



# Strategic customer engagement marketing: A decision making framework

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## ABSTRACT

Drawing on social exchange theory (SET), this research explores customer engagement (CE) as a firm-initiated resource. Based on interviews with 41 managers from 34 companies, a five-facet, strategic customer engagement marketing (CEM) decision making framework emerges. *CE Conceptualization* differentiates between behavioral and psychological engagement. *CE Target* refers to who is engaged with the firm through CE (end-users or intermediaries such as retailers or distributors). *CE Domain* distinguishes between online and offline contexts. *CE Experiential Routes* differentiates absorption (controlled by the firm) from appropriation (controlled or transformed by the customer). Finally, *CE Value* demarcates customer interactional value from customer multiplier value. The decision options identified for each facet are interrelated and firms are advised to follow an integrative approach to CEM. However, acknowledging SET's emphasis on cost-benefit ratios and opportunity costs, suggestions for potential moderators to the CEM framework are provided.

## 1. Introduction

Engagement has been recognized as an important and meaningful concept in organizational behavior, marketing, social psychology, and education. For example, Kahn (1990) investigates the effects of engaged employees, and Fredricks, Blumenfeld, and Paris (2004) describe how students engage with schools. Academic and managerial interest in customer engagement (CE) is considerable (Hollebeek, Srivastava, & Chen, 2017), increasing (Roy, Balaji, Soutar, Lassar, & Roy, 2018), and expected to persist (Beckers, van Doorn, & Verhoef, 2018). Marketing practitioners expect increased brand equity, sales, and profits from truly engaged customers. For example, a recent study from Rosetta Consulting (2014) shows that highly engaged consumers spend 60% more in each transaction, make 90% more frequent purchases, and are four times more likely to advocate for the brand. Marketing academics emphasize CE's potential to develop relationships with customers beyond monetary transactions (Venkatesan, 2017) and achieve sustainable competitive advantage (Kumar & Pansari, 2016).

Extant research has made important contributions through defining CE (e.g., Brodie, Hollebeek, Jurić, & Ilić, 2011; Hollebeek, 2011a; Mollen & Wilson, 2010; van Doorn et al., 2010; Vivek, Beatty, & Morgan, 2012) and investigating its valence and dimensions (e.g.,

Dessart, Veloutsou, & Morgan-Thomas, 2016; Hollebeek, Glynn, & Brodie, 2014; van Doorn et al., 2010; Vivek, Beatty, Dalela, & Morgan, 2014). However, two issues have not been addressed sufficiently by the extant literature. First, while prior research examines the psychological mechanisms that drive CE (compare, e.g., Harmeling, Moffett, Arnold, & Carlson, 2017; Pansari & Kumar, 2017), CE as a strategic company resource remains unexplored. Second, existing interpretative research investigating CE from a managerial perspective that incorporates the “voice of the firm” is rare (for exceptions, see Hollebeek, 2016; Hollebeek et al., 2017; Vivek et al., 2012), and managerial implications are predominantly deduced from consumer-based research. Viewing CE as a firm-initiated resource is important because organizations typically take the initiative to engage the customer (Vivek et al., 2012), and firms should proactively manage the CE experience (Calder, Hollebeek, & Malthouse, 2018; Lemon & Verhoef, 2016; van Doorn et al., 2010).

Based on interviews with 41 managers from 34 companies, the current study outlines a comprehensive decision making framework that articulates five strategic facets of customer engagement marketing (CE Conceptualization, CE Target, CE Domain, CE Experiential Routes, and CE Value). Our research contributes to the emerging stream of CE research by combining the perspective of CE as a firm-initiated resource (Beckers et al., 2018; Harmeling et al., 2017) with social exchange

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theory (SET) (Blau, 1964; Cropanzano & Mitchell, 2005). Hollebeek (2016) uses SET to investigate how and why consumers engage with brands and companies. However, despite the interactive, two-way nature of CE, the current state of CE/SET research remains single-sided by conceptualizing customers as engagement subjects and brands or firms as engagement objects (Beckers, van Doorn, & Verhoef, 2016; Hollebeek, 2016; Hollebeek et al., 2017). Our study argues that such a distinction between engagement subjects and objects contradicts the original tenets of SET, which posit that social exchange can be initiated by any actor in a dyadic relationship or network (Molm, 2006). Consequently, our research is based on the assumption that firms (and not only customers) can initiate CE and adds to the emerging stream of research on engagement-oriented firms (Venkatesan, 2017).

