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## Corporate activism best practices in the age of social media

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Pepperdine University  
Graduate School of Education and Psychology

CORPORATE ACTIVISM BEST PRACTICES IN THE AGE OF SOCIAL MEDIA

A dissertation submitted in partial satisfaction  
of the requirements for the degree of  
Doctor of Education in Organizational Leadership

by

Fransisco Flores

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DOCTOR OF EDUCATION

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## VITA

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## ABSTRACT

Corporate activism, or the act of corporations speaking out on sociopolitical issues, has become more common with technological advances and social media access. Corporations' role in society has evolved to include non-economic functions that aim to improve societal conditions. Despite corporations fulfilling additional societal roles, they face increased scrutiny from shareholders and stakeholders alike. Speaking out on social issues or staying silent causes ripple effects amongst their internal and external networks. Speaking out on social media while working for a private or publicly traded corporation can be challenging as it entails weighing a wide array of conditions, stakeholder desires, and corporate values, missions, and objectives.

This study recommends practices and strategies to assist those responsible or interested in a career in corporate communications. Its findings highlight the barriers and challenges faced by corporate leaders in their social media messaging. The study is significant as the expectations increase for corporations to act in society's best interest.

This dissertation used a phenomenological approach in the semi-structured interviews with corporate leaders that engage with stakeholders on social media. The interviews revealed corporate leaders' challenges in their roles and the strategies to overcome them. The methods for measuring success and recommendations for future leaders were also gathered from the interviews.

*Keywords:* Corporate activism, corporate social responsibility, social media, sociopolitical issues, greenwashing, and stakeholder activism.

## **Chapter 1: Introduction**

The expectation from stakeholders, including customers, investors, and employees alike, that corporations must behave socially responsibly has caused ripple effects throughout the business industry (Du et al., 2015; Matejek & Gössling, 2014). Corporations are driven by three basic motives for partaking in socially responsible activities and implementing policy in their firm: (a) contributing to society, (b) generating financial or other benefits, and (c) meeting social expectations and alleviating stakeholder pressures (de Jong et al., 2018). Corporate social responsibility (CSR) consists of a self-regulatory endeavor companies pursue with the intent to contribute to society through economic, legal, ethical, and philanthropic efforts (Carroll, 1991). CSR measures have become an important priority for corporations as new conditions present themselves, along with new challenges and opportunities that respond to the merging of technology, socioeconomic, and political problems (S. Gupta & Sharma, 2009). CSR activities are measured via environmental, social, and governance (ESG) evaluations, focusing on the non-economic aspects of a corporation's quality and ESG performance (Clementino & Perkins, 2021; van Duuren et al., 2016).

Corporations' concern for society goes back several centuries (Latapi Agudelo et al., 2019). However, in the 1930s and 1940s, literature began to showcase corporate executives' role in outlining their corporations' specific social responsibilities (Carroll, 1999; Furman, 2010; Latapi Agudelo et al., 2019). In recent years, many companies have altered their public image to reflect the desires of their numerous stakeholders. Stakeholders rely upon corporate image or reputation to shape career, investment, and even purchasing decisions (Dowling, 1986; Furman, 2010). Shareholders expect profits, but similarly to customers, they have pressured corporations to engage in business that protects the environment, contributes money to charitable causes, and

assists in solving problems in their communities (Cundill et al., 2018; Mohr et al., 2001; Reed, 2017). The type of social issues that a corporation might tackle will vary in scope, with goals evolving alongside social expectations.

Historically, the CSR agenda has dealt with topics such as environmental concerns, pollution, and working conditions (Utting, 2005). Recently, CSR efforts have encompassed sociopolitical issues, including race relations, gun control, immigration, and gay rights (Nalick et al., 2016; Reed, 2017). The role of corporations has evolved, and they are now expected to be good corporate citizens to all internal and external stakeholders and the planet. Carroll (1998) noted that good corporate citizens are profitable (economic), obey the laws (legal), behave ethically (ethical), and give back to society through philanthropic endeavors (philanthropic). The four pillars that serve as the CSR framework entail economic, legal, ethical, and philanthropic responsibility (Carroll, 1979; Rank & Contreras, 2021). A holistic understanding of CSR encourages firms to craft strategies that enhance overall business performance in which philanthropic efforts are a culmination once economic, ethical, and legal responsibilities are fulfilled (Carroll, 1991).

Publicly traded companies have more stakeholders to consider than private entities, so their actions regarding CSR can raise some questions regarding their authenticity. Private companies have fewer groups that pressure them, so their overall expectations are lower, but they are viewed as more genuine than publicly traded ones when they undertake CSR actions (Panwar et al., 2014). Greenwashing (sometimes called bluewashing) occurs when corporations pretend to be socially responsible and increase sales or boost their brand image, but do not make good on their claims (Cherry, 2014; Mahoney et al., 2013; Ruiz-Blanco et al., 2022). Many familiar Fortune 500 companies like Mobil Corporation, Shell, and Dow Chemical have been accused of

utilizing complex strategies to erode credibility, devise confusion, and deceptively posture commitments and accomplishments (Laufer, 2003). The market for CSR depends heavily on the goodwill of corporations and stakeholders; when trust is undermined, it can lead to cynicism and impede future efforts (Bazillier & Vauday, 2014; Cherry, 2014).

Social media has affected how companies communicate their CSR strategies to internal and external stakeholders (Paliwoda-Matiolanska et al., 2020; Zhang & Yang, 2021). In recent times, corporations have begun to speak out on sociopolitical issues even though doing so can create division among their customers (i.e., leading customers to support or boycott a product to own the libs/conservatives; de Oca et al., 2020). When corporations cave to activist pressure and take a stance on sociopolitical issues that do not have a normative consensus, it can hurt their reputation and cause efforts to backfire (Nalick et al., 2016). Although social media serves as the arena for people to debate sociopolitical issues, critics have suggested that these technologies promote “clicktivism” instead of activism, where millions can react to a post but fail to mobilize on the streets to bring forth change (Obar et al., 2012). Hashtags representing groups’ identities have played a significant role in bringing awareness, but an overreliance on them takes away from underlying structural issues and exploitations (Carney, 2016). Social media brings attention to problems that must overcome societal barriers that prevent widespread acceptance, especially if the problem is relatively new or taboo (Eilert & Cherup, 2020).

### **Sociopolitical Issues That Cause External Pressure on Corporations**

Corporations are increasingly speaking out on sociopolitical issues that cause customer controversy and backlash (Eilert & Cherup, 2020). Recently, some corporations have involved themselves in unsettled sociopolitical issues that are emotionally charged, heavily contested, and divisive (Nalick et al., 2016). Although organizations tackle many sociopolitical issues, the ones

mentioned subsequently are relevant and consistent with the current social norms and corporate activity. In a Gallup poll related to the 2020 election, voters considered the candidates' positions as either extremely important or very important (total % added) on gun policy (74%), immigration (84%), race relations (66%), abortion (64%), and LGBTQ+ rights (38%; Hrynowski, 2020). Issues such as terrorism and national security, education, and the federal budget deficit also received high marks, but corporations en masse rarely speak about these issues. In addition, traditional sociopolitical topics such as the environment and pollution are excluded from this study. However, they are covered for context in Chapter 2 due to legal advances and cooperation between the government and corporations to address these issues. The issues to be evaluated in this study are more recent yet contentious issues that cause polarization among the masses. A few examples of corporations and their involvement in social movements are covered subsequently.

### ***Abortion***

Regarding abortion, public sentiment has not changed much in the last few decades. A 1995 Gallup poll found that 56% of respondents were pro-choice, while 33% were pro-life, whereas in 2021, 49% were pro-choice, and 47% were pro-life (Brenan, 2021). The variability has not moved over +/- 5% for each perspective since 2006. Few sociopolitical issues cause as much division on moral and religious grounds as abortion (Boyle et al., 2015; Lindorff et al., 2012).

Purposely terminating pregnancies early remains a highly controversial issue (Boyle et al., 2015). It has been nearly 50 years since the *Roe v. Wade* ruling, where the Supreme Court found that women were constitutionally protected under the due process clause of the Fourteenth Amendment (Regan, 1979; *Roe v. Wade*, 1996). Partisanship between anti-abortion and pro-



abortion groups has created high resistance levels any time abortion policies emerge at the federal and state levels (Sawant, 2012). In a recent example, when Georgia passed what became known as the “heartbeat bill,” it effectively banned most abortions once a human heartbeat was detectable (Brumback, 2021). This decision led movie studio companies, including Netflix, to reevaluate their business strategy in the state (Eilert & Cherup, 2020). On social media, movements such as #shoutyourabortion have emerged as a direct response to opposition to abortions; the movement aimed to remove the stigma surrounding women having an abortion (Markens, 2016). These examples illustrate that abortion policies elicit a corporate response and civil engagement on social media.

### ***Immigration and Refugees***

Racial discrimination remains an unfortunate element of the national social and institutional makeup despite U.S. citizens committing to the notion of equality for all (Abrajano & Hajnal, 2015). Immigration issues have been a recurring topic in American politics in recent decades regarding handling nearly 12 million undocumented immigrants (M. Chen, 2014). In 2020, for the first time in history since Gallup began tracking the issue in 1965, more people wanted increased immigration (34%) than those who wanted to decrease immigration (28%; Brenan, 2021). The recent trends in immigration have led academics interested in race and ethnicity to examine the influence immigration has on political behavior, identity, and elections (Espino & Jimeno, 2013; Wong, 2000). Donald Trump’s win to become the 45<sup>th</sup> U.S. president in 2016, his policy decision-making, and his Tweets, angered many people around the country (Lan et al., 2020). One notable example is when Trump rolled out what became known as the “Muslim travel ban” early in his presidency (Lin, 2018)

In January 2017, President Donald J. Trump issued Executive Order 13769, titled *Protecting the Nation from Foreign Terrorist Entry into the United States*, which prevented certain non-citizens from Iran, Iraq, Somalia, Sudan, Syria, and Yemen from entering the nation (Exec. Order No. 13769, 2017; The White House, 2017). The nations that were banned entry have a Muslim majority, which led to the Muslim travel ban restriction and raised concerns about Islamophobia (Uzma, 2017). As a result of the ban, many corporations made public statements condemning the Trump administration's stance. Companies including Apple, Microsoft, Twitter, Netflix, and Facebook and a total of 97 corporations filed an amicus brief protesting the ban due to its impact on their respective communities and business operations (Fan, 2019). Lyft, a rideshare company, saw an increase in app downloads when it released the statement *Defending Our Values*, announcing its one million dollar donation to the American Civil Liberties Union (ACLU) as a counter to the travel ban (Brown & Scott, 2019). Starbucks also took action and committed to hiring 10,000 refugees (Eilert & Cherup, 2020). The actions taken by corporations on sociopolitical issues will be covered in-depth in this dissertation, as well as their effects on internal and external stakeholders.

### ***Gay Rights***

Corporations' support for lesbian, gay, bisexual, transgender, queer, plus (LGBTQ+) individuals on social media is evidenced by the adoption of the rainbow flag on their respective profile pictures during the whole month of June, known as Pride Month (Eilert & Cherup, 2020). The LGBTQ+ movement has developed over decades in the United States. Same-sex marriage acceptance and protections vary from state to state despite the U.S. Supreme Court ruling, which legalized same-sex marriage in the U.S. in *Obergefell v. Hodges* (Reed, 2017). U.S. Support for same-sex marriage was at 70% in 2021 compared to just 27% in 1997; in 2021, for the first time

in recorded history, republican voters (generally conservative) showed majority support, with 55% supporting same-sex marriage (Brenan, 2021). Disputes on this topic revolve around the clashing religious and moral values that are held by corporations, as well as their customers and employees (Brown & Scott, 2019). Corporations that hold positions against LGBTQ+ interests or have not joined other companies that advocate for the movement have often been vilified by the public (Nalick et al., 2016). Companies that have advocated for or made statements in favor of same-sex marriage include Starbucks, Amazon, and Ford, whereas Chick-fil-A and Barilla have been outspoken against same-sex marriage (Dodd & Supa, 2015). Corporations are increasingly speaking up regarding their perspective on LGBTQ+ issues; their stance will contrast based on corporate values. Being in favor or unsupportive of LGBTQ+ issues causes debates and creates groups that support them while others show disapproval. This dissertation will discuss examples of both.

### ***Gun Control***

In recent decades, the most prominent examples of mass shootings have been at schools, movie theaters, workplaces, and other public places (Cook & Pollack, 2017). Mass shootings in the United States are events that receive media coverage that can last days and even months (Schildkraut & Muschert, 2014). The coverage of mass shootings has evolved, with social media now serving as the arena where corporations speak out and condemn actions. The 2018 Parkland, Florida shooting was a gun control catalyst met with a hostile political climate, student activism, and social media pressure (Fan, 2019). The Parkland students changed the gun debate by organizing a nationwide tour and successfully registering 50,000 people to vote in the midterm elections (Zoller & Casteel, 2022). The Parkland shooting resulted in corporations taking sociopolitical action to make a difference in reducing gun violence. Dick's Sporting Goods and

Walmart increased the minimum age to purchase a firearm from 18 to 21, and Budget, Delta Airlines, Dick's Sporting Goods, and Symantec severed their relationships with the National Rifle Association (NRA; Fan, 2019). Mass shootings receive increased media attention and pressure politicians to do something about gun violence. Corporations and their reactions to address the concerns of stakeholders will be addressed in this dissertation.

### ***Race Relations***

The United States and race relations have been recurring themes since the nation gained independence in 1776. With the emergence of corporations' involvement across many different industries, their influence on sociopolitical issues cannot be ignored. In the last decade alone, race relations have been in the crossfire constantly due to the killings of African American men. The Black Live Matter (BLM) movement rose in 2012 after George Zimmerman was acquitted of killing Trayvon Martin, an unarmed African American teenager (Carney, 2016). The protest hashtag #BlackLivesMatter attained traction on social media after Micheal Brown, another African American teenager, died due to a fatal shooting by Darren Wilson, a White police officer from Ferguson, Missouri (Seymour, 2016).

In 2016, after several mainstream police shootings of unarmed Black men, sports players, most notably football player Colin Kaepernick, protested against police brutality and racial injustice by kneeling during the national anthem (Intravia et al., 2020; Nair, 2019; Riley, 2020). As a result of the kneeling, angry fans called for the firing of protesting players and pledged to boycott professional sporting events and not renew their season tickets (Intravia et al., 2020). Despite the backlash, Nike used Kaepernick for their 30th anniversary *Just Do It* campaign, which led many people to boycott Nike and burn their products, but Nike stood firm

and even made contributions to Kaepernick's charity called Know Your Rights (Alcadipani & de Oliveira Medeiros, 2020; Intravia et al., 2020).

Tensions rise when corporations take a stance on sociopolitical issues that are heated and controversial. They can prove to be risks calculated to help their image in CSR efforts and boost their economic earnings. In 1988, when Black and White adults were asked how boycotts on business would help social standing for Blacks, 54% of Black adults and 26 % of White adults said it would help, compared to 69% of Black adults and 48% of White adults who said it would help in 2020 (Hrynowski, 2020). Racial tensions in the United States elicit a corporate response; those will be covered in this dissertation.

### **Corporate Social Responsibility**

CSR includes voluntary integrated corporate practices that address social concerns (Boyd et al., 2016). Due to pressure from internal and external stakeholders, many corporations have begun incorporating CSR qualities into their business strategies. Corporations are looking beyond profit, investment return, and shareholder value and including social and environmental performances in their goals in what is known as the triple-bottom-line as well as people/planet/profit (de Jong et al., 2018). CSR efforts consist of endeavors to assist with local issues and other more ambitious ones that address global issues (Mattila, 2007). CSR efforts are mentioned directly on the websites of more than half of the companies in the United States (Matten & Moon, 2008).

Political gridlock has created a vacuum that allows corporations to maneuver and bring forth results in a way that Congress and the courts do not have (Fan, 2019). Despite the current expectations from corporations, CSR, as we know it today, has evolved since its inception and has shifted priorities but still encompasses core ideas. In the 1930s, the debate on the private

sector's social responsibilities began (Latapi Agudelo et al., 2019). However, in the 1950s, Bowen (1953) asserted that the doctrine of social responsibility started with the idea that business should concern itself with the effects on operations to attain valued social goals. The 1960s and 1970s had several landmark movements that increased citizens' and corporate activism efforts. Those landmark movements fought for: consumer rights, civil rights, women's rights, and an increased inclination to protect the environment, all of which are precursors to modern CSR (Carroll, 2015).

The actions of corporations outside of the United States also affect shareholders, which can pressure a corporation to change its practices. In the 1970s, stakeholders against the South African apartheid protested Polaroid and General Motors for their relationship with the South African government (Reed, 2017). The protests and the subsequent pulling out of the country by both General Motors and Polaroid are often referred to as the catalyst for the modern CSR movement (Reed, 2017). Stakeholders can modify the actions and behavior of corporations even if they are outside of the country in which they are based.

Throughout the 1980s and 1990s, corporations expanded their businesses outside the United States, and CSR gained international interest (Latapi Agudelo et al., 2019). As multinational corporations grow worldwide, leaders in those firms must be aware of their business practices' local and global implications. Initially, there was very little legal framework as businesses entered new countries; efforts were most developed to avoid protests or opposition in new territories. Treating all stakeholders ethically and responsibly is the current norm for CSR (Wan-Jan, 2006). The increased competition worldwide encourages corporations to push for a positive image that will not affect their reputation and will guide their ethical and CSR initiatives wherever they do business (Carroll, 2015). External pressure from various stakeholders guides

corporations to act in ways that align with public expectations. Stakeholder pressure and corporation reactions to that pressure will be covered in this dissertation.

### **Environmental, Social, and Governance Ratings**

ESG ratings first emerged in the United Nations Principles of Responsible Investment, followed by firms incorporating them into their CSR strategies (Alareeni & Hamdan, 2020; Davis & Stephenson, 2006). ESG scores help corporations craft CSR sustainable strategies that affect stakeholder investment and business financial performance (Duque-Grisales & Aguilera-Caracuel, 2021). ESG investing measures a corporation's impact on the environment, society, and governance, focusing on the non-financial aspects of a stock's performance (van Duuren et al., 2016). Corporations with advanced ESG programs view CSR as creating value by influencing competitiveness and profitability, which simultaneously helps with financial performance and shareholder value (Mirvis, 2012; Nielsen & Noergaard, 2011). ESG scores deliver CSR information that investors use to evaluate risks and opportunities; they also enable investors to access raw data and link it to financial data (Alareeni & Hamdan, 2020).

### **Corporate Activism**

Corporate activism occurs when an organization goes beyond its legal obligations to try and bring forth social changes. The challenges that prevent social, political, and environmental concerns from progressing toward a solution have created a path for businesses to seek ways to influence the institutional landscape and bring change (Eilert & Cherup, 2020). Companies are facing increased demand from various internal and external stakeholders, which has increased CEO awareness and recognition for their business to have a role in society that is more engaged and responsible (Mirvis, 2012). A recent study found that 70% of global chief executives viewed

CSR as indispensable to profitability (Kiessling et al., 2016). CSR efforts are important for corporations' planning and success strategies.

Corporate leaders taking a stance on a sociopolitical issue opens them up for critique, but it can also be met with praise. CEO Edward Stack of Dick's Sporting Goods, Salesforce founder, and CEO Marc Benioff, Apple CEO Tim Cook, Paypal CEO Dan Shulman, and former Starbucks CEO Howard Schultz are some of the leaders who have spoken about issues aligned with their beliefs regardless of the backlash they might encounter (Eilert & Cherup, 2020). The companies mentioned are all publicly traded ones that have used their positions to influence thought. Corporate activism can create a ripple effect on suppliers and manufacturers, affecting how goods and services are produced and ultimately modifying consumer buying habits (Paynton & Schnurer, 2010).

### **Shareholder Activism**

As corporate activities become a public debate, pressure from stakeholder groups rises because companies are in high visibility positions that can raise interest on issues considered beneficial to society (Hond & De Bakker, 2007). Shareholder activism takes place when investors who are concerned about social issues utilize their equity roles to insist on better reporting, increased transparency, and corporate policy changes (L. King & Gish, 2015). Shareholders even used the divestment strategy during the protests against the South African apartheid in the 1970s; shareholders used their ownership stake to exert influence (Cundill et al., 2018). Between 1977-1979, nearly one-fifth of colleges and universities divested fully or partially from South Africa-related stocks and bonds (L. King & Gish. 2015). Shareholder activists are part of a new generation of social movements that play an active role in corporations acting in the best interests of society (Campbell, 2007).



## **Social Media Activism**

Social media is a deliberately published communication tool that allows open discourse and showcases the demands of various stakeholders (Kim, 2019). Social media impacts the modern public relations strategies corporations utilize, which calls for stakeholder participation and transparency (Paliwoda-Matiolanska et al., 2020; Solis & Breakenridge, 2009). Despite not being universally accessible, social media has permitted people to participate in discussions in the public sphere that would not be possible otherwise (Carney, 2016). Sending a message or a Tweet requires very little effort, and thanks to wireless technology, it can be sent from anywhere at any time (Ng, 2020).

In 2005, just 5% of Americans used at least one social media platform; by 2021, 72% utilized an outlet on some social media (Pew Research Center, 2021). Social media products offered by companies like Twitter, Facebook, and Instagram serve as arenas in which competing ideologies provide data for corporations to act on. While social media platforms have emerged, they have not brought an end to television; however, television produces public discourse that is silly and impotent, and Twitter promotes a speech that is impetuous, simple, denigrating, and frequently dehumanizing (Ott, 2017).

Social media platforms and emerging Web 2.0 technologies often complement offline activism and help push for activism in the virtual world (Obar et al., 2012). Using a hashtag like #blacklivesmatter or the counter #alllivesmatter is a form of political activism like protesting and marching on social media instead of on the streets (Booten, 2019). Social media can empower consumers with a forum that allows them to pontificate and create their activist identities; it can be used for moralization by targeting social praise (e.g., liking a corporation's CSR action) or engaging in social criticism (posting a critical response to a corporation's CSR actions; Boyd et

al., 2016). Social media can be a corporate tool for marketing, such as promoting new products, pushing social causes, and participating in the political process. Social media usage by corporations and stakeholders will be addressed in this dissertation, as well as its effects on corporate activism.

### **Statement of the Problem**

U.S Corporations have progressively encountered more pressure from internal and external stakeholders to be better corporate citizens and use their influence to pressure governments and bring forth legal victories. At the time of this study, corporations are expected to provide much more than just financial returns for their investors; they are also likely to take an active role in sociopolitical issues that vary in scope despite the backlash taking a stance might bring. Corporations face scrutiny for speaking up on sociopolitical issues and are criticized when they do not. The research questions in this dissertation aimed to discover the common challenges corporations face when they speak out on social media, the strategies deployed to overcome those challenges, and their recommendations for future leaders speaking out on social media.

### **Purpose Statement**

This study begins by discussing the emergence of corporations taking an active role in society in contributing to socially responsible matters. Over the decades, corporations have shifted their approach to CSR, with stakeholders looking at their performance beyond economic metrics through ESG scoring (van Duuren et al., 2016). With social media becoming the tool to increase exposure to a brand, it has also been used to push ideas to the masses and pressure governments to act on matters important to the corporation and its stakeholders. As corporations increase their activity on social media, it is important to understand the rationale behind their activist actions. The majority of the current literature regarding corporate activism speaks on

corporations' actions but seldom covers the strategies utilized or overcome challenges or handle backlash from stakeholders. Identifying the best practices taken by current industry leaders will allow future generations to develop and incorporate strategies into their business CSR practice.

The purpose of the study was to examine findings related to the following:

- The challenges socially active corporations have faced when determining their messaging content on social media.
- The practices and strategies employed by socially active corporations speaking out on social media.
- How socially active corporations define, measure, and track the success of their messaging content on social media.
- The recommendations corporations have for future leaders to implement social advocacy strategies and practices.

## **Research Questions**

The following research questions (RQs) were addressed in this study:

- RQ1 - What challenges are faced by private or publicly traded companies implementing leadership strategies and practices for speaking out on social media?
- RQ2 - What leadership strategies and practices are employed by private or publicly traded companies to overcome the challenges they face when speaking out on social media?
- RQ3 - How do private or publicly traded companies measure the success of speaking out on social media?

- RQ4 - Based on their experiences, what recommendations would private or publicly traded companies have for the future implementation of social advocacy strategies and practices?

### **Significance of the Study**

CSR practices can strongly influence an organization's value to its stakeholders. This study strove to provide best practices for speaking out on social media for private and publicly traded companies on sociopolitical topics that are often viewed as taboo and cause moral debates among stakeholders (Lindorff et al., 2012). Corporations' role in CSR initiatives has evolved, with stakeholders expecting them to fill the gaps when the government does not act on social concerns of importance (Nalick et al., 2016). The lack of responsiveness toward pressing issues can give rise to employees and the marketplace utilizing coercive tactics, including protests and boycotts, to demand change at the government level (Eilert & Cherup, 2020). Actions such as boycotts generally receive massive media attention, allowing additional stakeholders to grasp ongoing issues and further destabilizing the power structure that relies on the legitimacy of its authority to be effective in business operations (Eilert & Cherup, 2020; B. G. King, 2011).

As stakeholders and non-stakeholders evaluate corporations' actions due to increased exposure to their business practices on social media, it is important to understand the workings from within. Interviewing the social media spokesperson of private or publicly traded corporations regarding their experience speaking out on social media revealed obstacles they overcame and what challenges are still present. The responses were measured, contributing to the literature on corporate activism and CSR. The findings will help companies craft practices consistent with the current industry expectations. Any gaps or challenges still present can be addressed in future research.

### **Assumptions of the Study**

1. The researcher assumed that participants in this study would respond to the semi-structured interview questions honestly and without bias related to their respective roles in their corporations. Full transparency was encouraged due to the anonymous and confidential nature of the study. No businesses were named in the findings to protect the interests of the private or publicly traded companies they represent.
2. The researcher held no previous bias, and the questions were crafted to understand the participants' best practices in their respective organizations. The observations noted during the interview are assumed to be normal behaviors.
3. Those who answered the questions were spokespeople in their corporations with the authority to speak on the topic of corporate activism on social media. Participants who responded to the study have participated in discussions on social media in one way or another.
4. The participants did not receive compensation for their involvement and were permitted to withdraw from the study anytime for any reason.
5. It is assumed that all participants met the participation criteria and followed all protocols to engage in the study.

### **Limitations of the Study**

The current study included several limitations therein. Weaknesses in the study are the limitations in research design which can impact the conclusion (Ross & Bibler Zaidi, 2019). To understand the context of the findings, it is important to address the study's limitations (Ioannidis, 2007). The researcher was limited to interviewing participants who were willing to have a 60-minute interview via Zoom. The study included the involvement of spokespersons of

private or publicly traded corporations. Future studies can evaluate corporations that do not engage on social media on any topics listed in this study.

The study consisted of 15 interviews with representatives of private or publicly traded companies. The small sample size may make it difficult to make meaningful relations and generalizations with the data (de Oliveira Vargas & Mancia, 2019).

### **Definition of Terms**

To clarify factors specific to corporate structure and corporate activism, this section reviews some of the basic operational definitions in the industry and their usage. This study utilized the following definitions to provide context and a sample of the lexicon often used in the literature regarding corporate activism. In addition, the descriptions noted are the intended interpretations the author aimed to incorporate into the study.

- *Corporate Activism:* A corporation's inclination to speak out on sociopolitical and environmental concerns to bring societal change by conditioning mindset and conduct within their command structure (Eilert & Cherup, 2020).
- *Corporate Citizenship:* Determined institutionally by how the external environment sets conditions for a corporation's socially responsible and sustainable policies (Jeurissen, 2004).
- *Corporate Governance:* Directs and controls the activities of a corporation through the establishment of rules, structures, and procedures that guide decision-making (Baker & Anderson, 2010).
- *Corporate Image:* The explicit promise or commitment a corporation has to the community and its stakeholders (Foster et al., 2010).

- *Corporate Social Responsibility (CSR)*: A corporation's voluntary behavior to pursue its mission while fulfilling obligations to stakeholders, their communities, the environment, and society (Coombs & Holladay, 2012).
- *Corporation*: A legal entity separate from its owners; it can make a profit, be taxed, and be held legally accountable (U.S. Small Business Administration, 2022).
- *Environmental, Social, and Governance (ESG)*: The total value from a corporation's ESG endeavors (Duque-Grisales & Aguilera-Caracuel, 2021).
- *Greenwashing*: A creative management of a corporation's reputation with the financial communities and the public that hides problems, deflects any fault, and reattributes blame to protect the organization's image (Laufer, 2003).
- *Hashtag*: The insertion of a hash symbol (#) before a word on social media to catalog and ease of search of content related to the subject assigned (Veszelszki, 2016).
- *Publicly Traded Company*: Corporate entities that offer public offerings are listed on a stock exchange (Nasdaq, 2018).
- *Non-governmental organization*: Advocacy organizations and activist groups or social movement organizations that fight for issues that serve the interests of their particular community at all levels of government (Obar et al., 2012).
- *Shareholder Activism*: Socially concerned investors that utilize their positions of equity as leverage to command better reporting, increased transparency, and at times corporate policy changes (L. King & Gish, 2015).
- *Social Media*: The platforms utilized to produce, consume, and exchange information by users interacting online (ElAlfy et al., 2020), including companies like Twitter, YouTube, and Facebook (Nambisan & Baron, 2007).

- *Sociopolitical Issues*: Unresolved and salient social matters where the institutional and societal opinion is divided, generating contested debates among different people, groups, and organizations (Nalick et al., 2016).
- *Stakeholders*: Made up of internal and external groups, which include shareholders, consumers, employees, suppliers, competitors, NGOs, as well as the communities in which they operate (Carroll, 2015; Eilert & Cherup, 2020).
- *Triple Bottom Line*: When corporations increase their reputation by investing in practices that emphasize people, profit, and the planet (Cherry, 2014).
- *Woke*: The corporate exploitation of values typically championed by historically oppressed and marginalized populations (Kanai & Gil, 2020).

## **Chapter Summary**

The business decision to take a public stance on sociopolitical issues has evolved to its current state, which entails corporations addressing matters on social media. Beyond the CSR initiatives a firm can enact, stakeholders are increasingly expecting corporations to use their reach and influence to change the political landscape on issues they consider valuable (Nalick et al., 2016). Taking a stance on controversial topics can lead to internal and external backlash (Eilert & Cherup, 2020). Corporations that engage in sociopolitical issues make a calculated decision that considers whether the benefits of engagement outweigh those of staying silent (Nalick et al., 2016). Although the norms surrounding short-term shareholder profit maximization provide incentives to promise to produce environmentally sound goods regardless of the impact on society, the practice known as greenwashing can affect the corporation's CSR efforts (Cherry, 2014). Maintaining a good corporate image is essential for keeping and building a reputation that solidifies credibility with stakeholders.



Corporations hold a unique position to influence their suppliers' manufacturing behavior and their consumers' purchasing habits (Paynton & Schnurer, 2010). While fulfilling their corporate citizenship role, corporations strive to be the ideal corporation that meets society's expectations (Reed, 2017). With social media enabling stakeholders to engage with others on ideas, corporations face increased pressure to manage their behaviors online. Corporations use social media for marketing their products and promoting their social causes, but they also have increased pressure on corporate behavior and their presentation to the world (Kiessling et al., 2016). Although stakeholders reward responsible businesses, they also punish those with socially irresponsible practices; the intensity is contingent on firms' proficiency in handling the challenges of CSR communication (K. Lee et al., 2013). A lack of response or action can also result in criticism of organizations and their leadership; timely responses typically reduce the doubts about the authenticity of the claims, whereas mimicking others can create suspicion.

Relying on questions such as, What challenges are faced by socially active corporations in determining their messaging content on social media?, this study sought to uncover new facets and findings that will shape how corporate activism is perceived. In addition to helping future leaders run organizations with CSR initiatives, it also uncovered details useful for stakeholders when considering CSR actions. Understanding how leaders engage their stakeholders on social media can add to the growing literature on best practices for social media usage.

## **Chapter 2: Literature Review**

Society relies on corporations for jobs and money while supporting them by purchasing their products and services (Fitch, 1976). Corporations have gone from standing on the sidelines in political issues to leading the charge and pushing for legislative change in a voluntary, non-mandatory effort to build credibility in their non-economic endeavors. With the advent of social media and modern technology, corporations and their leaders are increasingly under the spotlight to shed light on the issues that political leaders avoid. As corporations become household brands worldwide, they have embraced CSR to continue their growth and expansion. CSR is often used interchangeably with sustainability, corporate philanthropy, corporate responsibility, and corporate citizenship (ElAlfy et al., 2020; Ruiz-Blanco et al., 2022). CSR efforts are company-driven, but they are still subject to scrutiny. Stakeholders that include the media, NGO watchdogs, government regulators, and social media activists put pressure on corporations to assume responsibility and manage their business operations' impact on society (Matejek & Gössling, 2014).

Companies engage in CSR efforts to increase brand recognition, build positive attitudes and loyalty, increase competitive dominance, lower the cost of equity pricing, and eliminate or reduce government sanctions (K. Lee et al., 2013; Hur et al., 2014; van Doorn et al., 2017; Zhang & Yang, 2021). The U.S. Social Investment Forum (US SIF) noted that the sustainable, responsible, and impact investment market was \$17.1 trillion in 2019, representing 33% of all investment monies under professional management and a 97% increase since 2016 (US SIF, 2020; Utz, 2017;). In addition, consumers are more supportive of companies that engage in CSR efforts, and employees generally value and favor being associated with companies with good reputations (Hur et al., 2014). Companies are viewed positively by internal and external

stakeholders when their CSR endeavors are authentic. Companies or individuals that are caught deceiving others through intentional actions are accused of greenwashing, which can lead to backlash and boycotts, creating a blow to reputation and financial standing.

