

Consultant strategies and Technological affordances: Managing organisational social media

Completed Research Paper

Dick Stenmark

Department of Applied IT,
Gothenburg University, Sweden
dick.stenmark@ait.gu.se

Fahd Omair Zaffar

Department of Applied IT,
Gothenburg University, Sweden
fahd.omair.zaffar@ait.gu.se

Abstract

Organisations increasingly seek to explore the new opportunities that social media offers in terms of engaging with customers, users, and partners. So far, academic research on organisational practice of social media is sporadic and corporate actors are thus left without level-headed advice as to how to best implement and use social media technologies. In this paper, we examine what sort of advice management consultants offer organisations looking to engage in social media. We use four affordances of social media – visibility, persistence, editability, and association – to analytically explore the fit between social media as a technology and the strategies offered by consultancy firms. We also look attitudes towards social media and information management, which contributes to practitioners' understanding of the intrinsic characteristics of social media. Our research concludes that affordances of the technology clashes with a centralised top-down approach to information management that dominates in consultants' strategy documents.

Keywords

Social media strategy, social media affordances, organisational use, information management

Introduction

Organisations are increasingly adopting social media despite the fact that the implications of this new class of technology on organisational behaviour are yet unknown (Treem & Leonardi, 2012). Academic research on organisational use of social media is sporadic and corporate actors are therefore left without level-headed advice as to how to implement social media technologies. This situation has created a market for management consultants to provide corporate social media strategies for organisational stakeholders wanting to engage in social media. Some well-known practitioner organisations such as IBM, KPMG and Ernst & Young actively use social media technologies to share information, form a collective intelligence, and increase engagement amongst their employees (Faraj *et al.*, 2011; Majchrzak *et al.* 2013; Zaffar *et al.* 2013; Bergquist *et al.*, 2013). Loosely based on anecdotal data, strategy consultants claim that social media technologies are critical for organisations to connect with customers, users or partners, since these technologies create opportunities for peers to connect both within and outside the organisation.

However, technology and organisation affect one another (Howcroft & Trauth, 2005), and new technologies cannot be expected to work “as designed” when introduced in different contexts. In fact, the academic literature suggests that when it comes to management, social media requires a shift from a “traditional” centralised top-down strategy to a decentralised bottom-up strategy (Majchrzak *et al.*, 2000; Stenmark, 2008; Treem & Leonardi, 2012). At the same time, anecdotal evidence seems to indicate that management consultants continue to base their social media strategies on a traditional control-view on information management. This possible misalignment has not been thoroughly examined yet and hence this is the aim of this work. Our research question is therefore: How do social media consultants' strategies align with the affordances of the technology? Our research contributes to the academic

literature on social media usage in organisations and to practitioners' understanding of the intrinsic characteristics of social media.

The paper is organised as follows: first we introduce information management academic literature in relation to management strategies for information management in social media. This is followed by a method section where the selection, collection and coding of the data is described. The result section then presents the constructed four categories (central/decentral, explicit/implicit) in a 2x2 matrix (see figure 1), which is then discussed and analysed from an affordances perspective. The paper ends with the conclusion that there is indeed a misalignment between social media discourses.

Information Management in Organisational Social Media use

A thorough review of the academic management literature shows that these commentators unanimously and rather unreflectively speaks in favour of aligned, rigid, and highly standardised structures as far as organisational information is concerned (Ciborra, 2000). Information is tightly administered by a small elite and information management is seen as a managerial responsibility, primarily. The centrality of control, Ciborra concludes, is one of the basic tenets in this discourse. More recent work has shown that this attitude has prevailed despite changes in technology. For example, intranets, i.e., internal organisational webs, have been managed in a highly centralised way, leaving ordinary employees out of the process and thus unable to share information even within the organisation (Tredinnick, 2006, McAfee, 2006; Stenmark, 2006; 2008). These authors argue that organisational information on intranets comes from people who has little to do with the mundane work tasks of ordinary employees. Bennett *et al.* (2010) argue that in today's information society control of information should be handed over to those who actually do the work and are able to add information as soon as it becomes available, i.e., the employees. A decentralised view on information management is thus needed.