## 2. Theoretical lens on customer engagement marketing: social exchange theory

The organizational behavior literature (Kahn, 1990) describes engaged employees as those who perceive supportive conditions for authentic expression. In social psychology, Tyler and Blader (2003) identify mandatory and discretionary cooperation as two classes of engagement that determine how people form relationships with groups. Whereas mandatory cooperation is stipulated by the group, discretionary cooperation is driven by the group member. In education, Fredricks et al. (2004) conceptualize school engagement as a multi-dimensional construct consisting of behavioral engagement (e.g., doing the work and following the rules), emotional engagement (interest, values, and emotions), and cognitive engagement (motivation, effort, and strategy use). Based on her extensive review of the engagement literature, Hollebeek (2011b) concludes that “engagement represents an individual-specific, motivational, and context-dependent variable emerging from two-way interactions between relevant engagement subject(s) and object(s)” (p. 787). In the conceptual frameworks above, engagement subjects are represented by students, employees, or customers, and engagement objects refer to schools, one's job, or companies. Extending this perspective, we suggest that in the context of CE, a distinction between engagement subjects (e.g., customers) and engagement objects (e.g., companies or brands) introduces constraints that limit the contribution of the engagement construct for marketing theory and practice. That is, we argue that customers and brands/companies should be seen as equitable actors in CE relationships. Consequently, our research builds on the assumption that both customers and firms can initiate CE relationships.

Research on CE has only recently acknowledged this perspective. Beckers et al. (2018) coin the term “firm-initiated customer engagement” to denote companies' explicit strategies to stimulate CE by asking customers to create brand videos on YouTube or ‘like’ brands on Facebook. Similarly, Harmeling et al. (2017) distinguish customer engagement (a customer outcome) from customer engagement marketing, defined as “the firm's deliberate effort to motivate, empower, and measure a customer's voluntary contribution to its marketing functions, beyond a core, economic transaction” (p. 312). However, previous research on firm-initiated CE has focused on specific issues such as psychological ownership and self-transformation for CE effectiveness (Harmeling et al., 2017) or the effect of CE campaigns on shareholder value (Beckers et al., 2018), and has underemphasized the importance of social exchange, reciprocity, and opportunity costs in strategic CE initiatives.

To address this research gap, our work draws upon social exchange theory (SET) as a theoretical lens through which CE relationships are conceptualized. SET (Blau, 1964) builds on the fundamental notion of reciprocity and is guided by three basic tenets: a) rules and norms of exchange, b) resources exchanged, and c) relationships that emerge from exchange (Cropanzano & Mitchell, 2005). In general, any actor in a relationship or network can initiate social exchange (Molm, 2006). For example, Cropanzano and Mitchell (2005) explain that “[t]he

process begins when at least one participant makes a ‘move,’ and if the other reciprocates, new rounds of exchange initiate. Once the process is in motion, each consequence can create a self-reinforcing cycle” (p. 876). Based on a cost-benefit analysis, actors engage in relationships as long as there is positive equity (i.e., larger benefits than costs) resulting from the relationship (Beckers et al., 2016). Both parties in the relationship typically strive for a balance in the contributions made and gradually increase their commitment (Tekleab & Chiaburu, 2011) and trust (Roy et al., 2018) in a mutually satisfying relationship. As emphasized by Abdul-Ghani, Hyde, and Marshall (2011) and Hollebeek (2011a), the cost-benefit perspective of SET resonates well with the interactive nature of engagement. Based on SET, Hollebeek (2016) suggests that customers compare CE investments and CE returns on three dimensions (cognitive, emotional, and behavioral). As shown in Table 1, this three-dimensional conceptualization of CE has been adopted by a substantial number of CE researchers, such as Brodie et al. (2011), Hollebeek (2011a,b), and Wirtz et al. (2013).

