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Social Media and Customer Engagement: Customer Relations in a Digital Era

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Walden University
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Abstract

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MBA/MEd, University of Royal Roads, 2005

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Dissertation Submitted in Partial Fulfillment

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Abstract

Traditional big data analytics do not include the contextual facets that social media narratives and customer engagement do. There is currently a gap in research on how customer relations managers can integrate social media in their existing data analytics to improve business performance. The purpose of this qualitative, exploratory multiple case study was to further understand of how customer relations managers can use social media within the context of already existing data analytics across industries in Canada. Communication theory was the conceptual lens for assessing customer relations management and consumer feedback within an increasingly digital business environment. Purposeful sampling was used to identify 5 customer relations managers and 5 business analysts who engaged in customer relations management as well as 5 consumers who used social media to influence product or service offerings. Data were collected through semistructured interviews with the 15 participants and then analyzed using a scaffolded process involving hand coding and the use of qualitative data analysis software. The analysis resulted in 9 themes encompassing the benefits and constraints of social media as well as customer relations management. Themes included communication, responsiveness-knowing consumer needs, managerial competencies, trust and accountability, branding, IT/analytics, degrees of controlling the narrative, consumer involvement, and governance and strategy. Customer relations managers who embrace the themes identified in this study might improve their confidence, intentionality of practice, followership, and perceived accountability as social media platforms expand the public nature of e-commerce.

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Dedication

This dissertation is dedicated to my family and friends who are inherently part of my family for their support throughout this entire process to obtain my doctoral degree. To my father, the late Manu Macoon, and my mother, Ruby, for instilling a lifelong passion of learning and achievement in all facets of my life. Dr. Grant Henderson, your life, commitment to social change, and impact will never be forgotten, thank you. To my community, Carey, David, Mark, Tams, Ang, Erin, Dwight, and Shamela, I could not have done this without all of you; when we lost Grant, so much changed, but you all were my constant. I cannot thank you all enough for your enduring support.

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Chapter 1: Introduction to the Study

Social media platforms provide multiple entry points for organizational and consumer communication. Social media are "Internet sites where people interact freely, sharing and discussing information about one another and their lives, using a multimedia mix of personal words, pictures, videos, and audio" (Curtis, 2013, p. 32). Walaski's (2013) social media categories include blogs, microblogs, social networking sites, professional networks, video sharing, and content-driven communities (e.g., crowd sourcing).

Customer relations managers who use social media to communicate with their colleagues and clients must navigate various opportunities and constraints (Haenlein & Libai, 2017). In 2016, The Gartner Group argued that organizations need to consider how to best augment or retrofit data analytics and IT systems for the digital age in relation to social media, particularly within a big data context (Smilansky, 2015). *Big data* refers to high volume, high velocity, and/or high variety information assets that require new forms of processing to enable enhanced decision-making, insight discovery, and process optimization (Moorthy et al., 2015). Big data is fast-paced and includes large amounts of data or information that is accumulating. In this study, big data that is used by companies in their organizational development included crowd sourcing from social media platforms and enterprise-level data, as well as analytics approaches. These three types of big data are used to enhance organizational agility and inform strategy through the interconnections of the economic, political, and social place and space (see Bhimani, Mention, & Barlatier, 2018).

The soliciting of data and information from customers via traditional means has radically shifted with the advent of social media (Xiang, Du, Ma, & Fan, 2017). Customers can now communicate via technological platforms that transcend traditional geographic, political, and economic borders and that have altered the once outward-in dynamic of customer relations practice whereby companies pulled data from purchasing and trends rather than soliciting their voice through social media narratives, likes, and feedback (Kodish, 2015). The use of social media has precipitated the need to consider how to accommodate these new realities of customer feedback (e.g., crowd sourcing) within a deeply public sphere in relation to service, product development, and inputs.

Chapter 1 includes background information on customer relationship management (CRM) in a social media era. I discuss the rationale for this research and then present the problem statement, purpose, and research question. An overview of the conceptual framework and nature of the study follow. The last sections of the chapter include discussions of the assumptions, scope and delimitations, limitations, and significance of the study, along with a transition to Chapter 2.

Background of the Study

Within contemporary CRM practices, there are opportunities to adapt to the changing data and digital landscape for the purposes of staying relevant and advancing an organization's competitive advantage through product or service innovation (Bhimani, Mention, & Barlatier, 2018). If company leaders can adapt their CRM approaches to align with the bourgeoning technologies, opportunities abound to increase the number and engagement of customers (Abdullah, 2016). Clients could not only use various social

media platforms to interact with the company, they could potentially influence the marketing, communications, and product or service development of the company (Scuotto, Del Giudice, della Peruta, & Tarba, 2017). As a result of the propagation of social media and crowd sourcing apparatuses, a two-pronged strategy for traditional communication and marketing as well as digital processes is being developed by company's that are developing in this digital sphere (Grossberg, 2018; Santomier, Hogan, & Kunz, 2016).

In this new era, customer relations managers should have a higher level of comfort when using social media within an enterprise or big data frame. Authors of a 2018 Global Innovations Survey found that 65% of organizations were embracing digitization in the form of social media in order to engage in open and collaborative practices (Boston Consulting Group, 2018). As the use of social media increases, managers will need to understand how aspects such as crowdsourcing and online communities created by consumers can help provide greater context to inform strategy and how best to optimize customer feedback, voice, and subsequent purchasing intentions (Maecker, Barrot & Becker, 2016; Peerayuth & Pakamon, 2017). It is also integral that managers understand how the rapid evolution of communication is unfolding within the public and private spheres (Haenlein & Libai, 2017). The dynamism and fluidity of communication points to the need for strategy development and implementation to be understood and reflected across the organization.

There has been a proliferation of technology that gathers and analyzes data and analytics-based processes. Big data in terms of crowd sourcing derived from social media

and other mediums is one of the means that corporations use in order to draw conclusions regarding consumer purchase intentions through marketing strategies (Moorthy et al., 2015). As noted by Marcus and Davis (2014) and highlighted in *Forbes* magazine by Smith (2018), leaders of many firms assume that because the information was garnered through technology, big data provides all the information they need. However, the problem is that this information could be presented in incorrect ways, whereas social media could provide a check or qualification factor (Rizkallah, 2017). By putting customers and consumers at the forefront, customer relations managers can utilize a more holistic feedback gathering process to prevent a one-sided analysis. In doing so, they will be able to focus more on how the big data will inform customer relations management (Kunz et al., 2017).

The extant literature is evolving, but the existing customer feedback frameworks can provide a greater opportunity to solidify a road map that incorporates social media, consumer purchase intentions, big data analytics, and organizational responsiveness or marketing strategy (Kunz et al., 2017; Ngai et al., 2015; Parsons & Lepkowski-White, 2018). The proliferation of data as a result of the evolution of social media platforms, information collection, and analytics has created many rich research opportunities where there are currently gaps (Ngai et al., 2015; Parsons & Lepkowski-White, 2018). For example, expanding the traditional company information gathering by overlaying this with the narrative feedback that social media can provide can help managers more readily understand consumer purchasing intentions and lead to a cocreation value framework in which consumers feel they have a voice (Abdullah, 2016; Kunz et al., 2017).

Overall, there are many facets from this study that can contribute to common understandings of customer relations managers' use of big data analytics with a social media frame. The clarity of strategy for and implementation by managers attempting to more fully understand consumer purchasing intentions could be enhanced by social media usage; managers can develop a greater degree of comfortability as the technology advances (Bhimani et al., 2018). Accommodations need to be made at an organizational level to aid in highlighting the opportunities and constraints that exist for customer relations managers who are attempting to understand what consumers can bring to support organizational relevance and the continued development of the competitive advantage in the marketplace (Patroni, vonBriel, & Recker, 2016; Pérez-González, Trigueros-Preciado, & Popa, 2017).

Problem Statement

The general management problem was that many organizational leaders find it challenging to navigate social media so that what is gleaned can be confirmed or questioned and help inform CRM. Given the magnitude of data, company analysts may find connections that are not indicative of relational factors; furthermore, there is often a lack of context around the data, which may lead to erroneous conclusions (Marcus & Davis, 2014; Moorthy et al., 2015). Bontempi (2016) contended that using social media to inform all aspects of consumer purchase intentions eliminates the inductive benefits (i.e., context) that come with understanding the human condition and nuances of human behavior (Parsons & Lepkowski-White, 2018). This general management problem is a reality across industry and sectors.

The specific management problem was that customer relationship managers are challenged with navigating social media platforms with little training or understanding of how to use them. They may focus on frequency-oriented data, as in the number of likes, and may inadvertently ignore the more contextual and narrative feedback given by consumers through other parts of the social media platform, such as the comments section (Killian & McManus, 2015; Kunz et al., 2017). The behaviors of customers, their intent, and subsequent usage of social media can reflect their level of engagement and can subsequently inform CRM in marketing, yet little attention has been given to understanding how to use the platforms and understand the resulting data (Pentina, Guilloux, & Mixer, 2018). Kunz et al. (2017) reinforced that there is a gap in the research related to the opportunities social media provides in the context of big data. Parsons and Lepkowski-White (2018) also noted the lack of understanding of how marketing and management practices can be more in tune with a customer's personal narrative, intention, and subsequent purchasing behaviors. Several gaps in knowledge, thus, exist in the area of CRM and social media.

Purpose of the Study

The purpose of this qualitative exploratory multiple case study was to gain common understandings of how customer relations managers can use social media within the context of already existing data analytics across industries in Canada. I purposively sampled five customer relations managers, five business analysts who have CRM roles, and five customers who use social media for the purposes of product or service development for a total of 15 participants. Conducting semistructured interviews with the

participants allowed me to attain diverse perspectives pertaining to the same

phenomenon. I chose to collate the data to articulate the common understandings and

themes generated from all those interviewed. In addition, I assessed publicly available

strategic plans linked to participant companies to ascertain the social media strategy

planning at an organizational level. Understanding what social media data within the

frame of big data can provide in terms of a value-add to current CRM practices is

valuable (Kunz et al., 2017; Parsons & Lepkowski-White, 2018).

Research Question

What are the common understandings of how customer relations managers can

utilize social media within the context of already existing data analytics to support more

targeted and agile marketing and management strategies across industries in Canada?

Conceptual Framework

The conceptual framework for this case study consisted of concepts from

communication theory (Kodish, 2015). Communication is evolving within the digital

landscape. Within a CRM context, communication theory reflects the power and

dynamism of multiple dimensions of communication and brings these worlds together

(Abdullah, 2016). In addition, the uses and gratification theory offer an overlapping

cocreation value frame that can provide a more holistic and comprehensive picture of

consumer purchasing intentions (Kunz et al., 2017). Although it is not integrated well by

most organizations, this approach can not only provide the needed context for managers

to relate to but also help give direction in terms of strategy to help sort through negative

comments which, as Liu, Burns, and Hou (2017) asserted, are more indicative of web-

oriented consumer feedback. These theories and frameworks help to conceptualize social media, management, and the evolution of communication. From the literature, consumer utilization of these platforms could provide an increased shared value reality in relation to marketing and management which, in turn, can provide context and inform action for managers and, subsequently, organizations (Abdullah, 2016; Kunz et al., 2017).

Within the communication theory construct, Parsons and Lepkowski-White (2018) conceptualized social media marketing and management in a way that helps unpack how managers navigate within the realm of CRM. This conceptual framework connects readily to the multiple dimensions of communication, feedback, data collection, analysis, and the like (Kobia & Liu, 2017; Yen, 2016). The conceptual framework identifies four dimensions of consideration which include the elements that inform a firm's strategic focus, such as messaging/projecting, monitoring, assessing and responding (Parsons & Lepkowski-White, 2018). Through this lens, I explored how customer relations managers utilizes social media within their data practices and how this appeared from a consumer perspective.

This conceptual framework includes social media as a technological and communication platform as well as the implications of its use for and on consumers as the technology has become more ubiquitous. Parsons and Lepkowski-White's (2018) conceptualization offered the opportunity to explore the elements that were built into a marketing and management strategy in terms of the foundational management and communication understanding and how these understandings manifested in practice. This exploration could help emphasize the importance of social media narratives in terms of

legitimacy of feedback and platform usage. This research could also provide a more holistic picture of consumer buying intentions for customer relations managers when integrated with big data marketing and management practices.

Nature of the Study

For this study, I chose a qualitative research method. According to Yin (2011), qualitative case study research is exploratory and can result in discovering people's experiences and perspectives in order to have multiple understandings of an experience. In qualitative research, the researcher is part of the instrument and engages in comprehension of the phenomena which includes interpretive approaches in order to decode, explain and provide greater insight into the meaning of the phenomena of study (Patton, 2014). To reiterate, semistructured interviews were conducted with participants from across Canada. This sample aligned with a qualitative research method as the study was about gaining the understandings of those sampled in order to develop more responsive and agile practices within a burgeoning social media era (Barratt, Thomas, Choi & Li, 2011).

Comparatively, a quantitative research method was more applicable for the analysis of systemic challenges through statistical evaluation as well as relational facets between variables (Echambadi, Campbell, & Agarwal, 2012). A quantitative research method is deductive and requires hypotheses testing; however, I did not choose a quantitative method because there would be a lack of ability to extract more individual perspectives of the three groups within a social media and data analytics frame (Frels & Onwuegbuzie, 2013). Additionally, I decided not to use a mixed method design as

exploring the understandings managers may have in the digitized era were more conducive to a strictly qualitative methods design.

An exploratory case study design was more beneficial with a phenomenon of study that is continuing to evolve from management perspectives and related to the problems that were identified in the research (Eshlaghy, Chitsaz, Karimian, & Charkhchi, 2011). Moreover, an exploratory case study design in relation to findings could have a richness that can support the probative and appreciative inquiry underpinnings for this research (Yin, 2011). An explorative case study design was conducive to this studies as it included more than one single case, so customer relations managers, business analysts that were engaged in CRM and customers or consumers that utilize social media will each be treated as single cases (Woodside, 2010). Using single cases contributed to understanding the business context of each cohort and their professional competencies within a social media and big data frame. This design was best for this research because it afforded the researcher the ability to more comprehensively explore multiple perspectives and cases (Yin, 2011).

Other designs such as grounded theory evolved out of the systemically developed theory as the data is analyzed, which was not a part of this study (Cho & Lee, 2014). As West (2017) asserted, a phenomenological study related more to participants' lived experiences; an ethnographic study could be observational and cultural in nature; however, the latter was not appropriate as this study was not designed to provide the context of the phenomenon in these ways.

Definitions

Big data: High volume, high velocity, and/or high variety information assets that require new forms of processing to enable enhanced decision-making, insight discovery, and process optimization (Moorthy et al., 2015).

Cocreation value: The collaborative approach for engaging customers to help inform product and service offerings within a customer relationship management context (Quinton, 2013; Xiang et al., 2017).

Communication: A process that is "dynamic, on-going, ever-changing, continuous" (Kodish, 2015, p. 23). According to Berlo, communication is a relational and interdependent process that envelops over time and requires active participation of all those involved in the communication event or series of communication events (Kodish, 2015).

Customer relations management (CRM): A "business strategy supported by a technology platform, business rules, process, and social characteristics, designed to engage the customer in a collaborative conversation in order to provide mutually beneficial value in a trusted and transparent business environment" (Courchesne, Ravanas, & Pulido, 2019, p. 122).

Purchasing intentions: The willingness of a customer to buy a product or service offering (Abdullah, 2016; Parsons & Lepkowski-White, 2018)

Social media: "Internet sites where people interact freely, sharing and discussing information about each other and their lives, using a multimedia mix of personal words, pictures, videos, and audio" (Curtis, 2013, p. 12). Walaski's (2013) social media

categories include blogs, microblogs, social networking sites, professional networks,

video sharing, and content-driven communities (i.e., crowd sourcing).

Assumptions

One main assumption was that customer relations managers have the

competencies to navigate their current responsibilities and understand the metamorphosis

of communication as well as how the latter impacts CRM. Additionally, that throughout

the interview process, that participants would be truthful with their responses. Another

assumption was that utilizing a qualitative multiple case study with a semistructured

interview process could more readily enlighten the realities of managers. Additionally,

how consumer or customers viewed their feedback within their role as consumers as they

understand their realities and sense of truth. A final assumption was that a complimentary

demographic survey would be the best approach to help further distill the thematic data

which was drawn from the data analysis and synthesis process.

Scope and Delimitations

There was a lack of information in the literature about how managers could

develop greater levels of comfortability around big data analytics within a social media

frame. To attend to this gap, I gained common understandings through the study of the

professional experiences of customer relations managers, business analysts that held a

role akin to CRM, and customers or consumers that utilized social media to concertedly

influence product and/or service offerings. The scope of the study included customer

relations managers, data analysts, and customers through a purposive sampling of 15

participants. The decision to study individuals across sectors in Canada was to provide a

more comprehensive lens around CRM. The precursor was that understanding of management realities could help inform further advancements as big data analytics within a social media crowdsourcing frame advance.

In the research, some delimitations included the scope; social media technology is continuing to proliferate and the reach for the interviewees was not limited to one sector or area of business. Additionally, within organizational departments which focused on CRM, there were sometimes those who were business or data analysts in addition to their roles in management; consideration of the work that was done was integral to the sampling. As such, procedural accuracy in the participant solicitation and screening interviews was approached with specificity and openness (Roulston, 2013).