To verify CSR efforts, corporations today are audited for their financial performance and environmental (ecological) and social performances in what is known as the triple-bottom-line or people/planet/profit (de Jong et al., 2018; Song et al., 2020). In 1994 John Elkington created the term triple-bottom-line accounting, which consists of a mostly voluntary practice for organizations seeking to increase their control over their social, economic, and environmental domains (ElAlfy & Weber, 2019). The Sustainable Development Goals (SDGs) were introduced by the United Nations in 2015; SDGs serve as frameworks for corporations for a more sustainable planet (ElAlfy et al., 2020). Whereas corporations engage in CSR efforts important to their aspirations, countries that adopt SDG rules and regulations can shape and create pressure for corporations to modify or improve their current business practices (Latapi Agudelo et al., 2019).

This literature review explores the components that make up CSR and their influence on corporate activism. It also addresses activism in the 21st century related to utilizing social media and its technologies as the medium to exchange ideas and communicate with a wide range of stakeholders. A timeline of landmark Supreme Court decisions and government legislation aimed at influencing corporate behavior related to corporate activism will also be presented. This chapter explores current research to reveal how corporations navigate scandals and accusations of inauthentic virtuous communication. Examples of corporations handling difficult situations and their backlash will be discussed to better understand the ramifications of CSR efforts and their effects on internal and external stakeholders.

## CSR Timeline

In the 1770s, Adam Smith introduced the idea of the invisible hand, which meant that society would reap the benefits from individual business owners pursuing profit and their self-interest (Mohr et al., 2001; Wan-Jan, 2006). In 1927, Dean Donham, one of the early pioneers of CSR, emphasized the importance of business responsibility toward the community in which they operated and referred to it as the “art of living together” (ElAlfy & Weber, 2019). Other honorable contributors to CSR were Barnard in his 1938 work *Functions of the Executive* and Clark’s 1939 publication *Social Control of Business* (ElAlfy & Weber, 2019; Latapi Agudelo et al., 2019). The modern era of CSR was sparked by Howard Bowen’s 1953 book, *Social Responsibilities of the Businessman*, where the idea of the executive’s role in society was introduced by asking about the responsibilities that business people are expected to assume in society (Carroll, 2015; M. P. Lee, 2008). A corporation’s CSR level of involvement and nature is understood to be an expression of what they believe to be their social duties and responsibilities (Hond & De Bakker, 2007).

In the early stages, CSR was referred to as social responsibilities (SRs); Bowen believed this included business people’s obligation to seek policies and activities that are viewed more positively by society (Carroll, 2015). CSR evolved into the concept known today when, in the 1950s, Bowen pressed people in business obligation to act according to societal objectives and values (Bowen, 1953; Carroll, 2015; ElAlfy et al., 2020; M. P. Lee, 2008; Runhaar & Lafferty, 2009). Bowen’s book was pivotal in launching CSR to reflect the altering social environment in the following decades (M. P. Lee, 2008). Bowen’s contributions are frequently cited and viewed as the guiding principles of the modern CSR movement. During this same period (the 1950s), Theodore Levitt raised concerns about the dangers of SR and warned that businesses’ job is not

to function as the government, and the government's job is not to be a business (ElAlfy & Weber, 2019).

The 1950s and 1960s brought forth a great deal of legislation enacted that aimed to protect American consumers and regulate business behavior, such as the Equal Pay Act of 1963, the National Traffic and Motor Safety Act of 1966, the National Environmental Act of 1969, and the Clean Air Act of 1970 (M. P. Lee, 2008). During this period, there was an increase in social movements that fought for women's rights, civil rights, and consumer protection, serving as the CSR movement's predecessors (Carroll, 2015). In 1969 there was a large oil spill in Santa Barbara, California which lowered public confidence in the business sector leading to major protests nationwide and the creation of Earth Day 1970 as a result (Latapi Agudelo et al., 2019). In the 1970s, the federal government acted to address the many issues that had occurred in the 1960s and created the Environmental Protection Agency (EPA), Equal Employment Opportunity Commission (EEOC), and Occupational Health and Safety Administration (OSHA; Carroll, 1991, 2015; Latapi Agudelo et al., 2019). CSR and its analogs have been driving factors pushing for an overall better environment for workers, protecting consumers and human rights, and protecting the planet from corporate environmental abuse.

The new governmental bodies would establish U.S. public policy, formally address environmental concerns, and establish employees and consumers as business stakeholders (Carroll, 1991). The Committee for Economic Development (CED) published two notable works in 1971 that correlated with the social expectations of the time: *A New Rationale for Corporate Social Policy* and *Social Responsibilities of Business Corporations* (Latapi Agudelo et al., 2019). The CED used those publishings to create three concentric circles that depicted CSR, with the outer circle representing the new obligations businesses would pursue to improve society. The

middle circle indicated that a business's economic pursuits are conscious of evolving priorities and social values. Lastly, the inner circle was to define the business's financial endeavors, such as jobs, products, and growth. The move would emphasize corporate action, protection, and corporations implementing a more social role (Carroll, 1991).

In the 1960s and 1970s, corporations saw an increase of opposition comprised of shareholder activists linked to nearly every social movement, including LGBTQ+, women's rights, civil rights, environmentalism, and anti-Apartheid (L. King & Gish, 2015). The 1970s movement against the South African apartheid is recognized as the catalyst for CSR as society would redefine the responsibilities of businesses. The anti-apartheid movement protested American companies Polaroid and General Motors for working with the government of South Africa (Reed, 2017). The campaign brought together shareholders, including foundations and educational institutions, which all added divestment into their financial repertoire (L. King & Gish, 2015). Investors use a divestment strategy to pressure companies by strategic avoidance, sometimes referred to as ethical screening (Cundill et al., 2018).

The CSR movement was solidified in the 1980s as President Ronald Reagan urged businesses to engage in volunteerism for community initiatives instead of the federal government. This action would indicate that companies would lead social responsibility efforts, not the government (Carroll, 2015). In the 1990s, John Elkington popularized the triple-bottom-line concept as a practical framework for a corporation's social, environmental, and economic impact (Latapi Agudelo et al., 2019; Song et al., 2020). Organizations have three basic motives for pursuing CSR policy and activities: contribute to society, gain financial benefit, or meet stakeholder expectations and alleviate stakeholder pressure (de Jong et al., 2018). The 1990s also saw an increase in multinational corporations moving operations across the globe, which, in

effect, expanded CSR abroad rapidly; this the trend continues and shows no sign of slowing down (Carroll, 2015). In 1997, President Bill Clinton highlighted CSR and corporate citizenship by creating the Ron Brown Citizenship award for businesses leading in corporate citizenship; this award was given out until 2007 and then it was discontinued (Carroll, 1998; Latapi Agudelo et al., 2019).

At the start of the 21st century, a series of criminal corporate practices (i.e., Enron) and humanitarian and ecological disasters (i.e., the tsunami in Fukushima) sensitized the public to strive for higher standards in CSR (Utz, 2017). In 2005, the United Nations World Summit Outcome established three pillars of sustainability development (SD), including economic development, social development, and environmental protection. CSR efforts are decisions made at the company level; SD efforts are national and global commitments through initiatives. Whereas CSR encompasses mostly company-level decision actions, SD efforts are country-level or global pledges through initiatives (i.e., the total effect organizations have on the three pillars within their country and worldwide; Perez-Batres et al., 2012). At the end of the 2000s, CSR had begun focusing on creating shared value. Corporations have focused on developing policies and operating practices to help them gain a competitive edge while advancing social and economic development in their communities (Latapi Agudelo et al., 2019; Porter & Kramer, 2011). Porter and Kramer (2011) argued that aside from addressing financial needs, markets are defined by the idea of shared value, which includes an understanding of the needs of society.

As technology advances and communication among stakeholders has become instantaneous, more people and corporations are voicing their opinions and political standing; more people notice what is said and not said. A few decades ago, public figures and corporations would weather scandals gracefully with few repercussions, but now with the direct link to the

public through technology, escaping the public gaze is impossible (Velasco, 2021). Although social media helps corporations reach more customers and stakeholders, it can also be used against them when they engage in behaviors that go against the norms established by society. CSR today has become a mainstream business activity, with corporations devoting more resources to public goods and doing more than the minimum required by law (Kitzmueller & Shimshack, 2012). Corporations are no longer apolitical, private actors but entities that set, implement, and develop the norms and values of society (Stohl et al., 2017).

### **Government Law and Supreme Court Decisions That Changed the Corporate Landscape**

Conflicts over competing for individual rights result in broad legal disputes extending to clashes between secular and religious beliefs (Brown & Scott, 2019). Although numerous legislative and judicial decisions have transformed different sectors of society, this section will provide a basic overview of the landmark decisions that cover the legal protection of individuals concerning CSR and corporate activism.

The following constitutional protections apply to the topics covered in this study, comprising the legal framework via which decisions are made at the personal and corporate levels. The First Amendment guarantees both the right of free exercise of religion and the right to be free from the government establishing a religion, the freedom of speech and the press, and the right of the people to assemble in peace. This study explored examples of corporations and individuals exercising their First Amendment rights on social media and the subsequent exchanges and clashes with groups of opposing viewpoints. The Second Amendment of the United States Constitution covers the right of the people to keep and bear arms. The Second Amendment is relevant to gun control and activism, a key topic in this study. The 14th Amendment guarantees all citizens in the United States equal protection of the laws, indicating



that no state can deprive any person of life, liberty, or property without due process of law. The 14th Amendment has been cited numerous times in cases addressing abortion, which is also covered in this research paper.

Other government activities that correlate with the CSR movement and corporate activism are discussed in this section. In the 1960s, rising expectations on the role of business and government manifested through a wide range of social movements. During this period, the passing of the Civil Rights Act of 1964 symbolized the shift from the belief that corporations only had a responsibility to shareholders; the expectation would not include stakeholders (i.e., workers and consumers; Carroll, 2015). The Civil Rights Act of 1964 prohibits discrimination based on race, color, religion, sex, or national origin (U.S. Department of Labor, 2021). This law is relevant to this study because it protects the rights of immigrants, refugees, members of the LGBTQ+ community, religious groups, and those facing race-related challenges. Title VII of the Civil Rights Act of 1964 established the right of employees to be free from discrimination due to religious preference. The Religious Freedom Restoration Act of 1993 (RFRA) protects individuals from government interference in their exercise of religion (Brown & Scott, 2019). The religious protections are utilized by groups in abortion and LGBTQ+ cases and provide context for the reader to understand how corporations and individuals use laws to their advantage.

The government plays a critical role in crafting the rules that define market competition and establishing laws and punishments that serve as firms' institutional environment (McDonnell & Werner, 2016). Recent U.S. Supreme Court decisions have expanded corporations' rights and powers to exercise their political influence in many aspects of public life (Bose & Lyons, 2014). The U.S. Supreme Court's 2010 decision in *Citizens United v. Federal Election Commission*

reversed century-old regulations by removing limitations on corporate spending in elections or supporting political candidates (Hadani et al., 2018). The decision is widely interpreted as reaffirming the right of corporations to be legally considered as people and therefore granting them the same constitutional rights that individuals have by asserting that the First Amendment restricts corporations' spending limits for political purposes (Bose & Lyons, 2014). Although many more laws and regulations have been used for decision-making in CSR and corporate activism activities, the ones presented in this section provide a general framework encompassing corporate activism practices in the United States. More specific cases and examples are addressed throughout this paper when applicable to the section's main topic.

## **Corporate Governance and Corporate Citizenship**

### ***Corporate Governance***

Corporate governance directs and controls the activities of corporations by establishing the rules and procedures for decision-making (Baker & Anderson, 2010). Under good corporate governance, the board of directors representing the shareholders holds the company's management accountable for performance. When there is bad corporate governance, a systemic failure occurs when managers do not take actions representing shareholders' interests or when the board does not monitor activities, causing a breakdown (Guay et al., 2004). According to management scholars, self-regulation in CSR efforts is as effective as government-mandated regulation and programs as organizations strive to improve their social and environmental actions via public rhetoric (Perez-Batres et al., 2012; Runhaar & Lafferty, 2009). CSR disclosure is one strategic decision that companies undertake that serves as a function of the mechanisms of corporate governance (Zhang & Yang, 2021). CSR remains a paradox for corporations attempting to balance corporate governance and aiming to increase shareholder value while

serving stakeholders' social and ecological needs. The challenges are intensified in corporations that engage in controversial sectors whose corporate missions may contradict society's ecological and social interests (Song et al., 2020).

Some corporations have stricter internal guidelines that far exceed regulations expressed through law; these are known as the self-regulatory codes of conduct that are pivotal in confirming the organization's promise to build a sustainable future (Cai et al., 2012; Perez-Batres et al., 2012). Good corporate governance demands that businesses remain focused on profit maximization and operate with a singular fiduciary responsibility to shareholders that override any non-legal duty, as investors tend to avoid companies that are not well managed and profitable (Lindorff et al., 2012). By establishing good corporate governance practices, a firm can successfully tackle CSR efforts that are environmentally sound while simultaneously strengthening societal relationships (Duque-Grisales & Aguilera-Carucuel, 2021; Foote et al., 2010). Corporate governance is a good segue into corporate citizenship, transforming a corporation's inner workings into actions that manifest in society at both local and global levels.

### ***Corporate Citizenship***

According to Carroll (1998), to be good corporate citizens, companies must make a profit (economic), obey the laws (legal), behave ethically (ethical), and give back to the community through philanthropic efforts (philanthropic). Corporate citizenship is more accurately described when accounting for the "social" aspects of CSR because that entails the totality of corporate activity (McEachern, 2015). These actions are aligned with the four faces described by Carroll (1998):

- Economic: good corporate citizens provide strong financial returns for their shareholders while stakeholders can expect business operations, services, jobs, and other perks the organization provides.
- Law: good corporate citizens follow the law and are specifically concerned with laws that affect their status with stakeholders, including consumers, employees, the community, and environment.
- Ethical: good corporate citizens view the law as the minimum requirement for what is acceptable conduct; they go above and beyond compliance with the law.
- Philanthropy: good corporate citizens are philanthropic in giving back and aim to make a difference in the community and leave their stakeholders better off.

Corporate citizenship entails a mutual commitment to social cooperation with external conditions, including economic, social, cultural, and political factors. The external conditions include a wide array of networks that can influence corporations' citizenship (Jeurissen, 2004). As Table 1 shows, corporate citizenship includes networks and subsystems with institutional conditions that alter corporate citizenship status.

**Table 1**

*Institutional Conditions of Corporate Citizenship*

Subsystem	Institutional condition of corporate citizenship
Economical	Market relationships
Political	Regulatory Frameworks
Social	Stakeholder frameworks
Cultural	Societal values

*Note.* Adapted from "Institutional Conditions of Corporate Citizenship," by R. Jeurissen, 2004, *Journal of Business Ethics*, 53(1), 87-96 (doi:10.1023/B:BUSI.0000039401.06659.f8). Copyright 2004 by the author.

The competitive conditions in a market determine corporate citizenship at the economic level; at the political level, the political climate can promote or hinder corporate citizenship. On a social level, the amount of stakeholder activism that a corporation absorbs determines corporate citizenship status; at the cultural level, societal norms and values can hinder or stimulate corporate citizenship (Jeurissen, 2004). Similar to individual citizens, corporations are expected to have full responsibilities; there is also an implication that they need to fit into the communities and countries anywhere in the world where they do business (Carroll, 2015). Corporations that maintain strong relationships with society and the environment by practicing good corporate governance can succeed in their CSR efforts (Duque-Grisales & Aguilera-Caracuel, 2021). Corporate citizenship does not view actions toward stakeholders from a moral perspective; instead, it focuses on treating stakeholders and the environment well (Glavas & Piderit, 2009). Corporate citizenship entails philanthropic efforts to contribute to society beyond the provision of goods and services.

### **Substantive CSR, Symbolic CSR, Greenwashing, and Decoupling**

The existing literature on CSR focuses primarily on two contrasting perspectives, substantive (walk or cause-serving) and symbolic (talk or self-serving; Donia & Tetrault Sirsly, 2016; Ruiz-Blanco et al., 2022). Stakeholders respond distinctively to the prior corporate reputation, influencing the skeptical attitude toward CSR motives and mediating stakeholders' company evaluation (Song et al., 2020). More increasingly, CSR has consisted of corporations taking stands on issues beyond business and involving social and political matters. Corporations that take political stands understand that they are taking a profitable risk but cannot manipulate consumers' values and emotions or appear to be opportunists (de Oca et al., 2020).

Authentic efforts are more about action (substantive) than reflection (symbolic; Mazutis & Slawiski, 2015). The terms substantive and symbolic frequently appear in CSR literature to differentiate possible greenwashers from those committed to authentic efforts and causes (Perez-Batres, 2012). Corporations commit greenwashing acts when they deceptively manage their image with investors, the public, and regulators to hide deviant behavior, spin allegations against, and shift blame to others to maintain corporate reputation (Laufer, 2003). Companies take symbolic actions to show ceremonial conformity, whereas substantive actions result in real operational changes that can be measured and require organizational resources (Schons & Steinmeier, 2016; Zott & Huy, 2007). By investing in environmentally sustainable initiatives and CSR, corporations aim to be perceived as eco-friendly and socially responsible for building positive brand attitudes and purchasing intentions as well as favorable employment and investment outlooks (Gosselt et al., 2019; K. Lee et al., 2013).

Responses to sociopolitical and stakeholder requests vary in substance and form and can range from doing nothing and making symbolic statements to developing a substantive reaction (Groot et al., 2019). Stakeholder calls for more genuine corporate social and environmental efforts stem from increased skepticism due to the growth of corporate malfeasance (Mazutis & Slawinski, 2015). The inundation of CSR in marketing communications has blurred the lines between authentic CSR efforts and those driven by profit (Chatzopoulou & Kiewiet, 2021). CSR actions also affect employees; when a company engages in authentic CSR efforts, it increases commitment to the organization and improves in-role and extra-role performance organizational citizenship behaviors. When corporations' misdeeds or irresponsibility leads to null or negative individual outcomes, corporate engagement in CSR produces favorable outcomes for employees (Donia & Tetrault Sirsly, 2016).

## ***Substantive CSR***

Substantive CSR comprises corporate initiatives driven primarily to address societal needs (Donia & Tetrault Sirsly, 2016). Substantive corporate action, as opposed to symbolic corporate action, implies big expenditures, but it also may directly influence the firm's productivity and reduce litigation risks (Schons & Steinmeier, 2016). The Federal Trade Commission and the Bureau of Financial Protection look for consumer fraud actions in CSR information's accuracy (Cherry, 2014). Substantive actions increase legitimacy and explain the relationship between business and society, bringing rewards or incentives to organizations that contribute to society's well-being (Matejek & Gössling, 2014). Corporations take substantive or direct action when they impose standards on their suppliers and boycott those that do not produce goods under their socially and environmentally acceptable means (Paynton & Schnurer, 2010).

Another example of substantive CSR occurs when companies withdraw advertising from programs that do not align or comply with their stance on social issues (Eilert & Cherup, 2020). Although most CSR actions are intentional, other priorities may precede those actions. Corporations will sometimes engage in CSR efforts not because they want to engage in behavior that helps social or environmental causes, but for cost-saving reasons (Cherry, 2014).

Extensive research demonstrates that substantive CSR efforts increase the organization's level of attractiveness, commitment, identification, trust, pride, job enjoyment, the passion of work, and in-role achievement (Donia & Tetrault Sirsly, 2016; Hansen et al., 2011; Jones et al., 2014; Moon et al., 2014). Legitimacy is important for the level of cultural support and investor appeal because it can create a bigger unsystematic variation in stock prices (Panwar et al., 2014). Stakeholders typically look at the distinctiveness of CSR efforts and their connection to the

organizational mission, vision, and values, as well as social relatedness, which is the extent CSR actions align with the larger social conditions (Mazutis & Slawinski, 2015). A higher level of authenticity determines the degree to which consumers and stakeholders believe the organization's claims (Chatzopoulou & Kiewiet, 2021).

### ***Symbolic CSR***

Whereas substantive CSR aims to improve society, symbolic CSR involves self-flattering presentation, a characteristic of the self-serving organization (Donia & Tetrault Sirsly, 2016). Corporations engage in lip service behavior in corporate reports, websites, advertisements, and elsewhere to spread the notion that they act socially responsibly (Campbell, 2007). Symbolic actions allow corporations to appear as if they are doing something to fulfill stakeholders' requests at a low cost and without altering the business processes; even ceremonial conformity can increase the organization's legitimacy in the right conditions (Schons & Steinmeier, 2016). Corporations use symbolic and rhetorical framing to improve or maintain their public image (Campbell, 2007). An example of a corporate symbolic action was when Coca-Cola pledged \$2 million for five years to the World Wildlife Foundation (WWF) to save polar bears (Coca-Cola's mascot), compared to their \$4 billion annual marketing budget (Donia & Tetrault Sirsly, 2016).

Critics question if CSR is a management tactic to handle issues symbolically or for corporations to greenwash their activities (Bowen & Aragon-Correa, 2014; Jackson et al., 2020). When responding symbolically, corporations only appear to make changes to meet the expectations of stakeholder activists (Groot et al., 2019). Schons and Steinmeier (2016) argued that the proximity to an organization impacts the validity of substantive and symbolic CSR activities. Substantive actions are effective for high-proximity stakeholders (employees) because they recognize authentic efforts and appreciate viewing the company positively. On the other



hand, symbolic CSR is more effective when aimed at low-proximity stakeholders such as the customers or communities they conduct business with because they have more difficulty discerning information as genuine or deceptive.

### ***Greenwashing***

Another word that is used frequently to describe symbolic actions by corporations is greenwashing. Greenwashing is a symbolic attempt but no substantive action on CSR issues; it can relay selective positive information to impress stakeholders and mislead them (Mahoney et al., 2013; Ruiz-Blanco et al., 2022; Zhi et al., 2020). Jay Westervelt popularized greenwashing in 1986; he was a New York environmentalist inspired by the idea of whitewashing, which symbolized adding bright paint to conceal flaws (Dickinson, 2012). Westervelt wrote an essay criticizing a hotel that urged customers to use bath towels in their rooms more than once, touting environmental friendliness, but in reality, it was viewed as an attempt to cash in on the growing interest in the environmental movement (Dickinson, 2012; Donia et al., 2019). The proliferation of sustainable products and services has exposed businesses to accusations of greenwashing (Jacobs & Finney, 2019). Corporations increasingly engage in greenwashing by omitting questionable CSR data in their communication and marketing approaches (Delmas & Burbano, 2011; Siano et al., 2017). Greenwashing has made it possible for corporations to share information with stakeholders that are hard to verify by non-experts (Bazillier & Vauday, 2014).

The practice of greenwashing leads to questioning whether companies are trusted to respond authentically and substantively to pressing environmental and endemic social issues (Pope & Wæraas, 2016). Extreme consequences may result from greenwashing going unchecked for long periods of time because fewer investors or stakeholders are willing to invest, and it encourages the deceitful practices of corporations (Zhi et al., 2020). Enron is an example of a

company that appeared to be a good corporate citizen with strong CSR rankings before its acts of corporate malfeasance were uncovered (Mazutis & Slawinski, 2015).

Greenwashing actions can lead to scrutiny from stakeholders but also are subject to federal and state jurisdiction. The greenwashing actions of a corporation subject to federal regulation fall under Section 5 of the FTC Act (Delmas & Burbano, 2011). The Federal Trade Commission (FTC, 2013) is empowered to apply Section 5 to CSR marketing claims by forbidding deceitful actions and unfair established ways that affect commerce. Although protection agencies serve to safeguard consumers, it is difficult to prosecute because most CSR claims are not fully false but are partial truths beyond the purview of the law. Whereas corporations retain latitude in their disclosures of favorable information, government agencies and NGOs can disclose the less fortunate information, which counterbalances corporate claims (Lyon & Montgomery, 2013).

When communicating CSR initiatives, stakeholders tend to view external sources as more credible than internal sources (from corporations), which consumers may perceive as self-serving (Dawkins, 2004; Gosselt et al., 2019). When corporations propagate self-serving ethical claims or greenwash, it leads to cynicism from stakeholders (K. Lee et al., 2013). Companies that report positive CSR performance must anticipate the risk of being attacked for greenwashing (Lyon & Montgomery, 2013). Consumer and shareholder demand for CSR products and services are among the leading drivers of greenwashing (Delmas & Burbano, 2011). Greenwashing has limited benefits (the perception of environmental performance), can be a threat to the corporations (perceived integrity), and possesses no bona fide competitive leverage (purchase interest; de Jong et al., 2018).

## *Decoupling*

CSR greenwashing requires decoupling CSR statements from CSR practices, which is a common practice in nearly all CSR initiatives (Pope & Wæraas, 2016). Decoupling is a strategy used to manage outside impressions, and it is done by separating core internal activities from more visible and public aspects of the organization (Clementino & Perkins, 2021; Lyon & Montgomery, 2013). Decoupling refers to corporations promoting ambitious CSR projects without the proper organizational structures (departments) or the plentiful mechanisms to attain the applicable corporate standards (Siano et al., 2017; Zhi et al., 2020). Greenwashing is a decoupling strategy that aims to appear authentic and legitimate by indicating compliance without conforming strictly (Delmas & Burbano, 2011; Yang et al., 2020).

Studies in the management field have uncovered that symbolic actions can be decoupled from application while acquiring the accurate results that emphatically affect a corporation's legitimacy (Perez-Batres et al., 2012). When shareholders signal to corporations that they want a change to occur, at times, managers will engage in behaviors that appear to address shareholder desires but do not result in organizational changes; these symbolic actions are decoupled from actual practices but provide a legitimate explanation for company actions (Cundill et al., 2018). Due to the low cost of symbolic efforts, seemingly minimal legal repercussions, and strong demand from stakeholders, companies are likely to engage in actions that are considered greenwashed by using the strategy of decoupling. However, as they prolong those tendencies, pressures from stakeholders increase and end up affecting their corporate image and reputation as the ability to greenwash effectively declines (Lyon & Montgomery, 2013).

## **Corporate Image and Reputation**

Corporations understand that it is critical to participate in CSR activities and justly necessary to communicate CSR information to their stakeholders (Tata & Prasad. 2015). The corporate image, or as it is called in management literature, the corporate reputation, affects recruiting, public relations, publicity, and sales (Furman, 2010). A corporation's branding is a categorical commitment between the firm and key stakeholders that aligns an organization's vision and employees' values to deliver consistent communication (Foster et al., 2010). Companies build a consummate reputation and corporate image when they engage in CSR activities while commanding positive consumer awareness, attitude, and a sense of attachment (Hur et al., 2014). Well-designed CSR initiatives can yield financial benefits related to a positive image and strong stakeholder relationships that include increased loyalty and satisfaction (Du et al., 2015)

Socially responsible corporations have an increased opportunity to attract, retain, and motivate employees due to their positive image allowing members to develop their self-esteem and gain confidence in their career advancement (Mirvis, 2012; Moon et al., 2013). Typically, poor corporate reputations negatively influence CSR outcomes (Song et al., 2020). A good corporate image helps companies achieve internal and external goals because having a negative image does the opposite and prevents successful CSR outcomes. Abstract resources that are hard to copy or replace include the corporate reputation, culture, and potential to improve corporate financial performance (Hur et al., 2014).

CSR has been recognized as a tool that enhances and manages corporate authenticity and legitimacy (Lyon & Montgomery, 2013). When constructing authenticity, marketers advise that (a) companies/brands should stick to their stands without fear of alienating consumers; (b) in

order not to appear superficial or opportunistic when engaging in politics, corporations should align values with actions; (c) because emotions convey the truth, commercials' narratives should mobilize emotions; and (d) commercials should have closure so that consumers feel the problem has a solution and they experience emotional relief (de Oca et al., 2020). The success of an organization's CSR efforts depends on the truthfulness of its CSR principles and practices and the ability to communicate those practices to its stakeholders (Tata & Prasad. 2015).

A corporation's reputation and image are threatened when investors criticize them on social media as information spreads rapidly (Zhang & Yang, 2021). With social media available to stakeholders, it has become ever more necessary for corporations to conform to external groups' demands to continue doing business, avert reprimand from influential stakeholders, and accomplish the presence of legitimacy (Lyon & Montgomery, 2013). Deliberate published communication on social media incorporates the demands of several stakeholders and allows for an open dialogue between stakeholders (Kim, 2019). Social media makes it easier for stakeholders to protest and form a unified voice against corporations that go against their interests or those of society; these protests affect their reputation and legitimacy (Groot et al., 2019).

The shift that aims to make the corporate image more appealing to the many internal and external stakeholders continues to occur in real-time. In August 2019, 181 of 188 CEO representatives of the influential Business Roundtable endorsed and presented *Our Commitment-Statement on the Purpose of a Corporation* (Taylor, 2019; Tucker & Jones, 2020). A summary of the revised principles highlights a commitment to stakeholders that keep them in business and to the communities, their businesses engage and are a part of (Tucker & Jones, 2020)

## **Woke Capitalism, Virtue Signaling, Cancel Culture, and Identity Politics**

Buzzwords like cancel culture, woke capitalism, virtue signaling, and identity politics are frequently used to attack disingenuous efforts or go against societal standards (Coppola, 2021). Currently, there is a simultaneous acceleration in right-wing nationalism, populism, and authoritarian neoliberalism amid a corporate climate full of rebellious posts and the championing of identity politics constantly labeled *woke capitalism* (Kanai & Gill, 2020). Examples include the adoption by capitalist companies of feminists, queer pride, and social movements in their merchandise and services (Kanai & Gill, 2020).

The advances in social media have facilitated socio-political discussions by breaking them down into simple narratives comprising binary antagonism of good and evil created by symbols and buzzwords instead of careful consideration in matters of contention (Bouvier & Machin, 2021). Social media has permeated society, turned into a dominant tool in the present day, and created the runway for the surge of social movements through its digitally participative nature (Velasco, 2021). To provide perspective, all four critical responses to CSR, like efforts and corporate activism initiatives, are covered in the next section.

### ***Woke Capitalism***

*Woke* refers to the corporate production of value from the attempts for acceptance championed by attested marginalized and oppressed communities (Kanai & Gil, 2020). Companies that had avoided any sort of discussion about politics have suddenly become woke (de Oca et al., 2020). The election of Donald Trump caused a resurgence in corporate wokeness as companies aimed to capitalize on widespread division and would go beyond feel-good product-based communalism into taking what resembles an overtly political stance (Nair, 2019). Woke ads that target controversial issues are direct in that they do not just aim to evoke feelings

but also promote what the corporations stand for on a particular social or political issue (Riley, 2020). Political awareness or wokeness is largely dependent on social media, and this relation has enabled corporations to attach themselves to sociopolitical issues, which helps create an appearance of progressiveness (Vis et al., 2020).

Some observers view that people and corporations are alert to institutional racism, homophobia, transphobia, and sexism and are courageous in battle, whereas others view them as “special snowflakes” that are unable to accept any worldview that does not match theirs (Eilert & Cherup, 2020; Jacobs & Finney, 2019). An example of woke capitalism is when corporations take a stand against social injustice by firing a person or releasing a statement without any substantial modifications to the systems that encouraged or fostered such behaviors (Sailofsky, 2021). Although the term woke is routinely associated with racial awareness, it has grown in complexity, with some feeling that it has been co-opted mostly by White people to articulate their social consciousness disingenuously (Coppola, 2021). This section highlights the hijacking of movements by corporations to gain relevance with disadvantaged groups while making money doing so. It also shows that corporations will align themselves with causes by taking a stance on controversial issues to show stakeholders where they stand socio-politically.

### ***Identity Politics***

Renee Anspach coined identity politics in 1979 in reference to people with disabilities to alter the societal perception of people with disabilities (Bernstein, 2005). More recently, identity politics has become popular due to the political and social movements that promote the acceptance of people’s sexual, gender, ethnic, religious, and racial identities (Beland, 2017; Bernstein, 2005). Some have claimed that identity politics is a strawman argument by groups that are unhappy with the course of modern politics, especially with the left (liberal-leaning) during

the second half of the 20th century (Pritchett, 2005). Identity politics is a cultural phenomenon since each identity group pushes for respect and acceptance of their differences that derive from unique group identification (Bernstein, 2005). The term identity politics can be problematic when used in an academic setting since it focuses on certain people and is depicted as a current phenomenon that can cloud the boundaries and the creation of identity as key facts of public policy and politics (Beland, 2017). The rise of large-scale political participation that differs from connecting to political parties or candidates to direct connection with corporations and brands is due to the personalization of politics, which mobilize multiple issues that are part of the same protests through a shared ethos of inclusiveness and diversity (Bennett, 2012).

Identity politics discourse tends to conceive identity in terms of a person's ethnicity, gender, or gender orientations, with critics wanting to replace the idea of identity with one that promotes a sense of belonging to a group with shared values (D'Ambrosio & Moeller, 2021). Identity politics is often dismissed as a wicked closure of the liberal mind that has permeated politics and modern society, and more recently in universities (Beland, 2017). Scholars and the press frequently associate political correctness with identity politics, with the former used as a tool to assault racial inclusion attempts and academic reform at universities while simultaneously promoting conservative values (Bernstein, 2005). Critics argue that the academic left has lost interest in commonalities by engaging in identity politics because doing so prevents the reemergence of universalist politics that were present in the civil rights movement (Pritchett, 2005). One of the problems identity politics presents is that it places the in-group at odds with the perceived other, and it can foster open antagonism, discrimination, and chauvinism (Dervis, 2015). The terms identity politics and, as it is sometimes known, political correctness appear to



splinter liberal groups from conservative groups much like the rest of the terms that are critical of CSR, corporate activism, and its equivalents.