In the remainder of this paper, we follow Hollebeek (2016) in her conceptualization of CE as a process guided by reciprocity and cost-benefit analysis over time. However, because our research focuses on firm-initiated CE (i.e., customer engagement marketing), we integrate SET from the company's point of view, not the customer's. Nevertheless, companies must conceptualize cost-benefit relationships from both their own and the customer's perspective. It is only when both the customer's and the company's cost-benefit perceptions are positive that both parties will be motivated to advance the relationship. Fig. 1 delineates how the current research augments the extant CE literature. Whereas Table 1 focuses on the conceptualization of CE (including definitions and dimensions of CE), Fig. 1 embeds CE in the broader context of related work and clarifies the positioning and contribution of our study. Previous research has investigated CE as a firm-initiated resource (Beckers et al., 2018; Harmeling et al., 2017), through the lens of SET (Abdul-Ghani et al., 2011; Roy et al., 2018; Hollebeek, 2011a, 2016), or focused on decision making and boundary conditions (Bowden, 2009; Maslowska, Malthouse, & Collinger, 2016; Pansari & Kumar, 2017; Wirtz et al., 2013). Some authors combine two of these approaches (Beckers et al., 2016; van Doorn et al., 2010; Vivek et al., 2012). Further, CE literature focuses on specific issues, such as CE Conceptualization, CE and firm performance, CE operationalization/scale development, or customer experience management.<sup>1</sup> Our study combines the view of CE as a firm-initiated resource with SET and a focus on decision making and boundary conditions. This is represented by the area called “Current Study” in Fig. 1.

## 3. Methodology

Because research on CE as a firm-initiated construct has not yet achieved a consolidated state, we employ a qualitative, discovery-oriented research perspective to provide contextual sensitivity (Glaser & Strauss, 1999). This approach investigates phenomena in their naturalistic settings and accepts that realities are multiple, constructed, and holistic (Denzin & Lincoln, 2011). The qualitative approach focuses on how the complexities of the sociocultural world are experienced, interpreted, and understood in a particular context (Merriam, 2009). Consequently, rather than striving for statistical generalizability, qualitative research seeks findings that can be meaningfully transferred to other contexts (Marshall & Rossman, 2011).

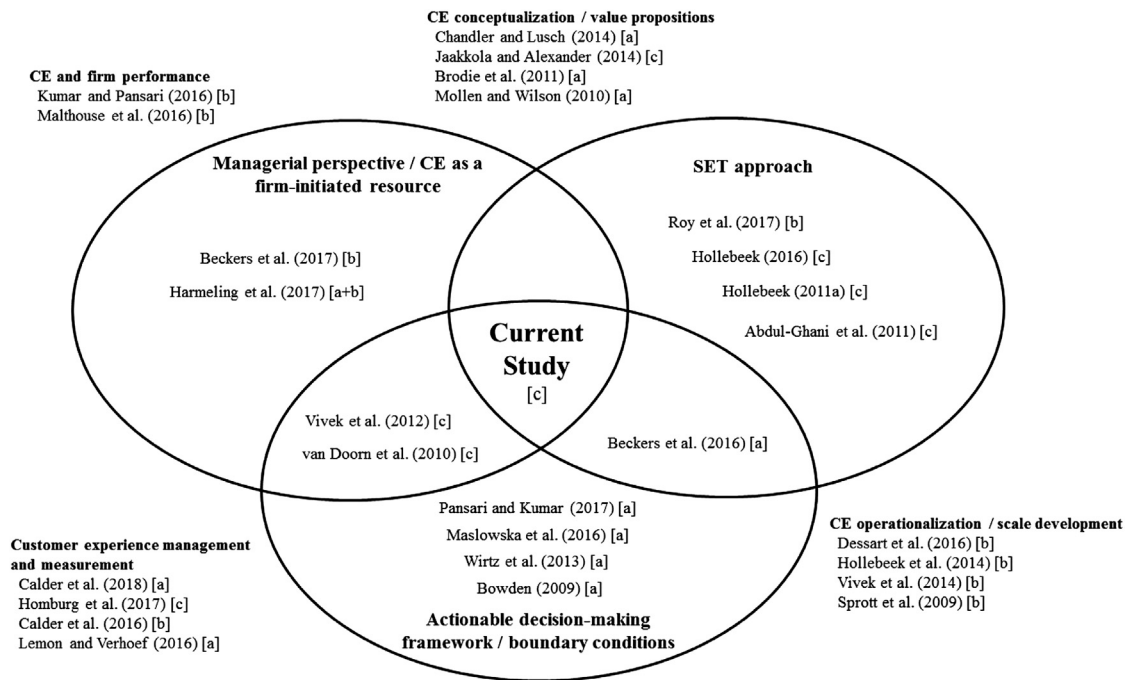
### 3.1. Sample and data collection

The current research employs a two-stage research design (see

<sup>1</sup> We acknowledge that Table 1 and Fig. 1 strive to present a representative set of CE papers rather than a comprehensive list of all available publications on CE.