Limitations

Within a multiple case study design, the results needed to have considerations that included the human condition. Interviewees may have had a bias, were uninformed or were motivated by elements outside the scope of the research (Yin, 2011). Another aspect that needed to be considered was that the researcher was a part of the instrumentation is that the interviewer may have unintended influence within the process of interviewing (Patton, 2014). This could have extended into the data synthesis and subsequent analysis; however, the utilization of triangulation methods such as a coding check or taking time between coding to refresh the outlook of the researcher helped mitigate this influence (Jacob & Ferguson, 2012; Kvale, 2007).

Significance of the Study

Significance to Practice

Based on the research, many companies have not harnessed the true power of social media for many reasons which, in the context of data analytics, can impinge on the more fulsome picture of consumer purchasing intentions (Abdullah, 2016). CRM in this digital era encompasses a plethora of communication points such as marketing and feedback from a customer perspective, purchasing context, intention, motivation, and buying patterns/behaviors. Other less intangible reasons such as ethical commitments or community programs that are fostered by firms, if leveraged more readily, could be more authentic, comprehensive and more aptly inform strategy (Parsons & Lepkowski-White, 2018). Based on the dynamism of social media, the voice of consumers is not leveraged as readily and could help companies attain a deeper understanding of purchase intentions which can inform more holistic CRM (Kunz et al., 2017). This research could support managers attempting to navigate this evolving landscape and further engage them in more targeted and agile CRM approaches.

Significance to Theory

As social media proliferates, companies are faced with realities such as the need for infrastructure changes, strategy augmentation, and communication approaches that are more dynamic (Papagiannidis & Bourlakis, 2015). The results of this study could add to the communications theory and customer relationship conceptualization that linked processes at a management and customer level and could facilitate social change (Killian & McManus, 2015). Uses and gratification theory, while, it was not substantial in this

research, could be an area of continued development (Chen & Popovich, 2003).

Researchers that want to mobilize the knowledge and adaptability of CRM in this state of

technological proliferation might value the contributions of this literature.

Significance to Social Change

The relationship of social change included that customer relations managers could

utilize the interview feedback from customers in order to understand how an

organization's product and service offerings were being applied and how they could

improve (Orenga & Chalmet, 2016). In an era where the proliferation of technology and

the use of social media is evolving, how the growing socially conscious consumers

choice was based on ethics as well as utility. The social and political impact could

provide an outlet or unpin a level of positive influence on organizations whether applied

to service, product or multi-oriented providers (Abdullah, 2016; Grewal, Roggeveen, and

Nordfalt, 2017).

Customer relations managers could gain needed insight as to how best support or

apply aspects of the triple bottom line in their own organizational mandate (Connelly,

2012; Abdullah, 2016). Furthermore, this study could help identify an understanding of

the increasing socially conscious consumer behaviors such as choosing fair trade

products or backing companies that engage in social enterprise (Dominici, 2015). This is

readily becoming part of the norm which not all industries have tapped into; the narrative

or voice which social media provides is now readily accessible and should be part of the

CRM considerations (Dominici, 2015).

Summary and Transition

In Chapter 1, I aligned the problem statement and purpose statement with the research question and conceptual framework of the study. The unit of analysis, as indicated in the problem statement, was CRM, business analysts and consumers within Canada that work with social media analytics within a big data frame. The exploratory multiple case study was done to attain a series of understandings of how customer relations managers can navigate their roles within a big data analytics and social media frame. The realities of this departmental practice could be more concertedly linked to a broader understanding of strategy; perhaps a more targeted approach in understanding the feedback of narratives or the ability to navigate within the social media space could be realized (Bashir, Papamichail & Malik, 2017; Grossberg, 2018). Chapter 2 consists of a review of the literature related to the study. Specifically, I reviewed and analyzed the literature about the realities of contemporary big data analytics and social media (i.e. crowdsourcing) usage, the implications of customer intentions, and the barriers to social media implementation. Within the next chapter, I examine the literature that was foundational to this study.

Chapter 2: Literature Review

The continued proliferation of social media and other technologies and the shifting economic landscape are expected to precipitate more adaptive approaches by customer relations managers attempting to understand the multidimensional aspects of communication, consumer intentions, and the opportunities and constraints of social media (Chen, 2017; Kobia &Lui, 2017; Vickers, 2017). The authors of a 2018 Global Innovations Survey found, for instance, that 65% of organizations were embracing digitization in the form of social media in order to engage in open and collaborative practices (Boston Consulting Group, 2018). Within this context, I wanted to gain an understanding of how customer relations managers could use social media within a data analytics frame from scholarly and practitioner perspectives.

In this chapter, I review literature on the role of social media, the experiences of using data analytics for CRM, and the notion that customer-centric technologies could change the understanding customer intentions. In the first section of the literature review, I focus on the role of social media in CRM in order to understand the implications of the spread of Web 2.0 technologies. In the second section, I focus on cases of big data analytics and provide crowdsourcing examples from cases of organizations; I also discuss literature on the benefits and challenges within this space. In the third section, I discuss customer-centricity and communication implications for CRM. The literature provides a foundation for understanding the phenomenon being studied as well as supports the methodology used in the study. I begin the chapter by reviewing my literature search strategy and conceptual framework.

Literature Search Strategy

I sought literature from scholarly and practitioner perspectives to ensure there was a fulsome examination of the existing practices and advancements in Web 2.0 from 2013 to 2018. Additionally, I searched for literature on branding community development within a communication and marketing strategy association in order to ascertain what the contemporary considerations have been within organizations across sectors. The reason for not limiting the scope of literature was that this technology is continuing to develop, and the literature is not saturated within any sector. For example, the implications of social media as a tangible strategic choice have been considered by researchers and practitioners alike (Grossberg, 2018; Holtzblatt & Tierney, 2011). I also explored literature which explained the historical and current assessments of CRM and what shifts researchers and practitioners view as needing to occur for organizations to more aptly leverage social media.

I completed the searches using multiple databases in the Walden University online library, including Academic Search Complete, ProQuest Central, SAGE Premier, Business Complete, and Science Direct. I also used Google Scholar to retrieve articles from reference lists that pertained to the phenomenon of study. The search parameters included publications from the year 2000 to the year 2019. The key words that were used in the search included, "big data", and "social media", and "customer relationship management". Additionally, the limiters in the search engine included peer reviewed scholarly journals and full text. The Gartner Group and articles from *Forbes* magazine provided contemporary context within the field; the first entity is considered a think tank

(Smith, 2018) while the second is a popular periodical focused on finance. I considered them as credible sources for this investigation.

Conceptual Framework

The conceptual framework for this multiple case study consisted of concepts foundational to communication theory (Kodish, 2015). Dimensions of communication theorizing and research included in the study included uses and gratification theory, constructs of feedback, and processes for data collection and analysis (Khan, 2017; Kobia & Liu, 2017; Webb & Middle, 2016). Communication is evolving within the digital landscape, which accounts for the exploratory nature of the study. I focused especially on four dimensions of social media marketing and management identified by Parsons and Lepkowski-White (2018) that help distill how managers navigate the realm of CRM. The four dimensions of consideration that inform a firm's strategic focus are messaging/projecting, monitoring, assessing, and responding (Parsons & Lepkowski-White, 2018). Through this lens, I explored how customer relations managers utilize social media within their data practices and how this appears from a consumer perspective. Social media is a technological and communication platform, which has implications for consumers as the technology has become more ubiquitous (Khan, 2017; Webb & Middle, 2016). I found communication and uses and gratification theories to be appropriate for studying these media.

The conceptual framework provided a multipronged lens by which to look at an organization's engagement with social media (e.g., crowdsourcing) through a data analytics frame. Parsons and Lepkowski-White's (2018) framework bridges the higher

level of strategy and organizational raison d'etre to the application or tactical aspects for customer relations managers. The four core dimensions of messaging/projecting, monitoring, assessing, and responding are areas that customer relations managers and other leaders need to readily understand (Parsons & Lepkowski-White, 2018). The dimensions within the conceptualization highlight the messaging and projecting that firms use to engage in social media whether from an information push out or in their integration of communication and engagement with customers (Parsons & Lepkowski-White, 2018). Parsons and Lepkowski-White did not advocate for one or the other as it is the organization's responsibility to consider what best fits their vision, mission, and governance framework.

These conceptual factors should direct an organization's strategy to engage in the same data analytics surrounding customer behaviors and actions without social media (Parsons & Lepkowski-White, 2018). For example, if customers tend to communicate via e-mail, the data could show that customers want more information on a firm's social actions, organizational leaders may direct their strategy to posting information and other static approaches to communication. The opposite would hold true as well. Understanding the CRM capacity from within as well as the predilections of customers would inform the process of the first dimension as well as the second dimension of monitoring (Parsons & Lepkowski-White, 2018). The complexities within this area are how experienced or trained customer relations managers are in understanding the data, analysis, and implications; how data and messaging fit into the strategies and abilities of managers and departments; and how the aspects of monitoring can contribute to the

overall effectiveness and efficiencies within the departments and organization as a whole (Parsons & Lepkowski-White, 2018).

Customer relations managers and their respective departments, as highlighted previously, should have an infrastructure that could help enact strategy which may include tools such as text or word recognition applications that could work within social media mediums and help support efficiencies in the data analytics processes (Kabir, Karim, Newaz, & Hossain, 2018; Liau & Tan, 2014).Within a co-value or creation framework, customers could help with the process of analysis in that their feedback can inadvertently act as triangulation mechanisms by confirming, questioning, sharing frustrations, and making recommendations which can be used as part of the understanding and assessment connected to customer relations managers portfolios or core responsibilities (Parsons & Lepkowski-White, 2018).

Within the conceptualization, Parsons and Lepkowski-White (2018) asserted that organizations can function within these dimensions in a non-sequential manner depending on their mandates, infrastructure and management acuity. Other organizations within the cases explored similar conceptual arenas, in that companies such as Lego, Proctor & Gamble, Ford and Starbucks created their own strategy and frame for social media approaches that included variances from monitoring, engaging or a hybrid of these conceptions (Kodish, 2015). For example, within an extensive social media literature review, Bhimani et al. (2018) noted that 'My Starbucks Idea' provided the environment for customers to be engaged in ideas or feedback inclusion; Nokia engaged in front-end design by soliciting customer feedback through their branding community. This resulted

in a very successful WP7 iteration of their mobile phone line. In many of these case examples the predictive analytics of time of day for responses, areas of response and communication style made it easier for the customer service management in shaping their day-to-day responsibilities and dissection of high levels of data and relevance to the organization (Kodish, 2015; Webb & Roberts, 2016).

The last dimension Parsons and Lepkowski-White (2018) addressed was the facets of responding to the data and information in a way that added value to the organization and customers. Communication methods need to be solidified both at the high level and granularly as the implications of intention, tone, vocabulary, and being able to swing negative narratives or redirect messaging could be a delicate balance. However, in the recall cases discussed earlier, King (2015) asserted that the relationships cultivated as a result of applying a framework which reflected integrity, genuine concern, social consciousness and ethical practice helped guide the responding applications that were utilized (Parsons and Lepkowski-White, 2018). A particularly poignant consideration was, as organizations evolved their infrastructure, the organizational language, graphics and incentivization approaches should managers implement as the online community may not have been as receptive to more traditional face-to-face methods (Parsons & Lepkowski-White, 2018).

In conclusion, this conceptual framework integrated the theoretical elements such as the evolution of communication and the pragmatic aspects of integrating social media practices within a data analytics frame (Webb & Roberts, 2016; Moorthy et al., 2015).

The richness of this conceptualization is embedded in (Parsons & Lepkowski-White, 2018), and it:

1. Assumed that social media and data analytical practice would reflect strategy and are part of a 'now' reality for organizations.

2. Synthesized the realities that were faced by customer relations managers and attempted, through the dimensions in the framework, to mitigate perceived constraints in a value-add approach.

3. Highlighted the core elements of a cocreation approach whereby customers are a large part of the conversation whether in data pulls (crowdsourcing) or online community engagement.

4. Served to inadvertently hold organizations from the leadership to customer relations managers, accountable for the positive engagement of customers within a social media context. (i.e. shared accountability)

5. Provided latitude for customer relations managers and organizations to consider the dimensions within social media and data analytics yet are not beholden to a one size fits all mentality.

Within the research, the conceptualization provided the necessary foundation for exploring the phenomenon of how customer relations managers could utilize social media within big data/data analytics frame to support targeted and agile marketing and management strategies (Grewal et al., 2017). Additionally, with the consideration of communication and technological usage, the design was pre-emptive in accordance with the constraints that customer relations managers saw contemporarily which this study

attempts to further explore. Throughout the literature review, cases of organizations that have been successful in this realm as well as the subsequent gains have been highlighted. The theoretical facets such as communication theory, uses and gratification theory as well as the pragmatic aspects are integrated into the realities for customer relations managers. These included a broad spectrum of considerations interwoven throughout the discussion of social media and marketing strategies.

<div align="center">**Literature Review**</div>

Big Data Analytics and Crowdsourcing Frame: Case Examples

As the literature indicated from the scholarly business journal publications such as Gartner Group and practitioner journals such as Customer Relations Management, big data analytics and crowdsourcing methods such as social media provide both context within the data and a voice for consumers (Adams, 2014). Based on the cases that were evaluated, the current state of social media and customer relationship practices are being realized as the technology and platforms evolve. For example, traditional big data and analytics are complimented by extended data points which include crowd sourcing within social media (Orenga & Chalmet, 2016; Aquino, 2015). Additionally, there were significant benefits to using big data analytics in accordance with social media for CRM frameworks, which helped provide a justification for companies to be more adaptive. (Smilansky, 2015).

Many organizations that have not invested in tools or IT infrastructure development that engage with crowd sourcing risk omitting contextual facets which narrative data may illuminate (Kunz et al., 2017). Marcus and Davis (2014) and Rizkallah

(2017), when they analyzed the inherent problems with big data approaches, identified

the importance of an integrated approach to customer relationship management. The

Hume problem, as described by Bontempi (2016) addressed the importance of gathering

information that reflects the human context and discerns that inductive practices can

support customer relationship management systems. Moorthy et al. (2015) provided a

powerful case which depicts the integration of big data and social media as data points

within a more holistic approach in the communications industry; highlighting the

interplay between traditional data analytics and the incorporation of social media support

this studies case.

Kunz et al. (2017) provided an analysis of customer engagement within a big data

context and reaffirms the merits of social media as indicated in the previous section. This

article provided greater context on how companies evaluate and use information to

manage customer engagement. This study brought to light some of the important reasons

why customers engage or choose not to and how that choice impacts CRM practices. The

bridging of relational factors provided more customer-centricity and the opportunity for

organizations to more fully inform their marketing, communications and branding

strategies and consider how to more readily equalize feedback from consumers (Moorthy

et al., 2015). With the proliferation of social media and handheld devices which in some

ways act as personal computers, access to crowdsourcing is equalized in relative terms

for customers and businesses alike; communication and the ability to participate in online

communities related to product or service offerings is easier than it has ever been

(Adams, 2014; Liu et al., 2017; Lu et al., 2017).

Despite these changes, digitization is lacking in many organizations the upper echelons of leadership may not see the real time advantages of the initial sunk costs because of fiscal prioritization; an entire infrastructure shift can be immensely expensive (Boston Consulting Group, 2018). Moreover, organizations have yet, at scale, to invest and subsequently integrate social media within their current data analytics approaches with confidence (Agnihotri, Trainor, Itani, & Rodriguez, 2017). The benefits of seeing small and medium size companies utilizing social media within a data analytics frame could help others appreciate or understand the benefits of this bourgeoning technological reality (Courchesne, Ravanas & Pulido, 2019; Kim, Kim, Wang, & Kim, 2016; Zahoor & Quereshi, 2017). For example, many South Pacific and Asian oriented case studies indicated that companies leveraged social media from a luxury market perspective, providing credence for the advancement of CRM with social media within a big data context (Pentina, Guilloux, & Mixer, 2018). Other cases from companies in the Middle East showcased the benefits of social media and CRM practices and reaffirmed that the usage could support a greater understanding of customer behaviors and purchasing intentions, leverage customer relationship management for optimization, and organizational effectiveness (Malthouse, Haenlein, Skiera, Wege, & Zhang, 2013).

Data point confirmation and cleaning are opportunities within customer relations management and social media approaches because they can provide greater clarity and underpin a common organizational language. Additionally, the data triangulation approaches such as data overlay, multiple data points from internal and external pulls can

further support a co-creation value framework within a branding community orientation and more customer centric practices (Parsons & Lepkowski-White, 2018).

Customer Intentions: Role of Social Media in Customer Relationship Management

Within the current literature, the proliferation of social media within the customer relationships realm reflected the continual advancements in scholarly and practitioner fields. Social media transcends traditional social, economic and in some way's political boundaries within e-commerce, which creates powerful opportunities for customer relations managers pertaining to communication, inputs, iterative practice, performance and the like (Erkan & Evans, 2016). Initially in the infancy of social media and customer relationship management, researchers and practitioners theorized about the possibilities and constraints to which social media would lead.