Recently, social media has emerged as a new class of technology. Despite the massive adoption of social media applications in society at large, organisations have remained sceptical about bringing it to the organisational domain (Deans 2011). It has been argued that this may stem from the fact that relatively little is known about social media usage within organisations (Treem & Leonardi, 2012). In the last few years organisational interest has risen dramatically (Faraj *et al.*, 2011), but the implications of social media use in organisations are still poorly understood and have not been explored succinctly (Treem & Leonardi, 2012; Bergquist *et al.*, 2013).

Although social media are easy to recognise they remain difficult to clearly define. Recent analysis of practitioner documents revealed that almost 80% of the examined texts on organisational social media strategies lacked a definition of what is social media (Bergquist *et al.*, 2013). Not only practitioners struggle; even academics find it difficult to exactly define this phenomenon, and Treem and Leonardi (2012) notice that most definitions typically conclude that social media is something that exists online, enables content creation, and visualises that content to others. To illustrate, Van Osch and Coursaris (2013), having synthesised over 600 research articles, arrive at the following definition:

“Social media are technology artefacts, both material and virtual, that support various actors in a multiplicity of communication activities for producing user-generated content, developing and maintaining social relationships, or enabling other computer mediated interactions and collaborations” (p. 703).

Such a definition, argue Treem and Leonardi (2012), is too broad and general to be useful since it fails to clearly distinguish social media from other forms of communication applications, such as e.g. email. Instead, the authors argue, one should look at the features that are unique to this class of technology and they suggest that what separates social media from earlier organisational communication tools are that social media share four specific affordances; visibility, persistence, editability and association.

Visibility means that social media afford users the ability to make their behaviours, knowledge, preferences, and communication network connections that were once invisible (or at least very hard to see) visible to others in the organisation. Treem and Leonardi means that work behaviour, meta-knowledge and organisational activity streams are three types of actions that are made visible through the use of social media in organisations. *Persistence* refers to the fact that communication remains accessible in the same form as the original display after the actor logs out from Facebook or exits the blog

application. The information provided by the actor remains available to other users and does not expire or disappear. Three ways in which the affordance of persistence affects organisations are sustaining knowledge over time, creating robust forms of communication, and growing content (Treem & Leonardi, 2012). *Editability* means that individuals can take their own time to carefully craft and edit a communicative act before it is made publicly available. This way, these authors argue, the affordance of editability is used to shape organisational behaviour through regulating personal expressions, targeting content, and improving information quality. *Associations*, finally, denotes recognised and established connections. Associations in social media come in two forms; a person to another individual or an individual to a piece of information. When social media afford association with other individuals or content, it supports social connections, gives access to relevant information, and enables emergent connections (Treem & Leonardi, 2012).

Research Method

In this study, we wanted to learn to what extent social media strategy consultants’ advice organisations to adopt an approach that is in line with the affordances of the features of social media as it is understood in academic literature. To understand the practitioner discourse, we used generally available whitepapers and reports on corporate social media strategies authored by consultancy firms as our empirical data. Based on Miles and Huberman’s (1994) principles of data reduction, data display, and conclusion drawing, Romano *et al.* (2003) suggest a similar method when dealing with web-based qualitative data, which they refer to as elicitation, reduction and visualisation. In this work, we have followed this approach as described below and summarised in Table 1.

| <i>Elicitation</i> | | <i>Reduction</i> | | <i>Visualization</i> |
|--------------------|--|--------------------|--|---|
| Collection | Top 500 PDFs reports were collected using Google search engine | Reduction Criteria | 1. Documents should explicitly mention corporate social media strategy 2. Documents should target management and decision makers 3. Documents should be authored by management/strategy consultants portrayed as experts on social media | The 136 documents were placed in the 2x2 matrix |
| Search terms | Social media strategy corporate management | | | |
| Language | English | Selection | 136 reports were selected based on the reduction criteria | |
| Region | All | | | |
| Time | Updated to anytime | Coding | Dimensions used: Centralised or Decentralised approach Explicit or Implicit arguments | |
| File Type | PDF | | | |

Table 1. The process of Elicitation, Reduction and Visualisation (adapted from Romano *et al.*, 2003).