**Table 1**  
Conceptualizations of customer engagement.

Study	Construct	Engagement object	Focus of definition	Dimensions	Approach
Beckers et al. (2018)	Customer engagement	Firm	Behaviors that go beyond customer transactions	Behavioral	Empirical (quantitative)
Bowden (2009)	Customer engagement	Brand	Psychological process by which customer loyalty forms (for new customers) or is maintained (for repeat customers)	Cognitive, emotional	Conceptual
Brodie et al. (2011)	Consumer engagement	Brand or firm	Psychological state which occurs by virtue of interactive, cocreative customer experiences	Cognitive, emotional, behavioral	Conceptual
Calder, Isaac, and Malthouse (2016)	Customer engagement	Experiences with product, brand, or firm	Multilevel, multidimensional construct that emerges from the thoughts and feelings about one or more rich experiences involved in reaching a personal goal	Cognitive, emotional	Empirical (quantitative)
Dessart et al. (2016)	Consumer engagement	Brand, firm, community	State that reflects consumers' dispositions towards context-specific engagement foci, expressed through affective, cognitive, and behavioral manifestations that go beyond exchange situations	Cognitive, emotional, behavioral	Empirical (quantitative)
Harmeling et al. (2017)	Customer engagement	Firm	Customers' voluntary resource contribution to a firm's marketing function, going beyond financial patronage	Behavioral	Conceptual/quantitative
Hollebeek (2011a)	Customer brand engagement	Brand	Customers' cognitive, emotional and behavioral investment in specific brand interactions	Cognitive, emotional, behavioral	Conceptual
Hollebeek (2016)	Customer engagement	Firm or other stakeholders	Perceived cognitive, emotional, and behavioral investment and returns from a customer's interactive brand experience	Cognitive, emotional, behavioral	Empirical (qualitative)
Jaakkola and Alexander (2014)	Customer engagement behavior in value co-creation	Firm or other stakeholders	Customer provision of resources during non-transactional, joint value processes	Augmenting, co-developing, influencing, and mobilizing behavior	Empirical (qualitative)
Mollen and Wilson (2010)	Online consumer engagement	Brand	Cognitive and affective commitment to an active relationship. It is characterized by instrumental and experiential value	Cognitive, emotional	Conceptual
Pansari and Kumar (2017)	Customer engagement	Firm	Focuses on the various ways through which the customer contributes directly (purchases) or indirectly (referrals, influence, feedback) to the firm	Behavioral (direct and indirect contributions)	Conceptual
Sprott, Czellar, and Spangenberg (2009)	Brand engagement	Brand	Individual difference representing consumers' propensity to include important brands as part of how they view themselves	Cognitive, emotional	Empirical (quantitative)
van Doorn et al. (2010)	Customer engagement behaviors	Brand or firm	Customers' behavioral manifestations that have a brand or firm focus beyond purchase	Behavioral	Conceptual
Vivek et al. (2012)	Customer engagement	Brand or firm	Intensity of an individual's participation in and connection with an organization's offerings and/or organizational activities	Cognitive, emotional, behavioral, social	Empirical (qualitative)
Wirtz et al. (2013)	Online brand community (OBC) engagement	Brand community	Consumers' identification with the OBC that results in interactive participation in the OBC	Cognitive, emotional, behavioral	Conceptual



**Fig. 1.** Research contribution and positioning.  
 Note: [a] Conceptual; [b] Quantitative/theory testing; [c] Interpretative/theory building.

Table 2 for a summary of informants). In stage 1, managers from 34 firms in Northern Mexico articulated their perspectives of CE through semi-structured interviews. In this stage, research assistants helped with contacting companies and conducting the interviews. To allow for comparisons across companies, research assistants were trained by the first author and equipped with a semi-structured interview guide. On average, the semi-structured interviews lasted 45 min. For stage 2, we sought a deeper and more nuanced understanding of CE practices. The first author conducted a total of seven unstructured interviews (Fontana & Frey, 2008) with managers from two consumer goods companies in Northern Mexico. One company is a subsidiary of a global beer producer, and the other is a producer of branded footwear with a presence in North, Central, and South America, Asia, and the Middle East. In-depth interviews lasted on average 80 min. The sampling process was discontinued when theoretical saturation was reached, i.e., when no new insights emerged from the interviews (Eisenhardt, 1989). Because most informants in our study were recruited from firms with an international or global presence, our interviews enabled us to include perspectives of engagement practices from both advanced and emerging economies.

