivered wider and deeper use of feedback within the organizations studied and was a central theme in our analysis. In some organizations feedback from social media channels developed more naturally within the culture of the organizations, such as in the case of Philips where the culture was perceived to be open and relaxed. While in other organizations we noticed the need to follow a more formal approach to managing new feedback from social media. For example, HSBC created a structured programme, called Exchange to stimulate feedback and engagement with employees and more specifically to “put employees in a position where they have the freedom and the trust to talk about anything they want to talk about.” Feedback from employees under this program was initially pushed through the formal structures of the bank to ensure it was listened-to by senior managers. However, expectations about using feedback became quickly accepted, as captured by the Global Head of Insight, Culture and Group CEO communications at HSBC:

*“In the early days I had to be really prescriptive and very, very strict actually with leaders. Because I think they had forgotten the art of listening and they’d forgotten the art of listening with intent.”*

A more complex form of feedback was anonymous posting. Philips’ social media channel called “Office World” allowed totally anonymous feedback. This feedback feature complemented other forms of social media feedback, but allowed employees to raise issues they otherwise would not without the safety of anonymous posting. The Digital Communication Manager at Philips described the use of this service:

*“... everybody with a Philips’ email address can sign up for employee feedback anonymously, where your identity is protected... people share their feedback about certain things... you’re free to say what you really think.”*

The above highlights the emergence of new forms of social media feedback and novel forms of interaction, which were associated with new forms of participation increasingly structurally embedded in formal structures of organizations. Next we explore emergence of inherent tensions arising along the new emergent feedback loops.

### ***Tensions from integrating open feedback in extant structures and norms***

As identified previously, the adoption of social media can bring unprecedented levels of feedback and dialogue to organizational life. It also sets new expectations of participation and engagement in increasingly important and strategic aspects of the organization. Tensions emerge when the structures of organizations are then in opposition to these expectations of participation. We conceptualize four types of tensions experienced by organizations as they become more *transparent* and *inclusive* in their approach to strategizing (Whittington et al., 2011) using social media.

**Tension 1** is characterized by frustration when organizations adopt social media but limit its reach (*inclusiveness*) and visibility of content (*transparency*). User frustration ensues when they start to engage with social media and feedback features but realize that their contributions are moderated and/or restricted in terms of visibility. Imbalance and dissatisfaction emerge with the exclusion of certain groups or where the process and ability for employees to contribute is too rigidly controlled. This leads to inconsistencies between

established norms and new expectations of open participation is captured by the Global Head of Internal Communications at Xchanging:

*"You know, you can't give people a voice and then tell them 'well, actually, you can have a voice but only if you say what we want you to say'. If you're going to give them a voice, then you have to listen. I think we've given them the voice and now we're learning to listen, but actively listen, and that's the difference ..."*

She further reflected on the more structural implications of this tension. Employees were happy to engage with organizational discourse but expected in return their voice and contribution to be acknowledged and purposefully considered. This is illustrated in the following quote

*"As people get braver and start to ask questions of the senior leaders around their strategy, and they're being held accountable to it now, so people are saying, you know, 'You said you'd deliver there. Where are we and what have you delivered and why haven't we delivered that?' The questions are really up front."*

Typically, organizations react to this by taking strides towards increasing either *inclusiveness* and/or *transparency*. However, although this signifies that the effects of tension 1 are alleviated, it can produce different tensions.

**Tension 2** is characterized by greater *inclusiveness* but still low *transparency* of strategy on social media. Typically, this means that greater inclusiveness provides conditions for all employees to contribute and participate in organizational discourse through social media tools. However, frustration emerges from this situation when management fails to allow the expression of conflicting views or are seen to not be engaging with employee views. Dissatisfaction emerges from limited ability to engage with strategy content and have meaningful conversations despite the wider access. We noticed this tension in Virgin Media for example with a significant emphasis on building a large and inclusive online community but where the focus was on specific topics and operational discussions.