As social media continues to develop, cases of use and restructuring of infrastructure, as well as pragmatic implications can be assessed in accordance with theoretical discussion (Haenlein & Libai, 2017). As Trefler (2014) and Akar and Dalgic (2018) reinforced, it was the intent of social media within a customer relationship management that needs to be considered holistically; the implications of online consumer behaviors and purchase intentions were reflected within this medium and within the context of crowd sourcing methods which include platforms such as Facebook, Instagram, LinkedIn and the like. These implications are the anchor to the gap that was established in this study. What was missing was an examination of the realities of social media, customer relationship management as well as how social media was navigated and informed customer relations. The gap in implementation and understanding, and the

ability to manage within these platforms is evolving at a steady rate including business processing and analytics tools that are being developed or already have been made available for organizations (Bhimani, Mention, & Barlatier, 2018). Therefore, research completed to support customer relations managers as they navigate these realities can help support the scholar and practitioner states within this phenomenon of study (Gautam & Sharma, 2017).

Agnihotri et al. (2017) asserted that social media provides feedback for customer relations managers in ways that can support responsiveness and helps anchor the behavioral facets of managers in ways which contribute to building communities as well as contribute to greater human impact. In this case, Agnihotri et al. (2017) discussed the notion that social media creates opportunities for greater consumer voice, whether solicited or unsolicited, which, while positive, can create complexities as well (Bhimani et al., 2018). Organizational performance and customer satisfaction are an arena to which social media can feed and support a greater understanding of data and the process of analysis within a big data frame (Peerayuth & Pakamon, 2017). For example, many organizations leverage big data from multiple conduits such as mobiles, sensors, and the internet, as well as a metric platform. The plethora of data points can serve to reinforce areas outside of customer satisfaction but also enterprise level elements. These could include usage points, optics around company divisions for marketing, branding and communication, as well as support profile effectiveness (Akar & Dalgic, 2018; Peerayuth & Pakamon, 2017).

Economic entrance for small- to medium-size firms is positively influenced as social media provides access as well as community development. This increased access can level the field in relation to exposure, market accessibility and consumer communication (Agnihotri et al., 2017; Reed 2015). A case example included a company within the meat trade industry where the organization implemented a consumer-centric business model with the utilization of Twitter and Facebook. They crafted a strategy around the ways in which social media (i.e. crowdsourcing) and management practices are enacted which supported implementation fluency and helped mitigate a product recall situation (Colliander, Dahlen, & Moody, 2015)

Yuu, Xiaozhu, Yung and Sukki (2018) analyzed a transportation companies' utilization of social media and ascertained that the ripple of consumer action and positive feedback supported management in deciphering customer needs within a community forum. Utilizing paratextual methods for social media narrative by customer relations managers supported a higher degree of understanding and engagement with their followers within a branding and marketing vein (Yuu et al., 2018). Within this case, it was clear that the technological tools available were still evolving; however, the infrastructural implications far surpass the problems (Webb & Roberts, 2016).

Del Rowe (2018) analysed the implications of social media from Fiji Water, a company which carved out its competitive advantage among beverage giants such as Dasani and Aquafina with higher end water and high end beverages. Within this case, the authors argued that social media provides more opportunity for digital influencers. In terms of communication flow and impact, these opportunities have been noted as a

bourgeoning aspect that influences consumers at a higher rate from the positive and negative (Quinton, 2013). Del Rowe (2018) asserted that the facets of communication, or interchanges within a social media platform, and the evolving nature of interactive engagement can be opportunities for organizations to have a pulse on consumer needs, product, service or support from an understanding focus (Balaiji, Jhan & Royne, 2015; Jaber & Simkin, 2017). However, the constraints are that these forums where digital influencers play a significant role, leave space for negative commentary and could exacerbate crisis-oriented situations as seen in the Unilever scandal (Agnihotri et al., 2017; Gregoire, Salle & Tripp, 2015; Hunter, Gough, O'Kane, McKeown, Fitzpatrick, Walker, McKinley, Lee & Kee, 2018; Preimesberger, 2016; Reed 2015). It is within these facets that customer relations managers need to understand how best to traverse these elements in order to optimize the positive, inform strategy and mitigate the negative (Jaber & Simkin, 2017).

From another perspective of looking at the value of social media and customer relationship management, Preimesberger (2016) elucidated that within an acquisition and merger assessment, organizations which utilize their social media within a big data frame, meaning they utilize the data as part of the broader matrix, can produce greater gains as this type of feedback approach provides a more comprehensive framework. It is a value-add from a competitiveness arena (Moreno, Morales, Lockett, & King, 2018; Orenga & Chalmet, 2016) Moreover, organizations which seek to merge or acquire companies with existing infrastructure assess the degree to which social media has been integrated into

the existing fabric of customer relationship management as it relates to agility of strategy and the like (Gironda & Korgaonkar, 2018).

Aspects such as customer perceptions, perceived benefits and integration of branding communities are important and tend to be integral aspects as they relate to social media and e-commerce regardless of sector (Grewal et al., 2017; Preimesberger, 2016; Singh, 2017). Singh (2017) discussed the implications of analytics and data-based practices within marketing and management practices. Digitization of organizations can support a higher degree of interactivity as well as confirming or disconfirming facets for informing strategy, responsiveness, and having a clearer pulse within the customer community. A lack of infrastructure or understanding of the benefits of social media can result in lagging approaches to engaging branding communities, as well as to understanding consumer concerns and needs (Gironda & Korgaonkar, 2018).

Kite (2016) examined the spread of social media in addition to the changes that the current medium has undergone in relation to consumer use, personalized advertising and a litany of other options. For example, Twitter as a social media platform once concentrated on sales and product placement which was not necessarily conducive to the wants of their followership (Kite, 2016; Liu, Burns, & Hou, 2017). As such, consumer voice influenced the designers of Twitter to move more readily to information sharing, personalization and the delineation of knowledge; the clout, power expression and, as Gironda and Korgaonkar (2018) affirmed, critical mass only reaffirms the importance of a new era which the proliferation of social media has ushered in (Colliander, Dahlen, & Modig, 2015).

Additionally, as in many cases, customer and organizational connectivity were prioritized (Kite, 2016; Lui et al., 2016). Findlay and van Rensburg's (2018) study evaluated how Twitter connectivity supported higher degrees of understanding and engagement from a consumer to firm and firm to consumer reality. Social media amplifies the impact of human connectivity and communication and transcends political and economic boundaries (Webb & Roberts, 2016). Part of the conclusions drawn from Findlay and van Rensburg's (2018) study reiterated the importance of understanding the customers from a relationship management point of view through facets such as emotional responses versus orchestrated responses as this can aid in mitigating negative posts or communication. Although their study was completed in South Africa where political and geographically, individual and collective voice may be highly charged, organizations that work within this microcosm can still find a higher level of validity within the context of feedback and communication which informs evidence-based practices for customer relations managers (Findlay & van Rensburg, 2018). Other cases, such as in Asia, reinforced the same sentiment in that customer relations managers that utilize social media within a big data frame can yield greater product advancement and service offerings than more traditional methods (Benitez, Castillo, Llorens, & Braojos, 2018).

Xiang, Du, Ma, and Fan (2017) analyzed review platforms within the hospitality sector to assess how data analytics and social media approaches work together to provide a more seamless approach to customer relationship management. Within this case, the authors explained that consumers partake in social media as they want to be heard and

engaged with, as well as utilize the information and knowledge that others convey (Kite, 2016; Singh, 2017; Xiang et al., 2017). The authors noted that customer relationship management is integral to navigating within an ever-evolving digital era; cocreation approaches provide a value for customers and bridge a once one-way communicative approach which was supplemented by enterprise data matrices (Kim et al., 2016; Quinton, 2013; Xiang et al., 2017).

In an era where consumers can participate and influence online communities, optics around product and service offerings as well as responses to organizational enactment of marketing strategies are increasingly important. Practitioner magazines such as Forbes and CRM Magazine as stated by Smith (2018) and Aquino (2018) asserted that clout, influence and, at times, pressure are pieces of social media oriented customer relationship management and these aspects can result in higher levels of social consciousness purveyed by consumers, but they necessitate responsiveness from an organizational perspective (Yen, 2016). Moreover, Grewal et al. (2017) contributed to an academic exploration of the social media technologies that customers utilize as retailing evolves. The implications for organizations along with what other technologies could do for retailing include further customer engagement in relation to IT tools for social media within an analytics frame, customer purchasing intentions, engagement, organizational advancement and product or service iterative feedback loops (Alhidari, Iyer & Paswan, 2015; Marion, Barczak & Hultink, 2014).

Within the conceptualization of social media and customer responsiveness, Balajia, Jha and Royne (2015) explained the connectivity between public and private

communications within a social media realm and the implications of attribution, consumer perspectives and loyalty. As with much of the contemporary literature within this phenomenon of study, customer loyalty and responsiveness of organizations from a social relationship vein positively correlate (Balajia et al., 2015). Additionally, if a thorough social media strategy was implemented which includes a two-way communication approach as well as overt and intentional organizational practices that are informed by data from multiple sources (i.e. big data frame and social media), customers will be more apt to participate in solicited or non-solicited feedback (Balajia et al., 2015; Simkin & Dibb, 2013). For example, Erkan and Evans (2016) asserted that many luxury brands such as Tiffany & Co. utilize a hybridization of cocreation value practices called story giving whereby customer voice was elicited and shared within internal and external communities by customer relationship departments. What was quickly ascertained by the company was that embedding engaging customer voice into the strategy and then building around it acted as a forum that supported marketing efforts as well as served as a mechanism for branding.

Ngai et al. (2015) assessed the different theories, frameworks and constructs that relate to social media. Their theoretical and conceptual analysis of social media supports an enhanced appreciation of the methods (i.e. social, psycho-behavioral etc.) consumers use to engage. This phenomena and evolution of social media from a theoretical and conceptual vein aids in recognizing the dimensions related to the usage of social media and how this can best serve organizations.

As social media continues to take root as a mainstream form of communication for customers, we see other cases that showcase the importance of customer relationship management and value creation on both organizational and consumer ends (Kobia & Liu, 2017). Moreno, Morales, Lockett and King (2018) evaluated the site of TripAdvisor which concentrates on consumer travel ratings and, within their study, determined that consumers optimize social media to empower and share their voice regarding product and or service offerings. These communities not only provided value for the travel industry in respective countries but also served to hold companies accountable based on specified criteria and averaging results (Garridu-Moreno et al., 2018). A granular data approach coupled with posted narratives can provide a powerful and more contextual frame for a company's potential and existing customer base (Garridu-Morend et al., 2018; Malthouse et al., 2013). Aquino (2015) reaffirmed the positive implications of reciprocal branding and customer relationship management when strategy is developed around social media while leveraging data analytics as well to provide a more complete representation. From a communications perspective, social media can create a continuum for social responsiveness, consciousness and the positive implications of crowdsourcing processes that help movements take root (Liu et al., 2017).

Chen (2017) promulgated that the implications of lagging infrastructure and lack of strategy around social media, such as customer engagement, intention and communicative approaches, are not always utilized within an IT and customer relationship management frame. The realities of millennial consumers as active participants in social media which translates into crowd sourcing capabilities, can provide

needed data to inform areas such as marketing, branding and communications (Killian and McManus, 2015). Koo, Joun, Han and Chung (2016) contended that the notion of word of mouth (WOM) and communication theories are exacerbated by social media which certainly have constraining facets; however, the benefits of multiple data points and real time narrative or feedback far outweigh the potential limitations. For example, social media could transcend geography and proliferate globalization in its purest sense. Abdullah (2016) reinforced that the evaluation of social media and dialog mining, the study upheld the notion that communication and language provide windows to customer context; ontological tools help frame enterprise data and give faces and voices to consumers (Boschini, 2015). Moreover, web-based analytic tools are constantly evolving. The human condition, which is reflected by managers, leaderships and other stakeholders or decision makers, naivety in relation to managing, sustaining relevance and leveraging one's value proposition may be markedly impeded if social media narratives and analytics capacities are not harnessed (Abdullah, 2016; Ngai et al., 2015; Venciute, 2018).

As social media platforms evolve and developers continue to understand user needs and preferences, voice and interchanges can continue to serve customer relations management practices by acting as channels for customer feedback and opinion classification (Del Rowe, 2018). For example, purposeful communication and shared opinions, as well as elements such as user attribution can provide context within the narratives, encourage sharing communities and provide access at a global scale (Boschini, 2015; Aquino, 2015; Del Rowe, 2018). Del Rowe (2018) analyzed a

corporation in Chicago which had embedded a social media strategy within their

customer relations practices and, as a result, established that some of the social media

tools that connect to the data analytics frame served to enhance the understanding of

customer and employee engagement. This small case study explained the possibilities of

co-creation approaches, internal data analytics comprehensiveness, and the provision of

context within an internal and external customer-oriented community (Del Rowe, 2018).

This example illustrated, albeit on a smaller scale, the positive implications of social

media usage within a customer relationship and larger data analytics frame (Bhimani,

Mention & Barlatier, 2018; Mainsah, Brandtzæg, Følstad, 2016).

Simkin and Dibb (2013), within these aspects of digitization and the implications

for customers, illustrated the aspects of communication and threats of customer

empowerment as nascent factors to engagement. Whether through internal or external

usage of social media, at times customers see narratives or posts as potential threats in

terms of creating realities which are similar to propaganda or compromising meaning so

as to carve out a competitive advantage (Zahoor & Qureshi, 2017). Customer

responsiveness could be impacted by the infrastructure or perceived access points from

the organizational level; loyalty and freedom to communicate, as well as aspects of

transcendence of action are facets to which customer relationship management are

important (Boschini, 2015).

Boschini (2015) argued that whether the narratives are positive or negative can

still support innovative and creative practice. Millennials, in particular, assess their role

within social media communities and crowd sourcing approaches which result in voice,

agency and a realization of impactful engagement (Aquino, 2015; Boschini, 2015; Gironda & Korgaonkar, 2018). The dance in which customers and organizations are engaged is a part of the richness of the social media narrative, and data analytics can aid both parties in the process of informing practice, product and service iteration and the like (Xiang, Du, Ma, & Fan, 2017). Within this realm of customer engagement and social media (i.e. crowdsourcing) management, this innovative field illuminates the importance and considerations of infrastructural mechanics and frame. These considerations, which include strategy and governance in addition to the platforms, are integral to seeing the phenomenon of study in play (Bhimani et al., 2018).

Infrastructure: Realities of Customer Relationship Management

Considerations of the infrastructure and framing of data analytics and system-oriented practices are important to the integration of social media data points as well as the harnessing of a detailed approach to strategy implementation (Guha, Harrigan & Soutar, 2018). In this research context, infrastructure refers to the technology as well as strategy that a firm has crafted in order to govern their customer relationship approach from the upper echelons and throughout the organization (Guha et al., 2018; Jaber & Simkin, 2017; Webb & Roberts, 2016). Gartner (2018) postulated that customer relationship management practices are not as advanced in relation to top echelons of leadership making decisions without feedback and engagement from sales teams or management rungs. The lack of systems thinking, or ecosystem design, as technology multiplies could render organizations hamstrung by archaic practices (Kim et al., 2016; Liyakas, 2013). Liyakasa (2013), in accordance with the Gartner Customer 360 Summit,

estimated that organizations spent $242 billion in IT expenditures in order to accommodate for big data. The integration of IT systems from an enterprise level as well as within a social media or crowd sourcing approach can support more robust, responsive and intentional applications of data in relation to strategy implementation (Barry & Gironda, 2018; Moorthy et al., 2015). As the construct of communication has evolved at an unprecedented rate, the usefulness of customer voice in accordance with choice as it relates to crowdsourced data points can support managers in understanding how best to navigate client relationships (Goldenberg, 2017). Customer relations management required a greater understanding of data and analytic processes as well as a newness consternation; not fearing the advancements of data analytics and being able to traverse the influx of information are integral competencies within this position (Goldenberg, 2017). Ensuring that human resource practices as well as training are artfully designed to engage managers that have a level of knowledge and skill within the data world is integral. Providing, 'just in time' supports to advance may be barriers resourcing-wise but should be part and parcel to leadership practices and departmental offerings as they pertain to business intelligence (Strategic Direction, 2017).

Customer autonomy, voice, and ability to influence product or service iteration or practices are a reality with the advancement of social media platforms or entities and should be a significant consideration within an organization's data pull and subsequent analytics (Singh, 2017; Zahoor & Qureshi, 2018). Language, word usage, questioning, and branding communities created and facilitated by customers are realities in many sectors whether retail, commerce, or petroleum (Vickers, 2017). In a two- or multi-

pronged communication framework, the ability for customers to impact change, help

organizations streamline processes or bolster productivity are immense and should be a

part of management considerations (Colliander, Dahlen, & Modig, 2015). Moreover, as

Tse, Loh, Ding and Zhang (2018) reaffirmed in their analysis of a customer recall

situation during 2017, the utilization of social media and analytics to ascertain the reach

of their message and mitigation points served the company quite well as customers

communicated their concerns. Additionally, the company was able to validate the

realities of the recall and mitigate the impact of misinformation or alternative facts within

a real-time forum (Tse et al., 2018). The training and awareness of managers within a

customer relationship realm was integral to the positive gains by the company in

optimizing social media in the recall case (Tse et al., 2018; Mariana & Mohammed,

2014).This co-creation value framework provided ample opportunities for

communication such as messaging, question and answers within the emergent customer

community, and a higher degree of responsiveness which had tremendous positive gains

even within a product recall circumstances (Escobar-Rodriguez, Gravalos-Gastumnza &

Calanos, 2017; Kobia & Liu, 2017).

Singh (2017) critically analyzed IT investment and infrastructure progression and

asserted that it was important for firms to understand that the initial investment in

technology could enlighten customer experience and solicit responses from customers

can provide greater context in addition to support a holistic communication approach.

