Executive Summary

This article focuses on the potential impact of social media on organizational leadership and governance at the C-level. Although IT governance in general has become more shared across C-level leaders over time, social media initiatives have elevated the importance of an IT governance role for the chief marketing officer (CMO). Based on case studies and interviews with CIOs, CMOs and other C-level leaders, this article presents four leadership/governance models and describes their challenges and perceived success. The findings of this study also provide evidence for the paradigm shift in the CIO role that has been predicted by other researchers.

SOCIAL MEDIA AS A DRIVER OF BUSINESS TRANSFORMATION

Social media are changing the way companies can interact and engage with their customers, as well as the way they can interact and collaborate internally with their employees. Social media initiatives have resulted in a restructuring of the marketing function, as well as the way companies think about their relationships with customers, business partners and internal employees. Some have described the social media movement as the dawn of a new era and IBM has coined the term “social business” to describe this business transformation and the pervasiveness of this phenomenon across the organization. Similar to the shift that took place as the Internet became a platform for doing business, social business success may require the rethinking of organizational structures, functional silos and strategy development. Organizations that adapt and take advantage of social business opportunities have the potential to gain competitive advantage.

This article is based on findings from interviews with CIOs, chief marketing officers (CMOs) and other C-level executives, in-depth case studies and follow-up focus group sessions with CIOs on the leadership and governance issues impacted by social media. (Details of the research methodology are provided in the Appendix.) First, the social media strategies being pursued and the associated evolving IT leadership and shared IT governance roles are briefly discussed. Four models of IT leadership/governance specific to social media identified during the research are then described, highlighting their challenges and level of success. The article concludes with recommendations for CIOs as they proactively address the challenges of becoming a social business. These recommendations are based on the insights gained from the research study, which focused on two main questions:

1 Varun Grover, Elena Karahanna and Omar El Sawy are the accepting senior editors for this article.
2 An earlier version of this study was presented at the 2010 SIM Academic Workshop on New IS Leadership Roles for a Digital World, St. Louis, MO, on December 10, 2010. The author acknowledges the valuable comments of the senior editors and the reviewers on prior versions of this paper.
1. How did the company’s leadership/governance model evolve as social media were introduced in the organization?

2. Specifically, how have social media impacted the role and leadership profile of the CIO, including the CMO-CIO relationship?

SOCIAL MEDIA STRATEGIES

Developing a social media strategy is essential for successfully implementing social media applications that provide value to the organization. There are numerous examples of how social media applications have provided companies with value and profit. Culnan, McHugh and Zubillaga argue that effective social media implementations that provide value to companies are based on “mindful” adoption decisions, community building and adaptive capacity (i.e., the ability to acquire new customer knowledge and exploit knowledge provided by the customer). An important component of mindful adoption is the upfront planning process that involves assigning governance responsibility and ownership of social media initiatives.

In the companies studied, social media strategies were both internal and external:

- **Internal** strategies include employee-facing applications, such as employee social media networks and the use of collaboration technologies using wikis, and HR recruiting applications and research and development (R&D) applications that may include both employee and external constituencies.

- **External** strategies include customer-facing applications that rely on marketing expertise, as well as social media applications for business partners in a business-to-business (B2B) context that may or may not involve marketing.

The distinction between internal and external strategies is important because social media associated with the marketing function refer specifically to customer-facing applications, brand protection and other social media implementations that involve marketing. These implementations are a CMO responsibility. Employee-facing strategies and other social media applications are a CIO responsibility. Alignment across these two domains is therefore an organizational governance challenge.

There are many examples of successful applications of customer-facing (external) social media implementations that illustrate how social media are fundamentally changing the interaction between firms and customers. Using Starbucks as an example, Gallaugher and Ransbotham show the value that can be derived by using social media to develop deeper relationships with customers. To address the governance challenges, Starbucks uses a distinct, centralized cross-functional unit coordinated by the Vice President of Brand Content and Online, which coordinates with support functions, including IT.