Alternatively, organizations may focus on adding transparency via social media tools, rather than on widening reach. This is characterized as **Tension 3** where content and information is open and visible but restricted to some closed groups. This inevitably causes division and instability. For example, knowledge workers may have more access to digital channels than their colleagues in factory or retail outlets. This type of tension was visible for example at IBM between the agile subunit based at the IBM Studio and the rest of IBM, the following quote by the CIO Lead illustrates how these tensions were felt by the IBM Studio team.

*"They're trying to create this fast moving environment... but based still around this very slow moving, large organization. So there's this little hub that's working to produce quickly, but still... this huge process-orientated, monolithic organization behind it, that kind of fights with that ideal I think."*

Organizations naturally respond to these tensions by rebalancing their internal structures to accommodate employee feedback. They may then reach a state where they have enabled

wide reach (inclusiveness) and richness of content (transparency) so that all employees can openly interact with each other and content. However, our analysis suggests that this state is perhaps the most precarious of all because the expectations of participation are the highest but the organization has not yet developed appropriate structural conditions to incorporate the feedback created and use it meaningfully and strategically. We characterize this stage as tension 4.

**Tension 4** therefore is also associated with tensions between the open nature of social media and established more closed and hierarchical structures. For example, where employees contribute openly to strategic discourse, but senior executives still retain discretion and control of what and how employees contribute to discourse around strategy content. Thus a disconnect may arise between open feedback and the structures supporting the strategic development of the organization. Tension 4 is fostered by the existence of open communication, but without the associated redistribution of power and reward structures. Whittington *et al.* (2011, p. 535) allude to this when they say that

*"Inclusion and transparency do not extend to the transfer of decision rights with regard to strategy: openness refers to the sharing of views, information and knowledge, not a democracy of actual decision making."*

Tension 4 is a corollary of this when organizations adopt social media to open strategizing but do not become more participative structurally in their strategy processes. The Director of Technical Services at Virgin Media reflected on how far they had gone to be both inclusive and transparent but were still under serious tensions to adjust more structurally to the new environment

*"We're still on that journey, that shift to really truly transform. It's almost a leap of faith to really move from [being] reactive, to be proactive ... it's about relationships. It's quite a long lead time to get into that truly transformed space"*

Figure 2 illustrates these tensions using a two dimensional diagram where each axis represents expansion of either inclusiveness or transparency. The four resulting quadrants capture the types of tensions described above.

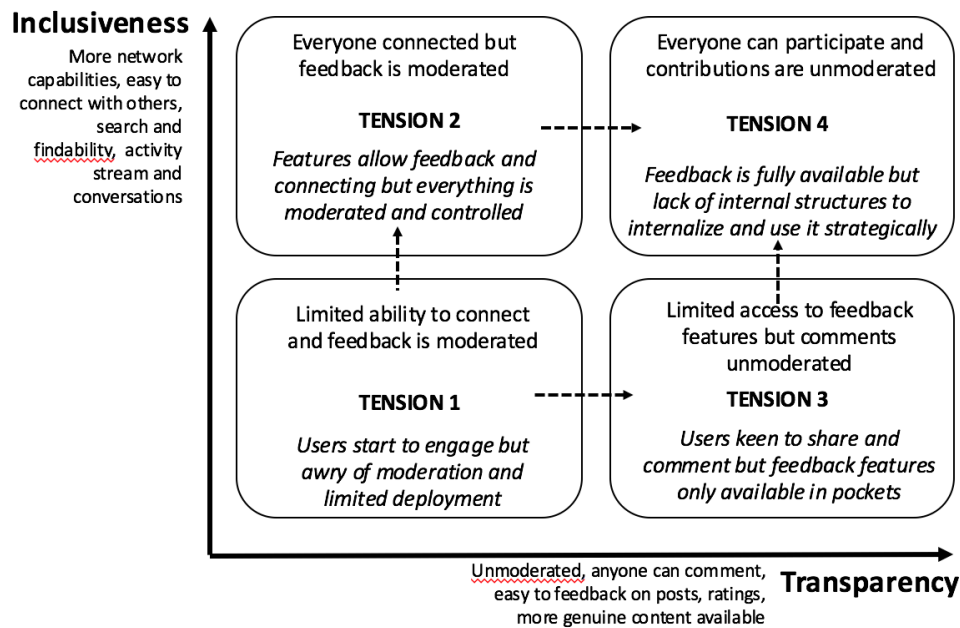


Figure 2: Tensions arising from increasing inclusiveness and transparency through social media