The data that is collected and subsequently aggregated as The Garter Group (2016) (as

cited by Singh, 2017) as essential to enacting an effective strategy. The sample within the

study indicated that 70 percent of those surveyed indicated that, as a result of the

propagation of social media and crowd sourcing apparatus, a two-pronged strategy for

traditional communication and marketing facets as well as digital processes are being

developed (Santomier, Hogan, & Kunz, 2016; Grossberg, 2018). Singh (2017) discussed

the implications of critical factors in strategy development which included a two or three

dimensional strategy that can include traditional marketing and management approaches

in accordance with emergent contemporary strategizing to include data facets from the

web, social media and other customer relations management tools.

Chin, Ting, Chi, Han and Chien (2015) addressed an Asian populace called the

Otaku group that are known to be affluent as well as vocal customers; the study affirmed

that a co-creation value approach provided organizational insight in buying behaviors and

needed demographic data that was leveraged by luxury market-oriented companies.

Additionally, through data analytics, customer intentions and a greater sense of

purchasing behaviors were clearer, and this data was more readily disseminated to the

necessary departments. The claims were reiterated within a practitioner journal which

affirmed the benefits of wrapping data analytics within a social media frame, as it helped

understand the customers DNA which included:

- Predictive processes

- Language mining; a fulsome approach to information cleaning; and
  meaning making

- Aided in road mapping customer orientation, intentionality and purchasing

  proclivities (Fanning & Grant, 2013; Malthouse et al., 2013:Smilansky,

  2015;)

Since Gartner (2015) forecasted the need for companies to make IT infrastructure

augmentations to accommodate for social media, titans like IBM have been engaging in

this realm. Many companies have made the infrastructural shift to accommodate for

social media amongst their big data or data analytics approach (Orenga & Chalmet, 2016;

Smilansky, 2015; Zahoor & Qureshi, 2018). A reinforcement that social media provides a

series of tangible data points, as Kunz et al. (2017) indicated, offers more contextual

facets to traditional data analytics, as voice, feedback and narratives can be used to check

other mechanisms of data such as frequency of purchasing and other customer buying

behaviors, as well as loyalty predilections (Fanning & Grant, 2013; Grewal, Roggeveen,

& Nordfalt, 2017; King, 2016).

Goldenberg (2017) underpinned the Gartner Groups assertions in a study which

analyzed the IT frame for engaging in social media or crowd sourcing methods. Within

this study, the discussion of the rate of data, which is a constraint in the literature for

customer relations managers within the knowledge sharing, transfer, and mobilization

realities, highlights that organizations should consider four areas infrastructurally. These

included:

- Integrating offline and online customer data (i.e. enterprise and social

  media data)

- Attaining organization buy-in

- Knowing how to apply big data

- Creating a meaningful road map

Technological infrastructure was one important element of customer relationship management within a more complex people and process management matrix (Goldenberg, 2017; Lager, 2013). These elements affirmed the importance of a concerted customer relationship management framework which at the heart addresses infrastructure design, as well as the human condition in relation to change leadership. Within a contemporary Harvard Business Review article surrounding the state of global marketplaces and the advancement of social media, the discussion of the implications of the volatility of markets and the uncertain nature of consumer practices reaffirmed that social media can aid in navigating the uncertainty (Bennett & Lemoine, 2014). Additionally, the shifts in resourcing reaffirms the importance of understanding the DNA, or pulse, of customers within the data pull and analysis (Bennett & Lemoine, 2014).

This digital era is markedly reflective of higher rates of information from the customers directly as a result of increased connectivity. Customer relationship management solutions which included infrastructure or tools which support text mining (Liau & Tan, 2014; Quinton, 2013). These tools reinforced the idea that content and context are key, underpin the importance of engaging in co-creation value practices as well as robust infrastructure shifts (Bugshan, 2015; Romanczuk, Willy & Bischoff, 2017). A hybrid of enterprise and crowdsourcing data attainment and analysis are integral to this new reality; the infrastructure progression and initial investment by firms will

yield immense benefits within an everchanging economic landscape (Bhimani et al., 2018; Lager, 2013; Singh, 2017).

Communication and Customer-Centricity: The Implications of Co-Creation Value Approaches and Customer Relations

Akar and Dalgic (2018) asserted that consumer purchase intentions, buying behaviors and clout contribute to the rich tapestry of networking and dynamic online community interchanges, as well as to product, service and process iteration. The power of likes, shares and narratives, as Rodriguez, Gastumnza and Calaras (2017) argued, can aid organizations in understanding customer intentions and purchasing behaviors, as does the sampling that is provided in branding communities within social media platforms such as Instagram, Facebook, and LinkedIn (Ascarza, Ebbes, Netzer, Oded, & Danielson, 2017; Mariana & Mohammed, 2014; Pemberton, 2016;). Customers are integral to the value and effectiveness of organizations within a sales, product development and service realm; data analytics coupled with aspects such as crowd sourcing in branding communities are rich areas for exploration; this dynamism of cocreation reflects the strength of the intersections of communication, social media, data draws, etc. (Ismail & Evans, 2016; Papa, Santoro, Tirabeni, & Monge, 2018; Trefler, 2014).

Ismail and Evans (2016) asserted that cocreation value practices built within appropriate mechanisms organizationally can yield increased engagement internally and externally. Feedback, in a feedforward way, elucidates the opportunities within this sphere of technological proliferation. Branding community forums within a social media frame is a fruitful arena for strategies which leverage the cocreative facets that are

inherent in the structure and customer relationship management approaches (Papa et al., 2018; Barry & Gironda, 2018). Homophily, or like-mindedness, can be the anchors of cocreative benefits as constructs such as gregarity, dynamic communication and the realities of crowdsourcing within social media underpin the sheer power of customer relationship management (Fanning & Grant, 2013; Gunarathne, Rui, & Seidmann, 2018; King, 2016; Smilansky, 2015; Zhang & Yet, 2018).

Barriers to Social Media Implementation

The literature indicated that the proliferation of social media within a big data frame has some constraints from a customer relationship management perspective (West, 2017). For example, the impact of negative feedback in a crowdsourcing arena can have tremendous ripple effects if not mitigated by communication mechanisms from a relationship management perspective (West, 2017; Yuu et al., 2018; Zhang & Yu, 2018). Mob mentality, self-interest, greed and implications of social ecological impact from an anthropological perspective create fear and reticence for customer relations managers because their responsiveness feels high stakes (Hunter et al., 2018). However, as Gunarathne, Rui and Serdmann (2018) and Hunter et al. (2018) asserted, social media provides a "realistic platform for complaints" (p.13) since it provides a medium that is responsive and has tremendous utility (West, 2017). Additionally, the just-in-time capacity or positive effects of product and service iterations, as well as feedback, far surpass the potential constraints (Gunarathne, Rui, & Serdmann, 2018; Hunter et al., 2018). In two cases dealing with recalls of products in the food industry, the responsiveness of customer relations managers helped weather the potential business

viability and market value as consumers were able to voice their concerns in addition to engaging in a community which supported the socially conscious and integrity laden approach (Agnihotri et al., 2017; Hunter et al., 2018; Reed 2015).

West (2017) discussed the reactionary premise of how responding to negative narratives can be managed through the critical awareness of managers and by utilizing the skills to interpret and engage in data analytics. The realities of any communicative format can result in positive, negative and mute perspectives or points of consideration. Abedin (2016) asserted that within many platforms which include Facebook, the adoption of the technology with the inclusion of social media and crowdsourcing mechanisms and the realities of negative commentary can be received as unaligned with the intent of the strategy at play. In this vein, whether traditional customer relations management or adaptive analytics, any negative narrative or challenge based on customer voice needs to be considered in the context of governance and the agreed upon approach of organizations (Grewal et al., 2017; Orenga & Chalmet, 2016; Nickerson, Wuebker, & Zenger, 2017).

Even though the rate of advancement of social media can be intimidating for most practitioners, the critical pieces are understanding the what's, why's and how's of the medium and the right questions to ask and messaging; within the realm of data, communication from customers is one of the elements that has been amplified, yet an organization's strategic goals, implementation and methods in form have stayed relatively the same (Digital Global Report, 2019; Guha, Harrigan & Soutar, 2018; Liu et al., 2017). Social media is not going away and the growth of platforms and usage is

exponential (Bhimani et al., 2018). Gartner (2016) argued that by 2020, over 3.5 billion people will be using social media as a result of universal access to the world wide web through cellphones and other personal devices (Digital Global Report, 2019). In this research, utilized a theoretical backdrop of communication, uses and gratification theories provided the necessary underpinnings for understanding the motivations, actions and subsequent constraints of customer narrative feedback (Kim et al., 2016).

Chen and Popovich's (2003) uses and gratification theory addressed the reasons why consumers utilize social media as a means to communicate their purchasing intentions and the like. Chen and Popovich's (2003) work was adapted from Dholakia, Bagozzi and Pearo (2004), who had originally used the theory to examine the social influence of consumers that utilized social media. This theoretical frame includes social media as a technological and communication platform as well as the implications of its use for and on consumers as the technology has become more ubiquitous. Chen and Popovich's (2003) theory offered the opportunity to explore the elements that motivate consumers to use social media which includes behavior, user comfortability and subsequent utility as it relates to consumer satisfaction. These elements could help emphasize the importance of social media narratives in terms of legitimacy of feedback and platform usage and how they can provide a more holistic picture of consumer buying intentions when integrated with big data CRM practices.

Bringing these worlds together, that is, utilizing an overlapping approach of a co-creation value framework of big data and social media narratives could provide a more holistic and comprehensive picture of consumer purchasing intentions (Abdullah, 2016;

Kunz et al., 2017). This approach cannot only provide the needed context which some

traditional customer relationship management analytics may lack, but also support a more

targeted approach to weed through the litany of negative comments. Additionally, having

a more holistic picture can support managers in gaining the confidence needed to build

the necessary repertoire of questions, understandings and elements linked to digitization,

as currently these elements could be considered constraints or barriers. Liu, Burns, and

Hou (2017) asserted that these elements are more indicative of web-oriented consumer

feedback; synthesizing social media narratives that reflect consumer viewpoints provides

a shared value framework and context and form action for managers and subsequently

organizations (Abdullah, 2016; Kunz et al., 2017).

Abdullah (2016) evaluated the current research around social media and customer

relationship management and provided a theoretical discussion of the construct of

customer engagement, the usage of social media and how this relates to brand equity.

This theoretical facet provided a potential justification for social media narratives within

the current CRM information practices. Additionally, the uses and gratification theory

could help managers anticipate consumer motivations, behaviors and intentions within

the conceptualization of why customers utilize social media platforms. For example,

Chen and Popovich (2003) discussed the implications of personal identity, relational

facets and the implications of surveillance for customers when choosing what social

media platforms, they utilized. Coalescing these elements with communication theory is

the dynamism inherent in communication. Whether face to face or on the web, customers

could engage within branding communities based on facets such as being heard, a sense

of contribution and relationships developed under a sense of purpose within the branding arenas (Berlo, 1960; Kodish, 2015).

The extant theoretical basis of communication provides justification for inputting perceived barriers of traditional customer relations manager approaches to attaining information from solely static data points and demographic information into the contextual frames that align with Berlo's (1960) discussion of the "dynamic, ongoing, ever-changing, continuous interchanges" (p. 24) which social media seemingly amplifies. The potential barrier or constraint is an opportunity which scholars within this proliferating field asserted is beneficial to the competitive advantage, efficiencies and effectiveness whether as a product, service or hybrid offering (Guha, Harrigan & Soutar, 2018; Liu et al., 2017; Lu et al., 2017; Moorthy et al., 2015; Marcus & Davis, 2014). To reiterate, barriers in traditional customer relations management such as lacking strategy, data cleaning, accountability and guidance are still realities with the digitalization approach. Addressing infrastructure which includes strategy, IT systems orientation within a social media or crowdsourcing helps firms in this new era of Web 2.0 technologies to reinvent themselves and lay the foundations for sustainable change (Bhimani et al., 2018; Orenga & Chalmet, 2016; Dominici, 2015).

Gap in the Literature

The literature review served to anchor the gap established in this study which was the missing explorations of contextual necessities, realities of social media and customer relations management. An exploration of constraints within how social media was navigated informed customer relations and the yielded gains within existing cases served

to provide further reasoning for exploring customer relations managers understandings and also what customers could provide within a Canadian context. The gap in strategy and IT infrastructural implementation and understanding, and ability to manage within these platforms is evolving at a steady rate due to the proliferation of technology, business processing and analytics tools that are being developed or already have been made available for organizations (Bhimani, Mention, & Barlatier, 2017).

The gap in the research in terms of a deeper understandings for customer relations managers, of the benefits of leveraging social media (i.e. infrastructure and strategy) to help inform the existing data frame and analytics was clear and reinforced the validity of this study. Additionally, the study's data collection with customer relations managers, business analysts that were engaged in customer relations management to ascertain their perspectives surrounding cocreation or a shared value frame. In addition, the challenges managers face served as rich consideration which align readily with the literature and intentions in the phenomenon of study (Haenlein & Libai, 2017; Erkan & Evans, 2016).

Summary and Conclusions

This study was intended to explore what the common understandings of customer relations managers were that utilize social media within a data analytics (i.e. big data) frame to support targeted and agile marketing and management strategies (Parsons & Lepkowski-White, 2018; Zahoor & Qureshi, 2017; Kunz et al., 2016). As a result, this literature review has interwoven the state of big data analytics and crowdsourcing through social media in relation to the benefits and challenges (Bhimani et al., 2018; Kabir, Karim, Newaz, & Hossain, 2018; Steiger, Matzler, 2012). This reaffirmed the

current state of many organizations in luxury markets in Asia, online service or rating

conglomerates that are in their infancy in social media realms and utilize at least one

method of crowdsourcing whether from online community narratives, responsive two-

way feedback mechanisms, frequency data analytics from platforms such as Facebook,

Twitter or Instagram and the like (Colliander, Dahlen, & Modig, 2015; Escobar-

Rodriguez, Grávalos-Gastaminza, & Pérez-Calañas, 2017; Liu, Burns, & Hou, 2017).

The multi-pronged benefits of crowdsourcing in social media included

understanding the pulse and DNA of the customers and provided increased voice and

purpose for customers in relation to product and service offerings; real-time feedback for

organizations to support increased efficiencies and productivity (Fanning & Grant, 2013;

Malthouse et al., 2013; Smilansky, 2015). The information and data garnered from

crowdsourcing in the form of social media also served to support a natural qualifier or

deduction method related to other data analytical processes within enterprise capacity

Overall, the organizations that could conceptualize the promise and potential of

data analytics akin to social media and have invested in developing a strategy around

social media, infrastructure alignment and the implications of communication may be

more innovative in their practice (Bhimani et al., 2018; Ngai et al., 2015; Parsons &

Lepkowski-White, 2018; Patroni et al., 2016). Moreover, the literature showcased that the

contextual facets that are not overt in traditional data analytics could be brought to life

more readily when leveraging social media narratives (i.e. crowdsourcing) as a means to

give greater voice, targeted inputs and a forum for intentional feedback (Halale,

Gangadharan & Uden, 2015; Schlagwein & Bjorn-Andersen, 2014). These benefits

coupled with an understanding and picture of customer buying behaviors and intentions and the application tools such as key word identifiers can provide rich contextual and more nuanced facets for customer relations managers and their departments to support more accurate and agile practices (Bhimani et al., 2018; Parsons & Lepkowski-White, 2018; Patroni et al., 2016).

In the literature reviewed, the volume of cases of organizations that are integrating social media (i.e. crowdsourcing) methods through platforms such as Twitter, Facebook, and Instagram or other regional platforms that were similar in service offering reflected the immensity of buy-in, regardless of the potential constraints which included, pace of information, amount of data, impact of input within online communities (Goldenberg 2017; West, 2017). Globally, there are more than 3.4 billion consumers that engage in social media which provides a larger reach, higher potential productivity, performance and ultimately, sales for those organizations (Global Digital Report, 2019). These customers are primarily millennials, but a large segment transcend this generation due to the proliferation of the cell phone and web applications that provide greater opportunities for those that have access. These customers also engaged in the service and product offerings and online communities for support, collegial interchanges and sharing of buying intentions, agency, efficacy, and other tenets of consumer identity (Del Rowe, 2018; Ye, Hashim, Baghirov & Murphy, 2018).

Customer relations managers could harness this information, interchange and voice of their followers as well as the criticality that also happens within these forums. Critique, or what may seem like negative narratives to customer relations managers that

have digital competencies, understand the opportunities within the words can be a very powerful tool for product and service innovation (Bhimani et al., 2018; Goldenberg, 2017). Additionally, the alignment of leadership in terms of governance and strategy delineation as it relates to competency and comfortability of customer relations managers is certainly a key success factor as Parsons and Lepkowski-White (2018) and Banyai (2016) asserted. Aiding managers in understanding this digital reality and navigating their space to be confident in the information and knowing the right questions to ask and approaches to enact strategy can provide the needed elements to cultivate a dynamic systems level approach as it relates to strategy enactment, marketing, and management (Abdullah, 2016; Banyai, 2016; Courchesne, Ravanas & Pulido, 2019).