Elicitation means collecting the data. We decided to use Google search engine to retrieve our data for two reasons; Firstly, Google is reported to be the market leader in most Western countries (Beel *et al.*, 2010) and, secondly, Google uses a page rank algorithm that incorporate the judgment of other web commentators (Brin & Page, 1998). Using Google thus gave both the best coverage (i.e., finding most of the document related to the topic) and the best precision (i.e., ranking the most influential papers highest). We specifically searched for documents in the Portable Document Format (PDF), and this also for two reasons. Firstly, unlike a web page or a blog, which is constantly under construction, a PDF connotes stability and gives a more formal status to a text. A PDF document contains a finalised text that is ready for distribution. Secondly, the PDF format has become a de-facto standard for electronic document exchange that a large number of companies have adopted as a preferred format (Castiglione *et al.*, 2010).

The search terms ‘social media’, ‘strategy’ ‘corporate’ ‘management’ were used together with advanced features where language was set to ‘English’, regions to ‘all regions’, updated to ‘anytime’, and file type

'PDF files (.pdf)'. We ended the elicitation phase by selecting the top 500 reports for further manual investigation.

Reduction is an iterative process of selection, coding and clustering (Romano *et al.*, 2003). For the selection process we used three different retention criteria; Documents should 1) explicitly talk about corporate social media strategy, 2) target management and decision makers, and 3) be written by social media management/strategy consultants. Having screened the 500 documents, 136 documents were found to fulfil all three criteria (a complete list can be provided by the authors upon request). Each document was thereafter categorised depending on whether a centralised (i.e., information should be managed by a small elite team) or a decentralised (i.e., individual employees are empowered to share information) approach to information ownership was advocated. Further, such attitudes towards information management could either be explicitly stated in the documents or tacitly implied, so these two aspects were also used to code the documents. These two coding dimensions (central/decentral, explicit/implicit) formed four categories in a 2x2 matrix (see Figure 1). In addition, we found that some of the document did not disclose any view on information management so we felt compelled to introduce a fifth category for the documents where this topic could not be detected.

Two independent reviewers coded the documents using the above five categories as our coding scheme, resulting in a raw interjudge agreement of 78%. The Perreault and Leigh (1989) interjudge reliability *I_r*, which take into consideration the number of different categories, was calculated to 85%, which is fully in line with what can be expected in these kinds of studies. The final coding of documents where there was disagreement was decided through discussions. The outcome of the coding process was visualised in a table so the distribution over the two dimensions became clear (see Figure 1). A qualitative analysis of the content of each cell was thereafter carried out by the two authors jointly.

Empirical results

The results of our elicitation, reduction and visualisation work can be seen in figure 1 below. Each document is symbolised by a circle with a number. The number is the rank order from Google when the first 500 documents were retrieved.