Internal social media applications are also transforming the way employees work, collaborate, communicate and innovate. One illustration is described in the development of an Enterprise 2.0 system to attract and retain new IT hires into USAA’s workforce. Another example is Dell’s successful implementation of online User Innovation Communities, which provides an example of how social media technologies can be used to engage with the public in product R&D efforts. Dell is an example of a company that has established a position of vice president of social media (VPSM). However, both of these examples require strategic involvement from the CIO.

Broad industry studies have shed light on the current state of social media in organizations, and provide

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6 See Andrew McAfee’s work in which he coined the term “Enterprise 2.0” and provides valuable insights for harnessing the power of social media: McAfee, A. *Enterprise 2.0: New Collaborative Tools for Your Organization’s Toughest Challenges*. Harvard Business Press, 2009, Chapter 3.

7 For a discussion of the challenges of social media implementation and the value to companies, see: Culnan, M., McHugh, P. and Zubillaga, J. “How Large U.S. Companies Can Use Twitter and Other Social Media to Gain Business Value,” *MIS Quarterly Executive* (9:4), 2010, pp. 243-257.


Successful Social Media Strategies Require a Close CIO-CMO Partnership

Traditionally, there has been a distinct set of responsibilities for marketing and IT leaders. A report prepared by Accenture for the CMO Council suggests that this poses challenges for the implementation of social media strategies. According to the executives Accenture interviewed, marketing tends to be creative and fast-paced, looking for new opportunities, but marketing leaders are less likely to understand how technology works or the security challenges and other risk concerns faced by the IT organization. However, many social media applications can be launched at minimal cost on public networks (e.g., Facebook, Twitter) and do not require corporate IT involvement. In addition, there may be no clarity as to who is accountable in the event of a security violation or company embarrassment resulting from social media use.

In response to these concerns, the need for stronger ties between the CMO and CIO is increasingly being recognized. The CMO plays an important role because of his or her direct connection to the customer and intimate knowledge of the customer relationship. The CIO has in-depth knowledge of social media technologies and the technical issues related to implementing social media strategies. An effective CIO-CMO partnership that builds on the strengths of each is needed to ensure proper alignment for social media applications that require corporate IT infrastructure and support.

The CIO’s Role in Social Media Strategy

Leadership has therefore emerged as one of the key success factors in the development and implementation of sustainable social media initiatives that provide value and profit for companies. During the past decade, the CIO’s role in organizations has become more strategic, with an accompanying elevation to the executive level, which gives him or her significant interaction with other C-level executives. Recent research has described the role of the CIO as evolving to become a business technology strategist. Business technology strategists are strategic business leaders who create competitive advantage through the use of technology as a core tool. This description is consistent with the role that will be required as a result of social media trends in organizations.

Further, the “open leadership” concept described by Li provides the foundation and structure for more shared IT leadership across an organization transforming to become a social business. For example, in her work on open and transparent leadership skills and the mindset necessary to lead this transformation process, Li lays out a roadmap for tapping the power of social media technologies. Although Li’s work has limited discussion on who should lead, other authors have described an IT orchestrator role that fits the leadership profile for the social business. The IT orchestrator has strategic leadership capability as well as strategic decision-making authority within the organization.

IT Governance and Social Media Strategy

As discussed above, governance is an essential component of an organization’s social media strategy and deserves considerable attention. According to Weill and Ross, IT governance objectives:

12 For a summary of current social media trends across a broad industry sample, see Bughin, J., Chui, M. and Miller, A. How Companies are benefiting from Web 2.0: McKinsey Global Survey Results, McKinsey & Company, 2009; for a recent guide to developing a social media strategy that covers all the dimensions of implementation, see Thomas, D. and Barlow, M. The Executive’s Guide to Enterprise Social Media Strategy, John Wiley & Sons, 2011, Chapter 3.
13 For a summary of current social media trends and perceptions by CMOs and CIOs of the current state and future trends, see The CIO-CMO Alignment Imperative: Driving Revenue through Customer Relevance, CMO Council, 2010.
14 For a detailed discussion of the importance of leadership and how companies should embrace an open leadership model, see Li, C. Open Leadership: How Social Technology Can Transform the Way You Lead, Jossey-Bass, 2010, Chapter 4.
16 For a detailed discussion of the importance of leadership and how companies should embrace an Open Leadership Model, see Li, C., op. cit., 2010.
1. Promote desirable behavior in the management and use of IT.
2. Formalize organizational learning about IT.