Organizations could implement a strategy which supports direct engagement or monitoring/observation and synthesis of social media narrative data with perhaps the fear of high stakes communication for managers as the technology proliferated (Parsons & Lepkowski-White, 2018). Understanding where customer relations management practices were within a Canadian context was beneficial. The opportunity for a co-creation value model, whether through overt responsiveness or monitoring oriented responsiveness, provided a space for customers to contribute more readily to the approaches of a once one-dimensional customer relations framework (Bhimani et al., 2018). The realities for customer relations managers and how social media could support organizations within this phenomenon of study could enlighten researchers and practitioners and acted as a bridge for aspects that could influence further innovation in this field. This will be the primary focus in the research method discussion in Chapter 3.

Chapter 3: Research Method

This chapter contains an overview of the research design and approach I used to gain understanding of customer relations managers' approaches and perspectives related to data analytics and social media practices within an organization. I conducted this study to provide insight into CRM practices amid the continuing proliferation of social media. Specifically, I wanted to attain a deeper understanding of CRM and the benefits of leveraging social media (i.e., infrastructure and strategy) for informing existing data frames and analytics.

Chapter 3 includes information on the research methodology I used to answer the research question and attend to the gap in the literature. In the chapter I discuss the research method and design and rationale, restate the research question, consider the role of the researcher, and provide an overview of research participant selection and instrumentation. This chapter also includes sections on the procedures for recruitment, participation, and data collection; the data analysis plan; and issues of trustworthiness. The latter section includes aspects of validity, dependability, confirmability, and ethical practice.

Research Design and Rationale

Researchers rely on the research question as a guide for decisions they make throughout the data collection approach (Jacob & Ferguson, 2012). The main research question for this qualitative multiple case study was, what are the common understandings of how customer relations managers can utilize social media within the context of already existing data analytics to support more targeted and agile marketing

and management strategies across industries in Canada? For this study, I chose a

qualitative research method with a multiple case study design. A multiple case study has

a richness in that this approach can support appreciative inquiry through the analysis of

different experiences and perspectives (Yin, 2011). Using a qualitative research approach

can provide understandings of diverse human experiences and shared realities; through

interpretive, decoding, and meaning translation methods, a researcher can elicit more

information related to process and social truths than by using more passive approaches

(Patton, 2014).

A quantitative research method is hypothesis driven; researchers using this

method seek to determine the relationships between variables (Echambadi, Campbell, &

Agarwal, 2012). I opted against using a quantitative method because of the constraints it

would impose on exploration within the interview process. A mixed-methods study

involves a combination of both qualitative and quantitative methods. This provides an

opportunity to move from the analysis of concrete variables to an analysis of how these

may be reflected in a multidimensional analysis of the phenomenon (Feilzer, 2010). Due

to the nature of the study and the emphasis on gaining understandings of customer

relations managers' and business analysts' perspectives, variability analysis was

unnecessary, and as such, I chose not to use a mixed-methods design.

Research Design and Rationale

My case-study design included three cases: customer relations managers, business

analysts who engage in CRM, and customers who utilize social media. The purpose of

this qualitative, exploratory multiple case study was to gain common understandings of

how customer relations managers could utilize social media within the context of already

existing data analytics across industries in Canada. I completed a case study to

understand the perspective and behavioral facets of consumers who utilize social media

in an attempt to showcase the value of an outside-in or customer-centric approach (see

Liu, Burns, & Hou, 2017). The richness of a case study process is that provides insights

into a complex situation and a more complete triangulation of data which can reaffirm the

validity and reliability of the research process (Yin, 2011).

Grounded theory is a research design that is based on ongoing theoretical

development to inform established methods of practice or knowing (Cho & Lee, 2014); in

this study, grounded theory was not appropriate because I was interested in exploring an

existing practice rather than developing a theory (Yin, 2014). Other designs such as

systems theory and phenomenology did not fit the study purposes either. Systems theory

was too holistic in addressing pieces of the whole (Bansal & Corley, 2011). A

phenomenological approach would have emphasized the personal experiences of

participants and would not have reflected the professional environment in terms of

processes or product orientation (Bansal & Corley, 2011). A case study design is the best

fit because this design provides insights into a complex situation as well as the

perspectives of those within.

Role of the Researcher

Authenticity and reflexive practice are integral to the conduct of integrity-based

research (Patton, 2014). This is especially the case in qualitative research as the

researcher serves as an instrument (Yin, 2014). In terms of bias, qualitative researchers

need to calibrate their thinking and implement practices such as developing an audit trail

and using notes to reduce the possibility that data might be tainted (Alasuutari, 2010). My

role included interacting with the participants during and as part of data collection.

Studies in which a researcher personally interacts with participants include interviews;

casual conversations; group discussions or focus group interviews; field, naturalistic, or

participant observations; and the like (Yin, 2011). In these cases, determining the role of

the researcher encompasses answering the following questions: (a) what will the

researcher actually do with the participants?; (b) how is the researcher qualified by

experience, training and supervision, or study to do those things?; and (c), if the

researcher is unqualified or underqualified, what will he or she do to obtain the necessary

skills? (Alasuutari, 2010). I collected data from customer relations managers, business

analysts who had customer relations responsibilities, and customers or consumers who

used social media using a semistructured interview process, therefore, being aware of my

role as an instrument in the interview process as integral (Yin, 2014).

     I synthesized and coded the results based on the categories and themes that arose

as well as the outliers once the data had been unpacked. The motivation for a specific

outcome was a nonfactor because of my focus on understanding the data (see Bansal &

Corley, 2011). I also mitigated the potential for bias through consistency of the interview

protocol and questions, reliability of the data analysis, and strict adherence to the

standards set forth in the study design. Triangulation processes were included such as

interview notes, an audit trail, and transcription validations from the research participants,

which supported a higher degree of reliability (see Sutton & Austin, 2015).

Sutton and Austin (2015) asserted that within the research process, organization of data and development of analysis strategy are integral to successful qualitative processes. My process also included a compilation of participant interview responses and any audio recorded notes. The numerical system that was utilized for participant anonymity was also rechecked as due diligence. As the interviews were completed, I transcribed the audio recordings, added the interview notes data, and engaged in a comparison in order to keep everything organized and to clean data. Moreover, the steps for data collection and analysis were included starting with the transcription, use of Microsoft Excel and NVivo 12 software as a secondary check. The interview questions were reviewed in order to calibrate the descriptive thematic coding approach. These practices reinforced that I as the researcher took full responsibility for the work in terms of data collection, synthesis, and subsequent analysis (see Patton, 2015).

Security and integrity of information was solidified in a dual encryption program on my laptop, with the data then moved to an encrypted storage drive. In addition, physical copies of the transcriptions and interview documentation have been stored in a locked filing system within a locked office whereby in 5 years, as dictated by Walden's policies and Walden's Chief Academic Officer, the physical copies will be destroyed. This protocol was integral not only for the integrity of information but also the researcher's commitment to ethical practice.

Methodology

Participant Selection Logic

Identifying a larger "target population" was unnecessary in this case study: by definition, case study is interested in a particular case (or a number of instances of a particular case), not in the universe of possibly related cases (Carcary, 2010). Therefore, my selection of the research participants was related to their role and responsibilities within a CRM capacity as well as customers who utilize social media in a way that intentionally influences product and service offerings. Case studies are rich in information about the case issue inquired about. Because a "case" is a "bounded system" (see Qualitative Approaches in Psychology), the case boundaries or identifying characteristics needed to be clearly specified in this section (Yin, 2011).

The sampling reflected a multiple case approach whereby the recommendation from the literature indicates 5-10 cases to reach a level of saturation and supported qualitative overviews (Alaasutari, 2010). I purposely sampled five customer relations managers, five business analysts who had customer relations engagement and five customers who engaged in social media for product and service feedback orientation in Canada. Within this sample, an open-ended questioning approach was used in semistructured interviews to gain greater understandings of their practices within a big data analytics and social media frame. The multiple case study approach was achieved as each case, which resulted in three in total, was considered their own case study. A collective data strategy was used across all the cases to develop themes from all the participants interviewed.

Instrumentation

In a qualitative method, a researcher could increase reliability or quality of data using processes such as interview protocols, analysis of data by multiple analysts and detail documentation of data. Additionally, in a qualitative research method, the researcher was considered a part of the instrumentation and was part of the discovery process; attention to detail, clarity of application and attentiveness were essential for both reliability and validity of the process (Yin, 2014). Using approaches such as triangulation, member checking, and bracketing supported higher degrees of validity.

The protocol for the interview was created (see Appendix A) as with other steps within this phase which supported greater levels of validity and reliability (Amitabh & Gupta, 2010). The recruitment of participants was completed using an online post on LinkedIn (see Appendix B) and recommendations from potential research participants. To maintain procedural reliability, the interviews were audio recorded and participants were given the opportunity to review their transcribed interviews for accuracy before the data analysis had begun. The research participants were informed of the steps of the interview, data collection and synthesis in the invitation letter which was emailed or posted in LinkedIn prior to solidifying participants. The information was articulated again in the interview script used for the interview to reinforce transparency. The consent protocol was used prior to the interview engagement to ensure procedural accuracy and reliability within the data collection process.

Procedures for Recruitment, Participation, and Data Collection

The official recruitment of participants happened after the Walden University Institutional Review Board approved that data collection could begin. As a researcher, I complied with the guidelines of the board and started to recruit from LinkedIn shortly after the approval was given. At this stage, the documentation was submitted which included all requirements related to the data collection process.

Informed consent. Hoffman (2009) asserted that informed consent procedures, including the assurance that informed consent was given after the participants were informed of their role, risks, rights and participation in the study, are integral to the ethical underpinnings of a researcher's process. The assurance that informed consent was gathered after participants were informed of their role, risks, rights and participation in the study was documented and archived for the research records and audit trail. As such, each participant was provided with an overview of the purpose of the study, the use of data that will be collected and the stipulations for participants that agree to participate.

Data collection plan. Data collection approaches included semistructured interviews for the three case studies. Through a purposeful sampling, the goal was to obtain the perspectives of customer relations managers and business analysts who engaged in customer relations roles, as well as customers or consumers that utilized social media as a means of providing feedback for product or service offerings.

The transcription of each interview was completed and the transcription checking with each research participant was also completed to ensure the transcripts matched the recording and the research participants voice was honored. Through hand coding, I kept

track of the common words and phrases to ensure the synthesis was sequenced to yield

the best interpretive results. The transcription of the audio recording was completed

within 48 hours of each interview to preserve the authenticity of the dialogue and

memory recall as part of the instrumentation and the voice of the research participants.

Once this had been completed, the transcript was sent to the research participants with a

request for review within four days of the interview and it was also communicated that if

there was no reply, the transcription would be accepted as is. If the research participant

returned the transcription with edits, I would have revised the copy accordingly and sent

it back to them indicating 48 hours for their review and acceptance. This did not happen

because all of the research participants accepted their transcription. This process was

highlighted in the invitation letter and interview closing script (see Appendix C). A

follow-up communication was sent to thank the participants for their support of the study

and inform them of the transcription finalization. The protocol for the interview process

(see Appendix A), communication with the research participants and positivity are what

Roulston (2013) affirmed are integral to the flow, consistency and participant efficacy

throughout the interview process. As the researcher I was part of the instrumentation,

diligence in these areas and this was prioritized.

Data Analysis Plan

The process of data analysis served to bring meaning and a deeper understanding

of what the data reflected in relation to the phenomenon of study (White & Drew, 2011).

As Yin (2014) discussed in the scaffolded approach to data analysis, as a researcher,

elements such as a) organizing data files; b) reading and writing memos that include

emergent ideas – reading through text to form initial codes; c) describing and classifying

codes into themes; and d) developing and accessing interpretations will support the

interpretation and develop naturalistic generalizations of what was "learned." Yin (2014)

asserted that data analysis utilizing a step by step process should yield more reliable

results in the compilation of the data, sorting, fragmentation and theming of the data.

Using a mixture of divergent and convergent methods was helpful when I took the

granular data to make deeper meaning and then applying it within a narrative. The

thematic conclusions drawn supported greater understandings of the research problem,

relationships within the phenomenon of study and the participants' feedback, as well as

the conceptualization of the feedback for future inquiry (White, Oelke, & Friesen, 2012).

The design of the interview questions for the data collections are highlighted in

Appendix A; the intent was wholly aligned with this qualitative multiple case study

approach. The data analysis was completed using the application Microsoft Excel and the

results were recorded for accuracy. The NVivo 12 software was used to recheck the

themes from the hand coding process and to utilize the data visualization capabilities to

display the results. This entire process served to support the reliability of data collection

and synthesis which formed clearer ideas and themes out of the interview responses,

journaling and field notes that are taken.

Issues of Trustworthiness

The level of trustworthiness was, in some ways, alluded to in relation to coding

methods, sampling, and the review of literature. This helped define the gap as well as

understanding how the phenomenon was currently being defined (Sinkovics & Alfoldi,

2012). The credibility of the research process was emphasized by the alignment of the research design, the literature review, the rigor and ethical practice of the data collection and analysis processes which include the use of systems to preserve participant anonymity (Cypress, 2017). Researchers must take the utmost care and responsibility as instruments within the study; assumptions, bias, preconceptions and schemas must be put in check (White, Oelke, & Friesen, 2012).

Credibility

Patton (2015) believed that a qualitative research method's rigor has to be reflected in the systematic approaches for interview question quality, reliability and validity around the data collection and analysis processes. A qualitative method has had much scrutiny due to the false belief that the researcher as the instrument can override the truths that are ascertained because of bias, paradigm and cognitive schemas that researchers hold (Bleijenbergh, Korzilius, & Verschuren, 2011). The use of triangulation, process protocols and data analysis techniques that are divergent then convergent in nature (i.e. Yin's 5 steps) preserved the credibility of qualitative research results (Yin, 2014).

Transferability

In relation to transferability, despite the sampling size of 15 research participants, the process of data collection, analysis, and translating these into credible findings was completed with due care, methodical processing and an eye on the guidance from the course resources and literature (Saldana, 2016). Research constructs such as dependability and confirmability were reinforced by the methods of data gathering that

were varied and by making sure the research design and approaches were aligned. In addition, reflexivity was practiced throughout the data gathering and analysis phases (Rubin & Rubin, 2012). Harnessing the strength of writing memos, personal reflections and audit trails in the steps of the research process provided greater confirmability.

Additionally, through the development of detailed descriptions of participants responses by coding and documenting patterns, the thematic elements more readily emerged. Triangulation measures that involved utilizing multiple data sources, an overlay process of the data, similarities and differences, research findings and reflection supported a higher degree of dependability, confirmability and credibility (Cypress, 2017). These multiple data sources were used which included interviews, and field notes for the triangulation and in accordance with the field notes and interview transcriptions, the latter further reinforced the themes and findings related to the research question.

The documentation, positive intent and transparency of information and research processes were utilized in this exercise in an attempt to minimize harm and establish clear expectations for the research participants (Carcary, 2009). Moreover, during the preliminary interview process and follow up, I prioritized the creation of a climate and environment that reflected situational trust and collaboration to support a positive and welcoming experience for the participants (Sinkovics & Alfoldi, 2012). Within the interchanges with participants, there was a focus on continual communication to reinforce that their contributions would help the meaning, relevance and impact of their perspectives to the research (Sinkovics & Alfoldi, 2012).

Dependability

Dependability related to the accurate nature of data collection and (Cox, 2012). Yin's five steps was followed in the process of data analysis and followed the guidelines and procedures set by Walden University in relation to University Institutional Review Board researcher standards (Yin, 2014). Utilizing an expert validation process for the interview questions and process as well as engaging in confirmability practices such as an audit trail and reflexive journaling aided in achieving dependability within this study.

Confirmability

Confirmability related to the ways in which the study's results can be confirmed by others (Carcary, 2009). An auditing trail, reflexive practices such as journaling and consideration of the roles of the researcher was a part of the instrumentation and were integral to the rigor and confirmability for bias reduction and the impact of one's own assumptions and belief systems. My personal reflections were included and field notes and integrated wholly the process protocols and guidelines in order to promote higher levels of confirmability. Through the hand-coding process and integration of notes, the confirmability within the study was further enhanced.

Ethical Procedures

The customer relations managers, business analysts and customers were recruited from across Canada. IRB approval for the study was completed prior to beginning this study. The intended research participants were not connected to any one institution or involved in any work that I did as a consultant or within the post-secondary institution I work for. This helped to mitigate any conflict of interest that could have arisen in the

study. Additionally, the communication protocols pre- and post-interviews clearly outlined the rights of the research participants and articulated their rights in relation to participation and withdrawal, and informed consent.

The process of protecting participants from harm or infringement of their human rights included a robust ethics process, preliminary and post accommodations for participants, as well as a trust-based environment where participants knew they could communicate their discomfort with the process and questions. This study involved adults that were not considered vulnerable or at risk; however, as with any study that uses human participants, some areas of concern that was acknowledged included (Bleijenbergh, Korsilius & Verschuren, 2011):

- Unintended disclosure

- Intrusion of privacy

- Confidentiality

- Power dynamics

Even though none of the research participants in the study were from a vulnerable or protected group, the possibility of anxiety or stress when discussing work related memories or experiences could have occurred but it did not. To moderate these elements, a description of these areas was included in the informed consent, verbal consent and script in order to foster due diligence. Moreover, the anonymity of the research participants was preserved during the data gathering and analysis process, the participants names were coded using letters, numbers or symbols to prevent identification. The

original signed consent forms were kept in a secure facility as well as encrypted in an online database.