### ***Cancel Culture***

Cancel culture is referred to by many who sit on the political right as a method of political correctness, or identity politics gone wrong, which possesses threatening *Cultural Marxist* undertones aiming to overthrow Western societies (Bouvier & Machin, 2021). Cancel culture as an ideology views reality as socially constructed and is associated with group identity, power, and oppression (Velasco, 2021). Those that demonize *cancel culture* are argued to be doing it to protect their historically privileged voices that frame accountability they now face as being exaggerated to reduce the effect of their behavior and discredit marginalized groups (Sailofsky, 2021). Organizations and individuals face cancellation when the stakeholders withdraw their attention because of (in) action, offensive speech, or a clash in values that result in less money spent and engagement (Clark, 2020). Getting canceled results in reputational loss even though there might have never been a formal conviction of criminal behavior (Ng, 2020; Sailofsky, 2021). Canceled groups have ruptured the line of what is socially acceptable and are called out for bullying, homophobia, racism, sexism, and other related issues (Ng, 2020; Velasco, 2021).

The language of being canceled was originally an internet meme popularized on Black Twitter, which is a community of culturally connected communities on the social media platform (Clark, 2020; Shifman, 2013). Before the popularization of cancel culture, boycotts and blacklisting served as mechanisms limited in goals and validity by time, power dynamics, and resource availability (Clark, 2020). When dealing with injustice or the perception of justice, cancel culture also serves as a way for those in the canceled campaign to demonstrate they are

morally good (Bouvier & Machin, 2021). One of the critiques of cancel culture is that brands will lean toward low-cost but high-noise actions as a substitute reform to ensure their survival (Sailofsky, 2021). With social media, millions of people are part of collective networks that can mobilize in real-time and call for the accountability of powerful figures and organizations (Clark, 2020). Social media allows cancelation to spread like wildfire as thoughts and beliefs coalesce to create an echo chamber where people who think the same way hear what they want to hear and push for the same result (Velasco, 2021). This section highlights social media's effects on movements and their power to remove those unwanted characters from society if they go against socially accepted norms.

### ***Virtue Signaling***

Virtue signaling refers to moral grandstanding by contributing to moral discourse by convincing others that the acts performed are morally right (Levy, 2021). Moral grandstanding and performative allyship are the forerunner terms of virtue signaling (Coppola, 2021). Virtue ethics are rooted in the works of Plato and Aristotle and focus on the individual permeated with virtues such as honesty, integrity, honesty, and benevolence (Carroll, 1998). To be accused of virtue signaling indicates that a corporation or an individual is displaying a favorable trait but doing it for the wrong reasons by pretending to care. Virtue signalers are accused of acting outraged by injustice but are motivated by letting others know how morally superior they are to others, turning discourse into their vanity project (Levy, 2021).

Similar to accusations of greenwashing, virtue signaling as a marketing strategy is a tactic deployed by corporations. Socially conscious corporations virtue signal strategically to persuade stakeholders rather than hiding their political or social viewpoints that could result in investor backlash (de Oca et al., 2020). Proponents view CSR efforts as an ideological or political

masquerade acting predatorily by using soft power to socially legitimize a corporation (Alcadipani & de Oliveira Medeiros, 2020; Brodmerkel, 2019). American conservatives and corporations propagandize corporate virtue to dampen the effects of progressive forms of consumer action (Bennett, 2012).

### **CSR Scandals**

CSR scandals occur when unsustainable business activities reveal high-level risk exposure to an organization. Corporate scandals are highly publicized events that involve allegations of unethical behavior or managerial wrongdoing by one or more individuals in a company (Del Giudice & Rigamonti, 2020). CSR scandals that harm internal and external stakeholders with different intensity levels and society through environmental means may be subject to punishment under the law, most specifically crimes under corporate law (Alcadipani & de Oliveira Medeiros, 2020). Corporate scandals can catalyze corporations to implement changes that benefit shareholders (Utz, 2017). Corporations engaging in criminal actions can be traced back to discussions involving white-collar crimes, which are violations of criminal law by a person of the upper socioeconomic class while performing in an occupational capacity (Alcadipani & de Oliveira Medeiros, 2020).

The early 2000s witnessed a series of ethics scandals involving company leadership, such as the CFOs and CEOs, which included companies: WorldCom, Tyco, Adelphia, Global Crossing, and the most notable, Enron (Carroll, 2015; Matten & Moon, 2008; Utz, 2017). The Enron scandal drew increased attention to CSR and CSR disclosure (Giannarakis, 2014). The Enron scandal of 2001 was the last domino that led to the passing of the Sarbanes-Oxley Act (also known as the Corporate Oversight Bill) on July 25, 2002 (Agrawal & Chadha, 2005; Coates, 2007). The Sarbanes-Oxley Act shifted from explicit to implicit corporate responsibility

within the wider institutional framework (Matten & Moon, 2008). The Act required public companies to fund the Financial Accounting Standards Board instead of relying on accountants that prioritize judgment standards aiming fair reporting instead of rules that welcome evasion practices (Coates, 2007). The Act restricted auditor services available to their clients undergoing audit (Agrawal & Chadha, 2005). When big scandals occur, the government tends to punish the offenders through fines and enact legislation that discourages such behavior from happening again.

One notable example of the government punishing corporations occurred in 2010. The federal government issued the largest civil fine in American history against BP for the Deepwater Horizon oil spill, which killed 11 workers and dumped over 3 million oil barrels on the Gulf of Mexico (Cherry, 2014; Jacobs & Finney, 2019). BP had spent money on a green advertising campaign called *beyond profit*, which gave the appearance that the company practiced CSR and invested in alternative energy while simultaneously engaging in poor safety protocols and risky extraction practices (Cherry, 2014). Public opinion condemned BP's response to the disaster and contributed to the 40% drop in sales at BP gas stations (Kang et al., 2016). The BP oil spill example demonstrates that vague, misleading, and fraudulent claims regarding practices and products can lead to negative backlash from stakeholders (Jacobs & Finney, 2019). The scandal lowered the corporate legitimacy of BP as the media, and environmental NGOs accused it of faking a green image without backing it up with strategic or operational change (Matejek & Gössling, 2014).

In 2014, the Volkswagen scandal started when the International Council on Clean Transportation (ICCT) report identified discrepancies in three diesel cars and provided scientific and technical analyses to the EPA and to the California Air Resources Board, which began its

investigation (Siano et al., 2017). The investigation revealed that the Passat, and Jetta, both made by Volkswagen, produced on-road emissions at a high rate and emitted nitrogen oxides higher than the legal limit during the road tests (Cruden et al., 2018). Days before the scandal became public, Volkswagen's status of being included in the Dow Jones Indices was confirmed, only to be delisted in light of the new information (Utz, 2017). Despite various cover-ups and continuous questioning, a Volkswagen employee defied leadership by deviating from the given script and told regulators that the company produced cars that deceived emission testing (Cruden et al., 2018). Volkswagen was symbolic and irresponsible in claiming to be the world's most sustainable car producer while faking compliance and violating corporate sustainability practices (Siano et al., 2017). The Volkswagen scandal is a perfect example of a corporation greenwashing its actions to deceive the public and the government.

### **Climate Change**

When discussing sustainability, CSR, and corporate activism, it is important to explore the most widely developed and financed subject, which is climate change. During the 1960s and 1970s, many social movements addressed society's concerns, such as rapid population growth, resource depletion, and pollution. During this period, the momentum gained through social movements was enough for the federal government to make significant changes. The EPA was created in 1970, highlighting the notable progress made during that era (EPA; Latapi Agudelo et al., 2019). The EPA and the local and international bodies that supplement its guidance have engaged corporations directly since its inception to regulate corporate malfeasance, such as the Volkswagen scandal discussed in the previous section. Green energy is big business and one of the industry leaders in terms of commitments from organizations in the United States. By 2018, over 1,000 companies with over \$8 trillion in assets committed to fossil fuel divestment, a

significant increase from the 181 institutions and \$50 billion in 2012 (Jacobs & Finney, 2019). In 2015, the fossil fuel industry accounted for over 90% of global greenhouse gas emissions (Jacobs & Finney, 2019). In 2020, of all assets under management from money managers and institutional asset owners, \$4.18 trillion of \$51 trillion addressed climate change risk in their investment analysis (US SIF, 2020).

In 2016, President Donald Trump issued a statement declaring the decision to pull the United States from the Paris Agreement. The decision dramatically changed the United States' position, which had historically been a global leader fighting climate change (Lan et al., 2020). The decision to pull out of the Paris Agreement resulted in a public display of corporate activism concerning climate change. Publicly traded companies that included Amazon, Bank of America, Citi, DuPont, HP Inc., IBM, and Shell were some of the 41 companies that collaborated with the Center for Climate and Energy Solutions (CCES, 2021) in urging the incoming Biden administration to express support for the U.S. rejoining the Paris Agreement and to pass bipartisan policies aimed to combat climate change. On the first day of his presidency, Joe Biden signed for the United States to rejoin the Paris Agreement. In addition, President Joe Biden has apologized for the Trump administration's decision to withdraw, admitting that it had set the world back in the fight against climate change (Chalfant, 2021).

### **Corporate and CEO Activism Takes on Controversial CSR Topics**

Corporate activism focuses on problems that face barriers in their journey toward a solution; the behavior is goal-oriented toward solving specific social issues or transforming the social order (Eilert & Cherup, 2020). Corporations often engage in activities head-on by participating directly in campaigns that influence their institutional environment, including topics debated in social and political spheres that are divisive, contested, and emotionally charged

(McDonnell, 2016; Nalick et al., 2016). Corporate activism occurs when a company takes a strong, public stance on an issue it defends despite criticism (Eilert & Cherup, 2020).

Controversial industries offer products, services, or ideas that elicit negative reactions from stakeholders when presented openly for reasons of sensitivity, decency, morality, or even fear (Cai et al., 2012; Wilson & West, 1995). When sociopolitical issues lack societal consensus, they split opinions between supportive and opposing groups (Nalick et al., 2016). When corporations engage in divisive matters, they risk alienating their stakeholders with opposing views and face criticism when their actions are insincere or inauthentic (Lan et al., 2020; McDonnell, 2016). Divisive issues like gun control and reproductive rights allow corporations to establish their stances publicly (Dodd & Supa, 2015).

Corporate activism occurs when a company willingly takes a stand on social, political, economic, and environmental issues to influence behaviors and attitudes and create societal change (Eilert & Cherup, 2020). Examples include corporate-sponsored protests, mobilizing grassroots campaigns, and negative public relations campaigns that target activists (McDonnell, 2016). When the government does not act on a pressing issue, pressure groups will generally employ corporations as a substitute for action because they are highly visible in the social environment and can influence the political process (Nalick et al., 2016). Voters before the 2020 presidential elections considered gun control (74%), immigration (84), race relations (66%), abortion (64%), and LGBTQ+ rights (38%) as either important or very important (total % added) when considering the candidates (Hrynowski, 2020). Gun control, gay marriage, transgender rights, and immigration have majority support at the federal level, but local and state governments may disagree and impose additional restrictions/legislation (Nalick et al., 2016). Through pronouncements, policies, sponsorships, and lobbying, corporations contribute

resources to social issues such as immigration, gun regulation, racial justice, and religious freedom (Lin, 2018).

With pressure from internal and external stakeholders, companies and CEOs increasingly are under pressure to act and speak out for causes viewed as important to stakeholders. CEO activism entails corporate leaders taking sociopolitical stances on matters that are not related to the core business (Lan et al., 2020). Companies that do not engage internally in the change efforts they seek in society can lead to backlash from supporters of the social issue (Eilert & Cherup, 2020). As disagreements with governments characterize the current business climate, stakeholders increasingly demand that CEOs and corporations fight against unwanted government activities that go against their values (Lan et al., 2020). Some of the important issues that stakeholders want CEOs to defend include same-sex marriage, immigration, gun control, and race relations (Lan et al., 2020). Corporations that make supportive statements on racial injustice, gender equality, or human rights put a positive spin on their brand by obscuring their capitalist reality that can be oppressive (de Oca et al., 2020). The following sections present some examples of the topics mentioned above and the actions corporations and CEOs have taken concerning hotly contested issues and their subsequent backlash and reactions from the public, specifically on social media.

### ***Gun Control***

Medical professionals in the U.S. have declared gun violence a major public health issue due to the 100,000 people that are injured or killed by guns (Zoller & Casteel, 2022). The Second Amendment of the United States Constitution states: that a well-regulated militia, being necessary to the security of a free state, the right of the people to keep and bear arms, shall not be infringed. Despite the Second Amendment, gun violence and the topic of gun control is a



recurring divisive issue in American society. A 2019 Gallup poll showed that 61% of respondents believe there should be a ban on the production and possession of firearms considered assault weapons, while 38% are against it (Newport, 2019). The pressure to change the gun laws exists clashes with constitutionally protected rights, leading to a constant battle between groups to bring forth change in the gun debate. Mass shootings typically result in heavy media coverage, outrage and pleading for gun reform, and anger from pro-gun activists (Zoller & Casteel, 2022).

In December 2012, public concerns, corporate response, and mobilization around gun violence and regulation surged after the indiscriminate killings of educators and children in Newtown, Connecticut (Cook & Pollack, 2017). In 2013, a year after the Sandy Hook shooting in Newtown, 51% of Americans expressed dissatisfaction with current gun laws compared to 43% who were satisfied; in 2015, the highest dissatisfaction, 62%, was recorded (34% satisfied) a month after the 2015 San Bernardino, California mass shooting (Newport, 2019). Mass shooting events in the United States have created numerous social movements over the last 20 years, including Moms Demand Action for Gun Sense in America, Million Moms March, and the Sandy Hook Promise (Zoller & Casteel, 2022). Mass shootings tend to reignite the gun control debate and have included the involvement of corporations and CEOs in recent years.

One of the most recent examples of corporate activism related to gun control occurred in 2018, after a mass shooting at Parkland, Florida, high school that accounted for the lives of 17 people. Stakeholder pressure resulted in corporations making changes to reduce gun violence. Dick's Sporting Goods and Walmart increased the age limit to purchase firearms from 18 to 21, and Delta Airlines, Budget, Symantec, and United Airlines were some of the companies that severed their partnership with the NRA (Fan, 2019). Despite backlash from the NRA,

manufacturers, and other stakeholders, Dick's Sporting Goods stock went up as the CEO, Ed Stack, supported the social movement behind #NeverAgain and promised action instead of thoughts and prayers (Eilert & Cherup, 2020; Stack, 2019). Some corporations have chosen to remain silent on the issue of addressing gun violence; for example, FedEx said it would not change the rates of any of its millions of customers in response to their political beliefs or stance on social issues (Fan, 2019). During this time, various protests gained popularity to place pressure on the government to act and do something about gun violence. Student survivors of the shooting organized a national walkout on social media by using the hashtags #NeverAgain, and #MarchforourLives. The movement led over half a million people to protest in Washington, DC, at the March for our Lives rally, along with 800 concurrent protests throughout the United States (Zoller & Casteel, 2022). Corporations have acted to address gun violence by showing leadership in making changes to their business practices in ways that congress or courts cannot (Fan, 2019).

### ***Immigration and Refugees***

Immigration has been a recurring theme in American politics since its founding. The nation is known as the world's melting pot, home to more people from different nationalities than anywhere else on the planet. As the immigrant population grows, Americans are filled with anxiety as they notice the accompanying demographic, economic, and cultural changes (Abrajano & Hajnal, 2015). A 2021 Gallup poll reflected this concern, especially regarding illegal immigration; when asked how much they personally worry about immigration, 40% responded a great deal, 20% responded a fair amount, 22% only a little, and 18% did not worry at all (Brenan, 2021). More Americans show concern about immigration, especially illegal immigration. The media and the two major political parties take advantage of the partisanship as one (democrats) acknowledges the benefits that immigration can provide, while the other

(republicans) bemoans the social, economic, and cultural costs associated with immigration (Abrajano & Hajnal, 2015). In a 2021 Gallup poll regarding immigration and the current level, 35% of respondents said it should remain the same, 33% believed it should be increased, and 31% wanted a decrease (Brenan, 2021).

Although immigration has been a core issue since the United States gained its independence, it has become an important topic causing many debates, and discussions after the election of Donald Trump became president in 2016. President Donald Trump's policy and communications caused a lot of frustration and division (Lan et al., 2020). The Trump administration's immigration policy sparked a national discussion on social media and offline activism (Chon & Park, 2020). A New Balance spokesperson welcomed Trump's win and felt that the country was moving in the right direction, which caused a well-known Nazi blogger to declare New Balance the shoe of White people (Heldman, 2017). Social media activists posted pictures and videos of them burning their New Balance shoes with the hashtag #boycottnewbalance (Heldman, 2017). When the Trump administration introduced family separation measures for immigrant families on the border it shares with Mexico, Tesla's Elon Musk and Apple's Tim Cook condemned the actions on Twitter (Nair, 2019).

In 2017, in one of his first actions as president, Donald Trump issued Executive Order 13769, which barred entry of non-citizens from Iraq, Somalia, Iran, Sudan, and Yemen (Exec. Order No. 13769, 2017; U.S. Government Publishing Office, 2017). The move was dubbed the Muslim travel ban and reignited the Islamophobic sentiments present after 9/11/01 (Uzma, 2017). Normally travel bans are acceptable in order to maintain national security; however, President Trump used the travel ban to solidify support with his base by capitalizing on the fears and ethnocentrism of some Americans (Lutz & Ulmschneider, 2019). In response to the travel

ban, companies including Apple, Microsoft, Twitter, Facebook, and Netflix, along with over 100 other corporations, filed an amicus brief protesting the ban and elaborated on its impact on the communities they served (Fan, 2019).

The travel ban caused reactions from both sides of the political aisle, with groups targeting companies over their standing on the issue. On the liberal side, over 200,000 Uber users deleted the app after they lowered their prices to JFK airport after drivers protested the ban; its attempt to break the strike resulted in the #DeleteUber (Heldman, 2017). Uber's competitor Lyft saw a download surge when they announced a one million dollar donation to the ACLU to counter the travel ban (Brown & Scott, 2019). Conservatives had their trending movement called #Boycott Starbucks, after which CEO Howard Shultz denounced the travel ban and committed to hiring refugees and immigrants as a response (Eilert & Cherup, 2020; Heldman, 2017). During the 2017 Super Bowl, the hashtag #BoycottBudweiser trended over the commercial depicting the immigration of the founder of Budweiser to the United States; it was seen to be critical of the Trump ban (Heldman, 2017). These events highlight how contested issues cause uproar across political allegiances and the increased backlash for corporations taking a stance on social media.

### ***Race Relations***

Race relations, especially between White and Black people, have been the center of many heated discussions dating back to the founding of this nation in 1776. The injustices encountered by African-Americans and people of color exist throughout society. Racial and social research uncovered that minorities have a higher chance of experiencing educational obstacles, have a negative sentiment toward law enforcement, and are more likely to receive severe sentencing (Intravia et al., 2020). Over time, governments and businesses have attempted to address these injustices to varying degrees.

Despite attempts to address injustices, in 2021, 42% of adults believe that race relations between White and Black people are very good or somewhat good, compared to 57% saying that they were rather bad or very bad (Brenan, 2021). Since 2015, more Americans have felt that race relations in the country are negative. When the responses are broken down by race, in 2015, 54% of White adults viewed race relations negatively 2015 compared to 27% the year before; in 2021, the number was 56% (Brenan, 2021). Among Black adults, half of them viewed race relations negatively in 2016, and today a total of 66% of Black have negative views on the current state of race relations (Brenan, 2021).

The acquittal of George Zimmerman in 2012 in the fatal shooting of Trayvon Martin, an African American teenager, gave birth to the BLM movement; they are the most prominent group fighting systemic racism and racial inequality (Carney, 2016; Intravia et al., 2020). The frustration with the pace of progress of American race relations and the lack of judicial and moral accountability for the deaths of young Black people in the hands of law enforcement combined to give strength to the BLM movement (Seymour, 2016). In 2014, the BLM movement gained traction on social media with the protest #BlackLivesMatter after the killings of Michael Brown in Missouri and Eric Garner in New York by members of law enforcement (Intravia et al., 2020; Seymour, 2016). The demonization of police departments caused the rise of Blue Lies Matter protests formed by police forces and supporters as a countermovement formed in 2014 (Seymour, 2016).

In 2016, the quarterback for the San Francisco 49ers, Colin Kaepernick, began kneeling during the national anthem to protest racism and police brutality after a series of high-profile police shootings against unarmed Black men (Nair, 2019). Nike placed Kaepernick as a central figure in a massive advertising campaign for its 30th anniversary, with ads reading to “believe in

something, even if it means sacrificing everything” (Intravia et al., 2020, p.1224). The move divided consumers, as many burned their Nike merchandise to protest the company; despite the effort, Nike’s stock rose 18% in the days following the announcement (de Oca et al., 2020).

The summer of 2020 was tumultuous for race relations in the US as tens of thousands took to the streets to protest state violence against Black people following the murders of George Floyd, Breonna Taylor, and Ahmaud Arbery (de Oca et al., 2020). These events led to Goldman Sachs establishing a \$10 million fund to promote racial equality and honor the victims’ legacies. Money for racial-related causes was also contributed by Spotify, Amazon, Walmart, and Google (Fraser, 2022). These events simultaneously evolved the concept of cancel culture into one of calling out politically incorrect groups into an umbrella philosophy that merged disparate movements like Me Too, BLM, and Antifa (Duque et al., 2021).

With the 2020 elections looming, different groups targeted social media companies in their role of facilitating or allowing hate speech and misinformation on their platforms. The campaign #StopHateForProfit began when critics argued that Facebook did little to address misinformation and hate speech in its advertising practices and content moderation (Singh & Blase, 2020). In June 2020, over 1,200 companies including Best Buy, Starbucks, Verizon, and Patagonia took a stand against Facebook in a boycott over hate speech, which resulted in a drop in market value of \$56 billion for the company (Eilert & Cherup, 2020). Organizations including the Anti-Defamation League put out an ad aimed at Facebook that called for the firm to value profits over hate, bigotry, racism, anti-Semitism, and disinformation (Anti-Defamation League, 2021).

## ***Abortion***

In the 1973 *Roe v. Wade* ruling, the Supreme Court ruled that women had a constitutional right to an abortion under the Due Process Clause of the 14th Amendment (Regan, 1979; *Roe v. Wade*, 1996). In 1992, in *Planned Parenthood of Southeastern Pennsylvania v. Casey*, the Supreme Court ruled that abortion regulations are allowed, but they cannot cause an undue burden to the woman seeking an abortion (New, 2011). The issue of purposely terminating pregnancy remains controversial, and often, providers of such abortions are the subjects of moral and religious debates (Boyle et al., 2015; Lindorff et al., 2012). The degree of partisanship between pro-life and anti-abortion groups in the United States creates resistance to abortion-related policies and continues to generate debate in the political arenas at all levels of government, from state to federal (Sawant, 2012). Although abortion is legal in some states, some still see it as inherently sinful and morally wrong (Lindorff et al., 2012).

In a direct response to Republicans' attempt to defund parenthood, the 2015 Twitter campaign #ShoutYourAbortion encouraged women to publicly acknowledge their abortion to remove the stigma associated with the procedure (Markens, 2016). In 2019, Georgia passed what became known as the heartbeat bill, which would ban most abortions once a detectable human heartbeat was present (Brumback, 2021). This decision caused 180 CEOs to sign an open letter in the *New York Times* stating that abortion restrictions were bad for business (Fraser, 2022). Georgia is one of the main states where many production studios record movies and television shows, resulting in \$2.7 billion in direct spending on the state (Sandberg, 2019). The decision led to criticism from movie studios that opposed the bill, and movie studios (most notably Netflix) that stated they would rethink their business investment in the state due to the bill's passing (Eilert & Cherup, 2020). After the governor signed the law in 2019, NGO groups including the

ACLU, Planned Parenthood, and the Center for Reproductive Rights, sued on behalf of Georgia abortion providers to block the law, which, in 2020, a U.S. District Judge ruled was unconstitutional (Brumback, 2021).

As of 2021, 47% of Americans believed that abortion is morally acceptable, 46% believed it is morally wrong, 49% were pro-choice, 47% were pro-life, 48% believed that abortion should be legal with limits, 32% believed it should be completely legal, and 19% believed it should be illegal (Brenan, 2021).

As of December 2021, the breakdown of abortion laws were as follows:

- Physician and Hospital Requirements: 36 states allow abortions, but they must be completed by a licensed physician.
- Gestational Limits: 43 states do not allow abortions after a specified point during the pregnancy, with some exceptions.
- Partial-Birth: 21 states prohibit partial-birth abortion (fetus is removed intact from the women's body; Guttmacher Institute, 2021).

The division is reflected in the many laws and restrictions imposed throughout the nation, which makes the controversial topic recurring in political debates and social media.

### ***LGBTQ+***

Members of the LGBTQ+ community in the United States have faced many hurdles and setbacks, as well as progress during the cultural shifts of the last 40 years (Kaufman & Compton, 2021). In 1961, 29 states required the hospitalization of psychopathic persons, which was the term used to identify homosexuals (Fan, 2019). The month of June represents LGBTQ+ Pride Month, commemorating the Stonewall riots that occurred in 1969. During this month,



corporations have adopted rainbow symbol representation in their respective profile pictures to support the LGBTQ+ community (Eilert & Cherup, 2020).

A 2021 Gallup poll showed that 70% of Americans support same sex-marriage, and for the first time in record history, 55% of all Republicans supported it (Brenan, 2021). Disputes on the rights of members of the LGBTQ+ community clash mostly with corporations' moral and religious beliefs, customers, and employees (Brown & Scott, 2019). Despite increasing support for the LGBTQ+ community, conservatives may prioritize people's rights when supporting discrimination against members when businesses refuse service based on religious grounds (Kaufman & Compton, 2021; Kazyak et al., 2018).

In 2009, the 1969 federal hate-crime law was expanded to include perceived or actual sexual orientation and gender identification as a protected class. A year later, the military repealed the Don't Ask, Don't Tell Act, which would allow gay people to serve openly (Reed, 2017). In 2015, the U.S Supreme Court ruling in *Obergefell v. Hodges U.S 644* granted same-sex couples the right to marry, citing constitutional protection under the Due Process Clause and the Equal Protection Clause of the Fourteenth Amendment (Brown & Scott, 2019; Reed, 2017). The *Obergefell* decision suggested that fundamental rights cannot be contradicted by philosophical premises or religious beliefs (Brown & Scott, 2019). The decision would nullify the legal statutes and state constitutional protections of the 13 states that had not made same-sex marriage legal (Kaufman & Compton, 2021). The Human Rights Campaign publishes the Corporate Equality Index every year, ranking corporations on their LGBTQ+ policies. In the first year, 2002, 13 of 319 companies had perfect scores; by 2021, 767 of 1,142 companies achieved a perfect score (Fan, 2019; The Human Rights Campaign, 2021).

Same-sex couples have been involved in a series of legal battles with companies that refuse their services, leading to clashes on the relationship between First Amendment rights and nondiscrimination statutes, the most notorious being 2017's *Masterpiece Cakeshop Ltd v. Colorado Civil Rights Commission* ("First Amendment," 2019). In this case, the baker Jack Phillips refused to design and sell a cake for a same-sex wedding (Corvino, 2018). Phillips provided baked goods to gay customers but declined to create a cake for a same-sex wedding on the grounds that it would violate his Christian belief that marriage is only permissible between one woman and one man (Velte, 2021). The decision was 7-2 in favor of Phillips, with Justice Kennedy stating that the Colorado commission that heard the case had demonstrated hostility toward Phillips' religious beliefs and therefore failed to give him a fair trial (Corvino, 2018).

Recent examples of corporations making public stances on pro LGBTQ+ matters are Starbucks, Amazon, and Ford, whereas others such as Chick-fil-A and Barilla have supported the opposite perspective (Dodd & Supa, 2015). North Carolina passed the Public Facilities Privacy & Security Act into law in 2016. It would effectively require transgender people to only use the public restrooms for the gender noted on their birth certificate (Lin, 2018). Dozens of organizations, including Apple, Bank of America, Facebook, General Electric, Google, Lyft, Paypal, and Starbucks, publicly opposed boycotted North Carolina due to the *bathroom bill* (Eilert & Cherup. 2020; Lin, 2018). After the law went into effect, hashtag campaigns such as #BoycottNC and #WeAreNotThis trended on Twitter, Instagram, and Facebook; the pressure resulted in the National Basketball Association (NBA) canceling their All-Star game that was going to be hosted in Charlotte (Lin, 2018). The Associated Press (2017) estimated that the bathroom bill would cost the state \$3.76 billion in damages. The CEO of Apple, Tim Cook, has expressed the dangers of *religious freedom laws*, contributing significantly to the conversation

about those laws (Lin, 2018). As a result of the law, Target announced a policy that allows transgender people to use any bathroom of their choosing in states that prohibit such activity (Nalick et al., 2016). The pressure from corporations and the fallout from the North Carolina governor narrowly losing the next election resulted in Arkansas, Georgia, Indiana, and South Dakota vetoing or amending religious freedom laws deemed discriminatory toward the LGBTQ+ community (Lin, 2018).

## **ESG Rating, SRAs, and SDG**

### ***ESG Rating***

The extent of the damage or benefit to social welfare a corporation cause is captured on the ESG rating. The integration of ESG scoring into a corporation's business models was sparked in 2004 in a report by 20 financial institutions in response to a call from the Secretary-General of the United Nations, Kofi Annan (Gillan et al., 2021). In 2016, the United Nations introduced the UN Principles for Responsible Investment (PRI), which would incorporate ESG ratings to help investors integrate ESG factors into their decisions and calculate risks in investments (Alareeni & Hamdan, 2020; Christensen et al., 2022; Davis & Stephenson 2006). In addition, ESG ratings help corporations mold CSR strategies in consideration of stakeholder investment risk as well as their business financial performance (Duque-Grisales & Aguilera-Caracuel, 2021). At times, ESG is called responsible investing; it recognizes the influence that investment decisions have on society at large and the importance of good conservancy because it provides attractive risk-adjusted returns for investors (Haddock et al., 2018). ESG ratings are the evaluations of a company that are made available to investors and other stakeholders based on comparative assessments of the quality standard or performance on ESG issues (Clementino & Perkins, 2021; Del Guidice & Rigamonti, 2020).

According to the Governance & Accountability Institute, corporate interest in ESG measures grew from 20% of S&P 500 corporations to 90% in 2020 published sustainability or CSR reports (Gillan et al., 2021; The Governance & Accountability Institute, 2020). Recent estimates indicate that more than \$30 trillion of assets under management apply ESG under investment criteria and portfolio selection (Christensen et al., 2022). Deutsche Bank and Morgan Stanley are a few of the large corporations that have introduced ESG investing, known as impact investing, that uses a principled approach in placing importance on ESG issues to increase or improve companies' financial bottom line (L. King & Gish, 2015). As companies increasingly publish their ESG performance, HR leaders have noted that their reports are scrutinized by recruits and are a topic of conversation during interviews (Mirvis, 2012). Like CSR efforts, ESG scores are utilized by internal and external stakeholders to make informed decisions on the companies in which they invest, with which they work, or with which they do business.

Rating agencies emerged to capture firms' CSR based on ESG factors to give decision-makers measures of corporate CSR performance (Utz, 2017). As the benchmark for CSR performance, ESG rankings are functional to measure the non-financial impacts of corporations (Usman et al., 2020; Utz, 2017). Non-financial information can be utilized to align leadership incentives with value creation for long-term shareholders and social value creation (Del Guidice & Rigamonti, 2020). Reporting on CSR and sustainability performance is a known driver for corporate reputation and the monetary performance of corporations that report on their ESG performance (ElAlfy & Weber, 2019). ESG ratings are one of the ways that stakeholders can track and measure how corporations perform on causes and issues they care for.

### ***SRA*s**

Sustainability rating agencies (SRAs) are responsible for measuring corporate ESG indicators to provide stakeholders with information about non-economic risks and opportunities (Clementino & Perkins, 2021). Although thousands of corporations claim that their business integrates ESG into their strategies, it is not evident that this may be simply cheap talk or greenwashing (Christensen et al., 2022; Delmas & Burbano, 2011). A corporation's commitment to sustainability efforts is not always evidenced or visible. Hence, sustainability reporting serves as a meaningful tool for stakeholders and shareholders in evaluating the level of corporate commitment to CSR endeavors (Ruiz-Blanco et al., 2022). SRAs are similar to credit rating agencies in their assessment of corporate performance and sharing findings with investors and stakeholders alike (Del Guidice & Rigamonti, 2020). ESG data are the metrics that track, measure and interpret corporate ESG activities and performance (Del Guidice & Rigamonti, 2020). SRAs receive financial compensation from investors; this eliminates potential conflicts of interest because companies do not fund them (Christensen et al., 2022).