IT-savvy firms, as they are referred to by Weill and Ross, design their IT governance to fulfill their strategic business objectives and adapt their designs to match business changes. A shared IT governance model includes both a C-level committee of non-IT leaders and an IT leadership team. Recent Gartner reports also advocate shared IT governance designs and the need to rethink key decisions concerning IT governance when faced with major technology and strategy changes. For companies with significant social media involvement with customers, governance by non-IT leaders will likely become increasingly important.

FOUR SOCIAL MEDIA LEADERSHIP/GOVERNANCE MODELS

Initially, the research identified eight leadership/governance structures to describe social media leadership and governance trends in organizations across the various industries represented by the companies in the study. As well as industry sector, the analysis was framed using the following dimensions: social media platforms being used, leadership/ownership of social media strategy, leadership/governance structure, role of the CIO, leadership profile of the CIO, C-level open leadership orientation, CMO-CIO relationship and challenges/obstacles to strategy implementation. Each of these dimensions, and the findings within each of them, is described in the Appendix, along with a summary of company profiles.

However, no clear optimal leadership/governance structure emerged across all of the case study companies, and there were only minor variations between some of the structures. Because of this, the initial eight leadership/governance structures were then condensed into four models that are representative of current trends for social media leadership/governance. These four models were rated according to the relevant company assessments of success—i.e., the C-level perceptions of whether the structure currently is meeting the needs of the organization. The two models perceived as less successful had been adopted by companies that also reported conflicts between marketing and IT that resulted in stalled social media plans.

The four models, which are labeled A, B, C and D, are discussed below. A graphical depiction for each model is also provided, showing how the CEO, CIO, CMO and (sometimes) the VPSM interact.

Model A: CIO-Dominant

Model A (the CIO-dominant model), which is described in Figure 1, had been adopted by four of the eight case study companies.

In all of the four companies that had adopted Model A there were clear tensions between the IT and marketing leaders, and there was little or no social media strategy alignment between these two key functions. There were also some unique circumstances. For example, one company did not have a C-level marketing executive. In another, the CIO retained control of all technology initiatives, including social media, due to a high risk of company litigation. The CIO in this company was responsible for producing evidence of digital transactions (including social media interactions), which introduced high costs, and the absence of clear communication between the CIO and CMO concerning these risks and security concerns resulted in misunderstandings and frustrations within the marketing function.

A third company, a highly regulated financial services firm, also faced requirements to retain records of social media interactions to remain compliant with federal regulations and avoid heavy fines and/or government sanctions. For example, an interest rate promotion on a social media site such as Facebook must be retained for 25 months. In this company, both ad hoc planning for social media initiatives, as well as lack of coordination with the CIO, also resulted in tensions between marketing and IT and stalled social media planning. There are, however, examples of financial services companies that have made substantial progress with customer-facing social media initiatives.

The fourth company has a structure where the CMO reports directly to the CEO, whereas the CIO reports one level further down, to the chief financial officer.

19 For a discussion of the impact the convergence of digital technologies has on IT governance, see Mahoney, J. and Roberts, J. Convergence of Digital Technologies Needs Expanded and Strengthened IT Governance, Gartner Research Report, 2011.

20 For a discussion of Wells Fargo’s leadership in social media see Working, R. “How Wells Fargo has grown its presence on social media,” ragan.com, March 2, 2011, available at http://www.ragan.com/Main/Articles/How_Wells_Fargo_has_grown_its_presence_on_social_m_42734.aspx.
However, the CIO currently has ownership of the social media strategy. To enable the CIO to have the decision-making power to negotiate and work with the CMO to accomplish customer-facing social media goals would appear to require a change in structure, with the CIO also reporting to the CEO.

Model B: CMO-Dominant

Model B, described in Figure 2, had been adopted by two of the case study firms, both of which reported mixed results for social media success.