3.2. Data analysis

Our verbatim transcription of the interviews resulted in 272 pages of single-spaced text. In line with Huberman and Miles (2002), we used an iterative process of analysis by constantly oscillating between data and theory (Suddaby, 2006). We incorporated suggestions from thematic analysis for theory building (Boyatzis, 1998) and employed a three-stage data coding process using open, axial, and selective coding (Corbin & Strauss, 2015). In the first step, we used open coding to analyze data line-by-line to generate zero-order categories through questioning and constant comparison techniques (Goulding, 2005). Next, axial coding identified first-order, emerging themes on a higher level of abstraction by moving from description to interpretation and explanation. Finally, selective coding consisted of connecting and consolidating axial codes into top-level, second-order categories, which represent the main themes of our CEM framework. Overall, our analysis strategy for assembling zero, first, and second-order categories followed

the inductive process described in Homburg, Jozić, and Kuehnl (2017). Table 3 shows the first- and second-order categories that emerged from the data, along with examples from the zero-order categories.

4. Findings

Fig. 2 shows the strategic CEM decision making framework that emerged from the analysis. The dashed line labelled “cost-benefit trade-off based on social exchange theory” acknowledges the fundamental tenet of SET that actors, such as firms and customers, weigh potential benefits and costs and make choices that seek to maximize outcomes or respond to past choices (Molm, 2006). The following section details the five facets of the framework along with the respective decision options. This is supported by a discussion of the data. Fig. 2 maps both the foundational level (driven by the firm’s overall marketing strategy) and the instrumental level of customer engagement marketing (termed ‘Customer Engagement Value Creation’). Potential moderators of this framework and the implications for strategic decision making are then explored in Section 5.

4.1. CE Conceptualization: psychological state and behavioral manifestation

The importance of the behavioral manifestations of CE was a re-occurring theme in our interviews. CE practitioners emphasized that CE should lead to purchases and be measurable through sales figures along with retweets, likes, or tags. A focus on the behavioral dimension of CE is reflected in some streams of CE research (e.g., Beckers et al., 2018; Pansari & Kumar, 2017; van Doorn et al., 2010). However, our informants also pointed out that CE must be more than just a behavioral manifestation. As one of our informants explained, engagement goes way beyond transactions; rather, it builds on an emotionally-grounded connection between customers and firms. These integrative accounts of CE resonate with the conceptualization of CE as a psychological state rather than a purely behavioral manifestation (Brodie et al., 2011). For instance, one of the informants (see below) used an engagement ring analogy to describe the commitment involved in the customer-brand relationship. Based on this perspective, CE without additional

**Table 2**  
Informants stage 1 (semi-structured interviews) and stage 2 (unstructured interviews).

Informant #	Stage	Position	Seniority (years)	Industry	Sector
1	1	Marketing Manager	6	Soft drinks and beverages	C
2	1	Marketing Research Manager	1	Tobacco	C
3	1	Sales Director	3	Cosmetics	C
4	1	Marketing Manager	2	Footwear	C
5	1	National Accounts Sales Manager	17	Beer	C
6	1	Marketing Manager	5	Processed food	C
7	1	Marketing Manager	1	Beer	C
8	1	Marketing Manager	6	Milk	C
9	1	Chief Marketing Officer	5	Soft drinks and beverages	C
10	1	Brand Manager	5	Household cleaning products	C
11	1	Brand Manager	6	Beer	C
12	1	Sales Manager	4	Human development consulting	S
13	1	CEO	23	Marketing consulting	S
14	1	Planning and Logistics Director	2	Events consulting	S
15	1	Sales Manager	5	Banking	S
16	1	Marketing Manager	3	Banking	S
17	1	National Marketing Manager	3	Software consulting	S
18	1	Service Plan Specialist	–	Software consulting	S
19	1	CEO	5	Printing	S
20	1	CEO	4	Marketing consulting	S
21	1	General Manager	3	Marketing consulting	S
22	1	Accounts Manager	6	Banking	S
23	1	CEO and Owner	10	Marketing consulting	S
24	1	Owner	8	Software consulting	S
25	1	Marketing Manager	4	Real estate	S
26	1	Sales and Marketing Manager	1	Events planning	S
27	1	Sales and Marketing Manager	1	Chemical	S
28	1	Executive Director	2	Industrial services	S
29	1	VP Accounts Manager	26	Marketing consulting	S
30	1	Sales and Marketing Manager	14	Services	S
31	1	Product Manager	3	Industrial machinery	I
32	1	Marketing Manager	2	Supermarkets	R
33	1	Sensory Marketing Executive	1	Sportswear	R
34	1	National Marketing Manager	5	Furniture	R
35	2	VP Brand Marketing	4	Beer	C
36	2	Brand Director	20	Beer	C
37	2	Brand Manager	6	Beer	C
38	2	Consumer & Market Intelligence Director	15	Beer	C
39	2	National Accounts Sales Manager	17	Beer	C
40	2	Managing Director	4	Footwear	C
41	2	Marketing & Public Relations Manager	2	Footwear	C

Note: C = Consumer goods; S = Services; I = Industrial (B2B); R = Retail.