### ***SDG*s**

In 2015, the United Nations adopted 15 SDGs that covered 169 sub-targets to serve as the leading principles for human activity (EIAly et al., 2020). The 15 years that followed were marked by the Paris Agreement, which launched the 2030 Agenda for Sustainable Development, and the incorporation of 17 SDGs, representing the mutual vision for humanity as well as the social contract among global leadership and its citizens (Latapi Agudelo et al., 2019). Although CSR efforts are mostly company-level decision issues, SDGs aim at country-level or global commitments or initiatives (Perez-Batres et al., 2012). SDGs encompass many different topics like attempting to eliminate hunger and poverty, fighting for climate change, and promoting

innovation and sustainability consumption; because SDGs are interconnected, one cause can also simultaneously cover another (Latapi Agudelo et al., 2019). SDGs have transformed a firm's response from reactionary and company driver CSR efforts to a structure that assists in creating positive corporate SD (EIAly et al., 2020). Since the introduction of SDGs, CSR literature has primarily emphasized the application and impact in certain sectors of performance associated with SDGs. In contrast, CSR knowledge focuses on the generation and potentiality to create shared value (Latapi Agudelo et al., 2019).

Companies at every level are adopting the UN SDGs and incorporating them into their CSR programs, service, investment, and values strategies (Haddock et al., 2018). Countries that adopt the UN SDGs can create policies and regulations within their borders to put pressure on companies that have not adopted desired business practices or commitments (EIAly et al., 2020). SDGs serve to identify and assess broad trends on a global scale, leading to governance's potential to be cross-cutting and embedded within goals on sector-specific issues (Olsen & Zusman, 2014). Consumers and other stakeholders judge business achievements by measuring how they "walk the walk," which will test the effectiveness of legal and corporate governance programs (Haddock et al., 2018).

### **Shareholder Activism**

Shareholder activism occurs when unhappy shareholders speak out against corporations or management that does not act in their best interest and try to bring change without changing who is in control (Gillan & Starks, 2009; Guay et al., 2004). Shareholder activists use their equity positions to lobby corporate leaders and aim to change corporate behaviors through existing legal frameworks instead of radically changing structures and practices (L. King & Gish, 2015). Shareholders delegate decision-making powers to managers whose interests are bifurcated

from those of their shareholders (Gillan & Starks, 2009). The contemporary idea of using the power of financial markets to signal displeasure with corporate activities dates back to the 1920s when religious groups prescribed that their investment not be used in sin shares (i.e., tobacco, liquor, gambling; Guay et al., 2004). Normally the focus of shareholders is to improve the financial performance of a corporation, but most recently, environmental and social performance has increased in priority (Cundill et al., 2018).

Ideologically, shareholder activism has been linked to almost every major social movement, including civil rights, LGBTQ+, and environmentalism (L. King & Gish, 2015). Although corporations balance the expectations that come from their shareholders, they must also consider the expectations of other stakeholders to protect their interests without appearing to do so for pure financial gain (McDonnell, 2016). Shareholder activism simply is a direct response to the potential gains from addressing the agency conflict at the center of corporations by using absentee owners (Gillan & Starks, 2009). Absentee owners encompass individuals that legally own a stake in the company without actively managing or occupying it (J. Chen, 2011). Shareholder activists represent a new form of social movement that influences the degree to which corporations behave in socially responsible ways (Campbell, 2007).

### **Stakeholder Pressure and Activism**

Stakeholders as a group can strongly influence an organization's ability to achieve CSR goals (Freeman & Reed, 1983; Perez-Batres et al., 2012). Stakeholders, including professionals, clients, industry peers, clients, and political and legal authorities, will differ fundamentally when reporting organizational misconduct; some put pressure on the organization, whereas others will ignore it (Roulet, 2019). Corporations are aware of stakeholder interest and pressure and will take action that often exceeds the minimum regulations through self-regulatory behavior in

environmental and societal actions (Perez-Batres et al., 2012). Stakeholders have a tendency to view information controlled independently by a corporation to go against the interests of the community at large and instead only serve their interests (Illia et al., 2017). Trust issues can cause unwanted disruptions for corporations exercising CSR endeavors.

Stakeholders will sometimes behave like activists and perform tasks that can affect business operations. Stakeholder activists can disrupt corporate CSR initiatives by disrupting their targets' market position, which can result in downgrades by analysts, spur investors' divestment, and threaten the company's reputation and public image (McDonnell & Werner, 2016). Stakeholder activists typically deploy two different types of tactics to influence corporations: persuasive (influential) or disruptive (protests; Eilert & Cherup, 2020).

Stakeholders that use a disruptive tactic are willing to engage in extra-institutional tactics, including protests and boycotts, to press for corporate policy change that has not manifested through transitional influence channels or legal recourse (A. Gupta & Briscoe, 2020). Corporate activists that use persuasive tactics aim to convince targets of the merits of their claims (Eilert & Cherup, 2020).

As corporations expand businesses across the globe and aim to advance CSR efforts, it has become increasingly important to understand their different stakeholders' beliefs, values, and worldviews (Arenas et al., 2009). Organizations are likely to concede to activists' demands when they are under threat or immense pressure due to negative media attention, when they use disruptive tactics, when they mobilize bystanders, or when their finances and reputation are threatened (A. Gupta & Briscoe, 2020). When stakeholders have the ability to monitor corporate performance, it boosts the probability for corporations to act in socially responsible ways (Campbell, 2007).



## NGO Activism

Advocacy organizations known as non-governmental organizations (NGOs) champion a variety of issues including not limited to labor, civil rights, healthcare, religion, environment, and the justice system (Obar et al., 2012). Advocacy NGOs use their influence to lobby corporations, governments, and international organizations (Guay et al., 2004). *Social purpose NGOs* are composed of environmental groups, human rights organizations, or organizations that provide medical assistance in emergencies (Arenas et al., 2009). Social purpose NGOs help anybody in need, whereas the objective of *club NGOs* is to advance and defend the interests of their members; some social purpose NGOs include trade unions, business associations, and churches (Arenas et al., 2009). Whereas the primary concern for the majority of corporations is profit maximization, NGOs are traditionally associated with issues that affect people, the environment, and society (Hoepner & Li, 2021). Some of the major NGOs that advocate for the issues covered in this dissertation include the: National Rifle Association (NRA) for pro-gun causes, the National Association for the Advancement of Colored People (NAACP) for race relations, as well as the American Civil Liberties Union (ACLU) for LGBTQ+ and human rights (Obar et al., 2012). These organizations use their influence to push their agendas through activist efforts.

NGO activism heavily influences industrial decisions of which they disapprove by using boycotts, naming and shaming, and cyberactivism (Daubanes & Rochet, 2019). At times, corporations will mitigate the risks of tackling corporate activism head-on by collaborating with established NGOs and social movement organizations (McDonnell, 2016). By forming strategic partnerships with NGOs, corporations can achieve CSR goals while improving their reputation among stakeholders: the more salient the issue, the greater reputational gain (Nalick et al., 2016). Authentic partnerships among NGOs, corporations, and other stakeholders are important to help

with the perception of CSR endeavors (Arenas et al., 2009). NGOs benefit from collaborating with corporations because the relationship allows them to alter companies' policies and operations while simultaneously achieving their own goals (Hoepner & Li, 2021). Conflicts with NGOs not only threaten a corporation's current business but also come at a high cost in the long run in terms of reputation and brand value (Daubanes & Rochet, 2019). NGOs can be a powerful deterrent against corporations engaging in greenwashing by challenging their claims through direct questioning (Delmas & Burbano, 2011). NGOs can be allies for corporations but can also challenge them if their interests dictate opposition, as has been addressed in this section.

### **Social Media as a Tool for Corporate Social Responsibility**

Social media is a tool that corporations use in their evolving role and involvement in influencing dialogue on social issues that affect consumers, shareholders, and employees (Fan, 2019). Social media's popularity has increased over the years; as of 2021, 81% of adults reported using YouTube, 69% for Facebook, 40% for Instagram, 28% for LinkedIn, and 23% for Twitter (Pew Research, 2021). In the corporate world, in 2011, about 83% of Fortune 500 companies used social media to engage with consumers and stakeholders; by 2020 it had increased to 99% of all companies being active on social media (Carr, 2021; Naylor et al., 2012). Even though social media was not created with activism in mind, it is currently the most common gateway into digital activism (Harlow & Guo, 2014). Unlike traditional forms of communication (newspaper, radio), online stories have the power to reach national and international audiences regardless of their original source (Shaw, 2013). Unlike traditional methods of communication, social media platforms like Twitter have the distinction of allowing users to communicate quickly and in real-time with precision (Uzunoglu et al., 2017)

Social media platforms allow individuals to generate content that can be viewed via text, images, audio, video, or a combination of all of these, and be made visible to other internet users (Obar et al., 2012). Social media comprises inputs infused from its countless users, making it uncontrollable because the flow of information is multidirectional, interconnected, and difficult to predict (K. Lee et al., 2013). Social media creates an environment for firms to engage efficiently at a low cost while obtaining stakeholder information through data collection, which yields reduced costs, improves customer relations, and increases the accessibility of information (Groot et al., 2019). The internet and social media have increased the speed, reach, and effectiveness of communication efforts by social movement organizations (Obar et al., 2012).

Social media broadens the range of participation from the traditionally well-known groups to the anonymous and numerous followers and friends (K. Lee et al., 2013). Enhanced access to information and networks gave consumers, stakeholders, and activists a new voice in their interactions with corporations (Lyon & Montgomery, 2013). The usage of hashtags facilitates the classification, archiving, and retrieval of content labeled on a social media platform and has been instrumental in social movements (Veszelski, 2016). Social media platforms allow for the use of carefully chosen keywords and hashtags, creating trending conversations centered around CSR issues (Paliwoda-Matiolanska et al., 2020). Consumers with easy access to information through social media are more responsive to the CSR actions of an organization and play a crucial role in not only maintaining corporate reputation but also understanding desirable stakeholder outcomes and achieving engagement (Song et al., 2020; Uzunoğlu et al., 2017).

Social media technologies have contributed to easy and speedy mobilizations of groups that fall outside of the traditional institutional and organizational structure (Obar et al., 2012).

Social media also helps corporate CSR efforts in ways that traditional mediums do not by allowing direct communication with stakeholders while increasing public awareness (ElAlfy et al., 2020). Social media's dialogic nature shifts media communication from managing audiences to conserving stakeholder relationships (Friedman, 2006; K. Lee et al., 2013). Public criticism on social media is a safeguard of corporate governance as popular posts from investors force organizations to fix and correct any issues promptly (Zhang & Yang, 2021). Due to character limitations, social media sites like Twitter do not encourage nuanced or complex discussions of problems; instead, they perpetuate oversimplifications, and moralistic rage, and bring out radicalized points of view (Bouvier & Machin, 2021; Ott, 2017).

CSR activism occurs when consumers aim to influence the CSR-related activities a company undertakes, including passive CSR activism such as showing support through a *like* or more aggressively making posts criticizing an action (Boyd et al., 2016). Through social media, activists with little power or authority in a corporate setting can capture corporate managers' attention by using tactics like boycotts, negative campaigns, and protests (McDonnell & Werner, 2016). An example of this strategy occurred when Donald Trump was elected president in 2016; movements such as #GrabYourWallet aimed to boycott any Trump businesses over his recorded comments about grabbing women, which resulted in seven retailers dropping Ivanka Trump products (Heldman, 2017). Social media is an effective way to send out a message to the masses quickly and organize efficiently; it also allows for calling out behavior that goes against societal expectations.

### **CSR Limitations and Areas for Improvement**

CSR encompasses many topics and subtopics, including wages, workplace safety, the environment, climate change, social issues, philanthropy, and activism (Campbell, 2007;

Carroll, 1991; Eilert & Cherup, 2020; Koenig & Poncet, 2019). When looking at the issues the movement aims to address, the results show that they are not as effective as corporations would probably wish they probably wish. Carbon emissions have increased, the damage to the environment has accelerated, and social inequity is increasing (i.e., CEO compensation to the median worker widening significantly every year; Pucker, 2021). Although more corporations are subject to ESG ratings that provide stakeholders with data on various ESG benchmarks (Clementino & Perkins, 2021), the results vary. Pucker (2021) called out the following limitations that come from sustainability reporting:

- No mandated auditing – Although more than 90% of the largest companies produce CSR reports, very few have their results validated by a third party. This stands in contrast to financial reporting that follows standardized protocol with compliance ensured by the Securities and Exchange Commission.
- Opaque supply chains – Businesses moving to countries with lower production costs mean that supply chains are far away from the end-users. With over 85% of corporations producing overseas, the supply chains have made tracing products difficult, with audits rarely covering social or environmental abuses.
- Lack of compatibility – It is difficult to compare performance across industries and even more so within the same industry or company because companies might change their methodology or utilize different metrics to measure their progress.
- The difficulty of scaling up effective impact investing – With the increase in impact investing that aims to improve social and environmental concerns, insufficient capital is placed to make significant progress.

## Chapter 2 Summary

Corporations that engage in CSR efforts are constantly under scrutiny by stakeholders (internal and external), the media, NGO watchdogs, government regulators, and numerous actors on social media to measure how their actions influence society as a whole (Matejek & Gössling, 2014). Corporations and, more increasingly, corporate leaders are asked by numerous stakeholders to take a stand on environmental, social, economic, and political issues (Eilert & Cherup, 2020). Remaining silent on issues is a luxury that corporations in the age of social media can no longer enjoy. Pressure groups use tactics that include boycotts and online protests to use their stakeholder influence to bring forth change. A corporation's brand and reputation are continuously at stake and remain an important factor for stakeholders who use it when making investment decisions, product choices, and career decisions (Dowling, 1986). Companies that engage in CSR efforts are positively related to job satisfaction, motivation, commitment, performance, and valued employees' attitudes toward a corporation (Donia et al., 2019; Glavas & Piderit, 2009). When communicating CSR efforts, corporations need to be honest, because accusations of greenwashing can end up hurting their reputation. Corporations commonly use greenwashing as a complex strategy that helps boost revenue and brand image through advertising, but they do not follow through on their claims (Cherry, 2014). The pressure from stakeholders has led to an increase in greenwashing activities and corporate activism.

Corporate activism is the task in which organizations engage when they participate in the public square and push for social and political issues on divisive topics that they defend regardless of criticism (Eilert & Cherup, 2020). This chapter addressed controversial topics with which corporations engage on social media and through public statements on immigration, refugees, race relations, gun control, abortion, and LGBTQ+ rights. These topics were

considered to be important or very important during a Gallup poll for the 2020 presidential election (Hrynowski, 2020). These topics cause debates on social media and split groups into those that support corporations and those that launch campaigns to stop doing business with corporations that go against what they believe. Social media has expanded the reach that corporations have worldwide, allowing people who previously had no voice to speak out and align themselves with like-minded people. This dissertation expanded on the literature by uncovering best practices for private and publicly traded companies speaking out on social media.

### **Chapter 3: Research Design and Methodology**

This study aimed to uncover the best practices employed by publicly traded companies when they utilize, communicate, and interact on social media. This chapter discusses the research design and methodology that guided this study. This chapter will restate the RQs to identify the nature of the study, methodology, research design, interview protocol, and data analysis. This chapter will also cover the protocols aimed at protecting research participants from the negative impact associated with human subjects research.

#### **Re-Statement of RQs**

Using an open-ended approach when formulating RQs for qualitative research allows the inquirer to ask participants general questions that shape the response possibilities (Creswell, 2013). The RQs the researcher investigates focus on understanding how the participants experience the phenomena process and how they identify the steps in the process (Creswell & Poth, 2018). This study investigated the following RQs:

- RQ1 - What challenges are faced by private or publicly traded companies implementing leadership strategies and practices for speaking out on social media?
- RQ2 - What leadership strategies and practices are employed by private or publicly traded companies to overcome the challenges they face when speaking out on social media?
- RQ3 - How do private and publicly traded companies measure the success of speaking out on social media?
- RQ4 - Based on their experiences, what recommendations would private or publicly traded companies have for the future implementation of social advocacy strategies and practices?



## **Nature of the Study**

Qualitative research has distinct characteristics that involve paying attention to the interpretive nature of the inquiry and placing the study inside of the researcher's political, social, and cultural context (Creswell & Poth, 2018). For this phenomenological study, eight characteristics were described by Creswell and Poth (2018) that align with the research purpose and goals.

1. Natural Setting – The researcher conducted the study in the participants' natural setting. The researcher interviewed each of the participants in their workplaces using the teleconferencing platform Zoom.
2. Researcher as a key instrument – The researcher conducted the study by himself by observing behavior and utilizing open-ended questions during the interview process.
3. Multiple methods – The researcher gathered several forms of data that included interviews, observations, and documents. The data was then reviewed and organized into categories to align all different sources.
4. Complex reasoning through inductive and deductive reasoning – The researcher used inductive reasoning to compile a comprehensive list of themes from the bottom up. In addition, the researcher used deductive reasoning to align said themes with the data findings.
5. Participants' multiple perspectives and meanings – The researcher focused on the participants' perspective and meaning about problems or issues and not the research that was discovered in the literature.
6. Context-dependent – The research was situated within the setting in which the participants are normally located to perform work-related activities.

7. Emergent design – The research process was emergent, which entails adapting to the situation, and it included the modification of questions and awareness of the possibility of changing the individuals being studied.
8. Reflexivity – The researcher communicated his background to the readers to provide context to how the information was interpreted throughout the study.

A qualitative study has assumptions, strengths, and weaknesses. Phenomenology can include a streamlined data collection form by having a single participant interview (Creswell & Poth, 2018). Qualitative research can gather data through observations, interviews, and documentation. Phenomenology studies can face some challenges, including but not limited to: requiring a complex understanding of philosophical assumptions, and all participants in the study needing to be selected carefully to confirm that they have experienced the same phenomenon (Creswell, 2013).

Creswell (2013) identified the essential characteristics and assumptions that are the cornerstone of a qualitative study: (a) the researcher uses burdensome procedures in the data collecting process by gathering multiple modes of data; (b) the researcher frames the study according to the characteristics and assumptions of the qualitative approach to research; (c) the researcher approaches the research using phenomenology, which is a recognized approach; (d) the researcher focuses on a single concept or phenomenon that will be explored; (f) there is a rigorous approach to data collection, data analysis, and writing of reports; (g) the researcher analyzes data through multiple levels of analysis and abstraction; (h) the researcher makes the reader feel as if they are there; and (i) the study reflects the culture, history, and personal experiences of the researcher. Throughout the endeavor, the researcher strived to encompass all the characteristics of a phenomenological study as identified by Creswell.

## **Strengths and Weaknesses of Qualitative Studies**

### ***Strengths***

Qualitative research has strengths that make it the preferred method for researchers.

Qualitative research looks at behavior in the natural environment, yielding holistic insights that can provide a comprehensive explanation of the causes of a phenomenon (Johnson & Christensen, 2004). Johnson and Christensen (2004) noted five strengths of qualitative research: (a) it imparts understanding and depiction of a participant's particular phenomenon; (b) the researcher can pin down how participants understand ideas and constructs; (c) a qualitative approach is conscious of local conditions, settings, and stakeholders' needs; (d) qualitative data in the words and categories of participants contribute to the explorations of why and how the phenomenon occurs; and (e) qualitative researchers can pivot to any modifications that occur during the study and have the ability to shift the focus of their study as a result.

### ***Weaknesses***

Qualitative research has weaknesses that may cause issues for researchers. At times, individuals with a conventional viewpoint have criticized qualitative research for its inability to yield reliable and generalizable results (McMillan & Schumacher, 2014). Johnson and Christensen (2004) noted five weaknesses that may arise when conducting qualitative research: (a) observations gathered might not generalize to other participants or settings, (b) it is challenging to produce quantitative predictions, (c) it is difficult to test hypotheses and theories with large participant populations, (d) collecting data generally takes more time than with quantitative research, and (e) the results are more easily influenced by the researcher's personal biases and idiosyncrasies. Qualitative research is more descriptive than predictive; it dives into the viewpoint of a research participant, and each participant will have different interpretations of their experience and the systems in which they interact.

## **Methodology**

The researcher utilized a phenomenological approach for this study. In phenomenological studies, the researcher avoids speculation and makes a specific, fresh topic the focal point that can serve as the basis for future research and reflection (Moustakas, 1994). The researcher collected data from participants who have experienced a common phenomenon to develop a composite description of the core of all of their experiences (Creswell & Poth, 2018). The phenomenon of this study is corporations speaking out on social media and engaging with stakeholders. A key element of a phenomenological study is that the researcher aims to understand how the participants experience the phenomenon from their own unique perspectives (Johnson & Christensen, 2012). Each of the participants may have a different experience and altering guiding principles, but they all engage in the act of communicating with stakeholders on social media through posting on social media.

### ***Structured Process of Phenomenology***

Creswell (2013) identified key features that are normally included in all phenomenological studies:

1. A constant emphasis on the phenomenon under exploration.
2. The phenomenon being studied is explored with a group of 10-15 participants who have all experienced the phenomenon.
3. A discussion about the basic ideas involved in conducting phenomenology. This explores the lived experiences of the participants and how they have objective experiences in common with other people and subjective experiences with the phenomenon.

4. The researcher brackets himself out of the study by discussing personal experiences with the phenomenon. This allows the researcher and the study to focus solely on the participants' experiences.
5. Data is collected through interviews with participants who have experienced the same phenomenon.
6. A systematic procedure is adopted that summarizes two elements: what the participants have experienced and how they have experienced it (Moustakas, 1994).
7. The ending of the phenomenology with a descriptive passage that talks about the essence of the experience for participants, including what they have experienced and how they have experienced it.

### ***Appropriateness of Phenomenology Methodology***

This study aimed to identify the leadership strategies of leaders in private or publicly traded companies to overcome challenges in their leadership roles by engaging with stakeholders on social media. The phenomenological design of inquiry comes from psychology and philosophy in which the researcher describes the lived experiences of a phenomenon as described by the participants who have experienced it (Creswell, 2014). The study involved a small number of participants (15) and entailed lengthy and comprehensive engagement to identify patterns and relationships of meaning (Creswell, 2009; Moustakas, 1994). By using reduction in phenomenology, each of the participants' experiences is considered in its singularity, in and of itself, which permits the phenomenon to be perceived and described in its totality, openly and freshly (Moustakas, 1994).

A phenomenological study aims to study how people make meaning of their lived experiences, with the researcher serving as the witness to the data accounts (Starks & Brown Trinidad, 2007). One weakness of phenomenological research is that it assumes that the scrutiny

of a text is idiosyncratic to the researcher doing the analysis, as well as to the time, culture, and situation in which the research is produced, true replication is impossible. A strength of a phenomenological study is that the investigation provides new and compelling interpretations of phenomena (VanderStoep & Johnston, 2009). Another strength of a phenomenological approach is that it aims to faithfully grasp the structures and processes of mental life and how situations are lived and experienced with nothing added or subtracted. The phenomenological methodology does not doubt or disbelieve any natural science theories or research, but rather it aims to extend science into the domain of subjective experience (Charmaz & McMullen, 2011).

### **Research Design**

VanderStoep and Johnston (2009) noted that researchers should pick a research design based on the needs and requirements of the study with consideration of any resource limitations. This qualitative study utilized a phenomenological approach, seeking to identify the best leadership practices of leaders from private and publicly traded companies who engage with stakeholders on social media.

### ***Analysis Unit***

When considering who would be able to address the qualitative RQs in the data collection, it is necessary to decide at what level (e.g., individual, department, company) the data needs to be collected; this is referred to as the unit of analysis (Creswell, 2013). For this study, the unit of analysis was the individual that is responsible for communicating and engaging with stakeholders on social media. The individuals may consist of but are not limited to CSR department leaders, marketing managers, or other internal members responsible for corporate communication.

### ***Population***

The population of this study was corporate-level employees at private or publicly traded companies. The titles vary as companies assign communication responsibilities to various individuals and are not uniformly distributed among the population selected. Communication responsibility is the defining characteristic of the target population and is identified and studied by the researcher (Creswell, 2013). Qualitative research's exploratory nature typically means little has been written about the study's topic or population, allowing the researcher to listen to participants and build an understanding (Creswell, 2009).

### ***Sample Size***

Participants in this study were all employees of a private or publicly traded company. Creswell and Poth (2018) noted that a few individuals should be involved in a qualitative study, but extensive detail should be gathered about each individual studied. This notion of fewer individuals is reflected in the literature. Morse (1994) noted a minimum of six participants should be used in a phenomenological study. Creswell and Poth pointed out that the study should consist of a heterogeneous group that ranges from three to four individuals to 10-15 who have experienced the same phenomenon. This study using 15 participants meets the sample criteria for a phenomenological study.

### ***Purposive Sampling***

Purposive sampling, at times also referred to as *judgment sampling*, where the researcher purposely selects the sample of participants based on the experience and knowledge of the group selected in the sample (Gay & Airasian, 2000). In this case, the purposive sampling was based on participants meeting the criterion of being a part of a private or publicly traded corporation that engages with stakeholders on social media. The researcher specified the characteristics of the population of interest and located participants who matched those characteristics (Johnson &

Christensen, 2012). By narrowing the criteria to limit responses to private or publicly traded companies that engage with stakeholders on social media, the researcher purposely chose participants who play an active role in corporate communications. The selection of participants rests on the fundamental point that they will have the ability to provide pertinent data on the themes that are a part of the study (Horsburgh, 2003).

### ***Participant Selection***

When conducting a phenomenological study, it is necessary to identify participants who will best help understand the phenomenon and the RQs in the research (Gay & Airasian, 2000). Creswell and Poth (2018) noted that data should be collected from individuals who have experienced the phenomenon. The following steps were taken to select the 15 participants from private or publicly traded corporations that engage with stakeholders on social media. The first step was compiling a list of companies that have communicated on social media on any topics covered in this study. The next step was to apply the company's criteria to private or publicly traded, which allowed for the inclusion of those eligible and the exclusion of those that did not meet the requirements. To interview 15 participants, 25-30 companies were sampled because it was assumed that not all would participate, and some could potentially fall off the list of participants.

### **Sampling Frame**

Once the size of the population and the means of identifying participants in the population are determined, the researcher refers to the availability of sampling frames—mail or published lists—of potential respondents in the population (Creswell, 2009). LinkedIn (<https://www.linkedin.com>), Instagram (<https://www.instagram.com>), and Twitter (<https://www.twitter.com>) were the databases used to develop the sampling frame for this study. Each of these social media pages provided useful information that was relevant to the study.



LinkedIn is a professional networking database that provides key data pertaining to each company, such as size, location, industry, date founded, and type (public or private company).

Instagram is a social networking site that allows users to post pictures and videos to communicate with users; this is useful in identifying actions relevant to the study (i.e., pictures and videos promoting a social cause). Twitter is another social networking site that allows users to communicate mainly through microblogging via messages known as *tweets*. Because this study focused on strategies leaders use in private or publicly traded companies to overcome challenges when taking a stance on social media, the first search was to formulate a database of corporations engaging in these actions.

### ***Criteria for Inclusion***

The criteria for inclusion in this study were as follows:

1. The researcher can identify and communicate with the participant through social networking sites such as LinkedIn or via direct correspondence through company websites.
2. Responsible for communication to stakeholders on social media for a private or publicly traded company in the United States.
3. Has actively participated in the communication process in at least one of the controversial topics included in this study.
4. Is actively involved in developing and planning strategies for engaging with stakeholders on social media.
5. Agrees to be audio recorded and is interested in contributing to the study.
6. Can meet face to face via Zoom.

The researcher conducted interviews via Zoom, requiring a unique password that was assigned to each participant. The study did not include any children; it only included adults who volunteered to be a part of the study.

### ***Criteria for Exclusion***

The criteria for exclusion were as follows:

1. Unavailable to meet for a 60-minute Zoom interview during the months of January-June 2022.
2. Losing their employment status during the research period.
3. Those that wish to remove themselves from the study for any reason.

### ***Purposive Sampling and Maximum Variation***

In this form of sampling, a wide range of participants is purposely selected so that all more types of cases across many dimensions are part of the study (Johnson & Christensen, 2014). The criteria for maximum variation in this study included:

1. Representation of both genders.
2. Individuals from all regions of the United States were invited to participate in the study.
3. Representation of varied ethnicities.

### **Protection of Human Subjects**

Before the researcher conducts the study, it is necessary to attain university approval for the study from the institutional review board (Creswell & Poth, 2018). The researcher completed the Collaborative Institutional Training Initiative Course (Appendix A) required by Pepperdine University to work on human subjects as part of the Institutional Review Board (IRB) application. Pepperdine IRB approval was received (Appendix B) before the researcher contacted any of the participants requesting their involvement in the study. The researcher sent

out a recruitment script (Appendix C), interview protocol (Appendix D), and informed consent form (Appendix E). The consent form included the permission for the interview to be recorded and for the researcher to obtain transcriptions. The identities of each participant were kept confidential, and participants were informed that all data would be deleted permanently from the researcher's USB drive after 2 years or upon the researcher's graduation, whichever came first. All transcripts and the corresponding USB drive were kept inside a fireproof safe in a secure room inside the main researcher's house, which only the researcher could access.

### **Data Collection**

In phenomenological research, data is typically collected by conducting interviews with participants who have experienced the phenomenon. In order to collect data and undergo the qualitative research process, many actions must be taken. The researcher must gain permission, have a good sampling technique, create means for annotating information digitally and physically (on paper), store the data properly, and address the ethical challenges that arise (Creswell, 2013). According to Creswell (2013), data collection activities include the following: (a) locating a site, (b) gaining access to participants and building rapport, (c) purposeful sampling, (d) collecting data, (e) recording information, (f) resolving field issues, and (g) storing data. Qualitative research can gather data through observations, interviews, and documentation, but it can also stretch the imagination by gathering sounds or precious items to grasp comments during the interviews (Creswell, 2013, 2014). The researcher took the following steps in the data collection process.

1. The researcher contacted potential participants via email and direct messaging on social media platforms. Potential participants were gathered from a list of private and publicly traded companies' databases.

2. The researcher used the same standard script for all potential participants who were contacted to ensure uniformity.
3. All correspondence included the purpose of the study to allow the researcher to gauge the potential participants' interest.
4. The participants who met the criteria and agreed to participate in the study and be interviewed were sent the consent documents to their company email addresses.
5. The consent forms included the study's purpose and the benefits, procedures, risks, and the participant's rights, such as the ability to withdraw at any time from the study for any reason.
6. A signature was received from the participant to participate in a 60-minute interview that was recorded via Zoom videoconferencing.
7. The Zoom interview was password protected and consisted of semi-structured interview questions and one ice-breaker.
8. Eleven questions were part of the interview, and all participants received the same questions that followed the interview protocol. The researcher clarified any questions accordingly.
9. The interview was recorded and transcribed using Zoom video recording and an audio recording device.
10. The identities of each participant were kept confidential, and they were informed that all data would be deleted permanently from the researcher's USB drive after 2 years or upon the researcher's graduation, whichever came first.
11. The same process was followed for all 15 participants.

## **Interview Techniques**

Face-to-face interviews allow for comprehensive data collection because the interviews were tailored to the participant's unique experiences with the phenomenon. Face-to-face interviews' limitations include the fact that the sample size is smaller than using other techniques for data collection (VanderStoep & Johnston, 2009). The following interview questions (IQs) were posed during the interviews:

- Icebreaker: How long have you worked in this field/industry, and for how long have you worked for this company?
- IQ1: What was your biggest challenge when speaking out on social media?
- IQ 2: What organizational challenges have you faced in your role of speaking out on social media?
- IQ 3: What personal challenges have you faced in your role when speaking out on social media?
- IQ 4: Thinking of your biggest challenge when speaking out on social media, how did you overcome it?
- IQ 5: What leadership strategies do you use to overcome the organizational challenges you faced when speaking out on social media?
- IQ 6: What guides your strategies when speaking out on social media? (i.e., personal versus company values or both).
- IQ 7: What strategies do you use to address the expectations from stakeholders when speaking out on social media?
- IQ 8: How do you define success as a company in your social media messaging?
- IQ 9: How do you measure success when speaking out on social media?

- IQ 10: What is an example of something you could go back in time and do differently?
- IQ 11: What dangers exist for unqualified voices working at a private or publicly traded company when speaking on social media?

### **Interview Protocol**

To ensure that all interviews were parallel, an interview protocol was created to provide structure and orderly organization. A copy of the interview protocol can be located in Appendix D. The interview protocol was reviewed by the preliminary review committee and approved by the dissertation committee. The participants were invited to participate via emails and Zoom calls. Each of the interviews with the participants ranged from 45-60 minutes. Having a hard copy of the interview protocol that the researcher created contains the instructions for the process of the interview and the questions to be asked, providing ample space to take notes and write down observations and responses (Creswell, 2013).

### ***Relationship Between Research and Interview Questions***

Before starting each interview, the researcher notified the participants that the interview would last up to 60 minutes and reviewed the parameters that were agreed upon in the Informed Consent document (Appendix E). Data was collected in response to the 11 interview questions that were part of the study related to private or publicly traded companies' best practices when speaking out on social media. The questions help the reader understand the range of challenges that bring out unique perspectives in decision-making for private or publicly traded companies.

RQ1 asked: What challenges are faced by private or publicly traded companies implementing leadership strategies and practices for speaking out on social media? To

understand more about this question, each participant answered the following three interview questions:

- IQ1: What was your biggest challenge when speaking out on social media?
- IQ 2: What organizational challenges have you faced in your role of speaking out on social media?
- IQ 3: What personal challenges have you faced in your role when speaking out on social media?

RQ2 asked: What leadership strategies and practices are employed by private or publicly traded companies to overcome the challenges they face when speaking out on social media? To address this question, each participant answered the following four interview questions:

- IQ 4: Thinking of your biggest challenge when speaking out on social media, how did you overcome it?
- IQ 5: What leadership strategies do you use to overcome the organizational challenges you faced when speaking out on social media?
- IQ 6: What guides your strategies when speaking out on social media? (i.e., personal versus company values or both).
- IQ 7: What strategies do you use to address the expectations from stakeholders when speaking out on social media?