In both Model B companies, the CMO has clear responsibility for social media marketing initiatives with either a VPSM or social media manager taking responsibility at the operational level. In both of these companies, the involvement of the CEO was an important component for success. In the company
with a VPSM, there was also full CIO support for the marketing function’s social media efforts from a technical perspective. The company with a social media manager was a smaller company, and this non-VP role may be more appropriate for smaller companies. In both companies, however, a need for more collaboration between the CMO and CIO was identified, as both strained relationships and a lack of alignment between marketing and IT were observed. In one company, for example, the CIO worked with a brand manager involved with social media, but very rarely interacted with the CMO. This lack of involvement at the strategic C-level resulted in miscommunications and less than optimal outcomes.

Other companies that are adopting Model B have positions equivalent to a VPSM but use a variety of titles, such as Chief Digital Officer, VP of Cyber Risk and New Media Risk, VP of Social Media and Digital Communications, and VP of Global Social Media.\(^\text{21}\) In most of these organizations, the CEO is actively involved in the establishment of these new positions. An interesting observation is that the hiring process for these positions has involved the CMO, HR and sometimes the chief financial officer—but the CIO typically has been absent from these deliberations.

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\(^{21}\) All these titles are reported in the literature. For example, see: Elliott, S. *Ogilvy Adds Chief Digital Officer*, Media Decoder, December 13, 2010, available at http://mediadecoder.blogs.nytimes.com/2010/12/13/ogilvy-adds-chief-digital-officer/.
The Impact of Social Media on C-Level Roles

Model C: Joint CIO and CMO Ownership

One of the two case companies rating their social media initiatives as successful had adopted Model C (described in Figure 3). With this first model, IT and marketing executives collaborate, and have joint ownership and accountability for aligning social media across the organization.

Model D: C-Level Ownership

The second case company reporting success with its social media strategy had adopted Model D (described in Figure 4). With this model, social media ownership, accountability and leadership are orchestrated not only across the CMO and CIO but also across all C-level executives.

### Figure 3: Model C: Joint CIO and CMO Ownership: Successful

<table>
<thead>
<tr>
<th>Description of Model</th>
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<tbody>
<tr>
<td>The joint ownership and governance arrangement of Model C involves strong collaboration between the CIO and CMO. The VPSM reports to the CMO and leads cross-functional teams across the organization. The CMO and CIO jointly present social media proposals and requests for funding to the CEO. The CEO, who is actively promoting the social business concept within the business, recognizes that these proposals have more credibility and a greater probability of success.</td>
</tr>
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<tr>
<th>Governance</th>
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<tbody>
<tr>
<td>The CIO and CMO jointly are accountable for social media strategy and implementation. Performance evaluations, compensation and incentives are based on mutual performance and deliverance of shared objectives and goals. The social media goals and objectives of marketing are aligned with other organizational social media objectives through IT.</td>
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<table>
<thead>
<tr>
<th>Outcomes of Using the Model</th>
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<tbody>
<tr>
<td>The company using this model recognizes its merits in moving the company forward in its social media endeavors. It was a first mover in social media initiatives with strong leadership from the CEO, and is a leader in social media in its industry.</td>
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</table>

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<tr>
<th>Challenges/Obstacles</th>
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<tbody>
<tr>
<td>- New position under CMO: This position was a shift in the way business gets done via cross-functional teams.</td>
</tr>
<tr>
<td>- Education and training across the organization: Conducted as social media initiatives are implemented.</td>
</tr>
</tbody>
</table>

Executives in the companies that had adopted Model C and Model D indicated others in their industries recognize them as leaders in social media. However, these two models are quite different in structure: Model C fosters direct CMO-CIO interactions, while Model D clearly places social media strategy as a CEO-level responsibility. Both models require substantial organizational changes and require strong leadership to orchestrate these changes.

Taken together, the four models represent the current state of social media trends and the leadership/governance challenges and opportunities. Other companies can use the models to evaluate their current status and determine what they need to do to better position their companies for the emerging social business competitive landscape. However, as shown in the boxes above, the challenges and obstacles faced by

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companies adopting the models varied considerably. But there were similarities across all eight case companies, as described below.