The effect of these tensions in the long-run was that organizations adjusted their internal structures to accommodate the new forms of interaction and feedback. Various adjustments were visible at various levels in the organizations studied but they had in common increased appreciation of the participative nature of social media. We now conceptualize these adjustments as the development of a new capability of *reflexiveness*.

### **Reflexiveness as a new organizational capability**

*Reflexiveness* emerged as a new capability for managing the tensions described above. We suggest that the development of reflexiveness enabled organizations to successfully integrate emergent feedback from social media and harness advantages arising from engagement in open strategy initiatives. We characterize three stages in the progression towards gaining this new capability: 1) feedback accepted as valuable resource; 2) developing formalized structures to sustain open behaviours and; 3) strategic integration.

The **first stage** arises from structural adjustments in response to tension 1, specifically to the initial emergence of feedback features in organizations that social media provide. The main characteristic of this stage is the internal recognition that feedback from social media as a new resource that has value, needs attention and requires management. This recognition of feedback as useful for organizations was seen to develop gradually, for example the Global Head of Internal Communications at Xchanging said that they

*"... had the platform for probably a year and a half, and I think we've grown more confident and trusting in the platform."*

Another characteristic of increased reflexiveness is the stronger signals to encourage and stimulate open and unmoderated feedback from various areas of organizations. This type of feedback through social media is inherently emergent and unprompted, so outside the control of senior management. This often marks a departure from managed feedback

through employee surveys for example, and so it requires new approaches. At HSBC the *Exchange* programme was created to signal and create an environment for employees to provide unrestricted feedback.

As social media provide organizations with greater understanding and new methods for managing this type of feedback, new formalized structures emerge to monitor, measure and report feedback to executives, as captured in this quote from HSBC:

*"Every business and every function head, including the head of communications for that area, gets a report every quarter, and then there is a global HSBC one and that is the one that gets presented at the Board."* as reported by the Global Head of Insight, Culture and Group CEO communications.

Stage one encompasses the initial phases of the organization becoming aware of the new resource it has in terms of information and feedback, followed by structural adjustments where organizational members are made aware of the value of social media and the need to manage the new levels of feedback it provides.

**Stage two** in developing reflexiveness is a response to tensions 2 and 3 and is characterized by the greater level of formality in managing and using feedback internally. Often this was accompanied by formalized techniques to monitor the use of social media for sharing, collaborating and social networking for example. Some organizations then used this information as part of the reward structures for employees, so that they were directly incentivized to engage with feedback features with strategic significance in their organizations. One example from Philips was in identifying influential participants through advanced social network analysis as described by the Digital Communications Manager who said that they

*"Look at the influence, so how many group members and who are really influential, who have the highest response rate, the most active members. This is a really popular tool for the group admins."*

Other organizations had also developed advanced systems to measure engagement with feedback features. At Atos for example the Group Chief Change Office referred to a new and sophisticated system of stars that helped management to manage content and contributions.

*"We have a robust automated tool that captures the number of readers, the number of reactions, the number of posts, the number of people who subscribe and a few other parameters... this gives you the number of stars. We believe that the value brought by this community is reflected by these stars."*

However, some organizations moved further to establish a link between these metrics and the internal reward structures for employees. For example, at Philips they issued a regular report that assessed progress towards volume and quality of employee feedback and interaction, which was associated with internal bonus structures, the following quote.