RQ3 asked: How do private or publicly traded companies measure the success of speaking out on social media? To address this question, each participant answered the following two interview questions:

- IQ 8: How do you define success as a company?
- IQ 9: How do you measure success when speaking out on social media?

RQ4 asked: Based on their experiences, what recommendations would private or publicly traded companies have for the future implementation of social advocacy strategies and practices? To address this question, each participant answered the following two interview questions:

- IQ 10: What is an example of something you could go back in time and do differently?
- IQ 11: What dangers exist for unqualified voices working at a private or publicly traded company when speaking on social media?

### ***Validity of the Study***

To align the interview questions with the overarching RQs, the researcher followed a three-step validation process: (a) prima facie and content validity, (b) peer-review validity, and (c) expert review.

### ***Prima Facie and Content Validity***

Prima facie validity is defined as sufficient to establish a fact or raise a presumption unless disproved or rebutted (Cornell Law School, 2022). By creating a table with the RQs and the corresponding request questions, prima facie validity was established. Table 2 was created from the information gathered during the literature review, thus establishing prima facie validity.

**Table 2**

*Research and Corresponding Interview Questions: First Draft*

Research Questions	Corresponding Interview Questions
RQ1- What challenges are faced by private or publicly traded companies implementing leadership strategies and practices for speaking out on social media?	IQ1: What was your biggest challenge when speaking out on social media? IQ 2: Thinking of your biggest challenge when speaking out on social media, how did you overcome it?



Research Questions	Corresponding Interview Questions
	<p>IQ 3: What organizational challenges have you faced in your role of speaking out on social media?</p> <p>IQ 4: What personal challenges have you faced in your role when speaking out on social media?</p>
RQ2 - What leadership strategies and practices are employed by private or publicly traded companies to overcome the challenges they face when speaking out on social media?	<p>IQ 5: What leadership strategies do you use to overcome challenges when speaking out on social media?</p> <p>IQ 6: What guides your strategies when speaking out on social media? (i.e., personal versus company values or both).</p> <p>IQ 7: What strategies do you use to address the expectations from stakeholders when speaking out on social media?</p>
RQ3 - How do private or publicly traded companies measure the success of speaking out on social media?	<p>IQ 8: How do you define success as a company?</p> <p>IQ 9: How do you measure success when speaking out on social media?</p>
RQ4 - Based on their experiences, what recommendations would private or publicly traded companies have for the future implementation of social advocacy strategies and practices?	<p>IQ 10: What recommendations do you have for leaders when speaking out on social media?</p> <p>IQ 11: What dangers exist for unqualified voices working at a private or publicly traded company when speaking on social media?</p>

### ***Peer Review Validity***

Peer review serves as an external check of the research process (See Appendix F). An external person (peer) is contacted to enhance the accuracy of the questions by reviewing and asking questions about the qualitative study to resonate with people other than the researcher (Creswell, 2014). The researcher gathered three doctoral students in the Doctor in Education Organizational Leadership (EDOL) at Pepperdine University to perform a preliminary review of the interview questions. A peer who plays the role of a devil's advocate helps keep the researcher honest by asking hard questions about the meanings, methods, and interpretations (Creswell & Poth, 2018). Peers were asked to review each of the questions and follow these instructions:

- Review the summary statement attached to understand the purpose and goals of this study.
- Indicate whether the interview questions match the themes of the RQs.
- Indicate whether questions should (a) remain unchanged, (b) deleted, or (c) modified as suggested.

**Table 3**

*Research Questions and Corresponding Interview Questions (Revised)*

Research Questions	Corresponding Interview Questions
RQ 1- What challenges are faced by private or publicly traded companies implementing leadership strategies and practices for speaking out on social media?	<p>IQ1: What was your biggest challenge when speaking out on social media?</p> <p>A) Leave as is B) Delete C) Modify as suggested</p> <p>IQ 2: Thinking of your biggest challenge when speaking out on social media, how did you overcome it?</p> <p>A) Leave as is B) Delete C) Modify as suggested.</p> <p>IQ 3: What organizational challenges have you faced in your role of speaking out on social media?</p> <p>A) Leave as is B) Delete C) Modify as suggested</p> <p>IQ 4: What personal challenges have you faced in your role when speaking out on social media?</p> <p>A) Leave as is B) Delete C) Modify as suggested</p>
RQ 2: What leadership strategies and practices are employed by private or publicly traded companies to overcome the challenges they face when speaking out on social media?	<p>IQ 5: What leadership strategies do you use to overcome challenges when speaking out on social media?</p> <p>A) Leave as is B) Delete C) Modify as suggested</p> <p>IQ 6: What guides your strategies when speaking out on social media? (i.e., personal versus company values or both).</p> <p>A) Leave as is B) Delete</p>

Research Questions	Corresponding Interview Questions
	C) Modify as suggested
	IQ 7: What strategies do you use to address the expectations from stakeholders when speaking out on social media?
	A) Leave as is
	B) Delete
	C) Modify as suggested
RQ3 - How do private or publicly traded companies measure the success of speaking out on social media?	IQ 8: How do you define success as a company?
	A) Leave as is
	B) Delete
	C) Modify as suggested
	IQ 9: How do you measure success when speaking out on social media?
	A) Leave as is
	B) Delete
	C) Modify as suggested
RQ4 - Based on their experiences, what recommendations would private or publicly traded companies have for the future implementation of social advocacy strategies and practices?	IQ 10: What recommendations do you have for leaders when speaking out on social media?
	A) Leave as is
	B) Delete
	C) Modify as suggested
	IQ 11: What dangers exist for unqualified voices working at a private or publicly traded company when speaking on social media?
	A) Leave as is
	B) Delete
	C) Modify as suggested

### ***Expert Review Validity***

The researcher's dissertation committee formed a panel of three expert reviewers that also reviewed the RQs after the preliminary peer review. Table 4 reflects the final interview questions that were selected to address the RQs. The dissertation committee made several suggestions and changes to the IQs, adding a layer of validity to the preliminary peer review.

**Table 4***Expert Reviewed: Research Questions and Corresponding Interview Questions*

Research Questions	Corresponding Interview Questions
RQ1- What challenges are faced by private or publicly traded companies implementing leadership strategies and practices for speaking out on social media?	IQ1: What was your biggest challenge when speaking out on social media? IQ 2: What organizational challenges have you faced in your role of speaking out on social media? IQ 3: What personal challenges have you faced in your role when speaking out on social media?
RQ2- What leadership strategies and practices are employed by private or publicly traded companies to overcome the challenges they face when speaking out on social media?	IQ 4: Thinking of your biggest challenge when speaking out on social media, how did you overcome it? IQ 5: What leadership strategies do you use to overcome the organizational challenges you faced when speaking out on social media? IQ 6: What guides your strategies when speaking out on social media? (i.e., personal versus company values or both). IQ 7: What strategies do you use to address the expectations from stakeholders when speaking out on social media?
RQ3- How do private or publicly traded companies measure the success of speaking out on social media?	IQ 8: How do you define success as a company in your social media messaging? IQ 9: How do you measure success when speaking out on social media?
RQ4 - Based on their experiences, what recommendations would private or publicly traded companies have for the future implementation of social advocacy strategies and practices?	IQ 10: What is an example of something you could go back in time and do differently? IQ 11: What dangers exist for unqualified voices working at a private or publicly traded company when speaking on social media?

*Note.* The table identifies four research questions and related interview questions with revisions based on feedback from the expert reviewers (committee). The researcher made subsequent changes to the order and phrasing of questions within the interview protocol.

### ***Reliability of the Study***

A study is reliable when there is consistency or reliability in the results, which means that results are likely to be similar on every occasion that it is tested (Johnson & Christensen, 2012).

For the study to be valid, it is necessary for the research process to be reliable. To enhance reliability, the researcher obtained detailed notes and used a high-quality recording device that was useful for transcribing the recording (Creswell, 2013).

### **Statement of Personal Bias**

A threat to validity that researchers must watch out for is researcher bias (Johnson & Christensen, 2012). To clarify researcher bias, the researcher recalls past experiences, prejudices, biases, and orientations that have shaped the approach to and interpretation of the study (Creswell & Poth, 2018). A criterion of a good qualitative study is the allocation of plenty of detail that enables readers to interpret the meaning and context of the subject matter being studied and uncover the experience as a process (Horsburgh, 2003). This study explored the phenomenon of private or publicly traded companies engaging with stakeholders on social media regarding controversial issues. The researcher works for a large corporation but not in the capacity that involves communication on social media or with other stakeholders beyond his job responsibilities. The researcher does not hold any prior beliefs or convictions about the phenomenon being studied and does not own any stock or have a relationship with any of the study's private or publicly traded companies.

### ***Bracketing and Epoche***

Epoche is a Greek word that means to desist or evade the everyday, ordinary way of perceiving activities. To set aside any prejudgments in the act of epoche, the researcher will look at the phenomenon for the first time in its totality (Moerer-Urdahl & Creswell, 2004; Moustakas, 1994). The epoche process eliminates suppositions and raises knowledge above anything that causes doubt (Moustakas, 1994). Qualitative researchers must bracket out their own experiences as much as possible to fully describe how the participants view the phenomenon (Creswell, 2009). By bracketing own experiences, the researcher can understand the lived experiences

marking phenomenology as a method and procedure that involves studying a small group of participants through extended engagement to identify the relationships of meaning and patterns (Creswell, 2009; Moustakas, 1994).

### **Data Analysis**

Researchers using a qualitative approach to inquiry collect data in a natural setting while being sensitive to the participants in the study. Moreover, the data analysis is inductive and deductive to establish themes (Creswell & Poth, 2018). Creswell and Poth (2013) recommended the following steps in phenomenological analysis:

1. Participants' Multiple Perspectives and Meanings – The researcher focused on the participants' perspectives and meanings about problems or issues and not the research that was discovered in the literature.
2. Organizing the Data – The researcher typically organizes their data into computer files. By organizing, they can convert it to appropriate text units (e.g., audio to word by transcribing).
3. Reading and Memoing (annotating) – This step includes writing notes and memos and labeling photos or documents. The memos are made up of short phrases that incorporate key concepts.
4. Describing, Classifying, and Interpreting Data into Codes and Themes – The researcher goes through the process of coding by combining text and small data into categories and themes. Themes are made up of combinations of several codes to form a common idea.
5. Interpreting the Data – This step involves making sense of the data. The researcher would like their interpretation of the larger literature developed by other researchers.

6. Representing and Visualizing the Data – Information is packaged on what is discovered in text, tables, and figures.

### **Interrater Reliability and Validity**

To ensure inter-rater reliability, the researcher utilized the following four-step process:

1. After the researcher completed the first three interviews, the data was transcribed to identify the themes related to each of the RQs through coding.
2. The researcher shared his findings, transcripts, and codes with two co-raters to review the codes and the themes. The co-raters offered recommendations and feedback on the researcher's codes and themes.
3. Once there was an agreement on the recommendations, the researcher continued to code the remaining interview transcripts following the same structure as the first three.
4. The researcher repeated step 2 to obtain the final themes and codes.

### **Chapter 3 Summary**

Chapter 3 rendered a thorough and comprehensive depiction of the research design and methodology used to conduct the study. The RQs were restated, and the researcher addressed the reasoning for and appropriateness of using a phenomenological qualitative research approach to understand the best practices adopted by private or publicly traded companies in the age of social media. The nature of the study was discussed as well as the analysis unit and sampling frame. The population, the sample size, and the inclusion and exclusion criteria were presented to ensure the best candidates were selected to be part of this study. The researcher collected data from participants who directly experienced the phenomenon in this study by using semi-structured interviews. Key steps were taken to ensure that participants could opt out while maintaining their confidentiality and safety according to the IRB process. The IQs were created

after an exhaustive review of the research and utilizing prima facie validity, peer review, and expert review to increase reliability. Lastly, this chapter presented a statement of personal bias and a detailed account of the procedures to test the validity and reliability of data analysis. The findings of this research study are covered in section 4.



## **Chapter 4: Findings**

With the advent of social media companies and the expansion of the internet, more corporations are making public their stances on social, political, economic, and environmental causes (Eilert & Cherup, 2020). By and large, corporations have shifted their CSR approach as stakeholders heavily weigh non-financial dimensions typically measured by ESG integration (van Duuren et al., 2016). Corporations' actions have led to debate and pressure from activist groups, and the trend looks to continue as sociopolitical causes increasingly transfer from the state to private entities (Hond & De Bakker, 2007). Corporations and their leaders actively engage in policies, boycotts, lobbying, and fundraising on issues including gun regulation, racial justice, gender equality, and religious freedom (Lin, 2018). This qualitative study aimed to identify the best practices taken by leaders working for a private or publicly traded corporation when speaking out on social media. The researcher sought to answer the following four RQs:

- RQ 1 - What challenges are faced by private or publicly traded companies implementing leadership strategies and practices for speaking out on social media?
- RQ2 - What leadership strategies and practices are employed by private or publicly traded companies to overcome the challenges they face when speaking out on social media?
- RQ3 - How do private or publicly traded companies measure the success of speaking out on social media?
- RQ4 - Based on their experiences, what recommendations would private or publicly traded companies have for the future implementation of social advocacy strategies and practices?

The four RQs served as the foundation for 11 interview questions aiming to capture the applicable data from social media leaders from private and public companies who participated in the study. To improve the quality of the interview questions, inter-reliability procedures were applied to arrive at the final interview questions, which were as follows:

- IQ1: What was your biggest challenge when speaking out on social media?
- IQ 2: What organizational challenges have you faced in your role of speaking out on social media?
- IQ 3: What personal challenges have you faced in your role when speaking out on social media?
- IQ 4: Thinking of your biggest challenge when speaking out on social media, how did you overcome it?
- IQ 5: What leadership strategies do you use to overcome the organizational challenges you faced when speaking out on social media?
- IQ 6: What guides your strategies when speaking out on social media? (i.e., personal versus company values or both).
- IQ 7: What strategies do you use to address the expectations from stakeholders when speaking out on social media?
- IQ 8: How do you define success as a company in your social media messaging?
- IQ 9: How do you measure success when speaking out on social media?
- IQ 10: What is an example of something you could go back in time and do differently?
- IQ 11: What dangers exist for unqualified voices working at a private or publicly traded company when speaking on social media?

## **Participants**

The researcher utilized a purposive sampling technique to in reaching out to 250 potential participants that met the criteria for inclusion: (a) was accessible through social networking sites or direct correspondence through company websites, (b) responsible for the communication with stakeholders for a private or publicly traded company, (c) has actively participated in at least one of the controversial topics that are included in the study, (d) is actively involved in developing and planning strategies with stakeholders on social media, (e) agreed to be audio recorded and wished to participate in the study, and (f) could meet over Zoom. Five potential participants responded several times via email but ceased communication without explanation.

Out of the remaining 20 potential participants, the researcher used the following criteria for exclusion: (a) unavailable to meet for a 60-minute Zoom interview during the months of January-June 2022, (b) if the participants lost their employment status during the research period, and (c) those that wished to remove themselves from the study for any reason. The researcher aimed to interview 15 leaders of social media messaging for a private or publicly traded company who could share their experiences and provide enough information to produce rich data. Of the 15 participants, seven were male and eight were female. Five of the participants came from publicly traded companies, whereas 10 came from private companies. Seven participants came from companies with reported annual revenue of over \$1 billion, whereas eight participants represented companies with over \$1 million in yearly revenue.

## **Data Collection**

The researcher began recruiting participants on February 25, 2022, after receiving IRB approval on February 24, 2022. A sample of 50 social media leaders for private or publicly traded corporations was identified, considering the inclusion criteria. Contact information for the

prospective participants was obtained through LinkedIn and their respective companies' directories on their websites. After a month of receiving no responses, the sample was expanded to over 250 with the goal of interviewing at least 15 participants. Five potential participants stopped responding after several back-and-forth emails, and four declined after being made aware of the questions. Twenty-five said they had no bandwidth to participate or could not meet during the months of the study. Two hundred sixteen never responded to the initial email or follow-up email. Scheduling interviews and receiving responses was challenging, exceeding original expectations due to nonresponses and people declining to participate. Fifteen participants were the target of the study, and a total of 15 participants were accepted to be interviewed. The first interview was conducted on March 23, 2022, and the last one was completed on June 6, 2022.

Participants were contacted via the available email on their respective company websites, and sometimes voicemails were left. Upon participants' agreement to partake in the study, a calendar invite was sent along with the IRB-approved consent form for their signature (Appendix E). Once the signed document was returned, each participant was eligible to participate and authorized his/her consent to partake in the study. At the time of the interview, each participant was notified of the goals and purpose of the study; questions were permitted after the interview. None of the interviews reached the 60-minutes scheduled for each participant; the range was from 16-42 minutes, with an aggregate average of 29 minutes. All interviews were semi-structured, and the researcher replied only to clarify or repeat the responses provided by the participant. Table 5 summarizes the participants' corporation type, annual revenue of their company, and the interview date.

**Table 5***Participants, Corporation Type, and Interview Date*

Participant	Corporation Type	Interview Date
Participant 1	Private	March 23, 2022
Participant 2	Publicly Traded	March 30, 2022
Participant 3	Private	March 31, 2022
Participant 4	Publicly Traded	April 5, 2022
Participant 5	Publicly Traded	April 8, 2022
Participant 6	Private	April 19, 2022
Participant 7	Private	April 29, 2022
Participant 8	Publicly Traded	May 3, 2022
Participant 9	Private	May 12, 2022
Participant 10	Private	May 16, 2022
Participant 11	Private	May 17, 2022
Participant 12	Private	May 20, 2022
Participant 13	Private	May 23, 2022
Participant 14	Private	May 25, 2022
Participant 15	Publicly Traded	June 7, 2022

**Data Analysis**

Before each interview and throughout the process, the researcher bracketed his own experiences and set aside any prejudgments using epoche to eliminate suppositions and raise knowledge above anything that causes any doubt (Moustakas, 1994). The data captured from the interviews were analyzed by utilizing a qualitative research procedure known as coding. The researcher took notes throughout each interview and recorded each interview for further review.

The 15 interviews were the main source of the data; each interview was audio and video recorded and had a transcription. The transcriptions were reviewed two times for accuracy. After the transcriptions were reviewed, the researcher was able to pinpoint the general ideas and capture the codes and themes of the responses. The themes that emerged during the interview responses were color-coded to assist with differentiation.

### **Inter-rater Review Process**

To strengthen the themes' validity, the researcher sent the codes to two doctoral students enrolled at Pepperdine University in the Organizational Leadership program. Each of the raters possessed graduate-level knowledge in qualitative research. The process for inter-rater review had similarities to the operation of rating the interview questions. Once the first three interviews were finished, the researcher color-coded the data by highlighting the words and phrases that identified the themes in each interview transcript. Both reviewers replied with their suggestions, questions, and notes. The researcher applied feedback from the reviewers that fit the overarching themes of the study. Once the researcher gained a consensus on the themes, the remaining 12 interviews followed the same structure.

### **Data Display**

Data was collected and organized in line with the scope of the RQs and the corresponding interview questions. The recurring themes were noted based on the code words, and the researcher created frequency bar charts to represent the results visually. The charts showed the frequency of each response from largest to smallest. The researcher provided sample participant quotes from each theme's interview transcripts. None of the corporations were listed; all participants were nameless and appeared under the pseudonym Participant 1, Participant 2, Participant 3, etc.

### **RQ1**

RQ1 sought to understand the challenges private or publicly traded companies face in implementing leadership strategies and practices for speaking out on social media. The themes related to the RQ derived from responses to the following questions that were analyzed both individually and collectively.

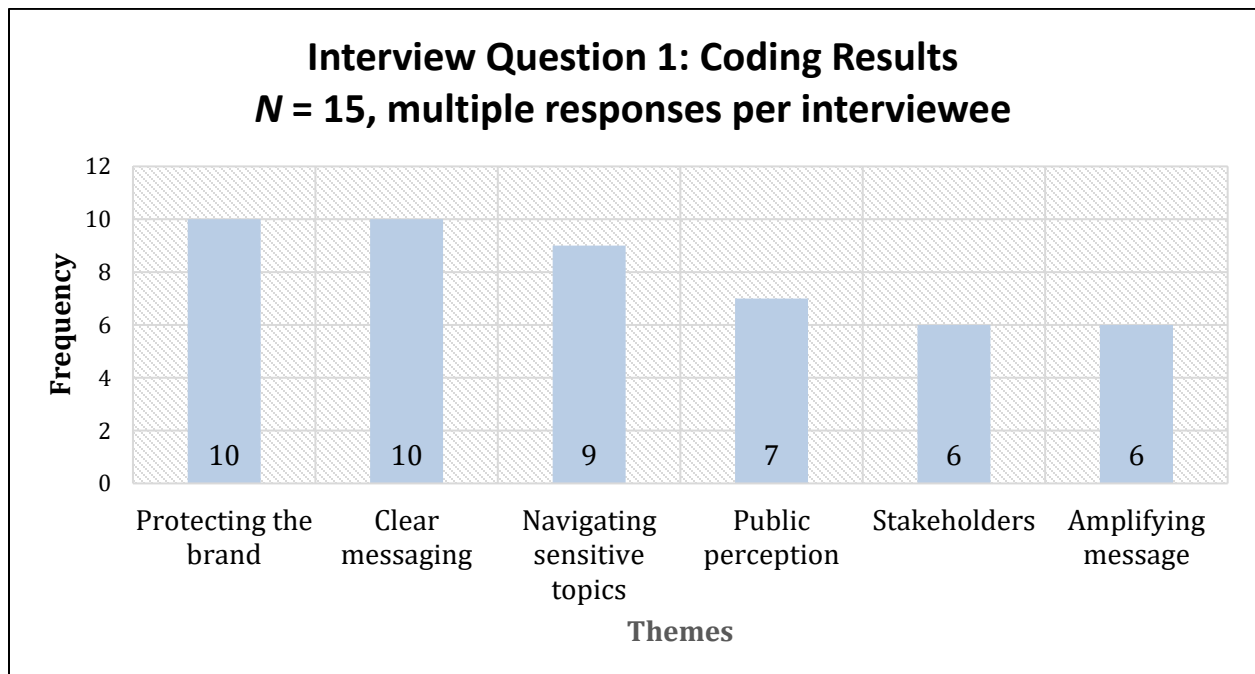
- IQ1: What was your biggest challenge when speaking out on social media?
- IQ 2: What organizational challenges have you faced in your role of speaking out on social media?
- IQ 3: What personal challenges have you faced in your role when speaking out on social media?

### ***Interview Question 1***

This question asked, What was your biggest challenge when speaking out on social media? The responses yielded six common themes: (a) protecting the brand, (b) clear messaging, (c) navigating sensitive topics, (d) public perception, (e) stakeholders, and (f) amplifying message.

**Figure 1**

*The Biggest Challenges When Speaking on Social Media*



*Note.* This chart visually represents the themes deriving from interviewee responses to question 1. Data appears from the most to the least frequent response. Inside each bar are the numbers accounting for the total participants contributing to the theme.

**Protecting the Brand.** The theme of protecting the brand emerged as the most common response when participants were asked about the biggest challenge they faced when speaking out on social media, with 10 out of 15 (67%) mentioning it. The decisive words, expressions, and perspectives included: protecting the brand, staying aligned with the brand, and increasing awareness of the brand. Participant 1 reported,

We spent the last couple of years protecting the brand, it is working really hard to make sure we had our brand guidelines in place, making sure that we knew how we're talking about ourselves, making sure the right to present ourselves to the world would be.

Furthermore, Participant 4 noted,

When is it appropriate to speak out on social media? Because if we do not, we will lose business. We look at first from a simple financial perspective, it is not the only perspective, but we look at this first and see if we see signals that our lack of speaking out will affect our business.

**Clear Messaging.** The theme of clear messaging also emerged as the most common response when participants were asked about the biggest challenge faced when speaking out on social media, with 10 out of 15 (67%) mentioning it. The decisive words, expressions, and perspectives included: ensuring the context is not lost, making sure the post is transparent, and avoiding virtue signaling. Participant 2 reported, "The biggest challenge on social media is ensuring the context is not lost." Furthermore, Participant 8 noted, "finding the right words that are going to resonate with our audience and getting engagement."

**Navigating Sensitive Topics.** The theme of navigating sensitive topics emerged as the third most common response when participants were asked about the biggest challenge faced when speaking out on social media, with nine out of 15 (60%) mentioning it. The decisive



words, expressions, and perspectives included: posting about sensitive topics, navigating sensitive topics, and being conscious about what is happening in the real world. Participant 9 responded, “The main one being politically correct, sometimes I have to question, is this okay to post, is this okay to use? And then also the things that the company doesn’t necessarily want to be broadcasted.” Furthermore, Participant 14 mentioned the importance of “being aware and sensitive to other things happening in the world, and other people’s viewpoints, perspectives, and histories.”

**Public Perception.** The theme of public perception emerged as the fourth most common response when participants were asked about the biggest challenge faced when speaking out on social media, with seven out of 15 (47%) mentioning it. The decisive words, expressions, and perspectives included: not what you say but how it is perceived, knowing when to speak out on an issue, taking a stance will offend somebody, why not offend nobody. Participant 2 reported, “when as a company you speak out on social media, it is not what you said but is how and in what context people perceive it.” Furthermore, Participant 6 emphasized the importance of “knowing when to speak out or frankly, knowing when not to speak out is the biggest challenge.”

**Stakeholders.** The theme of stakeholders appeared as the fifth most frequent response when participants were asked about the biggest challenge faced when speaking out on social media, with six out of 15 (40%) mentioning it. The decisive words, expressions, and perspectives included: stakeholders expect more from companies they support, representing many backgrounds, taking into account employees, families, and other stakeholders. Participant 13 reported, “there are competing interests internally that want a certain message pushed.” Furthermore, Participant 14 mentioned, “we try to be a united front as we are representing a lot of backgrounds, cultures, and geographical areas.”

**Amplifying Message.** The theme of amplifying the message emerged as the sixth most common response when participants were asked about the biggest challenge faced when speaking out on social media, with six out of 15 (40%) mentioning it. The decisive words, expressions, and perspectives included: reaching out to the most people, creating engaging content that amplifies, and making content appealing and more enticing to people. Participant 9 reported, “We are trying to branch out to make our social media more enticing and engaging.” Furthermore, Participant 8 mentioned the importance of “resonating with the audience to increase engagement.”

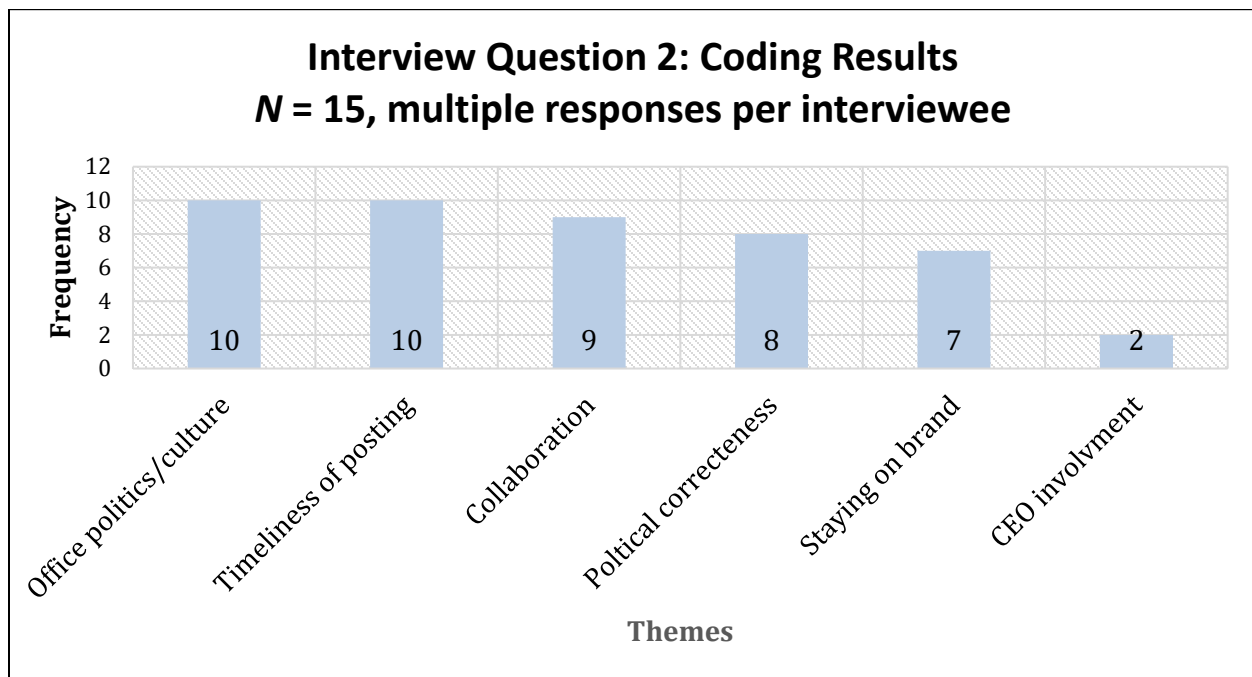
### ***Interview Question 2***

This question asked, What organizational challenges have you faced in your role when speaking out on social media? The responses brought forth six common themes, including: (a) office politics/culture, (b) timeliness of positing, (c) collaboration, (d) political correctness, (e) staying on brand, and (f) CEO involvement.

**Office Politics/Culture.** The theme of office politics/culture was the most common response when participants were asked about the biggest organizational challenge faced when speaking out on social media, with 10 out of 15 (67%) mentioning it. The decisive words, expressions, and perspectives included: internal politics, balancing internal processes, and competing interests internally. Participant 1 reported, “there is a discrepancy between political decision making and political drives for certain content and evidence-based content that we know performs.” Furthermore, Participant 4 mentioned that “the hardest thing is balancing whose voice outweighs others.

**Figure 2**

*The Organizational Challenges Faced When Speaking Out on Social Media*



*Note.* This chart visually represents the themes deriving from interviewee responses to question 2. Data appears from the most to the least frequent response. Inside each bar are the numbers accounting for the total participants contributing to the theme.

**Timeliness of Posting.** The theme of timeliness of posting was also the most common response when participants were asked about the biggest organizational challenge faced when speaking out on social media, with 10 out of 15 (67%) mentioning it. The decisive words, expressions, and perspectives included: time-sensitive posting, timeliness of posting, and not being too late. Participant 2 reported, “in order to remain relevant and to remain engaged in the conversation, you need to move fast; timeliness is important.” Furthermore, Participant 4 stated, “you cannot wait that long on most issues, because when you put something out, people will question, why did you wait so long?”

**Collaboration.** The theme of collaboration was the third most common response when participants were asked about the biggest organizational challenge faced when speaking out on

social media, with nine out of 15 (60%) mentioning it. The decisive words, expressions, and perspectives included: a multilayered process before posting, using internal leaders from diverse groups before putting out a statement, and navigating as a department. Participant 10 noted, “We put together a lot of different posts that we have and ask the rest of the group if they are okay with that.” Furthermore, Participant 12 emphasized the importance of “navigating it internally, whether as a department or team kind of talking it through.”

**Political Correctness.** The theme of political correctness was also the third most common response when participants were asked about the biggest organizational challenge faced when speaking out on social media, with eight out of 15 (53%) mentioning it. The decisive words, expressions, and perspectives included: do not want communication that will start a movement, being politically correct, and shy away from political and social views. Participant 9 stated that “the main one is being politically correct.” Furthermore, Participant 12 mentioned they faced difficulty “especially when it comes to like social issues, they are personal issues by and large, so that makes it complex because you are navigating something that is highly sensitive.”

**Staying on Brand.** The theme of staying on brand was the third most common response when participants were asked about the biggest organizational challenge faced when speaking out on social media, with seven out of 15 (47%) mentioning it. The decisive words, expressions, and perspectives included: speaking on topics approved within brand guidelines, being true to values, and alignment with goals and mission. Participant 8 mentioned, “you want to make sure that your messaging matches your goals and your mission.” Furthermore, Participant 13 reported, “all the departments have competing interests but are aligned in terms of the mission of the organization.”

**CEO Involvement.** The theme of CEO involvement was the third most common response when participants were asked about the biggest organizational challenge faced when speaking out on social media, with two out of 15 (13%) mentioning it. The decisive words, expressions, and perspectives included: pressure from the CEO and CEO approval. Participant 1 reported, “because the request to post came from the CEO, it was hard to say no.” Furthermore, Participant 2 stated, “it could be a question of going up to the CEO to ensure that the CEO is sanctioning off on whatever it is that we are going to say.”