**SIMILARITIES ACROSS THE CASE STUDIES**

One overriding conclusion that emerged from the case studies and interviews with C-level executives in all companies is that almost every one of them is having a hard time “getting their hands around social media.” Where do we start? Do we run a pilot project? Is it necessary to tackle the whole thing in order to gain value? How do we get C-level buy-in? How do we educate the organization? Is there an innovative way to approach social media rather than the traditional consulting route? The questions were wide-ranging because the tasks appeared daunting to most companies. Social media trends have been fast-paced and, in most cases, have not been guided by corporate strategy. The findings reveal that most CIOs and CMOs were caught off guard as to the direction social media was taking and its significance in organizations.

Nevertheless, when the CIO role of business technology strategist was described, all but one of the participants confirmed that it best represented

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**Description of Model**

Model D is the most radical in terms of the organizational change that is necessary for implementation. The organization’s social business strategy, which includes social media, is elevated to the corporate level and neither the CMO nor the CIO has ownership of the social media strategy. Implementation is the responsibility of both executives as well as other C-level executives. This model is based on the assumption that social media transcends both marketing and IT. Collaboration across C-level executives is essential and there is strong leadership and involvement from the CEO. Metrics for value and financial gain are assessed from an overall organizational perspective. An integrated focus on brand management and business architecture supporting these common goals is central to the success of the approach.

**Governance**

The CMO, CIO and VPSM collaborate within a leadership and governance framework that works closely with the CEO. This is a paradigm shift because it eliminates the distinction between non-IT and IT governance.

**Outcomes of Using the Model**

The merits of this model are still being assessed; some CEOs in this study recognize the value of this model for the kind of business transformation that may be necessary to remain competitive in the social business future. The advantages of this model, however, have to be considered against a set of political, organizational and leadership challenges. The company using this model is a medium-sized business in which the CEO is actively involved in the social media plans. This company was an early player in social media.

**Challenges/Obstacles**

- Political: Use of consultants resulted in resentment from IT employees who felt they knew what should be done.
- Lack of clear responsibility: Employees were not always sure where they should put their time and effort because social media responsibilities were added to their existing workloads. However, they were well compensated.
The Impact of Social Media on C-Level Roles

the characteristics of the CIO, both from the CIO’s perspective and from that of other C-level executives. The exception was a company where the CIO’s role was categorized as “supportive.” In this company, the CIO did not have the power that comes from reporting to the CEO. Every CEO who responded in this study indicated that business technology strategist described the CIO role they sought for their companies and that this role represents the skills and mindset necessary to lead organizations in the future.

In addition, all but one company identified the IT orchestrator leadership profile as representing the CIO and also the profile necessary to accomplish organizational goals in the digital age. Again, the exception was the company in which the CIO did not report to the CEO; here, the CIO’s role was perceived more as a support function to the organization, similar to an IT advisor role. All the C-level executives agreed that CIOs who currently are not IT orchestrators will need to develop these skills to meet the requirements of the future social business.

LEADERSHIP SKILLS NEEDED TO BECOME A SOCIAL BUSINESS

Model D most closely fits the structure that fosters the open leadership concept developed by Li and discussed above. In fact, the CEO of the company that had adopted Model D had read Li’s book and was making a conscious effort to follow that direction. The other companies in this study had not moved in this direction, but some were beginning to contemplate the merits of doing so.

However, based on discussions with C-level executives, the five leadership dimensions espoused by Li would appear to be needed to propel their companies toward an optimal open leadership orientation. These five dimensions are information sharing, a collaborative mindset, a willingness to relinquish control, more shared decision making and personal leadership growth (Table 1 provides a brief explanation of each). The executives also suggested that developing the leadership skills in these dimensions will be difficult for current C-level