*"A lot of those functions have in their objectives to increase adoption of the social platform... if they meet their objectives they receive a bonus...."*

These reward structures also worked to reward employee contributions through a system of badges which were seen as currency for influence. The Digital Communications Manager described the significance of the badges in profile development at Philips.

*"Everybody can give it away. For example, if I go to my profile you will see my things. You see how many I received. I received one brand badge, three eager to win. I also received fifty-one great contributions and two very meaningful innovations. I have four inspire and one operational excellence. One I deliver results and twelve take ownership and thirty-one team up to excel. This says something about my personality of course"*

However, there were organizations that demonstrated more advanced characteristics of *reflexiveness* where feedback was fully incorporated into the norms and ways of working in the organization, but also began to shape deeper aspects of the organization such as trusting attitudes and behaviour, leadership styles and culture. These are the characteristics of **stage three** in the development of *reflexiveness* which emerge in response to tension 4. In these organizations feedback was not just integral to the normal functioning but was starting to shape and influence management styles, governance structures and strategy.

Linking feedback from social media with organizational strategy is a sign of a *reflexive* organization where strategy is more than a statement from senior management, to be instead seen to be a shared effort and co-created. This aspiration for the organization to develop the ability to use feedback from social media is captured by the following quote by the Global Head of Internal Communications at Xchanging.

*"... hopefully slowly, bit by bit, we'll get to a point where, you know, we'll get people influencing the strategy to come. Right now they [employees] are just reacting to what they're being told, but as their confidence builds and as their leaders see that actually our employees aren't children and they do have some value to add, then it could influence things going forward.... they [leadership team] would say okay, these people [employees] are asking questions for a good reason, and they have things I need to start thinking about a little bit more when I'm setting strategies. How I'll answer those, and if I can't answer them, then let's think about it and consider all the other options and maybe ask people's opinions."*

An integral part of this process towards becoming more reflexive at strategic level is a shift in leadership style and management approaches. Leaders that operate more consistently with the participative nature of the environment developed recognition and notoriety and become more influential, and ultimately rise in the organization. This shift to form management approaches more consistent with the participative nature of a reflexive organization is captured by the following quote from HSBC stating how some leaders "got it" while others struggled with this new approach:



*“There was another cohort of leaders who just found this effortless. It was almost like a different breed of leader that had been quiet up until this point. Who would have thought you are now somebody who has followers rather than workers because you listened to them?”*

Further, we noted that this shift in leadership was reinforced as part of the Exchange programme discussed previously, and other structural changes at HSBC. The following quote captures this link between leadership and a wider movement towards a more reflexive environment in the bank.

*“Antonio [CEO of HSBC] runs a blog called Connected. People have no problem speaking up on his blog. That’s got nothing to do with social media though and I think this is where people get things confused. That is to do with Antonio. The one thing that he’s made crystal clear as part of his leadership is that no one is ever going to be told to shut up. I think there has been something that has subliminally happened through Exchange. Like I have heard people say, ‘I’m part of a speak up culture, I’m going to voice this, and I’m not going to wait for Exchange’. That’s exactly what should be happening, people should feel that they can knock on people’s doors and say things.”*

Similar evidence of progression was evident at Grant Thornton where the rise of a new CEO, Sacha Romanovitch, was linked to her growing profile and ability to engage and influence through social media. The Senior Manager for National Communications at Grant Thornton characterized her as *“the very definition of a social CEO”*. It is significant that as CEO she stated *“I don’t want closed leadership conversations happening via email. I want them happening out in the big wide world”*. This was consistent with her view of the management of the organization which she said would like *“the vast majority of the management of the firm to be done in an open forum”*. All this marks a trajectory towards gaining capabilities to appropriate and engage with feedback at a strategic level.

In some organizations a deeper implication of this was the effect on governance. At Atos the adoption of social media and feedback was far-reaching and the organization was therefore considering strategic implications of this. For them this had deep implications and represented a transformation as reflected by the Group Chief Change Officer.