As the research instrument in this study, I remained aware of bias and assumptions that may have impacted the power dynamic which could have affected the participant-researcher relationship. I concertedly made efforts to mitigate aspects such as perceived manipulation, directing answers and the like. The implications of dialogic interchanges were considered when attempting to develop rapport with the research participants so as to not bias their responses in any way within the parameters of the study (Creswell, 2014).

Summary

In Chapter 3, the research methodology and design were described in order to anchor the proposed study. Additionally, the rationale was explained in relation to using a multiple case study design for this study and the relationship to the research question and participant groups that will be interviewed. Chapter 3 reflects an outline which described the role of the researcher, the data collection plan, the data analysis plan and details related to credibility, dependability, trustworthiness, and ethical considerations. The themes and patterns that arose out of each stage of the data collection, analysis and evaluation will be the foundation of Chapter 4.

Chapter 4: Results

The purpose of this qualitative, exploratory multiple case study was to gain an understanding of how customer relations managers could utilize social media within the context of already existing data analytics across industries in Canada. According to the Digital Global Report (2019), by 2020, over 3.5 billion people will use social media as a result of universal access to the Internet through cellphones and other personal devices. Globally, more than 3.4 billion consumers engage in social media, which provides larger reach and higher potential productivity, performance, and ultimately sales for those organizations (Global Digital Report, 2019). The implications of social media usage relate to both management and consumer processes; the perspectives of the research participants in this study helped provide more context regarding strategies that customer relations managers may be able to use to foster more consumer engagement with their companies.

Using a semistructured interview process, I collected data from 15 research participants; I audio recorded, transcribed, and analyzed their answers to the seven interview questions. Of the 15 research participants, five were customer relations managers, five were business analysts who had customer relations roles, and five were consumers who use social media to give feedback to support product and service offerings across Canadian industries. Chapter 4 includes information on the research setting, participant demographics, and recruitment process. I also describe the data collection and analysis procedures, provide evidence of trustworthiness, and discuss

emergent themes that I identified through hand coding using Microsoft Excel and analysis using NVivo 12.

Research Setting

I gave the participants for this study the option of being interviewed in person at a public location of their choosing, via telephone conversation, or via video conference. The 15 participants had different preferences in that 12 (80%) chose to be interviewed by telephone, and the remaining three (20%) chose a video conference. Data collection occurred during the Christmas season, which accounts, I believe, for why participants declined the face-to-face option.

The research participants spanned different industries and companies. During the research and data collection, I used an interview protocol in every interview to support fluency, accuracy, and ethical practice. The average duration of the interviews was 35 minutes from the start of the introduction to the close of the interview script. I completed a robust review of the literature prior to the data collection. The inclusion criteria were clearly articulated within the recruitment social media and e-mail posts or documents, and a brief verification of the inclusion criteria was completed again prior to the confirmation of the interviews.

Demographics

The customer relations managers ($n = 5$) and business analysts ($n = 5$) who participated in this study came from start-ups and major corporations across industries in Canada and had substantial career experience, with 19-30 years in their roles. The customer participants ($n = 5$) had been using social media for the past 15 years and would

be considered digital natives (Smilansky, 2015). The average age of the customer

relations managers and business analysts was 42 years, and the average consumer age

was 27 years old. The gender distribution included seven (47%) female-identified

research participants and eight (53%) male-identified ones. I did not consider gender to

an integral specification for the purposive sample. Table 1 provides details of the

participant demographics.

Table 1

Participant Demographics

Participant	Gender	Age	Title/Industry	Location[a]
P.1.0	Male	47	CRM- technical sales-kitchens	Alberta
P.2.0	Female	43	IT business analyst - municipal	Alberta
P.3.0	Male	47	CRM- Business analyst-postsecondary	British Columbia
P.4.0	Female	46	CEO/CRM- EQ and Teams	Toronto/Calgary
P.5.0	Male	46	IT team lead- business analyst- insurance	Guelph/New Brunswick/Calgary
P.6.0	Male	45	Team lead- business analyst- clothing	British Columbia/Alberta/Ontario
P.7.0	Male	32	Digital CRM- automotive	Alberta/Japan
P.8.0	Male	42	Account manager CRM-tech	British Columbia, Alberta, Ontario, and United States
P.9.0	Male	48	CEO/CRM and sales rep- oil and gas	Alberta/Ontario
P.10.0	Male	27	CEO/CRM- mechanics	Alberta
C.1.0	Female	22	Blogger/student	Ontario
C.2.0	Female	46	Associate superintendent	Alberta
C.3.0	Female	22	Publicist	Ontario
C.4.0	Female	23	Environmental scientist	Alberta
C.5.0	Female	24	Freelance artist/student	Ontario/British Columbia

[a] Some of the participants worked in multiple locations.

Data Collection

The data collection process had many steps. In this section I provide information about how research participants met the inclusion criteria for the study and how the research population was identified, as well as the recruitment strategies and procedures I used for data collection and analysis. During the interviews, an interview script was used to welcome each research participant, overview the interview process, and engage in the questions and subsequent responses. Research participants were also made aware that throughout the interview they could recuse themselves if they did not want to continue with the interview.

I shared information about the member check process in the informed consent document and discussed the process when arranging the interviews. After the interviews were concluded, member checking was completed. I sent all 15 (100%) of the research participants their transcripts to check the accuracy or add content 48 hours after the interview with a 4-day response time. Each of the 15 (100%) research participants agreed to the transcriptions without changes.

Inclusion Criteria

For customer relations management participants to be included in the study, they had to be professionally engaged in customer relations management or business analysis who contributed to CRM in organizations that utilize social media as part of their data analytics. The consumer research population needed to be participants who use social media intentionally to influence product and service offerings. I used a purposeful sampling strategy to find possible research participants through the platform LinkedIn,

where I searched for customer relations management groups and profiles of people who fit the inclusion criteria. I encouraged the consumers I identified and contacted through LinkedIn, to share my contact information with other consumers who met the research participant criteria. The potential research population had to meet the criteria related to roles within customer relations management, business analysts with customer relations portfolios and consumers that utilize social media.

Identification of Potential Participants

The research participants responded to a posting on LinkedIn or showed interest from the word-of-mouth connections. Additionally, the potential research population who read the LinkedIn post shared it within their own networks, which resulted in attaining 15 research participants who fit the three-case criteria. There were at least 15 potential research participants who sought more information about the study but did not meet the criteria for participation. To extend the purposeful sampling technique, the potential research participants who contacted me via word of mouth also shared my contact information as well as the study synopsis via email. I sent an email that included the informed consent form to the potential participants initially to coordinate further discussion of inclusion criteria and any other questions they may have had about the study. Once this second check of inclusion criteria was done, the interview, date and method (telephone, video conference, or face to face) that worked best for them was solidified.

Participants

Of the 15 research participants who met the inclusion criteria, 12 (80%) chose to interview via the telephone and the remaining three (20%) chose to interview using a video conference. The research participants, due to the time of year and timeframe prior to Christmas closure, chose to interview during their lunch break or after work across Pacific Standard Time, Mountain Standard Time, Eastern Standard Time and Atlantic Standard Time. Before each interview, I offered to provide additional information or engage in a question and answer process. None of the 15 (100%) research participants needed further clarification. During the interviewing process, the interviews lasted from 25-45 minutes with an average duration of 35 minutes.

Variations in Data Collection

Telephone and video conference via Zoom or similar online platforms were used; however, I initially expected that there would be more people who wanted to engage in face-to-face interviews which did not occur. The majority of research participants chose to have a phone interview which did not impact the data collection process. All interviews were recorded using the Windows Voice Recorder software. The audio recordings were then transcribed and collated with notes taken during the interviews that related to more nuanced communication such as pauses and changes in intonation. The interviews were replayed, paused and replayed repeatedly to complete the transcriptions which supported a higher degree of accuracy from the transference of audio to text-based interview responses.

Data Analysis

Once all the interviews were completed and the transcriptions were verified by the research participants, the data was hand coded using Microsoft Excel to identify pre-categories, categories, and then themes. NVivo 12 software was used to recheck the themes and for the data visualization functions. The interview questions and subsequent responses were organized to allow for clarity based on the information that each research participant gave for each question. This information was then categorized, and themes emerged relevant to gaining common understandings of how customer relations managers can utilize social media within the context of already existing data analytics.

In consideration of the seven interview questions, six (86%) were intended to gain the understanding of the implications of managing related to the use of social media and customer relations management and the understanding consumers have within the context of using social media and the opportunities and constraints therein. The remaining one question (14%) was intentionally designed to elicit feedback for the competencies that may be needed to successfully engage in customer relations management within a social media environment. The responses from the interview questions were analyzed using descriptive coding to identify common themes.

Evidence of Trustworthiness

Cypress (2017) argued that in order to support higher levels of validity and reliability within qualitative research, trustworthiness, which includes credibility, transferability, dependability, and confirmability reinforced processes, is integral. Patton (2015) emphasized that within a qualitative multiple case study, the voice and

information of the research participants must be encapsulated in the data collection in order to provide authentic analysis. In this qualitative multiple case study, the data that was given by the research participants in their interviews were used to gain common understandings of how customer relations managers can utilize social media within the context of already existing data analytics across Canada.

Credibility

In order to support the credibility of the research, semistructured interviews were used among the three case groups to gather the data. In addition, member-checking or inclusion validation was done to confirm the accuracy of the data as the interview data was collected. Transcriptions were completed and sent to each participant to provide an opportunity for correction or changes to their responses within a four-day period. All of the research participants confirmed that the transcriptions were accurate. Consistency was also reinforced by following the same interview protocol for each participant. Every effort was made to ensure that the environment in which the interviews were done was comfortable in terms of an honest and trusting intent. For example, a friendly rapport was fostered during the initial communication and throughout the interview as well as, interviewees were informed that they could recuse themselves from the interview at any time if they believed they could not continue.

Transferability

Throughout the data collection process, the intention was to recruit participants from across Canada. Accordingly, the research participants had to meet specific criteria to participate in the study, which supports in many ways the replication or extension of

the study if another researcher decided to follow suit (Carcary, 2009). This aspect of

transferability is important within qualitative research as the research, data collection

process and consistency of interviewing are integral for a valid and reliable data

collection process. The research participants locations ranged from the west coast of

Canada to the maritime region of the far east coast. This geographic diversity ensured

that the results would show multiple perspectives and serve to eliminate the potential

regionalized skewing that could occur, even with a smaller sample of research

participants.

Dependability

To support the highest degree of dependability, the data collected from

semistructured interviews, audio recordings, transcriptions and member checking

documents were completed. Dependability or consistency was maintained by taking notes

and journaling as well as using the interview protocol to maintain consistency throughout

all of the interviews. All the interviews were audio-recorded, which provided a reliable

and referenced account of the research participants responses and nuances of

communications such as tone, inflection and pauses.

Confirmability

In order to ascertain confirmability, the exact words of the interview data that

were collected in its' entirety was used. After the data was hand coded using Microsoft

Excel, the NVivo 12 software was used as a check on the organization and also for the

word visualization capacity the software provides. The interview questions were

approved by the dissertation chair, was reviewed by the second committee member and

approved by University Review Board (URR). In addition, the Institutional Review

Board (IRB) at Walden University assessed the questions from an ethical lens in terms of

the question content and the intended information that would be elicited from the

research participants.

Study Results

The conceptual framework underlying this study is within the communication

theory construct which, in the current digital era, underscores the dynamism of two-way

communication as well as the possible feedback that can be inherent within social media

platforms (Kodish, 2015). Parsons and Lepkowski-White (2018) conceptualized social

media marketing and management in a way that helps navigate within the realm of

customer relations management. In sequence, this conceptual framework connects to the

multiple dimensions of communication, feedback, data collection, analysis and the like

(Kobia, 2017; Yen, 2016). The conceptual framework has four main dimensions of

consideration which include the elements that inform a firm's strategic social media

focus, marketing and management. These elements include messaging/projecting,

monitoring, assessing and responding (Parsons & Lepkowski-White, 2018). All of these

facets are embedded within social media as the purpose of these platforms is to create

forums for interaction, communication and sharing.

To reiterate, this phenomenon was studied using a qualitative multiple-case study.

As the purpose is to gain the understandings of customer relations managers and business

analysts that may have customer relations management responsibilities as well as

consideration of consumer perspectives, these three categories or cases encapsulated the

research participants within the geographic area of Canada. The research question was:

What are the common understandings of how customer relations managers can utilize

social media within the context of already existing data analytics to support more targeted

and agile marketing and management strategies across industries in Canada?

Hand-Coded Themes

Once the member checking was completed to ensure validity, the data collection

or the information from the seven interview questions were analyzed. Several themes

were identified through a hand coded approach. The codes included consumer

involvement, communication, IT/analytics, governance, and managerial competencies.

Questions 3 and 7 reflected the constraints or barriers that managers, business

analysts and consumers may perceive related to communication, social media use and

management practices. Common themes that arose out of the constraints included, a lack

of managerial understanding pertaining to the implications of demographics, capabilities

of the social media platforms, inadequate governance or strategy as well as a lack of

engagement by both consumers and managers. As a result of the data collection and

analysis process, these perspectives helped connect the research, literature and broader

notions of customer relations management and social media. To reiterate, NVivo 12

software was also used once the hand coding was completed in order to act as a thematic

check as well as to utilize the data visualization to represent the themes in another form

other than a narrative.

Emergent Themes of the Data

      The results from both the hand coding and NVivo 12 software are presented

below (see Figure 1). The data (text) visualization revealed the themes that were

highlighted in relation to the understanding of customer relations managers within a

social media reality. The emergent themes that were identified included communication,

consumer involvement, IT/data analytics, governance, and managerial competencies (see

Figure 1).

Figure 1. NVivo 12 word frequency cloud of emergent themes.

From the consumer perspective and feedback, the emergent themes revealed some unique

aspects that were not encompassed in Figure 1. Highlighting these themes shows a more

holistic understandings of CRM from multiple vantage points (see Figure 2).

Figure 2. NVivo 12 word frequency cloud of emergent themes from the consumer's

perspective.

These themes were primarily reflected in questions 2, 3 and 7. The dominant

areas of feedback related to the questions dealt with consumer roles and the use of social

media, the capabilities within platforms, feedback and perceptions of management

acumen. In addition, this included customer relations management factors such as

accountability and trust, knowing consumer needs and responsiveness, branding, and the

degrees of controlling the narrative. As such, the analysis of the data resulted in the

emergence of nine emergent themes (see Table 2). In Table 2, these nine themes were

placed in order based on the frequency of research participant responses as well as the

prevalence of these themes in the literature.

Table 2

Frequency and Percentage of Participants Who Responded to Each Theme

Theme	Total respondents	% of respondents
Communication	15	100
Responsiveness- Knowing Consumer Needs	15	100
Managerial Competencies	15	93
Accountability and Trust	15	87
Branding	15	87
IT/Analytics	15	73
Degrees of Controlling the Narrative	15	73
Consumer Involvement	15	67
Governance and Strategy	15	47
Total	N/A	100

Emergent Theme 1: Communication

The central theme from the data analysis was communication. Communication

was directly mentioned in all 15 (100%) of the research participants interviews and was

discussed in multiple facets based on their roles and responsibilities. In particular, during

the interviews, several references to communication were made, such as Participant P.3.0,

stated, "communicating with clients or consumers creates relational connections" and,

"Feedback is integral to how we do business well". Participant C.1.0 stated, "It is

important to share your experiences with the company; I use Instagram for this mostly."
The importance of communication was affirmed from multiple research participant
perspectives across various industries in Canada.

Emergent Theme 2: Responsiveness-Knowing Consumers

The theme, management responsiveness by knowing your consumers, was
identified as integral to customer relations managers roles and responsibilities. This in
turn, was essential to the company's performance and return on investment (ROI). The
research participants worked across many industries which included kitchen apparel,
clothing retail, municipal services, pharmaceutical sales, automobile manufacturing, IT
and sales. All 15 participants (100%) stated that responsiveness is directly related to
knowing one's customers and consumers at large within the social media space.

Participant P.1.0 and Participant P.9.0 reaffirmed how important it was for them
to be responsive, agile and knowledgeable based on their customer or consumer
demographics, purchasing behaviors, and how best to engage them within their respective
social media platforms. Participant P. 9.0 used phrases such as, "What makes consumers
tick?", "Gender can make a difference." and, "Social media is a lead generator!" to share
facets that could support customer relationship managers to optimize social media based
on their experiences. Participant P.3.0 also shared that, "responsiveness allows for
creative, intentional and meaningful interchanges."

Emergent Theme 3: Managerial Competencies

The second emergent theme was managerial competencies which were based on
traditional marketing comparative to social media marketing acumen and value creation.

14/15 (93%) of research participants discussed the importance of management

approaches within this digital era. Participant P.10.0 stated, "Social media platforms open

doors for managerial engagement, problem solving, critical thinking and real time

supports." This supported the main focus of this research which was to gain

understandings of customer relations management within a social media era. Participant

C.4.0 stated, "the power of the consumer and conflict management are part and parcel"

and Participant P.10.0 referenced "making the sale should not be too overt."

All 15 (100%) of the research participants reiterated the importance of digital

acumen in customer relations management and social media. Participant P.6.0 asserted

that "technology savviness; being able to see the bigger picture when it comes to using

social media.". In parallel, soft-skills such as resiliency was shared by Participant P.3.0 as

integral, stating, "You have to take the good with the bad, it can be easy to be

discouraged as a manager with some of the negative posts on social media." These

management competencies may help customer relations managers navigate across social

media platforms more confidently.