<table>
<thead>
<tr>
<th>Leadership Dimension</th>
<th>Explanation</th>
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<tbody>
<tr>
<td>Greater Information Sharing</td>
<td>Information sharing will be a necessary component of any leadership model that is more open while supporting more collaborative decision making. Incentives to share information will be necessary to move past some of these barriers.</td>
</tr>
<tr>
<td>Mindset for Collaboration</td>
<td>Mindset is another area that is difficult to change and yet necessary in order to move toward more shared leadership and decision making. It will be difficult to make the shift and it will require a willingness to take steps in this direction.</td>
</tr>
<tr>
<td>Willingness to Relinquish Some Control</td>
<td>Power and control have been the leadership orientation for many executives throughout their careers. Making a change in this area seems awkward and uncomfortable. Moving in this direction requires trust in others’ abilities to make good decisions and to do what is best for the company. New skills and the discipline to learn these new skills are required. Some will likely not be able to make the transition.</td>
</tr>
<tr>
<td>More Shared Decision Making</td>
<td>The objective of shared decisions can be accomplished only when the skills in the previous three dimensions have been acquired. A process and structure are needed to guide decision makers and to establish defined responsibilities. Performance measures should be developed to ensure a more successful outcome.</td>
</tr>
<tr>
<td>Personal Leadership Growth</td>
<td>Major change in human behavior requires training and possible mentoring. Leaders should think seriously about developing the skills to be successful in the social business arena. Leadership training for C-level executives, along with support and recognition of the importance of moving in this direction, will be necessary from the CEO. These skills will likely be required of future leaders, and those who resist do so at their peril.</td>
</tr>
</tbody>
</table>

Table 1: Leadership Dimensions Necessary to Become a “Social Business”
executives, who have spent their careers operating and leading companies with very different leadership perspectives.

These dimensions suggest that the days of the CIO totally owning the IT terrain and leading the IT strategy from a central position are gone. The business technology strategist role and IT orchestrator profile described by others could also be used by today’s CIO leaders to assess their personal strengths and weaknesses as a CIO leader in a social business of the future.

**RECOMMENDATIONS FOR CIOs**

The research findings firmly establish the increasing importance of the marketing function and the CMO in IT leadership, and show that it is essential for the CMO to participate in decision making concerned with the introduction of social media. The study participants also strongly believe that marketing will play a more significant part in IT governance in the future due to the use of social media evolving to become another marketing channel and the need for organizations to avoid image and brand protection risks. As companies’ social media strategies mature, there may also be an evolution toward more complex models, as indicated by the sequence of the four models described above.

Based on the research findings, there are four recommendations for CIOs as they define the IT leadership/governance structures necessary to achieve social media alignment across marketing and IT.

1. **Involve Marketing Executives and Managers in IT Governance**

The lack of success of the CIO-dominated model (Model A) clearly suggests that the top marketing leader (e.g., the CMO) should participate in IT governance. A shared IT governance model that includes C-level executives is not new. However, what is new is the growing importance of the CMO in IT governance and leadership, especially in the context of customer-facing social media. Further, in organizations that have established a liaison role for social media (vice president or manager level), this manager needs to be a part of the IT leadership team.

2. **Align Customer-Facing Marketing Initiatives With IT**

Regardless of the leadership/governance model chosen, the use of social media necessitates more sophisticated analytics based on interactive customer data. Absorptive capacity (i.e., the ability to acquire new customer knowledge and to exploit knowledge provided by the customer) will be the “killer concept” and analytics the “killer app” for social media. Marketing will therefore need to rely on the IT organization developing the platforms, mobile applications and information systems integration and interfaces to extract new knowledge from customer data and exploit knowledge provided by customers. Acquiring a critical mass of customers will require expertise from marketing so the business can engage with customers effectively through social media channels. And providing access to social media applications that link back to the company’s website will require IT support.

IT expertise will also be necessary to integrate social media platforms with cloud platforms and mobile applications. The potential value from connecting these new data flows to existing customer feedback is substantial. However, realizing this value is currently an enormous challenge because it is necessary for IT to develop the interfaces to connect to enterprise systems such as CRM (customer relationship management) and BI (business intelligence). Providing this functionality across systems and platforms will be the next phase of evolution, and will require guidelines and policies that integrate with existing IT policies. Risks must also be evaluated against the perceived business value, and enhanced collaboration across marketing and IT will contribute to the mitigation of these risks. Good governance, in conjunction with these elements of implementation, will be essential for ensuring that companies create value from their use of social media.