*“We are now at a step where we clearly see what the benefits will be when we move into a new model of organization. Not new tools, not a new hierarchy function supporting this way of work. When we really create a more agile organization, in which co-exists structurally a social organization and a classical hierarchical organization, and we make all these flow effortlessly, seamlessly. And of course now, we are speaking of a transformation, which starts with the senior managers and into all the organization.”*

Other organizations, recognizing the complexity of this transformation, took a different approach in reconciling the distinct nature of the two modes of working and organizing. For example, IBM created a separate unit called “IBM Studio” to operate according to the more

“agile” and employee centred approach. By separating the Studio from the rest of the organization IBM expected to create an environment that gives

*“... individuals more free reign and autonomy on what they choose to work on, and how they’re going to do it. The way that the team works, the tools that they use to operate on, and then even things that they do is very much open to them.”*

The vision was “that the rest of IBM catches up with us and operates in a model closer to the way we’re working” as stated by the CIO Lead of IBM Studio. At the core of this new way of working was a view of individuals as active participants of the environment where they operate. It is significant that IBM created this as a separate entity because as stated “If you try to change the ways of working and the culture to agile but at the same time keep on measuring people, rewarding people, and using exactly the same metrics you have previously, that will fail.”

The cross-organization analysis above highlights how the process of introducing social tools stimulates employee participation and feedback, but also leads to tensions and capability development, ultimately shifting deeper structures of organizations towards more participative environments where in some cases gives employees greater degree of influence over organizational strategy.

### **Conceptualising *reflexiveness***

Across the cases analyzed we saw that the use of social media created conditions for individuals to contribute and engage in meaningful and significant aspects of their organizations’ strategies. Social media provided a platform for appropriating strategic content, but also to shape that content by commenting and contributing to ongoing discourse in their organization. The feedback systems embedded in social media created structural conditions for individuals to become active participants of their own organizational settings. This is consistent with the view that strategic action involves individuals thinking and acting reflexively and is enabled by structural conditions in the organizational environment. A reflexive environment creates equal opportunities to all constituents for participation and engaging in feedback. Our analysis shows that the adoption of social media contributes to the creation of an environment and contextual conditions for reflexive behavior, which over time evolves to become a property of the organization as suggested by Gorli *et al.* (2015, p. 4):

*“Reflection thus becomes a collective ability to question the assumptions that underpin the organizing process. Although individual reflection is not eliminated, the attention paid to the organizational level stresses the impossibility of isolating reflection from the social and organizational micro-contexts in which courses of action are produced and reproduced.”*

Although Gorli *et al.* (2015, p. 3) do not mention social media they indicate that these same properties or affordances of becoming more reflexive and open ultimately contribute to “staff in an organization to become authors of their own work settings.” As strategy practice shifts from the realms of a privileged group to become recognized as a shared resource, it

builds a capability that “consists of a constant process of interrogation whereby we reconstruct shared meanings with others” (Gorli *et al.*, 2015, p. 5). Reflexiveness gives agency to employees to become actively *included* and derive meaning from more *transparent* information.

Thus, *reflexiveness* contributes a third dimension to Whittington *et al.*’s model of open strategizing as represented in Figure 3, thereby extending the open-strategy literature. This added dimension captures the dynamic nature of the process of opening up strategic work within organizations.