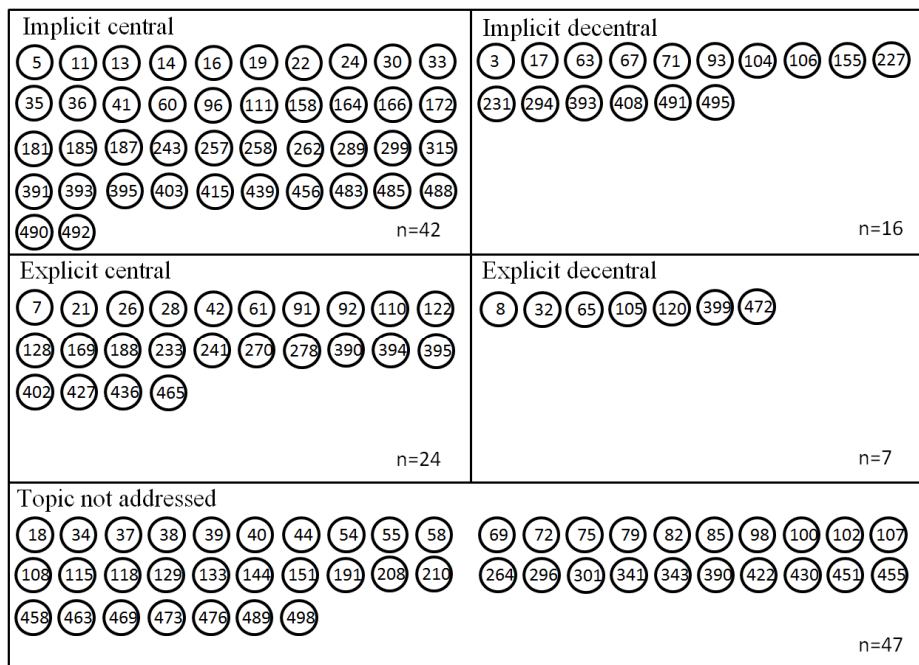


Figure 1. The 136 documents categorised according to whether a centralised or decentralised information management approach is advocated

The centralised approach

A centralised approach to information management means that social media should be used and handled by a small staff of trained communication officers and that individual employees in general should not use social media during office hours. This approach “[...] is necessary to ensure consistent customer experiences, reliable content creation, data governance and regulatory compliance” (Ernst & Young, PDF #128). With a total of 66 documents out of 136, the centralised approach, which is in line with traditional literature on information management, was dominating.

Going through these documents, we found that many of them did not include any motivations as to why a centralised approach was to prefer. In some of the documents, however, we could find such arguments and below we highlight a few examples of how the centralised information management approach was promoted both explicitly and implicitly.

Implicitly centralised

The largest group of the four was the group of documents where information management was tacitly suggested to be handled centrally. This group contained 42 documents which represents 31% of the total. As the documents in this group do not explicitly suggest an information management strategy they largely lack arguments as to why organisations should adopt such an approach. Here, the centralised approach is only implied. However, documents in this category often mention risks associated with social media. In fact, quite a few of the documents are focusing on risk management.

One such example is a document by Osterman Research, Inc. (PDF #262), in which they show that most organisations participating in one of their surveys failed to archive their users’ content posted to social media properties, a quarter of the organisations had had malware infiltrations through social media, and 13% had experienced the leakage of sensitive or confidential information through social media.

A very similar list of social media-related risks is presented by Ernst & Young (PDF #33):

- *Employees involved in social media inadvertently leaking sensitive company information*
- *Criminal hackers “re-engineering” confidential information – log-ins and passwords, for example – based on information obtained from employee posts*
- *Employee misuse of social applications while at work*
- *Hacked, faked or compromised corporate or executive Twitter or Facebook fan page or individual accounts*
- *More platforms create more access for viruses, malware, cross-site scripting and phishing*
- *Damage to a brand or company reputation from negative, embarrassing or even incriminating employee or customer posts, even those that are well-intended*
- *Failure to establish complete and fully compliant archiving and record-retention processes for corporate information shared on social media, especially in the health care, financial services and banking industries*

(Cited from Ernst & Young (PDF #33), page 5)

To summarise, the arguments presented in this category of “implicitly centralised” as to why organisations should go this way are thus also “implicit”, but “[...] the various risks that organisations face from unmanaged use of social media” (PDF #262) are highlighted and exemplified in many of the documents in this category.

Explicitly centralised

The second largest category with 24 documents (18%) was the one where the consultants explicitly argued for a centralised approach to information management. As a motivation, these commentators also primarily pointed to the risks associated with social media usage. Often, these risks were not specified but talked about as “risks” in general, as in the excerpt below.