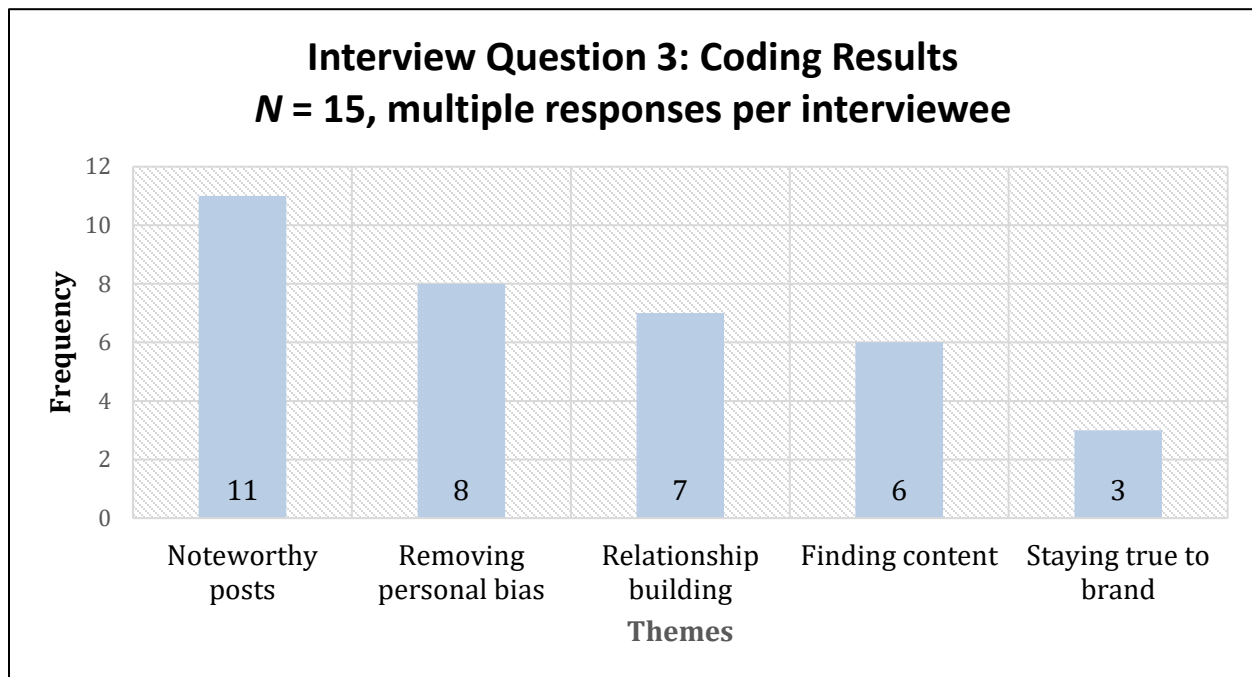
### ***Interview Question 3***

This question asked, What personal challenges have you faced in your role when speaking out on social media? The responses yielded the following five themes: (a) noteworthy posts, (b) removing personal bias, (c) relationship building, (d) finding content, and (e) staying true to brand.

**Noteworthy Posts.** The theme of noteworthy posts was the most common response when participants were asked about the biggest personal challenge faced when speaking out on social media, with 11 out of 15 (73%) mentioning it. The decisive words, expressions, and perspectives included: mindful of the impact on what is said over time, is an issue worth posting, and connecting spoken words with actions. Participant 2 emphasized the importance of, “in every situation, being mindful that is not what is said now but how it would look over time.” Furthermore, Participant 9 stated, “designing how it is going to look as it going to look appealing?”

**Figure 3**

*The Personal Challenges Participants Faced When Speaking Out on Social Media*



*Note.* This chart visually represents the themes deriving from interviewee responses to question 3. Data appears from the most to the least frequent response. Inside each bar are the numbers accounting for the total participants contributing to the theme.

**Removing Personal Bias.** The theme of removing personal bias was also the second most common response when participants were asked about the biggest personal challenge faced when speaking out on social media, with eight out of 15 (53%) mentioning it. The decisive words, expressions, and perspectives included: not letting bias come into the conversation, separating self from the brand, and keeping strong beliefs to oneself. Participant 2 stated, “the biggest challenge is not letting your conscious or unconscious biases come into the conversation.” Furthermore, Participant 4 reported, “you just do not want to make it about yourself.”

**Relationship Building.** The theme of relationship-building was the second most common response when participants were asked about the biggest personal challenge faced when

speaking out on social media, with seven out of 15 (47%) mentioning it. The decisive words, expressions, and perspectives included: creating new relationships to know more about what is happening, creating buy-in, and making sure the posting aligns with everyone's thinking. Participant 10 emphasized the importance of "making sure that as a group, we are aligned in the way we think." Furthermore, Participant 14 reported, "the biggest challenge for me is the communication with the powers that be in getting direction in what is acceptable and what is not acceptable."

**Finding Content.** The theme of finding content was also the second most common response when participants were asked about the biggest personal challenge faced when speaking out on social media, with six out of 15 (40%) mentioning it. The decisive words, expressions, and perspectives included: finding content, keeping up with material that captures attention, and staying up to date with what is going on in the world. Participant 9 emphasized the importance of "keeping up with what is current and appealing." Furthermore, Participant 13 noted the need to make sure "that I am aware and up to date on what is happening in the world, politically and socially."

**Staying True to Brand.** The theme of staying true to brand was the fifth most common response when participants were asked about the biggest personal challenge faced when speaking out on social media, with three out of 15 (20%) mentioning it. The decisive words, expressions, and perspectives included: benefit the business, aligning with organization, and staying within the brand. Participant 13 noted the importance of being "aligned in terms of the organization's mission." Furthermore, Participant 14 stated, "everything we post has to be within brand standards."

### ***Summary of RQ1***

RQ1 examined the challenges faced by private or publicly traded companies implementing leadership strategies and practices for speaking out on social media. A total of 17 themes were identified by analyzing the decisive words, expressions, and perspectives in participant responses to the three interview questions. The biggest challenge the participants faced when speaking out on social media included: (a) protecting the brand, (b) clear messaging, (c) navigating sensitive topics, (d) public perception, (e) stakeholders, and (f) amplifying message. The organizational challenges participants faced in their role of speaking out on social media included: (a) office politics/culture, (b) timeliness of positing, (c) collaboration, (d) political correctness, (e) staying on brand, and (f) CEO involvement. The personal challenges the participants faced when speaking out on social media included: (a) noteworthy posts, (b) removing personal bias, (c) relationship building, (d) finding content, and (e) staying true to brand.

### **RQ2**

RQ2 sought to understand the leadership strategies and practices employed by private or publicly traded companies to overcome the challenges they face when speaking out on social media. The themes related to the RQ derived from responses to the following four questions that were analyzed individually and collectively.

- IQ 4: Thinking of your biggest challenge when speaking out on social media, how did you overcome it?
- IQ 5: What leadership strategies do you use to overcome the organizational challenges you faced when speaking out on social media?



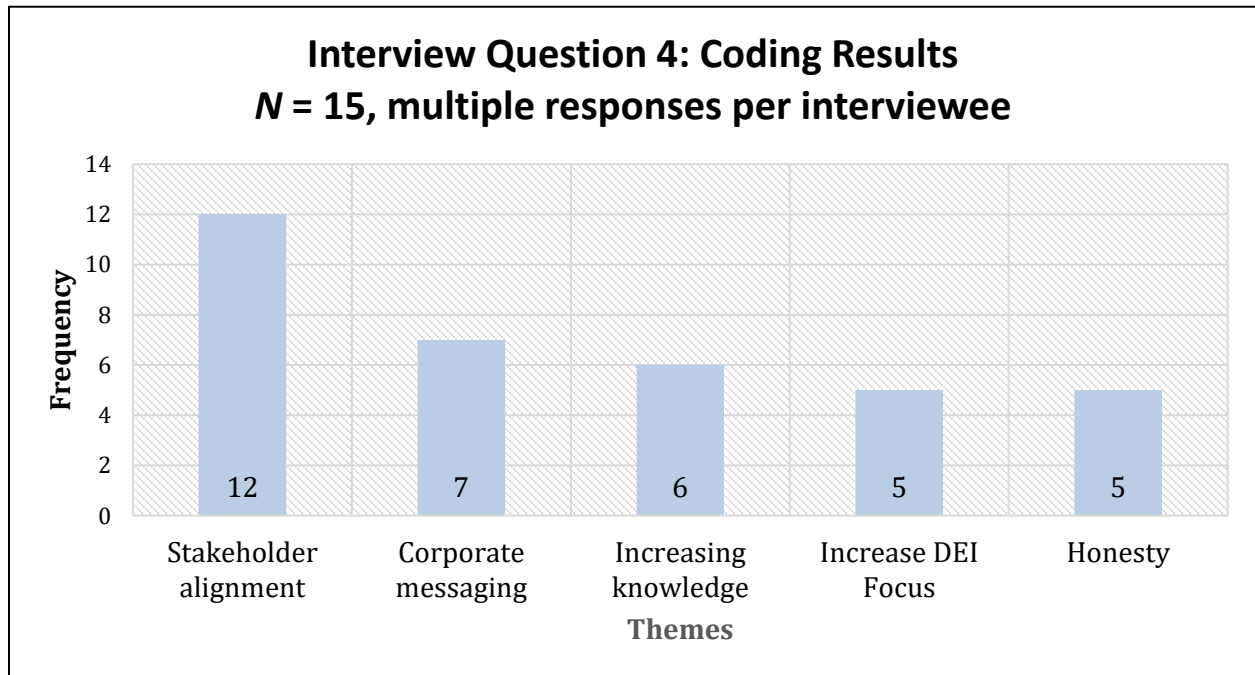
- IQ 6: What guides your strategies when speaking out on social media? (i.e., personal versus company values or both).
- IQ 7: What strategies do you use to address the expectations from stakeholders when speaking out on social media?

#### ***Interview Question 4***

This question asked, Thinking of your biggest challenge when speaking out on social media, how did you overcome it? The five yielded themes discovered in the responses were: (a) stakeholder alignment; (b) corporate messaging; (c) increasing knowledge; (d) increasing diversity, equity, and inclusion (DEI) focus; and (e) honesty (see Figure 4).

**Figure 4**

*The Biggest Challenge and How the Participant Overcame It*



*Note.* This chart visually represents the themes deriving from interviewee responses to question 4. Data appears from the most to the least frequent response. Inside each bar are the numbers accounting for the total participants contributing to the theme.

**Stakeholder Alignment.** The theme of stakeholder alignment was the most common response when participants were asked about the biggest challenge and how they overcame it, with 12 out of 15 (80%) mentioning it. The decisive words, expressions, and perspectives included: building alignment with stakeholders, informing stakeholders you stand with them, and working with multiple eyes. Participant 2 reported, “the key piece here is to build alignment before you start speaking out.” Furthermore, Participant 3 stated, “you kinda have to run through your list of all the people that would need to sign off.”

**Corporate Messaging.** The theme of corporate messaging was the second most common response when participants were asked about the biggest challenge and how they overcame it, with seven out of 15 (47%) mentioning it. The decisive words, expressions, and perspectives included: align with corporate strategy, it is not the individual but the corporation speaking, and staying within the brand. Participant 3 reported, “when making a case for why we should say something, it is about aligning it back to our corporate strategy.” Furthermore, Participant 12 noted,

I always sort of lead with when it comes to these situations is, like, what are we doing a business? And I think having that mindset has helped me streamline the number of opinions and requests that we receive when speaking out.

**Increasing Knowledge.** The theme of increasing knowledge was the third most common response when participants were asked about the biggest challenge and how they overcame it, with six out of 15 (40%) mentioning it. The decisive words, expressions, and perspectives included: asking questions to understand group thought, understanding generational differences, and rereading posts. Participant 9 stated, “learning about generational differences has helped me overcome my own issues and how to make appealing content.” Furthermore, Participant 14

emphasized the importance of “understanding how to communicate with people and the best way to reach those people, and then going with them with a plan.”

**Increase DEI Focus.** The theme of increasing DEI focus was the fourth common response when participants were asked about the biggest challenge and how they overcame it, with five out of 15 (33%) mentioning it. The decisive words, expressions, and perspectives included: social awareness, increased promotion of women from within, and working with internal groups. Participant 3 reported, “one of our overall corporate strategies and goals is to promote women in the marketplace.” Furthermore, Participant 13 emphasized the importance of “being more aware of other people’s viewpoints, perspectives, and histories alike.”

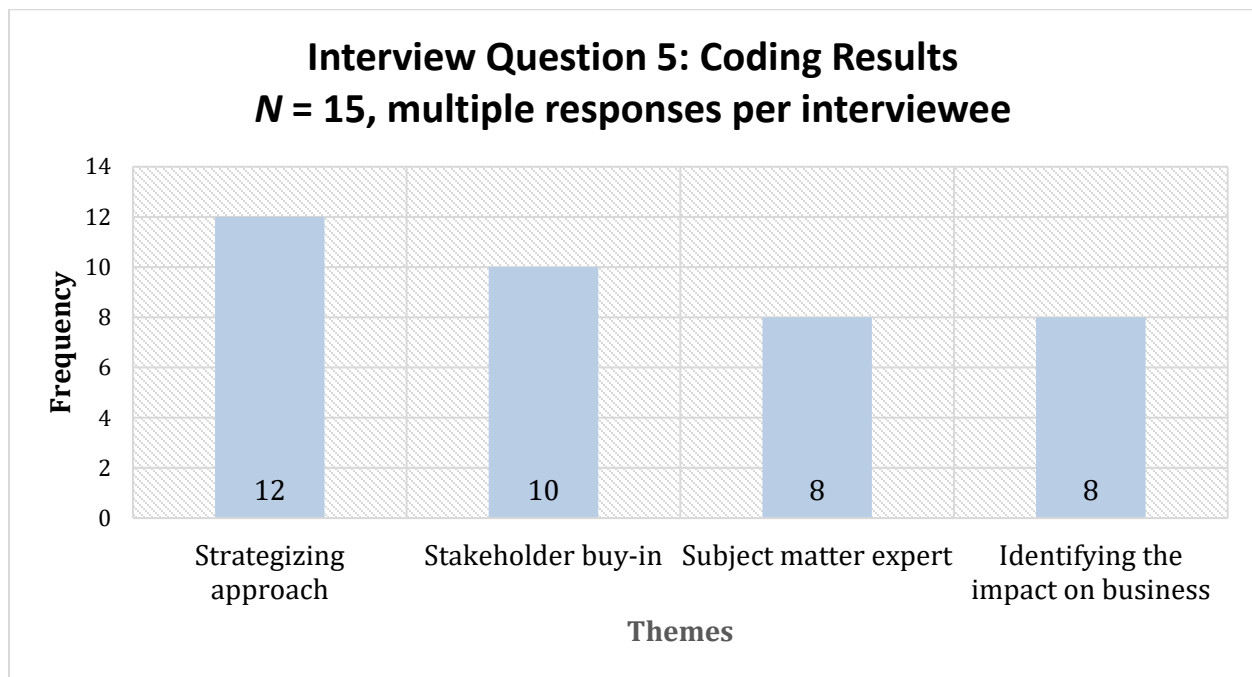
**Honesty.** The theme of honesty was also the fourth most common response when participants were asked about the biggest challenge and how they overcame it, with five out of 15 (33%) mentioning it. The decisive words, expressions, and perspectives included: accurate, truthful, and speaking honestly to avoid controversy. Participant 7 emphasized the importance of “trying to make things accurate and truthful for almost every reader, rather than being careful about your words.” Participant 12 stated, “what would you say that feels genuine? And, how are we backing a statement up, whether that is with money or action.”

### ***Interview Question 5***

This question asked, What leadership strategies do you use to overcome the organizational challenges you faced when speaking out on social media? The responses yielded four themes, including: (a) strategizing approach, (b) stakeholder buy-in, (c) subject matter expert, and (d) identifying the impact on business.

**Figure 5**

*The Leadership Strategies Participants Used When Speaking Out on Social Media*



*Note.* This chart visually represents the themes deriving from interviewee responses to question 5. Data appears from the most to the least frequent response. Inside each bar are the numbers accounting for the total participants contributing to the theme.

**Strategizing Approach.** The theme of strategizing approach was the most common response regarding leadership strategies to overcome organizational challenges, with 12 out of 15 (80%) mentioning it. The decisive words, expressions, and perspectives included: looking at data that perform well, creating a DEI group, and avoiding controversial posts. Participant 1 emphasized the importance of asking “what is the competition doing and does that work, and apply[ing it] to your own situation.” Furthermore, Participant 2 said, “not every conversation is for us to engage.”

**Stakeholder Buy-in.** The theme of stakeholder buy-in was the second most common response regarding leadership strategies to overcome organizational challenges, with 10 out of 15 (67%) mentioning it. The decisive words, expressions, and perspectives included: talking to

stakeholders, working with the internal group, and collaboration. Participant 5 reported, “I usually run blogs to the group in case something stands out that I might have potentially missed.” Participant 12 emphasized the importance of “making sure I am available for other people to talk about things they want to see posted or to bring up issues with a post that might have gone out for feedback.”

**Subject Matter Expert.** The theme of subject matter expert was the third most common response regarding leadership strategies to overcome organizational challenges, with eight out of 15 (53%) mentioning it. The decisive words, expressions, and perspectives included: increasing training, learning what other roles are, and continuing education. Participant 1 reported, “one strategy applies to become well informed about a topic, to read a lot of it, become like an expert in your field and use that background of knowledge.” Furthermore, participant 13 emphasized the importance of taking “continuing education courses or going to events and things like that.”

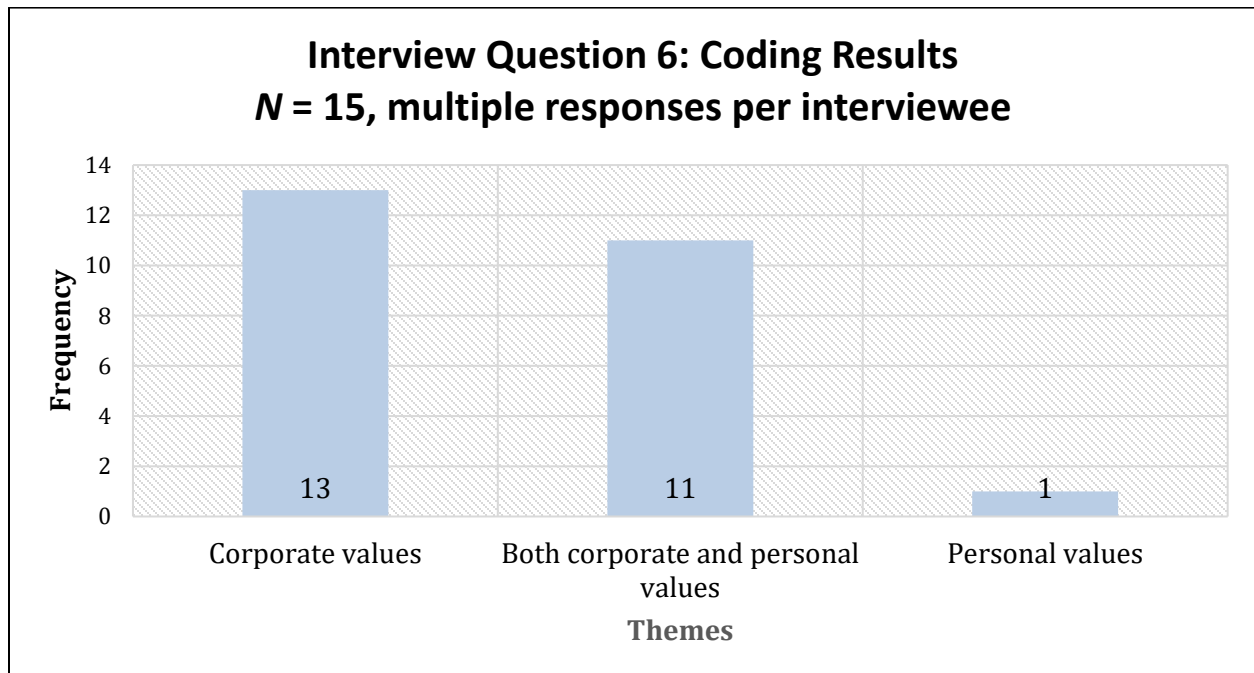
**Identifying the Impact on Business.** The theme of identifying the impact on business was also the third most common response regarding leadership strategies to overcome organizational challenges, with eight out of 15 (53%) mentioning it. The decisive words, expressions, and perspectives included: making a business case, understanding ramifications if silence is preferred, and proof of concept. Participant 2 reported, “when setting the business case, we can show we can show the impact of our decision on our business, and therefore, are able to make the right about whether we engage in a certain conversation or not.” Furthermore, participant 6 stated, “we can either speak or not speak, this can happen if we do, and this happens if we do not; if we decide to speak out, here are the pros and cons.”

### ***Interview Question 6***

This question asked, What guides your strategies when speaking out on social media? (i.e., personal versus company values or both). The three yielded themes uncovered included: (a) corporate values, (b) both corporate and personal values, and (c) personal values.

**Figure 6**

*The Values That Guide the Participants' Strategies When Speaking Out on Social Media*



*Note.* This chart visually represents the themes deriving from interviewee responses to question 2. Data appears from the most to the least frequent response. Inside each bar are the numbers accounting for the total participants contributing to the theme.

**Corporate Values.** The theme of corporate values was the most common response regarding what guides strategy when speaking out on social media, with 13 out of 15 (87%) mentioning it. The decisive words, expressions, and perspectives included: company values, corporate values, and organizational values. Participant 4 reported, “first and foremost, it is company values over personal values, because the logic for that is, if we only went with personal values, why are we part of a company making a statement? It would be a personal statement.”

Participant 15 stated, “we are speaking as the company, then obviously the company strategy and values.”

**Both Corporate and Personal Values.** The theme of both corporate and personal values was the second most common response regarding what guides strategy when speaking out on social media, with 11 out of 15 (73%) mentioning it. The decisive words, expressions, and perspectives included: Both. Participant 12 reported, “Company values align with my personal values because I would not work for an organization that I do not share their values.” Furthermore, Participant 15 stated, “I do not think I could be working for a company where I did not share the values also personally.”

**Personal Values.** The theme of personal values was the third most common response regarding what guides strategy when speaking out on social media, with one out of 15 (7%) mentioning it. Participant 11 reported, “if something ever felt truly off to me, I would not publish it, push it out, or do anything externally.”

### ***Interview Question 7***

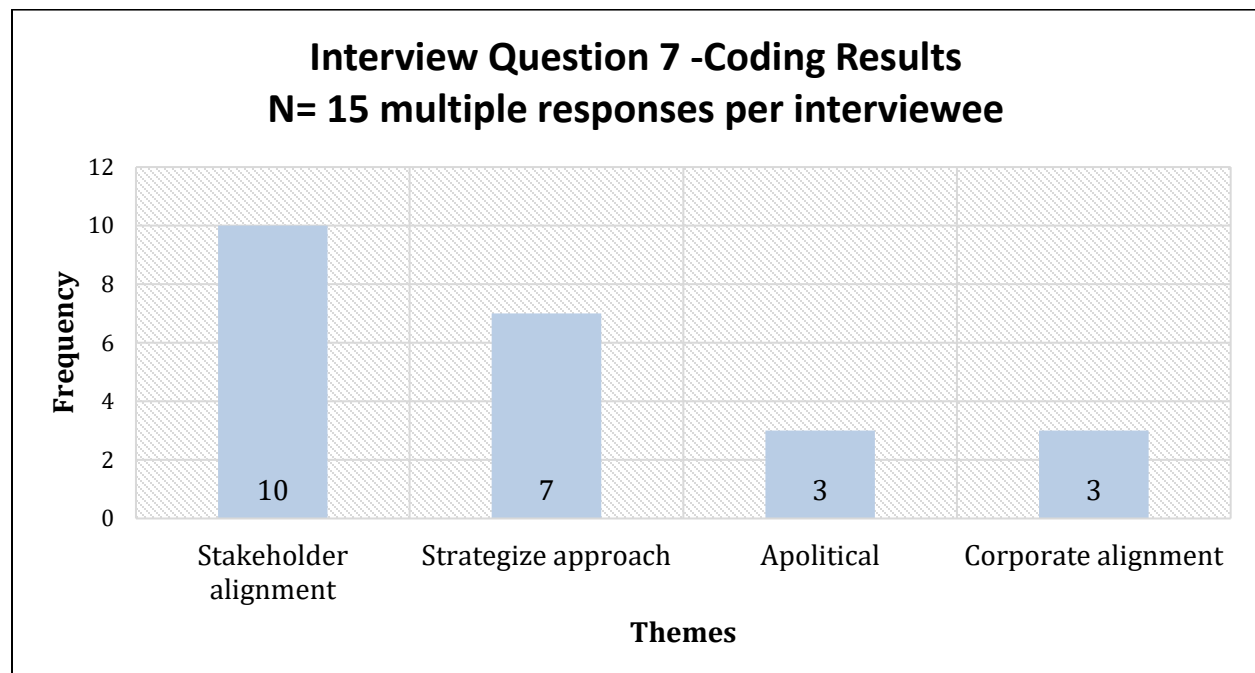
This question asked, What strategies do you use to address the expectations from stakeholders when speaking out on social media? The responses yielded four common themes: (a) stakeholder alignment, (b) strategize approach, (c) apolitical, and (d) corporate alignment (see Figure 7).

**Stakeholder Alignment.** The theme of stakeholder alignment was the most common response regarding strategies used to address expectations from stakeholders when speaking out on social media, with 10 out of 15 (67%) mentioning it. The decisive words, expressions, and perspectives included: Multilayered vetting process before posting, alignments with internal stakeholders, and working with internal groups to address social issues. Participant 1 reported,

“we have writers, and we have a creative team, so they will put together the content for social and someone else who will vet it.” Furthermore, Participant 12 emphasized the importance of “constantly meeting with various groups, and you know, hearing their objectives.”

**Figure 7**

*Participants’ Strategies in Addressing Stakeholders’ Expectations When Speaking Out on Social Media*



*Note.* This chart visually represents the themes deriving from interviewee responses to question 7. Data appears from the most to the least frequent response. Inside each bar are the numbers accounting for the total participants contributing to the theme.

**Strategize Approach.** The theme of strategizing the approach was the second most common response regarding strategies used to address expectations from stakeholders when speaking out on social media, with seven out of 15 (47%) mentioning it. The decisive words, expressions, and perspectives included: looking at the competitive landscape to see the issue’s importance, focusing on one post at a time, and having proof of concept examples. Participant 9 reported, “so I try to focus on one post at a time and one product at a time rather than the whole



slew of services we offer.” Participant 11 stated, “having examples of other brands is always helpful; I think it is a completing strategy is just having proof of those that have gone before us and have cautionary tales to show.”

**Apolitical.** The theme of being apolitical was the fourth most common response regarding strategies used to address expectations from stakeholders when speaking out on social media, with three out of 15 (20%) mentioning it. The decisive words, expressions, and perspectives included: not championing social issues, no controversial topics, and content is very safe. Participant 1 reported, “we do not want to create social noise or trigger any controversial debates just because we are trying to be apolitical at all times.” Furthermore, Participant 7 stated, “we want to remain neutral and avoid championing social issues.”

**Corporate Alignment.** The theme of corporate alignment was the fourth most common response regarding strategies used to address expectations from stakeholders when speaking out on social media, with three out of 15 (20%) mentioning it. The decisive words, expressions, and perspectives included: being aligned with corporate strategy mission and objectives, sticking to the company agenda, and being clear on what the values are in communication. Participant 2 reported that “the key thing here is having alignment on a corporate strategy and a corporate mission, and corporate objectives.” Participant 8 noted, “I will use keywords and messaging that is already approved.”

### ***Summary of RQ2***

RQ2 examined the leadership strategies and practices employed by private or publicly traded companies to overcome their challenges when speaking out on social media. A total of 16 themes were identified by analyzing the decisive words, expressions, and perspectives in participant responses to the four interview questions. Thinking of their biggest challenge when

speaking out on social media and how they overcame it, the participants' responses included: (a) stakeholder alignment, (b) corporate messaging, (c) increasing knowledge, (d) increasing DEI focus, and (e) honesty. The leadership strategies the participants used to overcome the organizational challenges faced when speaking out on social media include: (a) strategizing approach, (b) stakeholder buy-in, (c) subject matter expert, and (d) identifying the impact on business. The values that guide the strategies of the participants when speaking out on social media include: (a) corporate values, (b) both corporate and personal values, and (c) personal values. The strategies the participants used to address stakeholders' expectations when speaking out on social media include: (a) stakeholder alignment, (b) strategize approach, (c) apolitical, and (d) corporate alignment.

### **RQ3**

RQ3 sought to understand how private or publicly traded companies measure success when speaking out on social media. The themes related to the RQ derived from responses to the following questions that were analyzed individually and collectively.

- IQ 8: How do you define success as a company in your social media messaging?
- IQ 9: How do you measure success when speaking out on social media?

#### ***Interview Question 8***

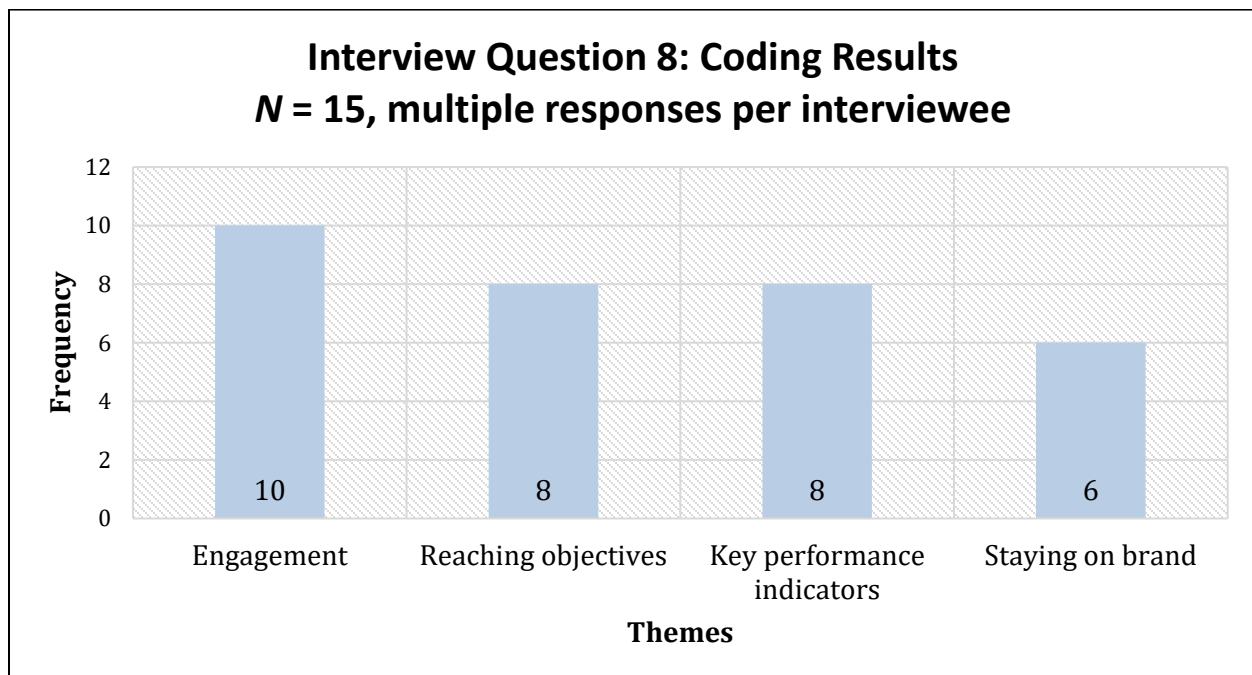
This question asked, How do you define success as a company in your social media messaging? A total of four themes appeared in the responses, including: (a) engagement, (b) reaching objectives, (c) key performance indicators, and (d) staying on brand (see Figure 8).

**Engagement.** The theme of engagement was the most common response regarding defining success as a company in social media messaging, with 10 out of 15 (67%) mentioning it. The decisive words, expressions, and perspectives included: engagement, which posts are

liked the most, and the amount of attention. Participant 1 reported, “that really gets down to engagement, the number of people you are able to reach out to and the engagement and the sentiment of that engagement.” Furthermore, Participant 15 stated, “reach and engagements, and clicks and what not.”

**Figure 8**

*How Company Success Is Defined in Social Media Messaging*



*Note.* This chart visually represents the themes deriving from interviewee responses to question 8. Data appears from the most to the least frequent response. Inside each bar are the numbers accounting for the total participants contributing to the theme.

**Reaching Objectives.** The theme of reaching objectives was the second most common response regarding defining success as a company in social media messaging, with eight out of 15 (53%) mentioning it. The decisive words, expressions, and perspectives included: reaching the objectives, the message being clear, and social presence growing. Participant 6 reported, “if you are constantly going back to clarify or expand on it, then your original post was not

sufficient.” Furthermore, Participant 14 stated, “we want to make sure that our social presence is growing, so we want to implement strategies that are going to be conducive for that.”

**Key Performance Indicators.** The theme of key performance indicators was also the second most common response regarding defining success as a company in social media messaging, with eight out of 15 (53%) mentioning it. The decisive words, expressions, and perspectives included: key performance indicators, metrics, and KPIs. Participant 3 reported, “it all comes down to the standard of metrics which include likes, shares, comments, all those usual social media metrics, of course, are very important to us.” Furthermore, Participant 11 stated, “we do a lot of analytics; we like to see which posts are liked the most, which ones are reaching out to the most amount of people.”

**Staying on Brand.** The theme of staying on brand was the fourth most common response regarding defining success as a company in social media messaging, with six out of 15 (40%) mentioning it. The decisive words, expressions, and perspectives included: message is aligned with values, social messaging is aligned with company values, and adding credibility to the brand. Participant 12 reported, “so for us; success is a little more difficult to measure it because I think it is like we are doing it because it is aligned with our values.” Furthermore, Participant 13 stated, “the mission, vision, and the goals of the organization are clear through the posting on social media.”