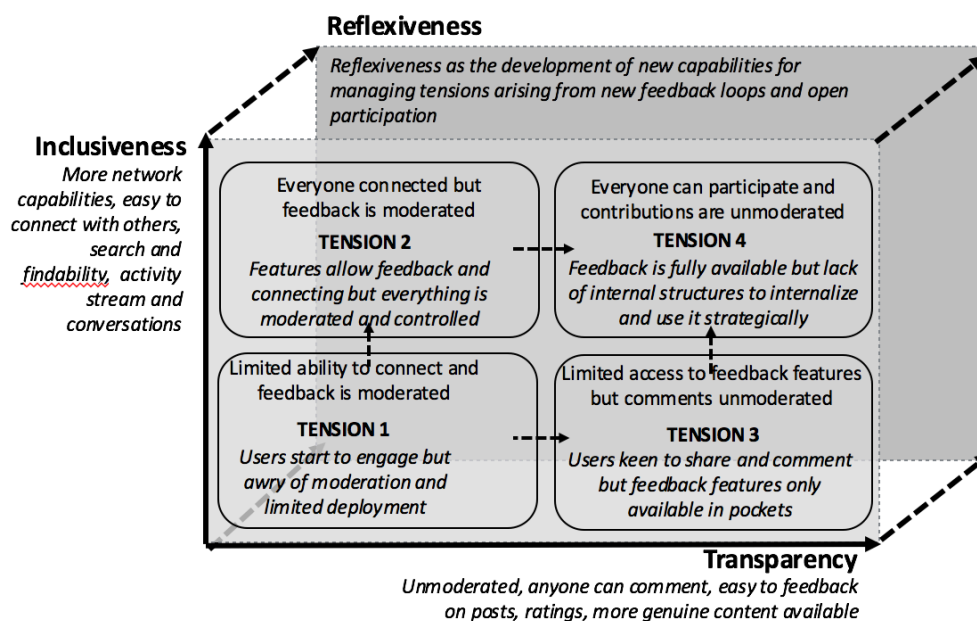


Figure 3: Tensions between open social media participation and extant structures as drivers for “reflexiveness” capabilities

This third dimension, as represented in Figure 3, injects the need for organizational capabilities to an otherwise static typology. In practical terms it represents the capability created by organizations to better manage feedback from individuals (as a result of a more transparent and inclusive environment) and use it positively to collectively shape the strategic direction of the organization. This is consistent with the view of strategy as a form of reflexive behaviour that draws on learned “institutionalised patterns and recipes for action” but “requires reflexivity in order to select the appropriate move at the appropriate time” (Wilson and Jarzabkowski, 2004, p. 15). This situated and contextual view of strategy suggests that social media and its feedback features gives individuals the ability to “assume responsibility for, and constructively contribute to the goals of the organizations to which they belong” (Gorli *et al.*, 2015, p.1), they call this “practical reflexivity”. As seen in the analysis of the case material the embedding of social media in the ways of working of the organization created conditions for the emergence of feedback, and in some cases the active participation in significant aspects of the organizations. In this respect their use creates the “reflexive” environment that Gorli *et al.* (2015) refers to in their study.

We find that, while social media creates *inclusiveness* (by involving more individuals) and *transparency* (wider availability of information) through the embedding of social media

features in organizations, *reflexiveness* is the ability to manage and appropriate this feedback structurally to shape the direction of the organization. We therefore suggest that increasing *inclusiveness* and *transparency* in strategy (Whittington *et al.*, 2011) through social media in organizations stimulates the corresponding development of *reflexiveness*. These relationships are illustrated in figure 3, where open strategy is a progression across the three dimensional axis.

Next, we take a more dynamic view of this process, to conceptualize the progression from tensions towards the development of new organizational capabilities, ultimately resulting in new but more consistent structural arrangements in the organizations.

### **Dynamic view of tensions and capabilities development**

We characterized the development of *reflexiveness* in three stages, as a gradual process of capability development as organizations adjust structurally to better manage emergent feedback from social media platforms. We noted how the normative structures shifted towards open communication and emergent feedback, gradually also shifting practices and behaviours. Figure 4 captures this process. It provides a dynamic and longitudinal representation of the process by which social media creates conditions to trigger tensions that encourage the development of new capabilities to better manage and integrate emergent feedback in the functioning of organizations. At the core of this process are the tensions characterized earlier in Figure 2. As discussed, these tensions trigger adjustments to the organization, rendering it more capable of managing and integrating emergent feedback within its work environment. Figure 4 shows two juxtaposing layers. The first layer shows the progression with the tensions identified. The second layer represents the new capabilities developed in response to the tensions.