**Table 3**  
Coding examples for zero-order, first-order, and second-order categories.

Zero-order categories (examples)	First-order categories	Second-order categories
<ul style="list-style-type: none"> <li>● Brand ambassador</li> <li>● Engagement ring metaphor</li> <li>● Repurchase</li> <li>● Content sharing</li> <li>● Conversations among store owners</li> <li>● Retailer preference</li> <li>● Consumer tribes; consumer community</li> <li>● Social identity</li> <li>● Store atmosphere</li> <li>● Sensual/sensorial experiences</li> <li>● Personalized attention</li> <li>● Social media marketing</li> <li>● Online customer service</li> <li>● Firms provide relevant content</li> <li>● Firms stimulate consumer response</li> <li>● Consumers take control; consumer-generated content</li> <li>● Brand meanings change</li> <li>● Feedback to the firm</li> <li>● Firm/customer value co-creation</li> <li>● Word of mouth; organic responses</li> <li>● Viral marketing</li> </ul>	<ul style="list-style-type: none"> <li>Psychological state</li> <li>Behavioral engagement</li> <li>Intermediary engagement</li> <li>End-user engagement</li> <li>Offline environment</li> <li>Online environment</li> <li>Absorption</li> <li>Appropriation</li> <li>Customer interactional value</li> <li>Customer multiplier value</li> </ul>	<ul style="list-style-type: none"> <li>CE Conceptualization</li> <li>CE Target</li> <li>CE Domain</li> <li>CE Experiential Routes</li> <li>CE Value</li> </ul>



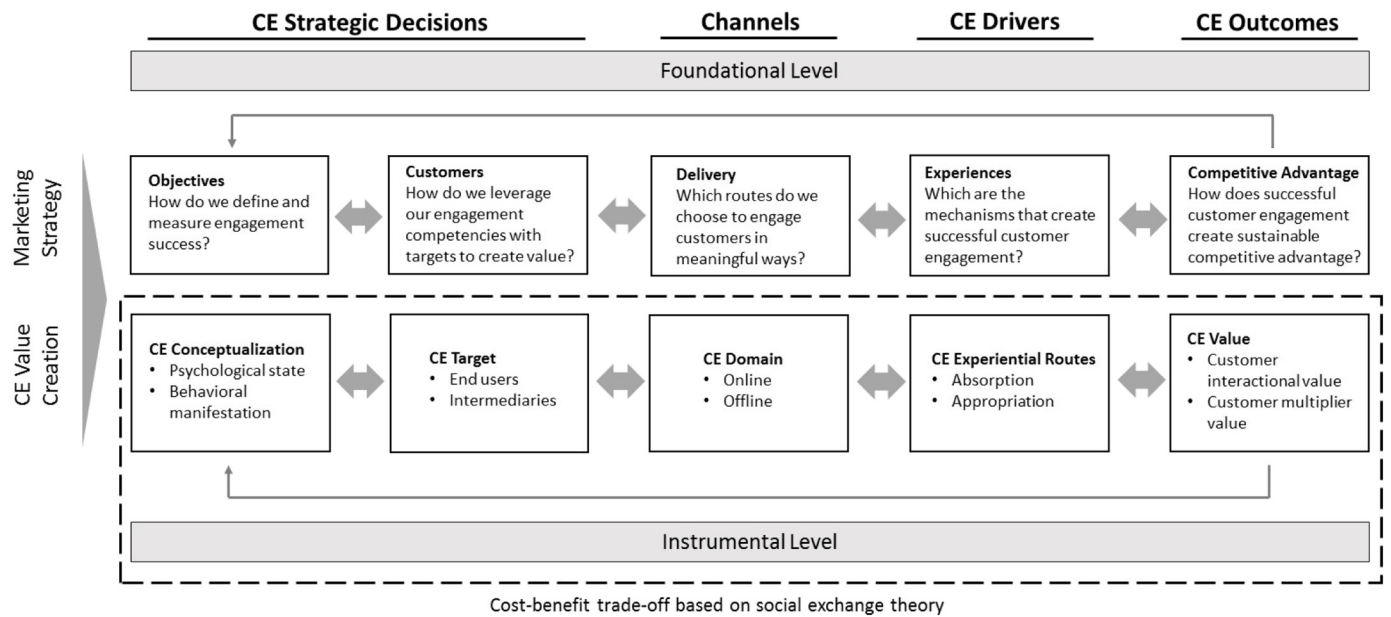


Fig. 2. Strategic CEM decision making framework. Note: CE = customer engagement; CEM = customer engagement marketing.