Emergent Theme 4: Trust and Accountability

The theme of trust was mentioned by seven (46.6%) research participants within

seven of the interview questions. Of the 15 research participants, 13 (87%) stated that

having trust in the company or organization was integral not only from a management

lens but also from the consumer or customer perspective. Participant C.1.0 shared that,

"Managers need to be accountable for the relationships that are built on social media

platforms." Participant C.10.0 discussed how social media influences the scale of impact

or number of viewers and as such, "the public nature of a company's actions can have far reaching results due to negative or positive press."

The construct of trust was alluded to in many ways from the research participants. For example, Participant P.4.0 and Participant P.9.0 shared, "certain generations don't trust easily…", and, " companies that try to do good are appealing." Participant C.3.0 stated, "perceived trust that is created on social media by influencers works and responses on social media create a sense of a quick community." These insights underscore the potential power of social media and the need for consistent and ethical engagement when engaging in the online platforms.

Emergent Theme 5: Branding

The theme of branding and the importance of companies and managers to be intentional about their CRM approaches was highlighted. The reality was that branding was integral for there to be an accurate representation of the product or service offering and value across social media platforms. Branding was mentioned in two (29%) of the seven interview questions. Of the 15 research participants, 13 (87%) shared that the brand and what the brand stands for is important and should be reflected quite intentionally through a company's social media practices. Participant C.2.0 discussed the potential for branding methods such as online communities that consumers or customer engage in to be disruptive in nature, stating, "…it is time to change the narrative and start a conversation to support growth and sustainability."

Participant P.4.0 shared, "as a customer relations manager that has worked in multiple settings, using social media to reinforce or support branding and using branding

communities to engage consumers can be a great tool if done right and consistently."

These facets that meld communications, marketing and branding, are now encompassed

in social media platforms and e-commerce.

Emergent Theme 6: IT/Analytics

IT and analytics were discussed in 11 (73%) of the 15 responses and directly

reflected in one (14%) out of seven questions. 14 (93%) out of the 15 research

participants shared their belief of the importance of an IT infrastructure and analytics

framework that was conducive to social media to be effective in their roles. For example,

Participant P.1.0 stated, "Google Analytics has tremendous capacity in addition to the

other analytics within most existing social media platforms; being able to link with

existing enterprise systems for business information will strengthen a company's

competitive advantage." Participant C.3.0 shared, "There is so much data, how do you

deal with it all?" These insights provide further context related to the importance of IT

and data analytics for social media-oriented customer relations management.

Emergent Theme 7: Degrees of Controlling the Narrative

The discussion of social media narratives and feedback were reflected in three

(43%) of the seven interview questions. Of the 15 research participants, 11 (73%) shared

regarding the implications of setting the narrative or story on social media, or, from a

consumer perspective, the implications of their narratives from their online posts.

Participant P.10.0 stated "social media is the epidemy of the human condition, good, bad

and ugly, as managers we can mute negative posts." Additionally, Participant, C.3.0

affirmed, "I have posted on Instagram and no one has responded to my feedback, I have

felt ignored and stopped shopping there!" In both these examples, the ways in which the narrative is controlled can have tremendous ripples that are positive or challenging; the core of this study was to explore the understandings and day-to-day implications of customer relations management within a digital era.

Words such as, "narrative", "story", "controlling" were quite vivid in the data visualization of research participants from the consumer case (see Figure 2.0). Additionally, "narratives" and, "consumers" were quite frequent and were in the larger frequency word category in the manager text visualization using the NVivo 12 software (see Figure 1.0). These results provided more insight into how the narrative was perceived.

Emergent Theme 8: Consumer Involvement

Consumer involvement was directly mentioned in 10 (67%) of the 15 research participants and indirectly discussed in all 15 (100%) of the 15 interview responses. Consumer involvement may be assumed based on the phenomenon of study; however, it is important to consider both the explicit and implicit data that has been analyzed. For example, the lens of consumer involvement included the ways in which managers solicited consumer involvement, the challenges and where the opportunities may reside to increase engagement. Participant C.5.0 and C.2.0 used phrases such as "consumer power", "consumer currency", and "consumer impact," and these choices reflect both the implications for customer relations management and the use of social media for e-commerce.

Participants C.8.0 and C10.0 alluded to consumer involvement within social media branding communities and how this can contribute to managerial agility and accuracy of customer relations management decision making. Participant C.3.0 stated, "Consumers purchasing intentions, buying behaviors and social media navigation (i.e. endorsements, page clicks, holds etc.), can bolster a startup company or reinforce a long-standing organizations brand or value proposition." Consumer involvement, while not one of the initial themes to emerge, has effects on the major intentions of this study and the evolving nature of social media and management practices.

Emergent Theme 9: Governance and Strategy

Governance practices and strategy were mentioned in one of the seven questions (14%); however, the implications of this theme impacted the majority of the research participants responses. Seven out of 15 (47%) research participants shared that the presence or absence of social media-oriented policies or practices impacted the confidence customer relations managers had in this digital era. Of these seven research participants, five (71%) indicated they had no governance or strategy which impeded their ability as customer relations management, target consumer groups or provide value on social media. Three (20%) of the 15 research participants shared that they had flexible social media strategies which allow them to be creators, monitor data effectively and respond confidently on the prescribed social media platforms.

The three (20%) research participants who worked in a company where there were sound governance practices for social media were in the automobile manufacturing sector and a luxury brand clothing retailer. Participants P.1.0 and P.10.0 used phrases

such as "not just selling", "creativity", "test environments" and, "weigh points for our

team" were shared as benefits of having dedicated governance practices within a social

media environment. Participants P.6.0 and P.8.0 both affirmed they had hoped to engage

in more collaborative or co-creative strategy development in their departments because

the lack of understanding from the leadership to management was seen as a constraint.

Participant P.6.0 stated, "Social media is still developing, and we are learning." If

customer relations managers do not understand the direction or a social media strategy

does not exist or is not clear, it may impede the value proposition that the companies or

organizations are attempting to convey.

Summary

This chapter contains the data collected during the interviews of the 15 research

participants and the analysis of the results. Using semistructured interviews with open-

ended questions to gain understandings of how customer relations managers can utilize

social media within the context of already existing data analytics to support more targeted

and agile marketing and management practices in Canada was the purpose of this

research. The analysis of the data resulted in nine themes through hand coding using

Microsoft Excel and then the additional check and organization through the NVivo 12

software. These nine themes are in order of the frequency or percentage of responses as

well as the prevalence in the literature. The themes included:

1. Communication,
2. Responsiveness-knowing consumer needs,
3. Managerial competencies,
4. Accountability and trust,
5. Branding,
6. IT/Analytics,

7. Degrees of controlling the narrative,
8. Consumer involvement, and
9. Governance and strategy

Both the opportunities and constraints of customer relations management were embedded in all seven questions as the questions used the stem, of how to begin the question. As such, each of the nine themes reflected responses which included constraints and affordances for customer relations managers amongst social media platforms. Chapter 5 contains the findings of the study, the implications of the findings, the limitations and areas of further inquiry based on the study's results.

Chapter 5: Discussion, Conclusions, and Recommendations

The purpose of this qualitative, exploratory multiple case study was to gain common understandings of how customer relations managers utilize social media within the context of already existing data analytics across industries in Canada. The 15 purposely sampled research participants included customer relations managers ($n = 5$), business analysts ($n = 5$) who had customer relations roles and responsibilities, and customers ($n = 5$) who used social media to influence product and service offerings across Canada. In this digital era, economic entrance for small- to medium-size firms has been positively influenced by social media, which have provided access as well as community development. Increased access could level the field in relation to exposure, market accessibility, and consumer communication (Agnihotri et al., 2017; Reed, 2015).

Given the magnitude of data from social media, business analysts may find connections, consumer purchasing implications, and ways to inform customer relations practice that are not conveyed in traditional business or enterprise analytics (Marcus & Davis, 2014; Moorthy et al., 2015). However, as technology advances, customer relationship managers are challenged with navigating social media platforms (Abdullah, 2016). Abdullah's (2016) findings in regard to the implications of minimal training or a poor understanding of how and why to use social media and what the data mean are reflected in my research findings.

The conceptual framework was foundational for this multiple case study. The communication theory underpins the dynamism of communication interchanges on social media platforms and the importance of customer relations managers understanding and

navigating their own communication and that of their customers or consumers (Kodish, 2015). The uses and gratification theory underscore the overlapping approach of a cocreation value frame that could provide a more comprehensive picture of consumer purchasing intentions outside of traditional big data analytics (Kunz et al., 2017). Within the conceptual framework, four pragmatic dimensions were included that informed a firm's strategic focus: messaging/projecting, monitoring, assessing, and responding (Parsons & Lepkowski-White, 2018). I used these theories and concepts to conceptually frame social media, CRM, and the evolution of communication.

Participants included customer relations managers, business analysts with customer relations management portfolios, and consumers who engaged in social media to provide feedback for product or service offerings. I posed seven open-ended questions in the semistructured interview process to the 15 research participants. Each research participant went through the same interview protocol and answered the same open-ended questions via a telephone or videoconference interview process. After collecting the data, I hand coded the information to identify common themes using Microsoft Excel. NVivo12 software was used to check the hand coding; the data visualization function helped display the pertinent themes in a dynamic way. In the next section, I interpret data findings in relation to findings from the literature review.

Interpretations of Findings

The process of codification and analysis resulted in nine themes:

1. communication,

2. responsiveness-knowing consumer needs,

3. managerial competencies,

4. accountability and trust,

5. branding,

6. IT/analytics,

7. degrees of controlling the narrative,

8. consumer involvement, and

9. governance and strategy.

The affordances and constraints perspectives from the research participants are reflected in all of the themes. Therefore, the interpretation of the findings will be presented in four sections that will serve to synthesize the nine themes and reflect the content in the literature review. The four themes reflect the areas that were more commonly emphasized by the research participants and also indicated in the literature. The four focus areas were (a) communication, (b) consumer involvement, (c) IT/analytics (infrastructure), and (d) managerial competencies.

Communication

Communication was a common theme within this research. Customer relations managers and consumers shared their perspectives surrounding their realities of communication within a social media environment for consumer support and engagement. All 15 (100%) of the research participants indicated that knowing the goals of the organization and understanding social media and its capabilities are integral to successful communication at all levels. Participant P.3 stated, "communicating with consumers is easier when you understand their motivations and purchasing intentions."

The theme of communication was multifaceted because, in addition to the responses about consumer support, all 15 of the research participants shared that the platform's capacity and potential for multiple levels of feedback highlight the need for intentionally designed communication to elicit the right feedback.

In addition, all 15 (100%) of customer relations managers and consumers shared that negative narratives were prevalent and not always constructive. From a managerial perspective, the pressure to respond to negative feedback appropriately created a higher level of intricacy to enact their roles and responsibilities. In the literature, Del Rowe (2018) asserted in a study of social media usage by Fiji Water that communication or interchanges within a social media platform could provide opportunities for organizations to attain the pulse on consumer needs. In a meta-analysis of social media and the influence on management practices, the implications of communications and customer relations management were reaffirmed. Hunter et al. (2018) confirmed that the constraints should be noted as these forums, where digital influencers play a significant role, leave space for negative commentary and could exacerbate crisis-oriented situations as seen in the Unilever scandal. While this example may be more elevated on the continuum of results from negative feedback, it readily reflects the risk of companies not communicating in times of negative events.

Participant P.10 shared that, from their experience, "If you pay attention as a manager, social media can be more forgiving because there is more feedback and data tracking; instead of traditional brick and mortar businesses where a person can walk away, you can ascertain how customers are feeling towards your brand and respond in

kind." This quote reflects the view that social media is a communication medium and that consumers can choose which platform suits their needs as buyers; knowing the platforms and deciphering the feedback to inform customer relations management was reflected in all 15 (100%) participants' responses. Furthermore, aall 15 of the research participants expressed that relationships and connections formed quickly through the communication interchanges on platforms such as Instagram or Facebook.

Identifying with those who had similar posts in the online communities resulted in more in depth connections. Research participants who were customer relations managers shared that these organic relationships and trust that developed whether through influencers, posts, or other narratives elevated the levels of public accountability. Parsons and Lepkowski-White (2018) affirmed that, as consumers continue to utilize social media to share their feedback, their currency of input and influence in marketing and management realms will grow increasingly more important. In response, communication within organizations around the information derived from social media and subsequently the communication on social media by customer relations managers should continually reflect ways to support product and service offerings.

Consumer Involvement

Consumer involvement was mentioned by all 15 (100%) participants in both a direct and indirect capacity. As this technology proliferates, the degree to which consumers engage, whether positive or negatively, provided the necessary data points or information for managers to work with in their day-to-day roles from their perspectives. All 15 (100%) of the research participants shared that social media provided a series of

platforms for feedback and human interactions that would traditionally happen in more

isolated person to person interactions. Participant C.3 affirmed that, "social media, if used

well, can introduce you to new potential customer bases just by taking the time to

understand and respond to certain feedback." The degree of consumer participation on

social media was based on many factors including, their role as a purchaser, follower or

user of a product or service offering, brand awareness, utility of the platform,

responsiveness from the company and the relationships that were developed.

All 15 (100%) of research participants expected that companies should have a

social media presence and use social media to respond to their needs whether directly

interchanges or communications that are shared. If the companies did not have a

presence, they would disengage or move on to a brand or company that was more

responsive. In a literature review of the current research around social media and

customer relations management from a brand orientation, as Abdullah (2016) asserted,

customer involvement directly related to a company's usage of social media and how this

related to brand equity. Participant P.1 affirmed that in their management experience,

"social media is a part of life now for all of us a managers and consumers." Having a

social media presence helps followers understand a company's story and brand strength

which ultimately supports relevance in the digital space and one's competitive advantage

(Orenga & Chalmet, 2016).

All 15 (100%) research participants shared that social media amplified the need

for companies to be highly aware of consumers, their voice and impact and be

accountable if there are ethical or public necessitated responses such as in the case of a

product recall. Assertions such as these, reinforced that consumers pay even more attention to the day-to-day practices of a company and their digital footprint due to the information on social media and available on the Internet were reflected in all 15 (100%) of the managers and consumer responses. In a qualitative study of customer relations management and social media, Guha, Harrigan, and Soutar (2018) affirmed that consumer involvement, awareness and participation on social media were higher for companies that intentionally used social media to engage, communicate their service or product offerings and engaged in some level of story-telling and branding. With the proliferation of technology and social media, the research participants were highly engaged online, and their online feedback would continue to be important and the implications will grow for managerial and thereby organizational success.

IT and Analytics (Infrastructure)

IT and analytics related to the infrastructure of companies were mentioned by all 10 (67%) of the research participants who were customer relations managers and business analysts that had customer relations management responsibilities and roles. To reiterate, Participant P.6 asserted, "Facebook, Instagram, Twitter are more loosely used, and we are behind our competitors, we need to develop more of a presence, see the trends and be more proactive." In this theme, the other 5 (33%) research participants discussed the importance of information technology from the utility and ease of use of the social media platform and company utilization or visibility on these platforms such as Facebook, LinkedIn, Instagram, and Pinterest. All 10 (67%) of those that worked in customer relations management shared that a major constraint was the lack of social media and

analytics infrastructure built into their enterprise IT systems. From their perspective and experience, part of the reasoning for a lack of infrastructure was the cost and a lack of understanding of the importance of investing in a comprehensive infrastructure.

Participant P.7 stated that, "In my company, our social media use is all template driven, has quite a bit of analytics, showing 15-20 times per day the consumer traffic patterns from, clicks, page skips and purchasing; investing in this type of infrastructure is a differentiator." This research participant was in the minority in terms of leveraging social media for the betterment of marketing, communication and branding. The implications for designing a social media-oriented IT and analytics infrastructure was significantly emphasized in relation to a company's competitive advantage (Bhimani et al., 2018).

In a study on the benefits of the feedback from social media and data analytics, Kabir, et al. (2018) asserted that an IT system that is conducive to analyzing data from social media in a way that can be used by managers to help their companies more effectively leverage the performance and competitive advantages that social media provides. Interestingly, only one (6%) of the research participants shared that the company they were employed with created their own social media and analytics platform that integrated into their enterprise business analytics, and they are leading within their sector. Yuu, Xiaozhu, Yung, and Sukki (2018) analyzed a transportation companies' use of social media when they implemented a more robust IT infrastructure and ascertained that the ripple of consumer action and positive feedback supported management in deciphering customer needs within a community forum. While there were only 15

research participants in this study's' sample, these implications were reflected in the

analysis of the interview data and within contemporary literature.

The relationship to strategy and governance was an integral part of the IT and

analytics infrastructure and should reflect an organizations' strategic direction. This was

an area of weakness or a constraint for many of the research participants based on their

professional experience. Seven (47%) of the 15 research participants shared that there

was an absence of a clear strategy or governance practice by the company and another 3

(20%) did not know whether this was a part of an organization's infrastructure.

Participants P.2 shared that, "we have a policy for usage but not how to use social media

to grow our company."

Participant C.3 also stated, "Usually with more grassroots or smaller companies

the strategy is explicit in the way customer relations managers; there should be an

authenticity because of certain things such as Zara's clothes are made by young

children." In this case, the strategy could also show the ethical or socially conscious

nature of a firm based on how customer relations managers navigate social media

(Grewal, Roggeveen, & Nordfalt, 2017). The content of their posts would be guided by

the strategy and based on their own corporate brand (Grewal, Roggeveen, & Nordfalt,

2017).