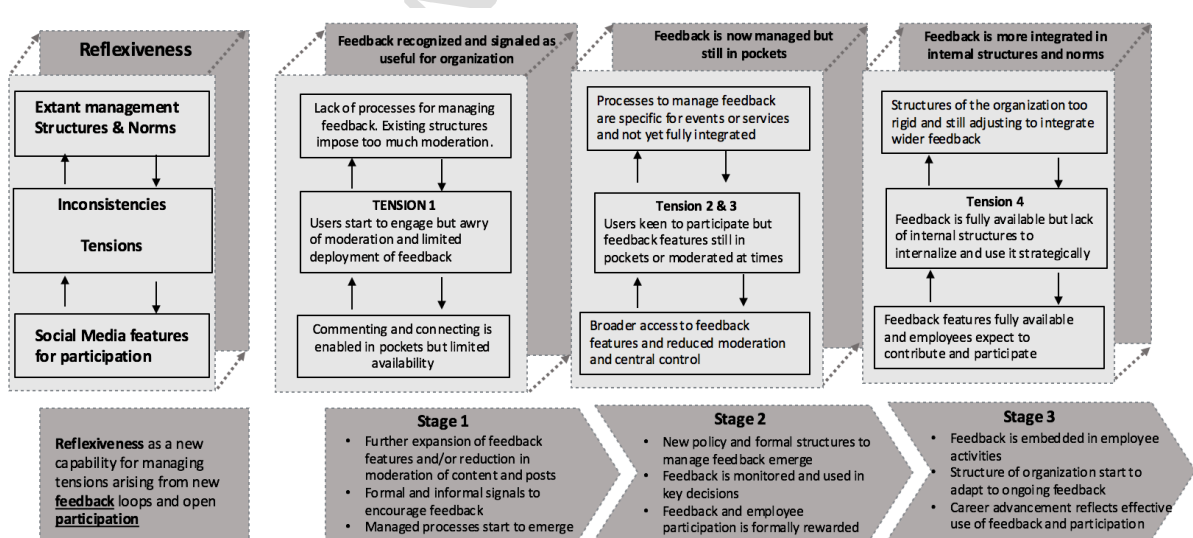


Figure 4: Dynamic and multi-level representation of the dynamic effects of tensions from social media use, and the emergence of reflexiveness as a new organizational capability

This longitudinal conceptualization of the dynamics that push organizations towards more open practices in strategizing, and ultimately their organizing was for example seen at Atos,

a process that was referred to as a “third revolution”. But there were also instances of these deeper effects at the IBM Studio which operated under a distinct mandate from the rest of IBM to create conditions for a more collective and agile governance model. This mandate gave employees a higher degree of independence and ownership of their work, which made it much closer to a *“startup than a monolithic and sometimes faceless organization”*. This meant that individuals performed their work with limited supervision but still as part of an organized structure of on-going peer evaluation, reinforcing collectively agreed contributions, while at the same abandoning what is perceived by the group to be inferior or low priority. Also, at Grant Thornton deeper changes to reward structures and working arrangements were noticed, reflecting a move towards a governance model that is more centred on individuals as owners of their work, and better able to shape the direction of their organizations. Our study indicates that as organizations gain new capabilities to manage and integrate emergent feedback in their structures they become more reflexive, and consequently create conditions for *organizational authorship*, or in the words of Gorli et al. (2015, p. 5) they:

*“... encourage social actors to see themselves as agents and as authors of the organizations and institutions in which they live. In other words, practical reflexivity is closely linked to the pursuit, enhancement and development of organizational authorship.”*

It is the subtle but gradual shift in agency towards individuals as “stewards” of their own paths that cumulatively shift the structures of the organization towards what Hernandez (2012, p.175) describes as “stewardship”. She argues that individuals can *“collectively create feedback loop processes to systematically shift organizational governance from agency towards stewardship”* (p. 172).