psychological commitment might be incomplete and spurious (Wallace, Buil, & de Chernatony, 2014).

Customer engagement is when they give you a ring. This is engagement. What the girl does is, ok, I have an engagement ring within six months... or I will get married tomorrow with this man, and this is a commitment that she has or that he demands from his girlfriend.

Stage 1 – Informant 7 [Brewery]

From an SET perspective, the accounts of building an emotional connection, defending the brand, and wearing an engagement ring reflect the notion of CE as a continuous sequence of reciprocal cognitive, emotional, and behavioral commitments (Cropanzano & Mitchell, 2005; Hollebeek, 2016).

4.2. CE Target: intermediaries and end users

CE Target indicates how firms leverage their engagement competencies to create value. On the one hand, companies can focus on the end user as the engagement target. Conversely, engagement can also be aimed at channel partners like retailers or other intermediaries. Extant research has yet to address intermediary or retailer engagement (Hollebeek et al., 2014), but the accounts from our interviews suggest that this is an important and relevant issue within the engagement conversation. For example, a marketing manager for a major commercial real estate company stated that the company tries to engage both shoppers and store owners within a mall. Further, an informant from a major bottling company explained how the company builds CE with intermediaries instead of focusing only on the end-user:

For me, consumer engagement is different from customer engagement. At least in our business, we differentiate. The consumer is the final consumer, and the customer can be [retailer chain 1] or [retailer chain 2], it is the client... So if [retailer 1] doesn't fall in love with us and doesn't want to sell, it will never get to the consumer. But if I tell [retailer 1] that I am going to have a campaign with different labels, like two years ago, 120 labels for different urban tribes where people can see which tribe they want to identify with, and in addition they are collectibles, then of course [retailer 1] says, this is going to fly, send it to me. So here we have an engagement from the customer and what we want is for this to transfer to the

consumer.

Stage 2 - Informant 37 [Brewery]

From an SET perspective, intermediary CE provides an opportunity to build exchange relationships based not only on tangible resources such as money, goods, and services, but also on less tangible or even symbolic resources such as information and empathy (compare Cropanzano & Mitchell, 2005). Because of the salience of personal relationships in producer-intermediary networks, shared values and expectations of reciprocity (Molm, 2006) become particularly important.

4.3. CE Domain: online and offline environments

CE Domain distinguishes between CE in online environments, such as social media platforms, and offline contexts based on physical surroundings. Most extant research on CE has concentrated on online environments and social media platforms (e.g., Brodie, Ilić, Jurić, & Hollebeek, 2013; Calder, Malthouse, & Schaedel, 2009; Hennig-Thurau et al., 2010; Hollebeek et al., 2014). This focus on computer-mediated environments is echoed by a substantial number of informants who explain how their companies stimulate and leverage CE through the use of email, blogs, and social media platforms. However, several informants emphasize that CE is also highly relevant in traditional, “offline” environments. For example, a provider of consulting services claims that focusing on generating CE through social media alone is erroneous, and describes how engagement is created in a traditional, physical store environment:

...there comes a moment when you get annoyed and unsubscribe. So my total customer base through these [social] media is low, and it may seem that customer engagement has terminated or solely lives through these media, and this is not true. You have other ways of relating [to the customer], which are traditional ways which form part of this interaction. From the moment you walk into a beauty salon and there you get your hair dyed, how they talk about the brand, how the packaging is presented, all this has to do with the loving you have with the customer. Sometimes we want to categorize this as referring only to networks and new media, but in practice it does not necessarily work this way.