3. **Establish Collaborative Relationships With the C-Level Executives**

The anticipated pervasiveness of a social business will require the involvement of C-level executives, including the chief operating officer, CFO, HR vice president and the chief information security officer. The CIO may therefore have to establish collaborative relationships with not only marketing executives but also HR executives for social media recruiting, for example, and with R&D for idea-generation. These C-level collaborations traditionally have not been reflected in IT governance teams. Alignment of social media goals, strategies and platforms will likely become a competitive imperative that will require involvement across the C-level suite.
4. Assess Current and Future Needs For a Social Business

Based on the case study findings and insights provided by CIOs, CMOs and CEOs, successful leadership in the digital organization will require a shift in mindset. CIOs who proactively anticipate the future need for the organization to become a social business will be well positioned to participate in a more collaborative joint-ownership governance model for social media. Table 2 provides a checklist of questions the CIO should ask when conducting a proactive assessment of social media plans.

CONCLUDING COMMENTS

This article contributes to a better understanding of the emerging relationship between the CMO and CIO and the consequent implications for IT leadership and governance resulting from the introduction of social media in organizations. The consensus across companies, industries and executives is that marketing and IT are converging. There is also agreement that the CMO should lead the customer-facing social media strategies in organizations, representing a shift in thinking about the role of the IT organization. In addition, it is essential that senior executives acquire the leadership skills needed to address these paradigm-shifting organizational changes.

Table 2: Questions to Guide CIO Assessments of Social Media Plans

<table>
<thead>
<tr>
<th>Questions About Today</th>
<th>Questions About the Future</th>
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<tbody>
<tr>
<td>Who owns the social media initiatives in the company today?</td>
<td>Who should own the social media initiatives in the company?</td>
</tr>
<tr>
<td>Who makes the decisions as to what social media projects will be supported and approved?</td>
<td>Who should make the decisions as to what social media projects will be supported and approved?</td>
</tr>
<tr>
<td>What is the process by which these decisions are made?</td>
<td>What process should be used to make decisions related to social media?</td>
</tr>
<tr>
<td>What role (business technology strategist or support role) does the CIO play in these decisions?</td>
<td>What role (business technology strategist or support role) should the CIO play in ownership of social media initiatives and strategy?</td>
</tr>
<tr>
<td>How should the CMO and CIO work together collaboratively to meet the needs of all concerned and the larger organization?</td>
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</tbody>
</table>
## Table 2: Questions to Guide CIO Assessments of Social Media Plans (cont.)

### Relationships with the CMO and Marketing Department

<table>
<thead>
<tr>
<th>Questions About Today</th>
<th>Questions About the Future</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is the CIO’s current relationship with the CMO (or equivalent) in the organization?</td>
<td>What relationship should the CIO have with the CMO in the organization in the context of social media and social business trends?</td>
</tr>
<tr>
<td>What role does marketing currently play in the strategic direction of IT?</td>
<td>What role should marketing play in the strategic direction of IT in the context of social media trends?</td>
</tr>
<tr>
<td>What role does the CMO play in the current IT governance structure?</td>
<td>What role should the CMO play in the governance of social media and IT?</td>
</tr>
</tbody>
</table>

### CIO Role and Leadership Profile

<table>
<thead>
<tr>
<th>Questions About Today</th>
<th>Questions About the Future</th>
</tr>
</thead>
<tbody>
<tr>
<td>What role (business technology strategist or support role) does the CIO currently play in the organization?</td>
<td>What role (business technology strategist or support role) should the CIO play in his or her current organization?</td>
</tr>
<tr>
<td>Has the CIO role evolved to business technology strategist?</td>
<td>What leadership profile should the CIO possess in his or her current organization?</td>
</tr>
<tr>
<td>What leadership profile does the CIO exemplify currently? Has progress been made toward the IT orchestrator profile?</td>
<td>Should the CIO embrace the open leadership style in his or her current organization to address the emerging social business environment?</td>
</tr>
<tr>
<td>How would the CIO currently describe his or her leadership traits? Has the CIO embraced the more open style that will be necessary for the future?</td>
<td></td>
</tr>
</tbody>
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## APPENDIX: RESEARCH METHODOLOGY

The findings of this study are based primarily on data collected from eight companies chosen from a total of 30 across a variety of industries. Two were manufacturing companies, two financial services firms, two retail companies, one a provider of medical supplies and one a technology firm. First, documents were analyzed including press releases relating to the introduction of social media and details of social media projects. Familiarity with these companies was gained primarily from consulting, supervised internships and MBA capstone projects. Subsequently, structured interviews and conversations with CIOs, CMOs, CEOs and others in the companies were conducted to discuss aspects of the findings.