While Hernandez does not empirically explore these feedback loop processes, our study offers practical examples of how participative social media may offer such dynamics in the workplace, ultimately leading to what Hernandez suggests is a culture and normative environment where *“an affective sense of connection with others prompts individuals to feel compelled to positively influence the collective”* (p. 175). Moving towards a stewardship model reflects this progression towards giving individuals greater ability to participate in organizational life so that they increasingly feel owners of “strategy”, as more broadly defined previously. It is this ability to shape the environment that employees operate in that we refer to as stewardship-based organizing, as conceptualized by Hernandez (2012).

These deeper changes represent what Hernandez (2012, p. 172) remark as *“feedback loop processes systematically shift organizational governance from agency towards stewardship”* and represents the aggregated effect of new capability development. This reflects the progression from organizing strategic activity around processes that optimize employee activity around predetermined goals towards an approach that is more centred on individuals as active participants of their own work environments.

### **Concluding remarks**

This study has examined the role of social media as organizations embrace open strategy. We contend that social media have the potential to increase *inclusiveness* and *transparency*

as two essential properties of open strategizing. However, these can initially create tensions and inconsistencies and so are not sufficient in themselves for openness. Our study suggests that organizations (including their leadership) respond to these tensions and learn to manage and integrate feedback from social media in their internal structures. We characterize this as a new capability of *reflexiveness* required for organizations to become more open.

The key engine for the development of *reflexiveness* arise from the tensions found between latent ways of undertaking strategy and the new levels of inclusive, transparent and participative work enabled by social media. We argue that the use of social media within organizations generates emergent feedback loops that create new and higher expectations and norms of participation, ultimately moving organizations to become more centred on individuals' abilities to contribute to organizational life. We suggest that adopting participative practices and becoming more reflexive create conditions for organizational authorship, and a shift towards stewardship governance (Hernandez, 2012) where strategy is increasingly jointly owned by organizational actors who feel responsible for the collective, rather than disengaged employees operating by following norms and procedures. We suggest that the adoption of social media and the embedding of participative practices in the structure of organizations creates conditions for strategy to become shared and collectively owned; one which positions many more organizational actors as strategy practitioners.

The interlinked nature of these areas reemphasizes the importance of forging a joint Information Systems – Strategy agenda for research and practice (Whittington, 2014). As discussed, there is much potential for social media to revolutionize strategizing as an open activity where stakeholders participate or take ownership of strategy content. Our study, thus, contributes to the literature on open strategy by advancing our understanding of emergent new arrangements in who is involved in strategy (practitioners) using what tools (artefacts) and how it is performed (praxis) ultimately detecting the emergence of new professional practices in this field (Whittington, 2006, Whittington *et al.*, 2011, Whittington *et al.*, 2006). We also contribute to the Information Systems Strategy literature by reflecting on the role of and impact of ICTs such as social media in organizational strategizing (e.g., Chen *et al.*, 2010, Galliers, 2011, Marabelli and Galliers, 2016), and their role in the development of new organizational capabilities (e.g., Peppard and Ward, 2004) but in particular to the growing literature that considers social media use in the workplace (e.g., Huang *et al.*, 2013, Leonardi *et al.* 2013). We also contend that this study informs practice: the more we know of the tensions and capabilities arising from social media and participative platforms in the workplace, the better placed senior management will be in leveraging these new phenomena.

The study raises several important interrelated challenges for future research, including a reinvigoration of the role played by employees in defining strategy content. Further, and as we have argued, the features of social media, coupled with reflexive agents and modified governance structures, render both the practice and content of strategy contested and negotiable. A further strand of investigation could thus focus on the interrelationship between social media and governance – an important, yet underexplored, theme within open strategy. It is clear from our findings that participation played an important role in the

emergence of feedback loops and engaging employees. However, an unresolved feature of our study concerns precisely how employees should participate in strategy using social media; participation from rendering strategy inclusive and visible may be perfunctory despite organizational actors appearing to take ownership of decision making.

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