“Harnessing the power of social media can seem like a daunting task, one that presents unique risks to your organisation.” KPMG (PDF #7)

“Social media is just the latest wakeup call to the risk management function. There is no turning back now. Being prepared is the only logical choice.” Edward Moed, crisis management specialist at Peppercom (PDF #394)

In some documents, the authors are more specific about the risks, and productivity loss, information leakage, and reputation damage are amongst the most frequently mentioned threats. It is argued that a centrally controlled use of social media is thus needed in order to avoid the risk of disclosing confidential information or other material not suitable for public viewing.

“Social media comes with several specific risks, including the potential for employees involved in social media to inadvertently leak sensitive company information.” Ernst & Young (PDF #128)

“This lack of social media governance exposes organisations to significant risks, including accidental or intentional release of confidential information or trade secrets, public embarrassment through employees commenting inappropriately online or engaging with inappropriate content”. UTS (PDF #21)

In addition to the above concerns, some consultants also point to the need to retain and archive material, which they argue risk being neglected unless management takes a firm grip of social media usage:

“In short, although social media is a relatively new communication and information management channel relative to more traditional tools like email or instant messaging, the same fundamental management requirements apply: social media must be monitored for malware and inappropriate content, and relevant business records sent through social media must be retained and easily accessible for as long as necessary.” Osterman Research, Inc. (PDF #92)

“Have a senior level employee manage communications so that they can ensure the brand, values and overall strategy are represented correctly in your social media interactions”. Debbie Dimoff, VP consulting, PwC

The main motivating factor for the explicit centralised approach is thus to avoid the risks associated with social media.

The decentralised approach

A decentralised approach to information management when it comes to social media means that the individual employees are allowed - or even expected - to use social media, to share information, and to contribute to the shared pool of knowledge. As Web 2.0 consultancy firm Awareness, Inc. says

“If you want to increase word of mouth and build good will, you’ll also need to give up on the control and ‘corporate speak’ and give users and customers the tools to create their own stories—about their interests, and your market and even about you. If you want them to help one another (which is in your best interest) you need to empower them with tools and features that enrich the discussions they are having and connections they are making” (PDF #472).

With a total of only 23 documents out of 136, the decentralised approach, which is in line with the academic literature on this topic, was thus in a clear minority. We now provide some illustrations of how decentralised information management was advocated both explicitly and implicitly.

Implicitly decentralised

The group of documents where the consultants advocated a decentralised approach in an implicit way turned out to be the second smallest group with 16 documents, representing 12% of the total. Most documents in the decentralised category provided positive arguments highlighting the opportunities and benefits of such an approach. A few commentators, however, addressed also the concerns that some companies seem to have with a wide-spread use of social media amongst the employees, e.g., the risk of productivity loss. These risks, they argued were often unsubstantiated or over-exaggerated.

“In reality, many of the worries about time wasting are no different from similar concerns when organisations adopted email or telephones: the potential for time wasting is certainly there, but generally it is only those that are determined to waste time that tend to abuse these privileges. [...] Our research demonstrates that – once implemented – the benefits clearly outweigh the risks. So, for

example, while only around a third of respondents cited time wasting as an experienced risk, more than double that amount claimed to have witnessed productivity gains.” KPMG (PDF #17)

The talk about risks is prominent also amongst the commentators who more implicitly are suggesting a decentralised approach to social media. Even though these authors advocate a decentralised approach, they caution organisations not to let go of control altogether but be aware of the risks that may be involved.

“[Organisations] are concerned about controlling the flow of information internally and externally and about what could happen if that control is lost. While the use of social media is valuable and to be encouraged, it is important that we are fully aware of the risks involved”. Tatiana Baquero, Principal Knowledge Management Analyst (PDF #93)

These commentators do nonetheless agree that the potential risks are outweighed by the benefits. A basic assumption amongst these authors is that employees are professional and responsible people, capable of acting under freedom, so a minimum of restrictions should suffice.