Moreno et al. (2018) affirmed, in a study of the tourism industry and the use of

social media, that having a clear strategy in accordance with a robust IT and analytics

infrastructure that is conducive to social media was a value-add from a competitiveness

stance. In the literature, organizations which sought to merge their existing infrastructure

to increase the degree to which social media had been integrated into customer relations management provided agility strategy wise (Gironda & Korgaonkar, 2018). As social media is still evolving in relation to the adaptation of the infrastructure for many organizations, so too was strategy development and implementation in accordance with the goals for the IT/analytics processes.

Managerial Competencies

Managerial competencies were discussed by all 15 (100%) participants because this theme was directly embedded in the interview questions. In a complex digital era, participants shared their own need for professional learning and competency development in areas such as communication, data analytics as it pertained to social media platform aptitude, and branding practices. Fourteen out of the 15 (93%) research participants shared their education or understanding of marketing and management felt outdated and most of their learning was done individually and intermittently. Participant P.5 stated, "Emerging in our area are our skills as managers, data analysis skills and deciphering what our end clients want from us, and our ability to communicate with them." Participant P.8 shared that in his experience, "Empathy, written and verbal communication skills, brand knowledge and research skills will help you not go down a rabbit hole in the internet of things and stay aligned with your strategic goals."

In a literature review on social media and communications, Bhimani et al. (2018), asserted that building managerial competencies which honed critical thinking, complex problem solving and soft skills such as empathy, were integral in this digital era; this was affirmed by all 15 (100%) of the research participants. When targeted as development

areas for managers, there could be an added confidence and management acumen related to customer relations practices; factors such as demography, consumer narratives and posting could increase marketing and communication acumen (Patroni et al., 2016). All 15 (100%) research participants discussed the importance of having a concrete understanding of leadership expectations which, as they pertain to social media, were not always clear. Participant P.6 communicated that, "With leadership, we engage in seminars around communication and agility with improv as the vehicle; a less formal way of collaborating with leadership." These responses helped contextualize the experiences of customer relations managers and the potential benefits of developing managerial competencies.

The responses of 14 out of the 15 (93%) research participants shared that conflict management and problem solving were critical managerial competencies that should be a focus of professional development within organizations. Participant P.9 stated, "it is difficult to balance the use of language that either is catching the malcontent or keeping it neutral; my role is not always dealing with reasonable people with reasonable complaints." In a study about creating value through social media and innovative practice, Papa et al. (2018) affirmed that managing customers are integral to the value and effectiveness of organizations within a sales, product development, and service offering. In online branding communities being able to resolve customer concerns on posts reflects the strength of co-creation which social media provides in terms of online feedback and branding communities (Abdullah, 2017). If provided with the proper training, social media provides the forum for customer relations managers to promote

their brand and engage consumers and continue the improvement process related to

product and service offerings (Orenga & Chalmet, 2016).

Limitations of the Study

The limitations within a multiple case study design were important to

acknowledge and mitigate where applicable. The researcher as an instrument and the

potential bias of this, in addition to mitigating research participant bias was recognized.

The consistency of the interview script which was approved by the Walden University

Review Board (IRB) supported greater fluency and dependability throughout the data

collection process. The IRB approval number is 12-13-19-0558400. An important

consideration for future research was to consider a larger sample size than 15 research

participants for a multiple case study. This may have provided greater depth of

perspective and support the generalizability of the results. The consideration that the

participants were across the provinces in Canada was used to showcase varied

perspectives from a range of regional areas to help mitigate the small sampling; however,

the generalizability may be subject to some scrutiny.

Recommendations

A qualitative exploratory multiple case study design was applied to gain common

understandings of how customer relations managers could utilize social media within the

context of already existing data analytics across industries in Canada. The common

themes that were derived from the data collection and analysis process have led to some

recommendations. These recommendations reflected the nine major themes and then

subsequently distilled based on the area of emphasis and included:

1. Communication,
2. Consumer involvement,
3. IT/analytics (infrastructure), and
4. Managerial competencies

The overarching recommendation derived from the themes, communication, IT/analytics (infrastructure), and managerial competencies were to develop the educational preparedness of customer relations managers to support greater competence and confidence in navigating social media. Managerial competencies that were resultant from a combination of education and professional experience pertaining to data analysis, business intelligence and communication could be beneficial for current and aspiring customer relations managers. Internal professional development processes are integral for companies to support customer relations managers in understanding how their roles, the organizations objectives, their brand and customer-based analytics coalesce with existing social media platforms (Strategic Direction, 2017).

As stated by Goldenberg (2018), the Gartner Group affirmed, in order for companies to stay relevant and compete within this evolving digital era, shifts in infrastructure and the ways in which enterprise systems are designed would support more agile marketing and management practices. This was also affirmed through the generated themes IT/analytics (infrastructure) and managerial competencies. IT integrations that supports data analytics across social media platforms or bridges the existing analytics that these platforms run would support customer relations managers to have real-time data on customer behaviors, purchasing intentions and other pertinent demographic information.

Another important consideration reflected in the themes IT/analytics (infrastructure), communication, and managerial competencies and the literature, were

the need for leaders and managers to collaboratively develop and implement a social media or digital strategy and concertedly communicate it across the organization. This would serve to guide customer relations managers more intentionally with their professional roles, responsibilities and overall performance. In the literature, Singh (2017) discussed the implications of critical factors in strategy development which included traditional marketing and management approaches in accordance with emergent and organic strategizing. The themes, IT/data analytics (infrastructure) and managerial competencies included how managers navigate data from the Internet, across social media and other customer relations management tools.

Customer and brand knowledge were important areas that were highlighted in the themes communication, consumer involvement and managerial competencies and from a customer relations management lens, could increase customer involvement when the appropriate engagement is posted on social media. Ensuring the company had a social media presence as well as prioritized brand development through story-telling, digital marketing and customer engagement could support increased, consumer traffic and potential sales. Thematically, this recommendation connected both managerial competencies through customer relations management training and communication as well as importance of hiring practices based on contemporary social media and managerial acumen. Managerial competencies should be multifaceted to navigate within this digital era. The themes consumer involvement and management competencies reinforced the importance of customer relations managers prioritizing consumer

involvement by designing their social media responsiveness to be timely, purposeful and helpful, showcase that they know their followers and value their engagement.

Human resource practices such as employee training and customer relations manuals could include the research implications that relate to communication, consumer engagement, data analysis. To substantiate this recommendation, I refer to the theme, managerial competencies in Chapter 4. The research participants indicated that the manuals with the standards that are utilized for performance reviews and interventions would help clearly articulate the connections between the company strategy and customer relations practices; this was also reflected in the theme IT/analytics (infrastructure). By integrating time for managers to explore social media platforms, this could provide ample opportunities for customer relations managers to be innovative and apply smaller scale creator-oriented practices to inform agile practices. To substantiate this recommendation, I refer to the themes of managerial competencies, IT/analytics (infrastructure) and communication. The Gartner Group (2016) asserted that in order for companies to stay relevant and compete within this evolving digital era, continual training and mentorship opportunities need to be made available for customer relations managers.

<div style="text-align: center;">Implications</div>

Implications for Practice

The research results may be of value for customer relations managers who work for companies that utilize social media to manage or market their product or service offerings. As shared in the recommendations section, these considerations may be valuable to inform management training and internal supports for developing greater

knowledge and competencies to navigate within a digital era. The contributions from the three case groups that included consumers could provide company leadership and managers with a deeper understanding of an integral dimension to a company's success performance and organizational effectiveness wise. Consumers are in many ways the heartbeat of an organization due to their purchasing power and impact across social media platforms. The emergent themes that were highlighted based on the realities of customer relations management may be significant to how the integration of social media feedback resulting from crowdsourcing in addition to existing data analytics could better position organizations in this evolving world.

Organizational leadership from human resource departments could increase their agility by investing in the training of new employees and experiential based scenario training for existing management, which was reflected in the theme, managerial competencies (Grewal et al., 2017). In the themes, communication, IT/analytics and management competencies, the technological and digital realities for management provided opportunities to scale creative practice and iterate marketing and branding initiatives based on platforms and demographics which was (Bhimani et al., 2018). For example, the theme of controlling the narrative and communication, customer relations managers regulated the narrative, underscored the opportunities that customer relations managers to mitigate their fears of negative feedback. Within the emergent themes of communication and in the literature, customer relations managers need to know their brand and the demography of consumers or customers which data analytics helps contextualize (Orenga & Chalmet, 2017).

Implications for Theory

The research findings addressed the research gap in the related literature. Communication theory, the uses and gratification theory and a social media marketing conceptualization by Parsons and Lepkowski-White (2018) formed the conceptual framework for this research (Kodish, 2015). As social media proliferates, the realities for companies include facets such as the need for infrastructure changes, strategy augmentation and communication approaches that are more dynamic not only because of the technological platforms but also the public nature of the world wide web (Kobia & Liu, 2017). The themes of communication and consumer involvement and subsequent recommendations were underscored by the connections between the communications theory and customer relations constructs which was also reflected in the feedback from the research participants related to managerial competencies. These implications linked customer relations management processes such as demographic analysis, platform understanding and communication methods together. In order for knowledge to be mobilized from this small-scale study the themes such as managerial competencies, communication, accountability and trust could be shared theoretically and practically from scholars to practitioners (Romanczuk, Willy, & Bischoff, 2017).

Implications for Social Change

Customer relations managers who embrace the themes linked to trust, accountability, and customer engagement and communication might improve their confidence, intentionality of practice, and followership as social media platforms expand the public nature of e-commerce. For example, as companies share their commitment to

socially conscious practice through customer relations management approaches, the financial, branding and the overall benefits of consumer involvement could be positively impacted (Dominici, 2015). Social change-based practice could improve the understanding of how customer relations managers advanced their roles and responsibilities to better serve internal or external needs, ethically. In an era where the use of social media is evolving, the growing socially conscious consumers may prefer ethical and socially conscious company practice.

The theme, managerial competencies, reflected the importance of professional learning within organizations and the theme trust and accountability may lead organizations to consider auditing their human resource practices and programming to reflect social change. These results could help customer relations managers and organizational leaders to understand the increasing socially conscious consumer behaviors that include choosing fair trade products or backing companies that engage in social enterprise. These choices are becoming part of the norm which not all industries have tapped into; the narrative or voice which social media provides is now readily accessible and should be part of customer relations management (Dominici, 2015).

Conclusion

The purpose of this qualitative exploratory multiple case study was to gain common understandings of how customer relations managers could utilize social media within the context of already existing data analytics across industries in Canada. Kunz et al. (2017) reinforced that traditional big data analytics lacked the needed context in terms of information and data that social media provides. In addition, Parsons and Lepkowski-

White (2018) asserted that there was a lack of understanding of how marketing and customer relations management practices could be more in tune with a customer's personal narrative, intention, and subsequent purchasing behaviors (Parsons & Lepkowski-White, 2018). Curating the understandings of customer relations management in a social media era and understanding how customers or consumers utilized social media could help management practices across industries. Additionally, Bhimani, Mention, and Barlatier (2018) posited that as social media continues to evolve so should organizational adoption, training and utilization; at this juncture social media continues to advance and the research can afford many insights that can help with this evolution. The key findings from this study were a demonstration of the need for customer relations managers to continue to learn and evolve their skills of using social media and data analytics as it pertains to communication, customer involvement, IT/analytics, and managerial competencies.

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Appendix A: Interview Procedures and Protocol

Interview Procedures:

E-mail Informed Consent Form for the Practice of Interview

To be emailed to the invited interviewee: You are invited to take part in an interview for a research course that I am completing as part of my doctoral program. The purpose of the interview is to help me hone my interviewing and data analysis skills.

Interview Procedures: I am requesting that you permit me to conduct an audio-recorded interview for about 45 minutes. Transcriptions of interviews will be analyzed as part of my course. Copies of your audio recording and transcript are available from me upon request.

Voluntary Nature of the Interview: This interview is voluntary. If you decide to take part now, you can still change your mind later. Risks and Benefits of Being Interviewed: Being in this interview would not pose any risks beyond those of typical daily life. There is no benefit to you.

Privacy: Interview recordings and full transcripts will be shared with each interviewee, upon request. Transcripts with identifiers redacted will be shared with my university faculty along with my analysis. The interview recording and transcript will be destroyed as soon as I have completed my course.

Contacts and Questions: If you want to talk privately about your rights as an interviewee, you can call _____. She/He is the Walden University representative who can discuss this with you. His/Her phone number is

_____.

Please share any questions or concerns you might have at this time. If you agree to be

interviewed as described above, please reply to this email with the words, "I consent."

Closing: Do you have any other questions or anything else to add as we close this

interview?

Thank you for taking the time to give your input on this topic as well as help me as a

researcher explore the realities of big data and social media related to custom relationship

management. I recognize that your work is not easy, and our economy is in such constant

change that being adaptable and nimble is part and parcel of your every day. I know that

the information you have given me and the time you took for this interview will help

provide support for other managers that work in similar contexts as you.

In terms of data, I will be sharing your responses as well as any other data that is

derived from your interview within the week you interview for feedback. Additionally,

when this research is complete, you can certainly have access to the compilation or what

has been created as a result. If you want to add anything to your responses or think of

something you would like to share in a follow up, please do not hesitate to email me a [e-

[e-mail address redacted] or send me a message on LinkedIn. Thank you again for you

time and thoughts.

Interview Protocol

Participant Code: _____

Location of Interview: _____

Date of Interview: _____

Start Time: _____

Finish Time: _____

Total Time: _____

Introductory Script: Hello, thank you for agreeing to be part of my study. This interview will take about 45 minutes. I will be asking you question related to (topic of your dissertation). Do I have your permission to tape-record the interview for me to get an inclusive record of your responses? The interview will involve taking as you respond to the questions. Are there any questions or clarifications you would like me to make before we begin? You may stop the interview at any time based on the consent agreement you signed. Are you ready to begin?

I will ask you some demographic questions to begin:

Demographic information that will be gathered includes:

1. Gender – Male, Female, Not Identifying

2. Date of Birth-

3. Age-

4. Location in Canada-

5. Job Title-

Interview Questions

1. From your perspective, how does the company use social media to gather feedback?

2. How does data analytics, including social media/crowdsourcing inform the company's direction of product and service offerings?

3. How do these feedback sources and information that include social media/crowdsourcing help you to fulfill your role?

   a. How is it improving your performance and/or needs?

   b. How is it challenging your performance and/or needs?

4. How do your company or organizational leaders use a social media strategy?

   a. Based on the strategy, how are you expected to navigate social media?

   b. Please describe how you would use training to support others in enacting the strategy in terms of resources, clarity, and education.

5. From your experience, what other opportunities exist to use social media as part of your data or feedback?

   a. How would value be seen in terms of:

      i. Platform choice

      ii. Communication processes that are only informative or advertising in nature

      iii. Branding community interaction (a dynamic interchange)

      iv. Troubleshooting

6. How does your company or organization use their current understanding of consumer behaviors derived from social media to drive strategy?

7. What are your skills in deciphering and responding to social media?

a. How would you improve them or what would you need as support to improve these skills?

Ending Script: Thank you again for your participation in this study. After the transcription of this interview is complete, I will email you a copy of the transcriptions for your review. If there are edits to the transcriptions, within three days of receiving, please reply to my email with comments in the document. If I do not receive any edits back within three days, I will consider our interview complete. Thank you again for your time and comments during this interview. If you are interested, I will share the results of my study with you once it is completed and has been accepted by my University. I will now end the recording

Appendix B: Recruitment Invitation Posted on LinkedIn

Good morning or afternoon,

I am currently engaging in my doctoral research to complete my dissertation. The purpose of the research is to explore common understandings of how customer relations managers can utilize social media within the context of already existing data analytics to support more targeted and agile marketing and management strategies across industries in Canada. If your current role professionally is in the following areas:

- customer relations manager   OR

- a business analyst that engages is customer relations management roles or responsibilities

Or if you are a consumer that uses social media as a feedback mechanism to influence product or service offerings and are interested in participating in a 45 minute interview, please message me on LinkedIn or at [e-mail address redacted].

Please note, your interview information will be confidential, and all privacy measures will be taken. Unfortunately, I cannot give any incentives to participate but hopefully you will see the value in research that is intended to support the evolution of customer relations management as well as how companies look at the information consumers give in social media narratives and the other feedback they give.

Thank you for your consideration and if you have any other questions, please feel free to contact me again on LinkedIn or at [e-mail address redacted].

Appendix C: Invitation E-mail

Invitation:

Good afternoon, prospective participants,

I am currently in the Walden PhD program with a focus in management, organizational behavior and change leadership. I am seeking individuals to participate in an interview that have been managers and have worked with customer relations profiles such as IT data analysts, marketing development, branding and forecasting. If you are interested in supporting this research to help support CRM practices, please let me know via email at [e-mail address redacted], message me on LinkedIn.

The process will include filling out and completing an Informed Consent statement as well as the interview process will take no more than 45-50 minutes as well as once the interview is completed, your transcript will be sent to you within 48 hours to be checked by you and returned within 48 hour. If you do not return the transcript, I will take this as there are no changes and you accept the transcription. All of this will be reviewed when the process is finalized.

Please let me know if you would like to participate. The course has deadlines, so we will need to begin the process by _____ and finish the interview by

_____. If you have any questions prior to committing, I would be happy to set up a time to talk on the phone or respond via email.