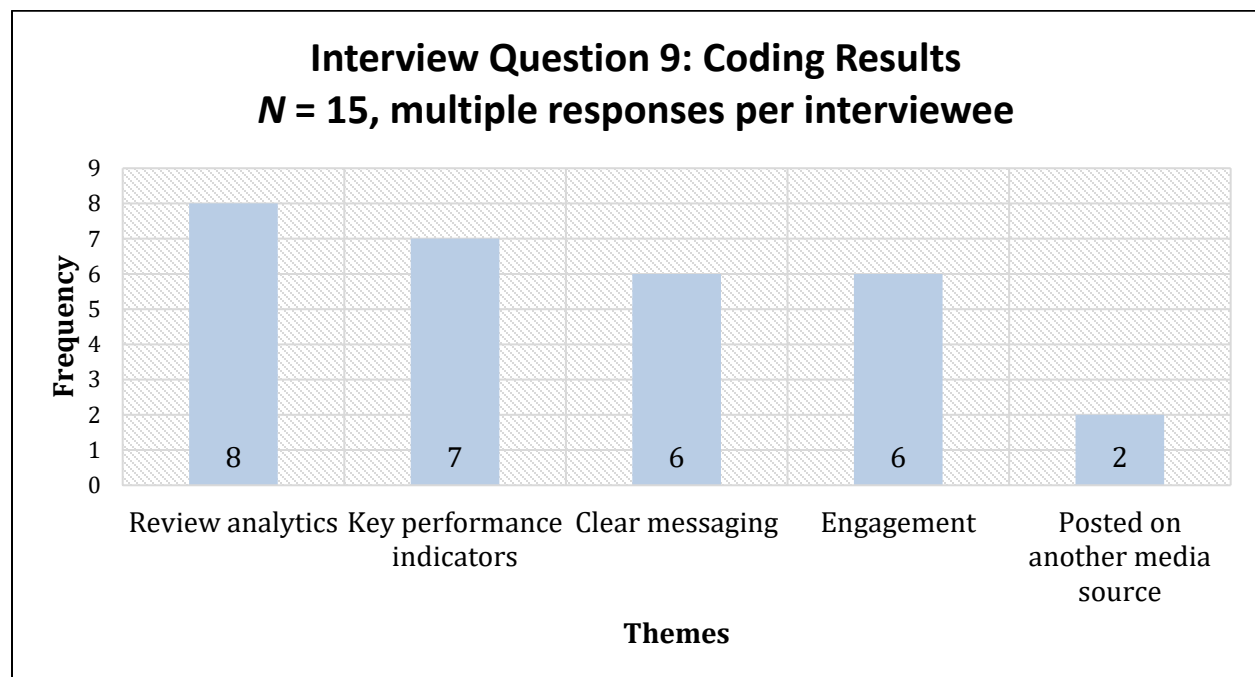
### ***Interview Question 9***

This question asked, How do you measure success when speaking out on social media? This question yielded five different themes in the responses, which included: (a) review analytics, (b) key performance indicators, (c) clear messaging, (d) engagement, and (e) posted on another media source (see Figure 9).

**Review Analytics.** The theme review analytics was the most common response regarding measuring success as a company in social media messaging, with eight out of 15 (53%) mentioning it. The decisive words, expressions, and perspectives included: Google analytics, comparing posts monthly, and tracking and monitoring success. Participant 1 reported, “we measure through Google analytics, and we measure it by looking on the platforms themselves.” Furthermore, Participant 3, “we track and monitor in order to measure success.”

**Figure 9**

*How Company Success Is Measured When Speaking Out on Social Media*



*Note.* This chart visually represents the themes deriving from interviewee responses to question 9. Data appears from the most to the least frequent response. Inside each bar are the numbers accounting for the total participants contributing to the theme.

**Key Performance Indicators.** The theme of key performance indicators was the second most common response regarding measuring success as a company in social media messaging, with seven out of 15 (47%) mentioning it. The decisive words, expressions, and perspectives included: KPIs, key performance indicators, and metrics. Participant 3 reported, “we track some

of the KPIs.” Furthermore, Participant 15 stated, “We look at metrics like reach, engagement, likes, and other related indicators.”

**Clear Messaging.** The theme of clear messaging was the third most common response regarding measuring success as a company in social media messaging, with six out of 15 (40%) mentioning it. The decisive words, expressions, and perspectives included: are aligned with the mission, the message is clear, and there is no need to go back and clarify. Participant 4 reported, “have we been clear on what our position is? So we do not like to put out statements that are vague; we try to be as specific as possible.” Furthermore, Participant 6 stated, “you do not want to get dragged into a hole; you want to state your position clearly.”

**Engagement.** The theme of engagement was also the third most common response regarding measuring success as a company in social media messaging, with six out of 15 (40%) mentioning it. The decisive words, expressions, and perspectives included: total engagement, measure engagement, and engagement. Participant 10 reported, “usually after we have posted something, we give it a week or so to see what type of engagement we get from it.” Furthermore, Participant 15 stated, “We also look at employee engagement that we can get around the topics.”

**Posted on Another Media Source.** The theme review analytics was the seventh most common response regarding measuring success as a company in social media messaging, with two out of 15 (13%) mentioning it. The decisive words, expressions, and perspectives included: picked up by the mainstream media and featured in the press. Participant 4 stated, “when we post something, it does not just stay on Twitter, because we are a company, the mainstream media will pick it up, and our investors will pick it up.” Furthermore, Participant 12 reported, “we hope that the right people are seeing it; maybe it will get picked up by the press.”

### ***Summary of RQ 3***

RQ3 examined how private or publicly traded companies measure their success when speaking out on social media. A total of nine themes were identified by analyzing the decisive words, expressions, and perspectives in participant responses to the two interview questions. The participants' definition of success as a company in their social media messaging included: (a) engagement, (b) reaching objectives, (c) key performance indicators, and (d) staying on brand. Responses to how success is measured when speaking out on social media by the participants included: (a) reviewing analytics, (b) key performance indicators, (c) clear messaging, (d) engagement, and (e) posted on another media source.

### **RQ4**

RQ4 sought to understand the recommendations that private or publicly traded companies have for future implementation of social advocacy strategies and practices. The themes related to the RQ derived from responses to the following questions that were analyzed individually and collectively.

- IQ 10: What is an example of something you could go back in time and do differently?
- IQ 11: What dangers exist for unqualified voices working at a private or publicly traded company when speaking on social media?

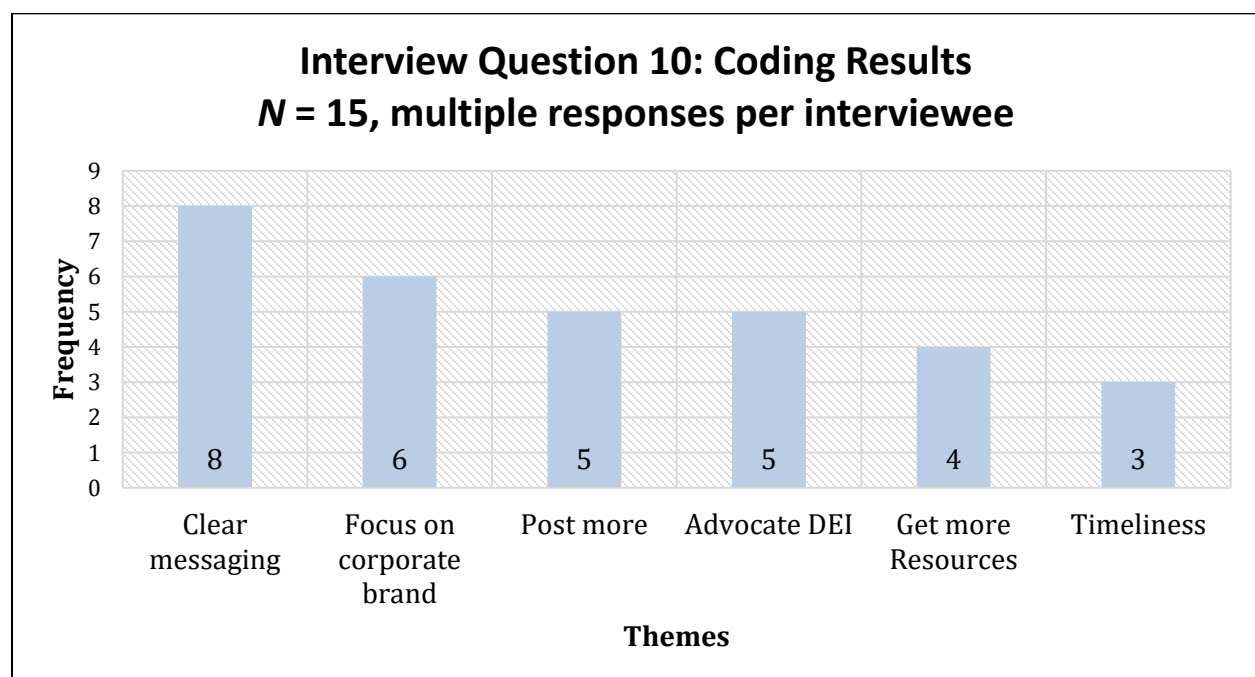
### ***Interview Question 10***

This question asked, What is an example of something you could go back in time and do differently? A total of six themes were yielded for this question, which included: (a) clear messaging, (b) focus on corporate brand, (c) post more, (e) advocate DEI, (e) get more resources, and (f) timeliness (see Figure 10).

**Clear Messaging.** The theme of clear messaging was the most common response regarding something the participant would go back in time and do differently, with eight out of 15 (53%) mentioning it. The decisive words, expressions, and perspectives included: the message is clear, uniformity in messaging, and getting the post right. Participant 2 reported, “most companies operate on the principle of FOMO [fear of mission out] if you do not speak on social, and I think that is incorrect; you have spoken from a place of honesty.” Furthermore, Participant 4 stated, “you have to be very clear on responses, do not be wishy-washy about it.”

**Figure 10**

*What the Participants Would Do if They Could Go Back and Do Something Differently*



*Note.* This chart visually represents the themes deriving from interviewee responses to question 2. Data appears from the most to the least frequent response. Inside each bar are the numbers accounting for the total participants contributing to the theme.

**Focus on Corporate Brand.** The theme of focus on corporate brand values was the second most common response regarding something the participant would go back in time and do differently, with six out of 15 (40%) mentioning it. The decisive words, expressions, and



perspectives included: reflect core values, follow corporate strategy, and do not outsource communications to groups that do not understand the culture. Participant 4 reported, “you need to make sure you do the due diligence and make sure you have all your ducks in a row to protect company interests.” Furthermore, Participant 6 stated, “while an outside company may know social media very well, they do not know the culture, nor can they, unless they are sitting in your company.”

**Post More.** The theme of post more was also the third most common response regarding something the participant would go back in time and do differently, with five out of 15 (33%) mentioning it. The decisive words, expressions, and perspectives included: done more content, product more content, and being active in the community. Participant 10 stated, “if anything, I would say I wish I had produced more content.” Furthermore, Participant 14 reported, “I wish I would have been more active in the social media communities.”

**Advocate DEI.** The theme of advocate DEI was also the third most common response regarding something the participant would go back in time and do differently, with five out of 15 (33%) mentioning it. The decisive words, expressions, and perspectives included: having a plan to address social messaging, learning more about social issues, and speaking more about diversity. Participant 1 reported, “a lot of the advocacy that we currently do related to diversity, equity, and inclusion; we could do more PSAs. “ Furthermore, Participant 3 stated, “I might put a flag in the ground sooner than we have currently to focus on the items that are near and dear to my heart... I strongly believe in certain advocacy causes like diversity, privileges, and opportunities.”

**Get More Resources.** The theme of get more resources was the fifth most common response regarding something the participant would go back in time and do differently, with four

out of 15 (27%) mentioning it. The decisive words, expressions, and perspectives included: take social media courses to learn about the business, do more, share resources, and work with influencers to collaborate. Participant 1 reported, “we could do more cooperation with public health officials, influencers, or people who can really amplify the message.” Furthermore, Participant 15 stated, “I wish we had more people, and more money, and more resources.”

**Timeliness.** The theme of timeliness was the sixth most common response regarding something the participant would go back in time and do differently, with three out of 15 (20%) mentioning it. The decisive words, expressions, and perspectives included: timing, timely posting, and having facts ready to go. Participant 4 stated, “if you know the facts are on your side, be very quick to disclose it.” Furthermore, Participant 11 reported, “there have definitely been times where I have been slow to respond and have let a crisis build.”

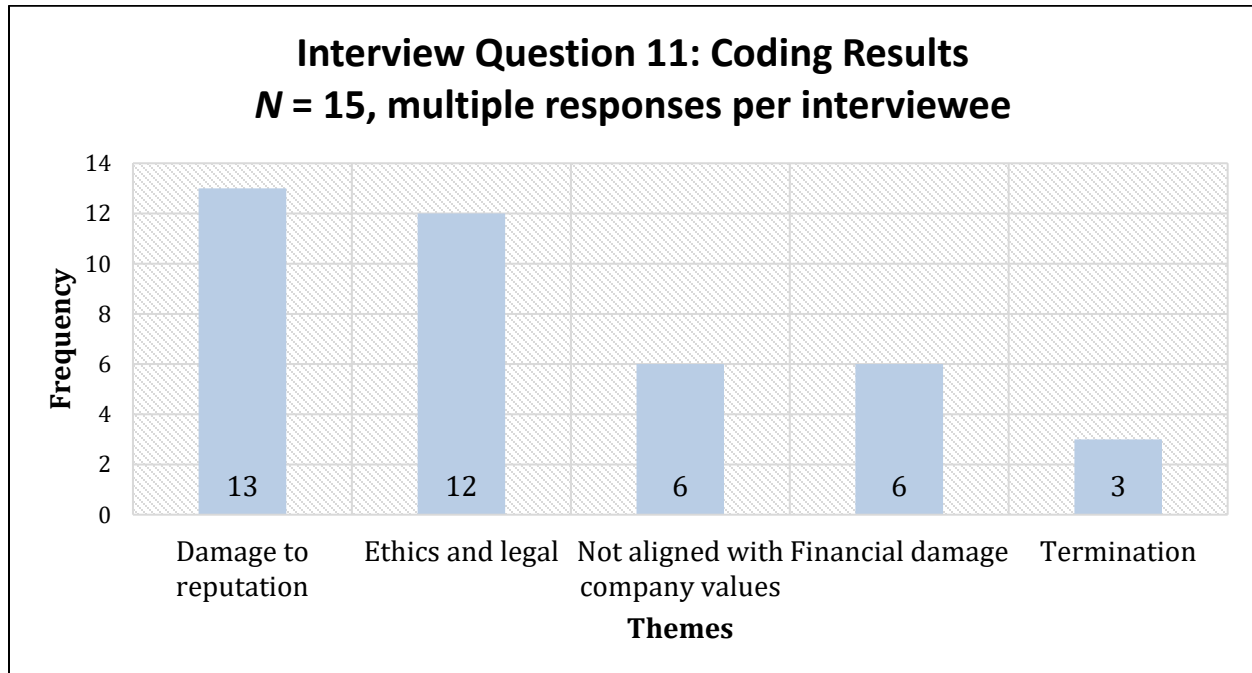
### ***Interview Question 11***

This question asked, What dangers exist for unqualified voices working at a private or publicly traded company when speaking on social media? This question yielded five themes that included: (a) damage to reputation, (b) ethical and legal, (c) not aligned with company values, (d) financial damage, and (e) termination.

**Damage to Reputation.** The theme of damage to reputation was the most common response regarding the dangers of unqualified voices working at a private or publicly traded company speaking out on social media, with 13 out of 15 (87%) mentioning it. The decisive words, expressions, and perspectives included: (a) damage to reputation and misrepresentation, and (b) the messaging is not tight. Participant 2 stated, “some dangers are severe, including loss of market capitalization and valuation, loss of business, and of course damage to brand reputation.” Furthermore, Participant 7 reported, “saying the wrong thing can get you canceled.”

**Figure 11**

*The Dangers When Unqualified Voices Working at a Private or Public Corporation Are Speaking Out on Social Media*



*Note.* This chart visually represents the themes deriving from interviewee responses to question 2. Data appears from the most to the least frequent response. Inside each bar are the numbers accounting for the total participants contributing to the theme.

**Ethical and Legal.** The theme of ethical and legal was the second most common response regarding the dangers of unqualified voices working at a private or publicly traded company speaking out on social media, with 12 out of 15 (80%) mentioning it. The decisive words, expressions, and perspectives included: HIPPA violations, legal structure, and release of sensitive information. Participant 1 stated, “in my case, they can violate HIPPA, the regulations around privacy protection for patients, which is a big risk.” Furthermore, Participant 11 reported, “they might release sensitive information that can hurt business.”

**Not Aligned With Company Values.** The theme of not being aligned with company values was the third most common response regarding the dangers of unqualified voices working

at a private or publicly traded company speaking out on social media, with six out of 15 (40%) mentioning it. The decisive words, expressions, and perspectives included: not in line with company values, does not align with the company, and not aware of issues the company believes in. Participant 5 reported, “they may have the right intention but might not contribute to issues due to not being properly informed.” Furthermore, Participant 13 stated, “they may not be aware of issues that the company believes in and send the wrong message.”

**Financial Damage.** The theme of financial damage was also the third most common response regarding the dangers of unqualified voices working at a private or publicly traded company speaking out on social media, with six out of 15 (40%) mentioning it. The decisive words, expressions, and perspectives included: responsibility to investors, loss of business, and hurt valuation. Participant 2 stated, “we have a responsibility to investors, so any unqualified voice on social can hurt valuation.” Furthermore, Participant 7 stated, “the wrong message can hurt the business and the bottom line.”

**Termination.** The theme of termination was also the fifth most common response regarding the dangers of unqualified voices working at a private or publicly traded company speaking out on social media, with three out of 15 (20%) mentioning it. The decisive words, expressions, and perspectives included: losing a job easily, termination, and getting fired. Participant 1 stated, “people could lose their jobs quite easily.” Furthermore, Participant 4 reported, “saying the wrong thing can lead to firing.”

### ***Summary of RQ4***

RQ4 examined the recommendations private or publicly traded companies have for the future implementation of social advocacy strategies and practices. A total of 11 themes were identified by analyzing the decisive words, expressions, and perspectives in participant responses

to the two interview questions. Examples of something the participants would go back and time do differently included: (a) clear messaging, (b) focus on corporate brand, (c) post more, (e) advocate DEI, (e) get more resources, and (f) timeliness. The dangers that exist for unqualified voices working at private or publicly traded companies when speaking out on social media included: (a) damage to reputation, (b) ethical and legal, (c) not aligned with company values, (d) financial damage, and (e) termination.

#### **Chapter 4 Summary**

This qualitative study aimed to identify the best practices for corporations speaking out on social media. A total of 15 participants responsible for social media messaging for their respective private or publicly traded companies participated in interviews to gather data for the study. The participants answered 11 semi-structured interview questions that were related to the following four research questions:

- RQ1 - What challenges are faced by private or publicly traded companies implementing leadership strategies and practices for speaking out on social media?
- RQ2 - What leadership strategies and practices are employed by private or publicly traded companies to overcome the challenges they face when speaking out on social media?
- RQ3 - How do private or publicly traded companies measure the success of speaking out on social media?
- RQ4 - Based on their experiences, what recommendations would private or publicly traded companies have for the future implementation of social advocacy strategies and practices?

After the 15 semi-structured structured interviews, the data was coded and validated by a panel of inter-rater Pepperdine doctoral candidates. The researcher used phenomenological techniques outlined in Chapter 3 to analyze the data. In total, 53 codes themes emerged from the data analysis. Table 6 displays all the themes that were uncovered in the study. Chapter 5 will discuss the study results, implications, conclusions, and recommendations.

**Table 6**

*Summary of Themes for Research Questions*

RQ1. Challenges in implementing strategies and practices	RQ2. Strategies and practices to overcome challenges	RQ3. Measuring success	RQ4. Recommendations
Protecting the brand	Stakeholder alignment	Engagement	Clear messaging Focus on corporate brand
Clear messaging	Corporate messaging	Reaching objectives	
Navigating sensitive topics	Increase knowledge	Key performance indicators	Post more
Public perception	Increase DEI focus	Staying on-brand	Advocate DEI
Stakeholders	Honesty	Review analytics	Get more resources
Amplifying message	Strategizing approach	Key performance indicators	Timeliness
Office politics/culture	Stakeholder buy-in	Clear messaging	Damage to reputation
Timeliness of posting	Subject matter expert	Engagement	Ethics and legal
Collaboration	Identifying impact on business	Posted on another media source	Not aligned with corporate values
Political correctness	Corporate values		Financial damage
Staying on-brand	Both corporate and personal values		Termination
CEO involvement	Personal values		
Noteworthy posts	Stakeholder alignment		
Removing personal bias	Strategize approach		
Relationship building	Apolitical		
Finding content	Corporate alignment		
Staying true to brand			

*Note.* This table summarizes all of the 53 themes discovered during the data analysis process.

## **Chapter 5: Conclusions and Recommendations**

Private and publicly traded corporations are increasingly taking a public stance on sociopolitical issues on social media in what is known as corporate activism. Corporate leaders and those responsible for their respective social media messaging are responsible to their shareholders and stakeholders. This research study examined how corporations use social media strategies when engaging in sociopolitical issues. This study's overarching goal was to identify best practices for corporations speaking out on social media. The data gathered in this study can be useful to new corporations with no social media presence or corporations that have not engaged in discussing sociopolitical issues on social media. The study can also be useful for corporate leaders and those wishing to enter the corporate hierarchy because corporate expectations are changing to include CSR activities. In addition, the study can be useful for governmental bodies as they make laws to regulate CSR activities and also in understanding that the gaps they are leaving are being filled by corporations. Chapter 5 provides a synopsis of the dissertation and a restatement of the purpose of this study. In addition, Chapter 5 discusses the study's results, applications, and recommendations for further research. Lastly, a final conclusion is noted.

### **Summary of the Study**

The purpose of this study was to examine the challenges socially active corporations have faced when determining their messaging content on social media, specifically: (a) the practices and strategies employed by socially active corporations speaking out on social media; (b) how socially active corporations define, measure, and track the success of their messaging content on social media; and (c) corporations' recommendations for future leaders to implement social advocacy strategies and practices.

The qualitative research utilized a phenomenological design where the researcher developed a synthesized portrayal of the participants by collecting data from people that have experienced the same phenomenon (Creswell & Poth, 2018). The literature review assisted in the creation of a total of four RQs. The researcher sought a population of social media leaders responsible for publishing social media messaging for their respective companies. The researcher reached out to over 250 potential participants, and in the end, 15 were selected to partake in the study. Participants were recruited from private and publicly traded companies that varied in annual revenue from \$1 million or more to \$1 billion or more. Both women and men were represented in the study. All participants agreed to participate in the study and consent to be recorded.

The four RQs and 11 related IQs were validated through a three-step process, which included: prima facie validity and content validity, peer-review validity, and expert validity (Appendix F). A pilot interview was conducted to establish reliability. A total of 15 leaders from private and publicly traded companies provided the data, which was gathered through semi-structured interviews. Each participant shared their experiences in detail in their roles of publishing social media messaging for their respective companies. The interviews were recorded via Zoom, and each of the recordings was transcribed.

In the first step of the analytical process, the prevailing ideas discovered in examining the transcripts were cataloged into codes and then organized into themes. To establish inter-rater reliability, the researcher relied on a peer review panel outlined in Chapters 3 and Chapter 4. Finally, the researcher used 11 bar graphs to provide a visualization of the dissertation's findings. Each graph grasped the general ideas, words, as well as phrases shared by participants.



## **Discussion of Findings**

The subsequent sections will provide a comprehensive analysis of the findings and themes from the four RQs and 11 corresponding interview questions. The results will be compared and contrasted to the existing literature on the challenges corporations face when speaking out on social media. Each section will highlight whether the themes concur with, contradict, or contribute a new idea to the literature.

### **Results for RQ1**

Research question 1 uncovered the challenges faced by leaders at private or publicly traded companies when speaking out on social media. The challenges brought to light stemmed from the corporate, organizational (structural), and personal levels. During IQ1, participants noted that protecting the brand and being clear about their stance when speaking out and navigating sensitive topics were the most common responses to the biggest challenges they faced. The responses were consistent with the literature regarding corporate image, brand, and clarity in messaging. Public relations strategies in their current form are distinguished by participation and transparency (Paliwoda-Matiolanska et al., 2020).

During IQ2, the most frequent responses among the respondents included dealing with the office politics and culture, timeliness of posting, and collaboration with stakeholders. The responses were consistent with the literature on organizational communication. In a corporate setting, stakeholders have different levels of urgency, which determines the timeliness of their expectations (Carroll, 2015). During IQ3, respondents listed their personal challenges when speaking out on social media. The most prevalent responses included creating noteworthy posts, removing personal bias, and relationship building. One of the main components of relationship

building in today's digital world comes from a view of participation stemming from a reciprocal approach and mutual understanding (Uzunoğlu et al., 2017).

## **Discussion of RQ1**

The data gathered on RQ1 showed that private and publicly traded corporations face multifaceted challenges when implementing leadership strategies and practices for speaking out on social media. Each interview question revealed information that matched the contents of the literature review. Each interview question is discussed in more detail in this section.

During IQ1, it was discovered that corporate leaders at private and public trade organizations face many challenges when they engage on social media. The majority of respondents noted that protecting the brand and clear messaging in communication and navigating of sensitive topics as the biggest challenges when it comes to speaking out on social media. Consistent with the literature regarding corporate branding, it serves as the explicit promise a corporation has to its key stakeholders (Foster et al., 2010). Participants noted that it was vital to be clear in communicating information on social media to avoid confusion on corporate intent and strategy. The assumption that the customer does not know the full intricacies and details of messaging highlights the need for clear communication and consequent policy-making (Gosselt et al., 2019). Participants noted that speaking out on social media is challenging regarding sensitive topics. The financial operations are conducted with a keen understanding of evolving societal norms and values (Carroll, 1991). These main responses highlight the importance of understanding brand goals, identity, and culture as they are the guiding principles for communicating clearly and effectively on social media. In addition, adapting to stakeholder demands and keeping up with societal norms is critical in the modern age of social media.

Other key responses that emerged during IQ1 included public perception, stakeholders, and amplifying message. Public perception entails what the public thinks of the brand regarding stances taken on social media. When corporations effectively communicate CSR, it helps grow their reputation while simultaneously building stakeholder trust and knowledge (Kim, 2019). Good CSR communication is aligned with the brand and stakeholders, pushing corporate ideals to the general public. This also connected with the stakeholder challenges the participants faced. Stakeholders' perceptions of the authenticity of a corporation's CSR efforts is gathered when the values are aligned with the social context (Mazutis & Slawiski, 2015). Amplifying the message so that more of the public receives the transmission was the least common response. With social media, corporations have many options to get their message across; social media is a space that can amplify unremarkable conversations (Clark, 2020). Social media also serves as the arena for marginalized groups to be heard and for social justice movements to amplify their messaging (Sailofsky, 2021).

For IQ2, the most common responses amongst the participants included office politics/culture, timeliness of posting, and collaboration for organizational challenges. These most common responses are aligned with the literature. Modern corporate HR activities value the perceived organizational CSR, which entails creating an authentic corporate culture (Rank & Contreras, 2021). Ensuring information was communicated in the proper time and context was also relevant to the literature. Stakeholders have different urgency levels, which determines their expectations' timeliness (Carroll, 2015). Working with the different stakeholders poses a challenge when speaking out on social media as there are different layers of approval and competing interests. Corporations can be selective about the issues they support and favor collaborations with causes that are aligned with core stakeholders' values (McDonnell, 2016).

Other key responses for IQ2 included political correctness, staying on brand, and CEO involvement. Some of these themes have already appeared, emphasizing their impact's importance. Corporations face scrutiny from the public when their messaging is disliked. Customers and social media groups are constantly evaluating a corporation's social media messaging. The threat of cancel culture occurs when individuals withdraw support from a corporation whose values, actions, or speech are offensive (Sailofsky, 2021). Corporations can avoid issues with messaging by being clear on their messaging while staying on brand. Consequently, that was also uncovered as an organizational challenge for this question. The corporate brand consists of the commitment originating from the knowledge of the culture and corporate identity (Foster et al., 2010). Last but not least, some corporations have CEOs that are more involved in their social media messaging; this poses an organizational challenge for some leaders. CEO activism is a recent trend in which corporate leaders make public statements on sociopolitical issues attempting to shift the voice of business on social and political discourse at a national level (Lan et al., 2020).

During IQ3, the most common responses were noteworthy posts, removing personal bias, and relationship building. These responses highlighted the personal challenges faced when speaking out on social media. Staying on top of the culture and creating posts that are relevant and timely was noted as a personal challenge. CSR is an essential public relations strategy that helps generate interest for a corporation depending on stakeholder reciprocity (e.g., engagement and response) to posts (Paliwoda-Matiolanska et al., 2020). When speaking out on social media, separating personal beliefs and sharing company beliefs posed a personal challenge to remove bias. Leaders have significant power in corporate decision-making, and their decisions can be influenced by personal biases, which can affect shareholders negatively (Nalick et al., 2016). As

noted in other responses, building relationships is critical for forming alliances that can strengthen standing. One of the main components of relationship building in today's digital world comes from a view of participation stemming from a reciprocal approach and mutual understanding (Uzunoğlu et al., 2017).

Other responses that were uncovered during IQ3 were finding content and staying true to brand. Keeping in mind that leaders must consider the stakeholders, community, and brand, finding content that checks all the boxes is difficult. CSR efforts are effective when they involve stakeholders and are relevant to their wants (Kim, 2019). Also, staying on brand appeared once again. Corporate branding strategies consist of methodical activities orchestrated by leadership in their communication to increase or retain a positive reputation from targeted stakeholders (Foster et al., 2010). Leaders face many organizational challenges that affect their success in effective communication on social media.

## **Results for RQ2**

RQ2 revealed the leadership strategies and practices employed by private or publicly traded companies to overcome the challenges they face when speaking out on social media. Each of the interview questions provided insights into the inner workings of corporations. The 15 participants detailed their roles in executing the corporation's strategies. IQ4 uncovered the most frequent strategy to overcome challenges was stakeholder alignment. This has appeared numerous times throughout the research, increasing the strength of the validity. The new generation of CSR expanded financial, social, and communication responsibilities to more stakeholders, emphasizing global connectedness, aspirational discourse, and collaboration among corporate, NGOs, and governments (Stohl et al., 2017). For IQ5, the most common response for speaking out on social media was strategizing approach. This method covers working with

stakeholders and understanding the corporate culture and strategy. Corporations utilize strategic CSR practices by contributing to specific community endeavors to achieve definitive organizational goals (Wan-Jan, 2006).

IQ6 revealed that corporate values are the guiding principle when speaking on social media. Corporate values are the building blocks for leaders in the absence of direction. Corporate image or identity entails the corporate values, aims, and ethos corporations represent (Foster et al., 2010). IQ7 revealed the importance of stakeholder alignment; this theme has presented itself numerous times, and it is consistent with the literature and findings. CSR consists of aligning stakeholders' interests to business by meeting the obligations of internal and external stakeholders while affecting society and the environment (Carroll, 1979; Rank & Contreras, 2021).

## **Discussion of RQ2**

The responses gathered in RQ2 provided the data on the leadership strategies and practices that private and publicly traded companies utilize to overcome any challenges faced when speaking out on social media. In the next section, all of the strategies and practices uncovered in the participant responses will be discussed in detail.

During IQ4, it was revealed that most respondents noted stakeholder alignment as a strategy to overcome challenges when speaking out on social media. Corporate messaging was the second most common strategy used, consistent with the findings throughout this study and literature. The new generation of CSR expanded financial, social, and communication responsibilities to more stakeholders, emphasizing global connectedness, aspirational discourse, and collaboration among corporate, NGOs, and governments (Stohl et al., 2017). Staying in line with the corporate messaging refers to the extent to which consumers believe in a corporation's

expertise and trustworthiness (Hur et al., 2014). The top responses push the notion of working together within the corporation while keeping in line with the corporate strategy and considering the brand.

Other responses that were revealed in IQ4 as strategies to overcome challenges were increasing knowledge, increasing DEI focus, and honesty. These findings reflect the importance of continuing growth and experience in key information relevant to societal goals and corporate strategy. Increasing knowledge is a challenge as norms change, and communication can get mixed up if not effective; CSR communications are effective when they increase stakeholders' knowledge and alter their perception of a corporation's reputation (Kim, 2019). DEI has become a front-and-center issue for many corporations as stakeholders increasingly look for corporations serving societal interests and representing underrepresented groups. The social factors stakeholders in ESG measure include diversity and human rights, which can influence investment in a company (van Duuren et al., 2016). Honesty in communication is a strategy used to overcome obstacles in social media communication for corporations. Corporations go to great lengths to donate to charities, support the community, treat workers decently, abide by the law, and maintain integrity and honesty (Campbell, 2007).

In IQ5, participants shared the leadership strategies when speaking out on social media. The majority noted that the strategizing approach was the most effective when speaking out on social media. Keeping in mind that corporations are evaluated for CSR and ESG information, leaders have to plan for the internal and external functions of the organization. ESG ratings are of considerable strategic significance to corporations as they influence how key stakeholders perceive them (Clementino & Perkins, 2021). When communicating on social media, the majority of leaders consider stakeholder buy-in as a strategy when speaking out. The new

generation of CSR expanded financial, social, and communication responsibilities to more stakeholders, emphasizing global connectedness, aspirational discourse, and collaboration among corporate, NGOs, and governments (Stohl et al., 2017).

Other responses found in IQ5 were becoming a subject matter expert and identifying the impact on business. The majority of the participants also revealed these responses. Becoming a subject matter expert on the topics expressed on social media is important to avoid offending stakeholder norms and customs. In addition, stakeholders are using social media as a tool to leverage their position with corporations. Stakeholders expect three things from online CSR conversations with corporations: (a) space for co-learning, (b) space for co-innovation, and (c) space for co-deciding (Illia et al., 2017). Decisions have to be made, but also decisions can have unintended consequences; as part of the strategizing phase, leaders identify the impact on business. Due diligence has expanded throughout assessments for the nonfinancial criteria impact on stock prices compared to estimates (Utz, 2017).