“No one wants to be told what to do, especially if it involves their personal life. You can’t dictate how your employees participate in social media on their own time, and creating disgruntled employees by implementing a strict social media policy will only fuel the fire and create disgruntled workers. If you’re going to initiate a social media policy, keep it simple, and use it to serve as a reminder that employees should use good discretion when engaging in social media. Your employees should have good common sense not to disclose confidential information on Facebook, but sometimes a reminder doesn’t hurt” HubSpot (PDF #104).

In sum, the arguments for the decentralised approach are mostly implicit and seem to be that the risks are exaggerated and that the upside of allowing all employees to engage in social media outweighs any potential problems.

Explicitly decentralised

The documents explicitly suggesting a decentralised approach is the smallest of our four categories with only seven documents. This equals 5% of the total number of documents. In these documents, the authors explicitly spell out that all organisational members, and not just an information elite, should be given access to social media tools. Amongst the primary reasons they put forward is the larger pool of collective ideas that social media enables, the collaborative environment they create and the increase in information sharing that they result in.

“Social media facilitates the interactive sharing of information and places increased emphasis on the creation and dissemination of content, ideas, opinions and experiences by all users. Used strategically, social media offers organisations an unprecedented opportunity to actively engage employees, customers, suppliers and other interested stakeholders and benefit from their collective ideas, knowledge and experiences”. Deloitte (PDF #8)

A related theme is increased collaboration both within the organisation and between organisational members and external parties. IBM is put forward as an example to follow by some commentators:

“[IBM’s] decision to use a social platform to encourage collaboration affirmed a larger commitment to embracing innovation, dialogue, and the exchange of ideas”. Paul Argenti, professor and communication consultant (PDF #105)

Although a decentralised approach is advocated, it does not mean that anything goes. Several authors argue that guidelines and policies should be in place but primarily not to restrict the employees but to help them act with more confidence:

“Companies need to support and empower employees by arming them with the information they need to successfully and appropriately engage on blogs, Facebook, Twitter, and other social media channels. Specifying rules and guidelines means staff can be confident about engaging without being afraid of doing lasting damage to your brand.” Radian6 (PDF# 120)

Even used within the organisational borders, social media empowers employees to contribute to the development of the organisation’s operation.

“Enable employees to make their company better by encouraging them to propose new programs and policies. Keep everyone in the loop by seeding groups with relevant information and documents, and allow employees to answer each other’s questions. This helps make people more passionate about solving the problems important to them.” Radian6 (PDF# 120)

Documents in this category argue that there are many benefits to be expected from adopting a decentralised approach to social media usage.

The absence of an information management discussion

Finally, a large number of documents did not touch upon the topic of information management - not even implicitly - and we were thus unable to place it within our two-by-two matrix. Seen as a category, this group was the largest group, with 47 of the documents, representing more than a third of total number of 136 documents. Twenty-one of these documents provided normative to-do lists for social media initiatives, predominantly for SMEs. Another ten documents focused on how social media can be used to respond to customers or the general public, particularly in times of crisis. Other documents very more targeted and addressed specific audiences, focusing on brand management or various marketing strategies. In general, many of these documents contained to-do lists or “top-10 tips” from which it was impossible to determine what take on information management the authors had.

Discussion

Although Treem and Leonardi (2012) acknowledge that affordances may differ between actors, contexts and situations, Leonardi (2011; Leonardi & Barley, 2008) has found that a particular technology still has the same (or at least similar) affordances across organisational settings because of the manner in which the features limit the outcome space. Treem and Leonardi’s (2012) conceptualisation of the social media features therefore resulted in a set of four distinct affordances that *commonly* emerge out of organisational use of social media; visibility, persistence, editability and association. In this paper we use these four affordances as the yardstick against which we measure and value different organisational strategies.