The findings were collated under the eight headings shown in the table below. Three follow-up sessions of two hours each were conducted with CIOs and others from six of the case study companies. These follow-up sessions focused on obtaining feedback on the study results and were intended to challenge the thought process and the conclusions from various perspectives.

22 In this instance, the capstone project is a final individual comprehensive and practical project that each student completes working with a company in partnership with a professor.
## Findings From Eight Selected Case Studies

<table>
<thead>
<tr>
<th>Data Item and Source</th>
<th>Findings</th>
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<tbody>
<tr>
<td><strong>Social Media Platforms</strong>&lt;br&gt;Specific social media technologies companies are using to drive their strategy. This information was provided by company executives and other employees in the company.</td>
<td>Facebook, Twitter, blogs, discussion forums, YouTube, LinkedIn, wikis and podcasts</td>
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<td><strong>Leadership/Ownership of Social Media Strategy</strong>&lt;br&gt;The person in the organization who emerges as the leader of social media strategy. Information was provided by company executives.</td>
<td>Results emerged from conversations with CIOs and CMOs and are discussed in the text</td>
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<td><strong>Leadership/Governance Structure</strong>&lt;br&gt;Refers to the C-level reporting and governance structure specific to social media strategies and initiatives. The focus was specifically on the marketing and IT dimensions and the nature of the relationship between the CIO and CMO in terms of shared ownership, joint leadership and non-IT versus IT governance. Information was provided by executives in the company.</td>
<td>Graphical results with reporting relationships and CMO-CIO relationships are presented in the four models</td>
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<td><strong>CIO Role</strong>&lt;br&gt;Evaluation of the current role of the CIO as either a support role or a business technology strategist role as defined in the literature (strategic business leaders use technology as a core tool to create competitive advantage). An assessment was made by the CIO based on an understanding of the roles. The assessment was verified by other C-level executives.</td>
<td>Business technology strategist: 7&lt;br&gt;Support Role: 1 (Model A: CIO-Dominant)</td>
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<td><strong>CIO Leadership Profile</strong>&lt;br&gt;Four leadership profiles defined in the literature as IT orchestrator, IT advisor, IT mechanic and IT laggard. (The IT orchestrator has strategic leadership capability as well as strategic decision-making ability within the organization.) An assessment was made by the CIO based on an understanding of the four profiles. Verification from other C-level executives was included.</td>
<td>IT orchestrator: 7&lt;br&gt;IT Advisor: 1 (Model A: CIO-Dominant)&lt;br&gt;IT Mechanic: 0&lt;br&gt;IT Laggard: 0</td>
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<td><strong>C-level Open Leadership Orientation</strong>&lt;br&gt;Based on company data as to the degree to which C-level leadership in the company has moved toward the open leadership characteristics as explained in the work by Li (see Table 1).</td>
<td>None: 6&lt;br&gt;Some: 2</td>
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<td><strong>CMO-CIO Relationship</strong>&lt;br&gt;Refers to the relationship that has developed between the CMO and CIO as a result of social media implementations. The researcher coded the relationships using the following categories: strained, supportive and collaborative. Strained refers to relationships that have prevented success with social media. Supportive refers to the IT organization providing the necessary technology with little additional collaboration. Collaborative refers to relationships in which the CMO and CIO intentionally work together, resulting in successful social media endeavors. Categorizations were made by the researcher based on conversations with CIOs and CMOs and other observations by the author.</td>
<td>Strained: 4&lt;br&gt;Supportive: 1&lt;br&gt;Collaborative: 2&lt;br&gt;N/A: 1</td>
</tr>
<tr>
<td><strong>Challenges/Obstacles to Strategy Implementation</strong>&lt;br&gt;Describes the primary obstacles and challenges that were reported and observed as currently hindering the organization from achieving its social media objectives.</td>
<td>Summary results presented with each model</td>
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</table>
ABOUT THE AUTHOR

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