IQ6 revealed the guiding principles leaderships utilize when speaking out on social media. Corporate values were the most important factor when speaking out on social media. Corporations have corporate values that outline their position in society and business. Corporate image or identity entails the corporate values, aims, and ethos corporations represent (Foster et al., 2010). Participants also noted that their personal values were weighted into the decision-making when speaking out on social media. Stakeholders, which include employees, expect corporations and corporate leaders to advocate their values and pressure governments for policies on issues of social and political importance (Lan et al., 2020).

During IQ7, participants shared the strategies deployed to manage stakeholders' expectations when speaking out on social media. The most frequent response to this question



was stakeholder alignment. Stakeholder has once again appeared in the responses, further strengthening the theme in the study. CSR consists of aligning stakeholders' interests to business by meeting the obligations of internal and external stakeholders while affecting society and the environment (Carroll, 1979; Rank & Contreras, 2021). The participants also noted that they strategize approach to manage the expectations of stakeholders. CSR efforts impact the ESG scores, and it is important to strategize before communicating on social media. ESG ratings are strategically significant to corporations as they influence how key stakeholders perceive them (Clementino & Perkins, 2021).

Other responses that emerged in IQ7 were remaining *apolitical* and *corporate alignment*. These two appeared only three times but are relevant to the study and the literature. At times, speaking out can disrupt internal and external networks, so some corporations choose not to communicate on social media for certain topics. Corporations used to be apolitical out of fear of alienating their stakeholders but are increasingly speaking up because silence can also negatively affect them (Lin, 2018; Nalick et al., 2016). Lastly, corporate alignment again appeared as a strategy when addressing stakeholder expectations. Aligning with corporate goals and strategy assist leaders in communicating the desired corporate message. Aligning corporate branding is important when considering the complex identities of stakeholders that can influence corporate brand management (Foster et al., 2010).

### **Results for RQ3**

RQ3 revealed how private and publicly traded companies measure success when speaking out on social media. Corporations are constantly measuring their practices and evolving to keep up with societal expectations. The 15 respondents shared insights that matched the literature. In IQ8, most respondents considered *engagement* to be the most important factor when

defining success on social media messaging. Corporations use social media to gain stakeholder engagement, yielding attitudinal and behavioral outcomes (Uzunoğlu et al., 2017). For IQ9, the most common response for measuring success was *review analytics*. These two questions uncovered many different qualities of corporations' success in their social media strategies.

### **Discussion for RQ3**

The data collected for RQ3 revealed that private and publicly traded corporations measure the success of their social media messaging in different ways. The following information was revealed during the participant responses for IQ8 and IQ9.

For IQ8, participants shared how their corporation defined success in social media messaging. Engagement was the most common response amongst the participants. Engagement reveals how stakeholders are reacting to their messaging by sharing, liking, or commenting on the post. Corporations use social media to gain stakeholder engagement, yielding attitudinal and behavioral outcomes (Uzunoğlu et al., 2017). Reaching objectives was another response that was revealed by the majority of participants. Objectives usually cover post engagement or ensuring the message was received by stakeholders without causing controversial responses. Effective CSR strategy supports business activities and strengthens their ability to achieve corporate goals (Latapi Agudelo et al., 2019).

Other revelations found in IQ8 for measuring success in social media messaging were key performance indicators and staying on brand. Key performance indicators reveal the data on messaging performance; it is a tool that shows what works and what does not. It provides rich data for corporations to make better decisions on future posts. KPIs allow corporations to measure CSR efforts comprehensively by looking at various data points (Jacobs & Finney, 2019). Lastly, staying on brand appeared again during this study, providing richer data on the

importance of corporate image. Aligning corporate branding is important when considering the complex stakeholder identities influencing corporate brand management (Foster et al., 2010).

For IQ9, the participants shared how their corporation measured success when speaking out on social media. The most common practice was to review analytics, which consists of looking at the results and the impact their messaging has on social media with stakeholders. Social media analytics is the process of interpreting the content of high-frequency social media contributions (ElAlfy et al., 2020). Key performance indicators appeared once again for this question. KPIs allow corporations to measure CSR efforts comprehensively by looking at various data points (Jacobs & Finney, 2019). Clear messaging appeared during this question as participants urged the importance of ensuring internal partners validate the message before publishing. Corporations have a brand to represent, so having clear messaging helps propel their ideas without negative backlash. Whereas consumers feel positive about socially responsible companies, corporations need effective and clear communication to benefit from their CSR efforts (Gosselt et al., 2019).

The last two themes for IQ9 were engagement and content posted on another media source. Once again, engagement appeared in the responses amongst the 15 participants. Corporations like to see their messaging do well, consisting of a post's engagement, shares, likes, and comments. Corporations use social media to gain stakeholder engagement, yielding attitudinal and behavioral outcomes (Uzunoğlu et al., 2017). Corporations also like to see their media posted on other platforms and media sources, enhancing their exposure on social media. CSR communication is highly effective when adopted by a third party (Kim, 2019).

## **Results for RQ4**

RQ4 interviews revealed the recommendations made by private or publicly traded companies for the future implementation of social advocacy strategies and practices. If leaders can go back and do something differently, they would have clear messaging. Although consumers feel positive about socially responsible companies, corporations need effective and clear communication to benefit from their CSR efforts (Gosselt et al., 2019). A total of 13 of 15 participants noted the biggest danger when unqualified voices working at private or publicly traded companies speak out on social media was damage to reputation. Customers rely on a corporation's reputation to judge the service or product when there is little or no information about the product or service (Hur et al., 2014). The rest of the responses will be discussed in the next section.

## **Discussion of RQ4**

RQ4 provided data for what private, and publicly traded companies recommend in the future implementation of social advocacy strategies and practices. The following information was revealed during the participant responses for IQ10 and IQ11.

In IQ10, what participants would do if they could go back and do something differently revealed that having clear messaging would be the most preferred. Misrepresentation, deceit, and greenwashing can have serious consequences for corporations. Corporations are constantly scrutinized, and clear communication is a quality that plays a role in the individuals working in a corporation and the corporation with their stakeholders. Although consumers feel positive about socially responsible companies, corporations need effective and clear communication to benefit from their CSR efforts (Gosselt et al., 2019).

Also, in IQ10, participants noted that they would focus more on the corporate brand. Aligning corporate branding is important when considering the complex identities of stakeholders that can impact corporate brand management (Foster et al., 2010). Participants would post more if they could go back. Corporations do not want to miss out on an opportunity to publicly promote an idea or support a cause their organization supports. Social media is a space that can amplify otherwise unremarkable conversation (Clark, 2020). Participants also wished they could have been advocating DEI earlier in their careers. The social factors that stakeholders in ESG measure include diversity and human rights, which can influence investment in a company (van Duuren et al., 2016). A few participants noted they would get more resources if they could go back and do something differently. Corporations with more resources are more prepared to measure, collect, and report on data used by rating agencies (Clementino & Perkins, 2021). Lastly, participants noted that Timeless was something they would go back to do differently. When a critical social media post goes viral, it forces corporations to make an immediate remedial response to address violations and reduce fallout (Zhang & Yang, 2021).

For IQ11, the participants noted that damage to reputation is the biggest danger when unqualified voices speak out on social media. Stakeholders, which include customers, rely on a corporation's reputation to judge the service or product when there is little or no information about the product or service (Hur et al., 2014). Most participants also noted that danger in the ethics and legal realm exists when unqualified voices speak out on social media. Stakeholders demand corporations are ethical in their CSR efforts and be held morally responsible for preventing harm from the actions they pursue (Chatzopoulou & Kiewiet, 2021). Some of the participants noted another danger that exists when an unqualified voice speaks out on social

media, and that is that communication is not aligned with company values. Stakeholders' perceptions of the authenticity of a corporation's CSR efforts are gathered when the values are aligned with the social context (Mazutis & Slawiski, 2015).

Lastly, in IQ11 financial damage and termination are also noted as dangers when unqualified voices speak out on social media. When stakeholder relationships are damaged, they ultimately decrease a corporation's financial performance (Walker & Wan, 2012). Corporations, especially publicly traded companies, depend heavily on financial health as they have shareholders expecting their investments are making money. Employees have the risk of losing their jobs for revealing information considered sensitive or confidential. Corporations also risk getting canceled; getting canceled is also related to this theme, as it consists of the systematic pursuit to remove a person from conversation through public scolding, requesting for them to be de-platformed, or requesting their termination (Velasco, 2021). When employee breaches the social media rules in their workplace, they can get fired, while corporations risk their corporate reputation or social standing.

### **Implications of the Study**

The study intended to ascertain the challenges socially active corporations have faced when selecting their messaging content on social media: (a) the practices and strategies employed by socially active corporations speaking out on social media; (b) how socially active corporations define, measure, and track the success of their messaging content on social media; and (c) corporations' recommendations for future leaders to implement social advocacy strategies and practices. The results can inform corporations, corporate leaders, stakeholders, and governmental bodies.

## ***Corporations***

Corporations with a social media presence should know by now that certain expectations are expected to be fulfilled, not just from a product/service standpoint but also from an altruistic and philanthropic perspective. Philanthropic activity is a core business attribute that addresses social responsibility expectations that are bestowed on today's corporations that strive for sustainability competitively in their operations around the world (Carroll, 2015).

Publically traded corporations have more stakeholders to consider when deciding whether or not to speak out on social media. Private corporations have fewer stakeholders to appease, but their CSR efforts are monitored by more and more potential employees and strategic partners. Private corporations are expected to be involved more in societal issues than publicly traded companies (Fan, 2019). Corporate branding is a vital factor to remember before speaking out on social media; there are expectations to fulfill associated with brand reputation before any other actions should be committed. Corporations that engage in CSR activities can gain a competitive advantage backed by CSR actions that improve their corporate image while establishing a positive reputation (Hur et al., 2014).

## ***Corporate Leaders***

Corporate leaders and those aspiring to corporate leadership can look at Chapter 4 for a list of best practices for speaking out on social media. Corporate leaders, especially CEOs, are expected to participate in the conversations that are important to their stakeholders, especially regarding the topics covered in this study. Being apolitical is an option that has been diminishing as stakeholders expect companies they support to contribute with the weight of their voices. Societal expectations have shifted for the role corporations and governments perform; stakeholders are now looking at corporate leaders to influence government, not vice versa (Lan

et al., 2020). Corporate leaders must balance personal ambitions, corporate missions and values, internal and external stakeholder requests, and shareholder expectations. CEOs are not randomly making decisions; instead, they consider their families, stakeholders, and their board, which influences corporate performance in CSR activities (Hubbard, 2018).

### ***Stakeholders***

Whether internally or externally, stakeholders have tremendous power and leverage with corporations, especially in large numbers. Corporations ultimately choose to engage in social and political causes because they are entwined with the scope or goals of stakeholders (Nalick et al., 2016). The more the reputation or the financial damage an action or inaction can cause, the more likely a corporation will cave to pressure. Stakeholders' expectations are ever-changing and adjust to the societal norms they wish to change and the organizations they want to be a part of. Corporate values and CSR efforts are important factors for internal stakeholders and can also impact the mobilization of external stakeholders.

### ***Governmental Bodies***

Governmental bodies can consult this study, specifically Chapters 2 and 4, for evidence of corporations taking action on more issues because their inaction in bringing forth change has been inadequate. Stakeholders use their power to target corporations to take action on issues that the government is not tackling. Politicians rarely take a public stance on controversial topics, which causes issues to become stagnant in the public discourse (Nalick et al., 2016). Stakeholders are now looking at corporations to champion the causes they care about because they believe the government does not listen to them. The political gridlock in the US has created a vacuum that allows corporations to push for issues relevant to their stakeholders in ways that Congress and courts do not have (Fan, 2019). The study demonstrates a shift in power between



governmental bodies and corporate entities with national influence and whose actions have a global impact.

### ***Application***

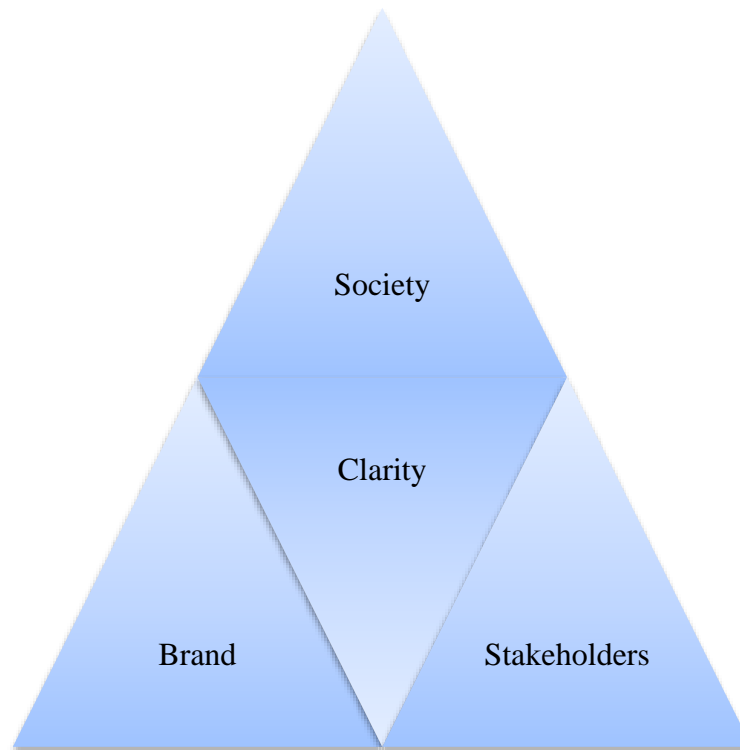
This dissertation's findings uncovered the corporate leaders' challenges and practices when speaking out on social media. The revelations in the participant responses and the literature review resulted in the creation of the Flores Triangle of Clarity for Corporate Activism. The interview question responses complemented the literature review findings. The model can best be applied in a corporate setting, but it may be useful in other organizational contexts.

The Flores Triangle of Clarity for Corporate Activism includes the following components: clarity, stakeholders, brand, and society (see Figure 12). These four themes were related to 29 of the 53 themes uncovered in the 15 interviews, with a total frequency of 224 throughout all interview responses. In addition, the four themes that are present in the model repeatedly appeared throughout the literature review. Each piece in the model related to the lived experiences shared by the participants. Each component and association with the triangle model are noted for implementation purposes. The model used the pyramid pattern as it connects important aspects discovered in the study for the best practices and strategies utilized by social media leaders working at corporations.

## The Flores Triangle of Clarity for Corporate Activism

**Figure 12**

*A Proposed Clarity Triangle Model for Corporate Activism*



### *Clarity*

Clarity is the most important aspect of the proposed model. Clarity is connected with all the other components in the triangle: stakeholders, brand, and society. Clarity includes transparency in communication efforts to prevent deceiving stakeholders and society and avoid deletions, retractions, or further clarification. Being straightforward in communication enhances the disclosure of information, and corporations with clear and effective communication benefit the most from their CSR endeavors (Gosselt et al., 2019; Illia et al., 2017). In addition, clarity should be a prerequisite in all remaining components because they all depend on a clear structure, vision, and agenda. Clarity with all aspects of the triangle will ensure no accusations of

greenwashing, deceit, or going against values. With social media playing a large role in the public dialogue, corporations must be authentic and transparent in creating and maintaining stakeholder relationships (Lyon & Montgomery, 2013). Corporations that talk but do not walk have a higher chance of being called out by various media outlets for being unethical hypocrites (Schons & Steinmeier, 2016). Clarity with intent and goals provides a safeguard against communication that is not backed up by action to benefit the portions of the triangle: stakeholders, brand, and stakeholders.

### ***Stakeholders***

Stakeholders are found at the base of the triangle because they are the foundation of any company and why corporations stay in business. Stakeholders have more leverage and put more pressure on publicly traded companies versus private entities (Fan, 2019). Internal Stakeholders are made of internal partners inside of a corporation and can include: workers, managers, board of directors, and owners (Carroll, 2015; Eilert & Cherup, 2020). Essentially, anybody directly involved in strategizing and executing the business process makes up the internal stakeholders.

External stakeholders include customers, the community, competitors, governments, vendors, and the media (Carroll, 2015; Eilert & Cherup, 2020). Both internal and external stakeholders are influential in the compliance of CSR activities by corporations, with some being symbolic and others being substantive (Perez-Batres et al., 2012). Corporations can avoid symbolic actions and the fallout that may occur by being transparent and backing what they say, starting with clarity in their communication. Having clarity with internal and external stakeholders will ensure clear expectations and responsibilities. In addition, clarity with stakeholders will allow obligations to be tracked, monitored, and measured. Lastly, clarity with stakeholders will ensure fewer surprises or turbulence for the direction on social media.

## ***Brand***

The brand is found at the triangle's base because it forms the foundation of everything related to a corporation. The corporate brand is what the customers and internal and external stakeholders expect from a corporation. The corporate brand is compiled of the reputation by the organizational and leadership activity and behavior; a brand should do what is necessary to produce what was promised to maintain credibility (Hur et al., 2014). Having clarity on the branding, corporate values, mission statement, and corporate objectives will ensure that employees, recruits, vendors, suppliers, and customers know the details of the business with which they are dealing. For the brand image to be consistent with external stakeholders, there needs to be an alignment between the corporation's visions and the values of the internal stakeholders (Foster et al., 2010). The corporate brand also serves as the framework for social media leadership when problems emerge; having clarity on corporate positioning will help employees perform tasks that match goals. A brand's actions strongly influence the reputation and corporate image, all of which can be factors in gaining or losing business. As more people entering the workforce choose to work for corporations that match their values, having clarity will ensure the right candidates apply. As this study showed, corporate values guided most of the participants in their social media strategies, constantly reminding them of organizational goals.

## ***Society***

Society is at the top of this triangle because it is the main benefactor of corporate activities. Society in this triangle comprises all aspects affected by corporate activities, including biology, environment, governments, workers, customers, communities, states, nations, and the world. Corporations engaging in CSR efforts have moved away from being apolitical and are now actors taking control over the implementation and creation of the norms and values of

modern society (Stohl et al., 2017). Clarifying the corporation's impact on society will help leaders determine the best strategies to address their issues. Companies that seek societal change must also engage in doing the same within the corporation or face backlash from stakeholders (Eilert & Cherup, 2020). Having clarity on the societal issues that a corporation wishes to address will support the fulfillment of stakeholder expectations and uphold branding, corporate image, and reputation.

## **Conclusion**

The researcher grew interested in this project after the summer of 2020, and the BLM movement was endorsed by many corporations in America, with many showing support on social media. It appeared to be a significant shift from previous social movements that corporations largely ignored, so the topic seemed to be worthy of further exploration. The researcher wished that the findings supply new information to the existing literature associated with the challenges and strategies of social media use at private and publicly traded corporations. The researcher bracketed his involvement in working for a corporation to avoid biased behavior. A total of 15 participants from private or publicly traded corporations responsible for their respective organizations' social media messaging were interviewed. Eleven IQs were part of four overarching RQs used to gather data associated with investigating the phenomenon that was part of this study. All 15 interviews were transcribed, coded, and inter-rater validated to increase legitimacy.

The results informed four RQs that addressed the challenges socially active corporations have faced when determining their messaging content on social media, included: (a) the practices and strategies employed by socially active corporations speaking out on social media; (b) how socially active corporations define, measure, and track the success of their messaging content on

social media; and (c) the corporations' recommendations for future leaders to implement social advocacy strategies and practices. The literature review and the study's findings served as the foundations for the triangle model.

### **Recommendations for Future Research**

The goal of this dissertation, was to examine the challenges corporate social media decision makers faced when speaking out on social media, their practices, and strategies, how they measured success in their social media messaging, and the recommendations for leaders wishing to utilize social media to voice their opinions on social or political issues.

Recommendations for future research include:

1. Replication of this study with leaders from non-profit organizations.
2. Replication of this study with corporations from all over the world.
3. Replication of this study with corporations that do not speak on any of the topics covered in this study.

### **Final Thoughts**

Corporations speaking out on social media or corporate activism have become an expected behavior from stakeholders, and there is no sign of it going away. In the middle of this study, several developments emerged in practically all of the sociopolitical topics covered in this study. Gun control, abortion rights, and race relations had significant momentum changes, indicating that these topics are pressing and the results are useful. As corporations engage in more CSR endeavors, their behaviors will be monitored by stakeholders and customers alike. In addition, the federal government and United Nations are increasingly making strides in regulating corporate CSR efforts, especially regarding climate change. The Flores triangle of clarity for corporate activism was created to benefit corporations, corporate leaders, stakeholders,

and the government. As the expectations from corporations toward society increase, stakeholders hold tremendous power to influence public discourse through social media and by voting with their wallets.

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## APPENDIX A

### CITI Certificate



Completion Date 01-Apr-2020  
Expiration Date 01-Apr-2023  
Record ID 30396476

This is to certify that:

**Fransisco Flores**

Has completed the following CITI Program course:

Not valid for renewal of certification  
through CME.

**Graduate & Professional Schools HSR**

(Curriculum Group)

**Graduate & Professional Schools - Faculty Human Subjects Training**

(Course Learner Group)

**1 - Basic Course**

(Stage)

Under requirements set by:

**Pepperdine University**

**CITI**  
Collaborative Institutional Training Initiative

Verify at [www.citiprogram.org/verify/?w4231bb31-bfca-49d4-8d1a-42f37824099b-30396476](http://www.citiprogram.org/verify/?w4231bb31-bfca-49d4-8d1a-42f37824099b-30396476)

## APPENDIX B

### IRB Approval Notice

**Pepperdine University**  
**24255 Pacific Coast Highway**  
**Malibu, CA 90263**  
**TEL: 310-506-4000**

#### NOTICE OF APPROVAL FOR HUMAN RESEARCH

Date: February 24, 2022

Protocol Investigator

Name: Fransisco Flores

Protocol #: 21-10-1684

Project Title: Corporate Activism Best Practices in

the Age of Social Media School: Graduate School of

Education and Psychology

Dear Fransisco Flores:

Thank you for submitting your application for exempt review to Pepperdine University's Institutional Review Board (IRB). We appreciate the work you have done on your proposal. The IRB has reviewed your submitted IRB application and all ancillary materials. Upon review, the IRB has determined that the above entitled project meets the requirements for exemption under the federal regulations 45 CFR 46.101 that govern the protections of human subjects.

Your research must be conducted according to the proposal that was submitted to the IRB. If changes to the approved protocol occur, a revised protocol must be reviewed and approved by the IRB before implementation. For any proposed changes in your research protocol, please submit an amendment to the IRB. Since your study falls under exemption, there is no requirement for continuing IRB review of your project. Please be aware that changes to your protocol may prevent the research from qualifying for exemption from 45 CFR 46.101 and require submission of a new IRB application or other materials to the IRB.

A goal of the IRB is to prevent negative occurrences during any research study. However, despite the best intent, unforeseen circumstances or events may arise during the research. If an unexpected situation or adverse event happens during your investigation, please notify the IRB as soon as possible. We will ask for a complete written explanation of the event and your written response. Other actions also may be required depending on the nature of the event. Details regarding the timeframe in which adverse events must be reported to the IRB and documenting the adverse event can be found in the *Pepperdine University Protection of Human Participants in Research: Policies and Procedures Manual* at [community.pepperdine.edu/irb](http://community.pepperdine.edu/irb).

Please refer to the protocol number denoted above in all communication or correspondence related to your application and this approval. Should you have additional questions or require clarification of the contents of this letter, please contact the IRB Office. On behalf of the IRB, I wish you success in this scholarly pursuit.

Sincerely,

Judy Ho, Ph.D., IRB Chair

cc: Mrs. Katy Carr, Assistant Provost for Research

## APPENDIX C

### Recruitment Script



Hello,

My name is Fransisco Flores, and I am a doctoral student in the Graduate School of Education and Psychology at Pepperdine University. I am conducting a qualitative research study examining the best corporate practices and strategies for engaging on social media and you are invited to participate in the study.

If you agree, you are invited to participate in a Zoom interview to discuss the best practices and strategies for speaking out on social media. The interview is anticipated to take no more than an hour. Participation in this study is voluntary. Your identity as a participant will remain confidential during and after the study. Confidentiality will be maintained using a series of security measures, including password-protected email communication using university firewall protections, a password-protected zoom meeting, deidentification of data using pseudonyms as well as compartmentalization of the various data elements, keeping all information separate.

If you have questions or would like to participate, please contact me at [fransisco.flores@pepperdine.edu](mailto:fransisco.flores@pepperdine.edu) or call me at (805)216-2966. Your response to this request is greatly appreciated.

Thank you in advance for your consideration.

Fransisco Flores

Pepperdine University| Graduate School of Education and Psychology

Doctoral Candidate

## APPENDIX D

### Interview Protocol

IQ1: What organizational challenges have you faced in your role of speaking out on social media?

IQ 2: What organizational challenges have you faced in your role of speaking out on social media?

IQ 3: What personal challenges have you faced in your role when speaking out on social media?

IQ 4: Thinking of your biggest challenge when speaking out on social media, how did you overcome it?

IQ 5: What leadership strategies do you use to overcome the organizational challenges you faced when speaking out on social media?

IQ 6: What guides your strategies when speaking out on social media? (i.e., personal versus company values or both).

IQ 7: What strategies do you use to address the expectations from stakeholders when speaking out on social media?

IQ 8: How do you define success as a company in your social media messaging?

IQ 9: How do you measure success when speaking out on social media?

IQ 10: What is an example of something you could go back in time and do differently?

IQ 11: What dangers exist for unqualified voices working at a private or publicly traded company when speaking on social media?



## APPENDIX E

### Informed Consent

**IRB #:**

**Formal Study Title:** Corporate Activism: Best Practices in the Age of Social Media

**Authorized Study Personnel:**

Principal Investigator: Francisco Flores  
100837185  
francisco.flores@pepperdine.edu

**Key Information:****If you agree to participate in this study, the project will involve:**

- ☒ (Males and Females) between the ages of (18-80)
- ☒ Procedures will include (Contacting participants using the recruitment script, informed consent, data collection via structured interview, transcription of data, analysis of data, documentation of findings)
- ☒ One virtual visit is required
- ☒ This visit will take 60 minutes total
- ☒ There is minimal risk associated with this study
- ☒ You will not be paid any amount of money for your participation
- ☒ You will be provided a copy of this consent form

**Invitation**

You are invited to take part in this research study. The information in this form is meant to help you decide whether or not to participate. If you have any questions, please ask.

**Why are you being asked to be in this research study?**

You are being asked to be in this study because you are leader in a corporation of a private or publicly traded company.

You must be 18 years of age or older to participate.

**What is the reason for doing this research study?**

This study will begin with the emergence of corporations taking an active role in society in contributing to socially responsible matters. Over decades, corporations have shifted their approach to CSR, with stakeholders looking at their performance beyond non-economical metrics through ESG scoring (Duuren et al., 2016). With social media becoming the tool to increase exposure to a brand, it has also been used to push ideas to the masses and pressure governments to act on matters important to the corporation and its stakeholders. As corporations increase their activity on social media, it is important to understand the rationale behind their activist actions. The majority of the current literature regarding corporate activism speaks on corporations' actions but seldom covers the strategies utilized or overcome challenges or handle the backlash from stakeholders. Identifying the best practices taken by current industry leaders will allow future generations to develop and incorporate strategies into their business CSR practice.

The purpose of the study was to examine findings related to the following:

- The challenges private or publicly traded companies face when implementing leadership strategies and practices when speaking out on social media.
- The leadership strategies and practices employed by private or publicly traded companies to overcome the challenges they face when speaking out on social media.
- How private or publicly traded companies measure success when speaking out on social media.
- The recommendations private or publicly traded companies have for the future implementation of social advocacy strategies and practices.

**What will be done during this research study?**

You will be asked to complete a 60 minute semi structured virtual interview. The PI will ask you a series of questions aimed at figuring out what strategies are used by leaders in your field. While the research will take approximately 26 to 52 weeks, your interview will only take 60 minutes.

**How will my data be used?**

Your interview responses will be transcribed, analyzed, and aggregated in order to determine the findings to the established research questions.

**What are the possible risks of being in this research study?**

This research presents minimal risk of loss of confidentiality, emotional and/or psychological distress because the interview involves questions about your leadership practices. You may also experience fatigue, boredom, or anxiety as a result.

**What are the possible benefits to you?**

You are not expected to get any benefit from being in this study.

**What are the possible benefits to other people?**

The benefits to society may include better understanding of leadership strategies used within your industry. Other emerging leaders might also benefit from any additional recommendations that are shared through this process.

**What are the alternatives to being in this research study?**

Participation in this study is voluntary. There are no alternatives to participating, other than deciding to not participate.

**What will participating in this research study cost you?**

There is no cost to you to be in this research study.

**Will you be compensated for being in this research study?**

There will be no compensation for participating in this study.

**What should you do if you have a problem during this research study?**

Your welfare is the major concern of every member of the research team. If you have a problem as a direct result of being in this study, you should immediately contact one of the people listed at the beginning of this consent form.

**How will information about you be protected?**

Reasonable steps will be taken to protect your privacy and the confidentiality of your study data. The data will be deidentified and stored electronically through a secure server and will only be seen by the research team during the study and until the study is complete.

The only persons who will have access to your research records are the study personnel, the Institutional Review Board (IRB), and any other person, agency, or sponsor as required by law. The information from this study may be published in scientific journals or presented at scientific meetings but the data will be reported as group or summarized data and your identity will be kept strictly confidential.

**What are your rights as a research subject?**

You may ask any questions concerning this research and have those questions answered before agreeing to participate in or during the study.

***For study related questions, please contact the investigator(s) listed at the beginning of this form.***

For questions concerning your rights or complaints about the research contact the Institutional Review Board (IRB):

Phone: 1(310)568-2305

Email: gpsirb@pepperdine.edu

**What will happen if you decide not to be in this research study or decide to stop participating once you start?**

You can decide not to be in this research study, or you can stop being in this research study (“withdraw”) at any time before, during, or after the research begins for any reason. Deciding not to be in this research study or deciding to withdraw will not affect your relationship with the investigator or with Pepperdine University.

You will not lose any benefits to which you are entitled.

**Documentation of informed consent**

You are voluntarily making a decision whether or not to be in this research study. Signing this form means that (1) you have read and understood this consent form, (2) you have had the consent form explained to you, (3) you have had your questions answered and (4) you have decided to be in the research study. You will be given a copy of this consent form to keep.

**Participant**

**Name:**

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(First, Last: Please Print)

**Participant**

**Signature:**

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Signature

Date

## APPENDIX F

### Peer Reviewer Form

Dear reviewer,

Thank you for agreeing to participate in my research study. The table below is designed to ensure that the research questions for this study are properly addressed with the corresponding interviews.

For each interview question please mark “leave as is”, “delete”, or “modify as suggested.” You can also add your recommendations.

Once you have completed the review, please return to [fransisco.flores@pepperdine.edu](mailto:fransisco.flores@pepperdine.edu)

Research Questions	Corresponding Interview Questions
RQ 1- What challenges are faced by private or publicly traded companies implementing leadership strategies and practices for speaking out on social media?	<p>IQ1: What was your biggest challenge when speaking out on social media?</p> <p style="padding-left: 40px;">A) Leave as is B) Delete C) Modify as suggested</p> <p>IQ 2: Thinking of your biggest challenge when speaking out on social media, how did you overcome it?</p> <p style="padding-left: 40px;">A) Leave as is B) Delete C) Modify as suggested.</p> <p>IQ 3: What organizational challenges have you faced in your role of speaking out on social media?</p> <p style="padding-left: 40px;">A) Leave as is B) Delete C) Modify as suggested</p> <p>IQ 4: What personal challenges have you faced in your role when speaking out on social media?</p> <p style="padding-left: 40px;">A) Leave as is B) Delete C) Modify as suggested</p>
RQ 2: What leadership strategies and practices are employed by private or publicly traded companies to overcome the challenges they face when speaking out on social media?	<p>IQ 5: What leadership strategies do you use to overcome challenges when speaking out on social media?</p> <p style="padding-left: 40px;">A) Leave as is B) Delete C) Modify as suggested</p> <p>IQ 6: What guides your strategies when speaking out on social media? (i.e., personal versus company values or both).</p> <p style="padding-left: 40px;">A) Leave as is B) Delete C) Modify as suggested</p>

Research Questions	Corresponding Interview Questions
	<p>IQ 7: What strategies do you use to address the expectations from stakeholders when speaking out on social media?</p> <p>A) Leave as is B) Delete C) Modify as suggested</p>
<p>RQ3 - How do private or publicly traded companies measure the success of speaking out on social media?</p>	<p>IQ 8: How do you define success as a company?</p> <p>A) Leave as is B) Delete C) Modify as suggested</p> <p>IQ 9: How do you measure success when speaking out on social media?</p> <p>A) Leave as is B) Delete C) Modify as suggested</p>
<p>RQ4 - Based on their experiences, what recommendations would private or publicly traded companies have for the future implementation of social advocacy strategies and practices?</p>	<p>IQ 10: What recommendations do you have for leaders when speaking out on social media?</p> <p>A) Leave as is B) Delete C) Modify as suggested</p> <p>IQ 11: What dangers exist for unqualified voices working at a private or publicly traded company when speaking on social media?</p> <p>A) Leave as is B) Delete C) Modify as suggested</p>