Organisational behaviour is typically understood as the behaviour of both individuals and groups within an organisation, but not so often the organisation as a whole (Heath & Sitkin, 2001). Individual employees and groups alike benefit from *visibility* as it displays behaviours, knowledge, and communication networks that are otherwise invisible, allowing these actors to benefit from such resources. Although a centralised team of elite communicators can benefit from the visibility affordance, to really leverage from this affordance, participation should include the organisation as a whole. Due to the network effects, the organisational gain from scaling up through a decentralised strategy would be multifold, and we therefore argue that a centralised approach to organisational use of social media limits the positive effects of the visibility affordance.

One aspect of *persistence* is the amount of information that is made available and searchable through social media. Although a central approach also leaves information available for the organisation to view, the amount is much less than if a decentralised strategy is adopted. Here, too, a centralised approach benefits less the persistence affordance. Content targeted for individual needs and improved information quality through repeated editing and updating are results of the *editability* affordance. However, both persistence and editability are based on the fact that those who provide information are also those who need information. As the centralised approach relies on an information elite who are separated from the operational work, such a strategy makes limited use of the editability affordance. The *association* affordance enables links between individuals and between individuals and relevant content. This is due to the fact that social media helps individuals make their associations more visible, and once these links are made public they recursively enables more associations. A centralised approach with only a few contributors does not seed off such a development. It would be a like a World Wide Web where only (a few) organisations provide information. What makes the Web a success is the information, links and associations between (a huge number of) individual contributors. In sum, the affordances of social media align best with a decentralised approach to information management.

Discussing Web 2.0, Stenmark (2008) has argued that the concept should be understood as a mix of technology and attitudes. Above, we have discussed the technology features and its affordances. Let us now look at attitudes towards social media and information management. In the absence of solid empirical research regarding organisational use of social media, managers have to turn to communication and media consultants to get advice on how to deal with these new information channels. Although growing rapidly, social media is still a new phenomenon in the corporate world and organisational actors are thus struggling with how to best use it, and it is understandable that organisations stick to traditional methods. However, our results show that also most social media consultants subscribe to a traditional information management approach. As can be seen above, the centralised strategy outnumbers the decentralised approach almost 3 to 1. This may reflect the fact that most strategy consultants are fostered according to a “traditional” management approach where command and control are considered norm. It may also be so that the fact that they are targeting what they expect to be a “traditional” management audience makes them likely to propose a strategy that is in line with what they expect the audience wants to hear.

All technology use offers both risks and opportunities and social media are no more risky than telephones and email, as KPMG points out in Document #17. In fact, many of the risks mentioned by some consultants were at the same time dismissed as unsubstantiated or over-exaggerated by other commentators. It is still interesting to note that so many consultants chose to address risk issues, i.e., the negative aspects of the technology, and it is even more interesting to note that it is predominantly those in favour of a centralised approach who talk about potential risks. Correlation does not imply causation but it seems plausible to suggest that if you are more prone to see risks you are more likely to subscribe to a centralised approach to organisational social media. This is a topic where more research is needed.

Finally, it may be surprising that not many commentators are explicit about information management. The number of documents being implicit about the information management strategy (58 PDFs) is approximately 80% higher than those that are explicit (31 PDFs). In addition, there is also a large group of documents (47 PDFs) not discussing information management at all. In other words, less than a quarter of the total number of strategy documents examined provides explicit advice to organisation when it comes to social media information management. In other words, a vast majority of consultants’ advice on social media strategy fails to address the issue of information management. A reason for this may again be that consultants tacitly see a centralised information management as taken-for-granted and fail to reflect upon the fact that new technology may require new attitudes and approaches.

Conclusions

The objective was to find out how consultants’ social media strategies align with the affordances of the technology, and our overall answer is that the affordances of social media seem to align best with a decentralised approach to information management, whereas most consultants advocate a traditional and centralised strategy.

However, we have also noted that a vast majority of consultants’ advice on social media strategy fails to address the issue of information management. We warn that the misalignment between affordances and strategy and the lack of explicit advice on information management, may stifle the potential of the technology and thus have a negative effect on organisations ability to implement and use social media.

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