Stage 1 - Informant 13 [Marketing Consulting Company]

Informant 41 from the footwear producer makes similar points that

echo a shift from multi-channel to omni-channel retailing where “the different channels become blurred as the natural borders between channels begin to disappear” (Verhoef, Kannan, & Inman, 2015, p. 175). Informant 41’s company insists that consumers should have a similar engagement experience regardless of how they purchase. From an SET perspective, the challenge for online CE is to develop valuable resources for other actors that convey tangible benefits such as money, goods, services, and information, but also transfer symbolic resources such as empathy and affect to an online environment.

#### 4.4. CE Experiential Routes: absorption and appropriation

Previous research has emphasized the importance of experiences in the CE process (Calder et al., 2018; Homburg et al., 2017; Lemon & Verhoef, 2016; Malthouse, Calder, Kim, & Vandenbosch, 2016). Building on the terminology used in Gensler, Völckner, Liu-Thompkins, and Wiertz (2013), we distinguish two routes through which branded experiences come alive for the individual: absorption and appropriation. Most informants agree that CE can be facilitated through actions such as providing interesting content, inviting customers into conversations, or generating emotionally stimulating environments. Customers can react to these company-driven initiatives through a process of absorbing these company offered attributes without altering their meaning or appearance. For example, the account from the stage 2 brewery informant below illustrates how [Brand B] generates CE by inviting people to express themselves and to be authentic. Although consumers indeed assign different meanings to what being authentic means to them, the campaign is company-driven and flows from the firm to the consumer.

The brand has something to say to the street, which is, never keep silent. [Brand B] invites you to express yourself, to be authentic, don't let yourself go with the flow, defend what you think, defend what you do and be authentic, don't trade authenticity for the approval of others.

Stage 2 - Informant 37 [Brewery]

On the other hand, informants explained how consumer-generated content can foster a process of CE appropriation where control is largely in the hands of the consumer (Gensler et al., 2013). The process of appropriation is strongly leveraged through social media which facilitate the creation of content. Some informants called this process *organic* or *natural* because the company does not pay for it. This perspective resonates with Malthouse and Calder (2011) who assert that “[a]n organization may create marketing programs to drive non-purchase behaviors or they may occur more ‘organically’” (p. 278). The process of appropriation also resonates with Singh and Sonnenburg’s (2012) metaphor of improvisation theater. Whereas traditional theater is based on a fixed script and the audience “consumes” the content (representing absorption), in improvisation theater (representing appropriation), the audience can make suggestions on how the story unfolds, or the audience is invited to become actors and to participate in the performance.

Moreover, as the testimony from the stage 2 footwear informant exemplifies, appropriation can be an oscillating process in which consumers appropriate content generated by companies, and companies then re-appropriate content generated by consumers. For example, customers from the stage 2 footwear producer uploaded their own pictures and assigned their own meaning to the brand. The company then appropriated this process by institutionalizing it in the form of a marketing campaign. However, the company’s clients can re-interpret and alter the meanings from this campaign, resulting in a process of re- and counter-appropriation. These sequences of re- and counter-appropriation are generally not hostile actions by competing agents in the market—rather, they are often symbiotic and friendly.

SET provides some guidance regarding which route (absorption or appropriation) should be a focus. Informants suggest that relying on

appropriation for building CE can decrease costs for the company substantially because tasks that traditionally would have been conducted by the company (such as taking pictures of the product in consumer-relevant contexts) are now completed by engaged and enthusiastic consumers. On the other hand, the benefits of appropriation may indeed come at the cost of losing control of content. Because the organic appropriation of content can occur both faithfully (as intended by the company), and unfaithfully (in ways unintended by the firm), marketing managers must be aware of the risks of appropriation and develop strategies to manage the loss of control inherent in consumer appropriation (Gensler et al., 2013; Harmeling et al., 2017).

#### 4.5. CE Value: customer interactional value and customer multiplier value

We distinguish two types of CE outcomes, customer interactional value and customer multiplier value. Customer interactional value refers to transactional relationships between customers and the firm, such as purchases, feedback to the firm, and value co-creation within the firm-customer dyad. Our informants echoed Kumar and Pansari’s (2016) argument that CE ultimately leads to an increase in competitive advantage. For example, the relationship between CE and competitive advantage is highlighted when an informant draws a direct relationship between customer engagement marketing, brand relevance, sales, and profitability:

*Researcher:* Why is customer engagement important for the company?

*Informant:* It is the way in which you maintain consumer preference, it is to maintain a brand that is significant, that it is worth it, and obviously the profitability of the company. The important thing is to make yourself relevant at any point you decide you want to be at.

*Researcher:* In which way is customer engagement measured in the company—if it is measured?

*Informant:* How develop our brands year by year, how develops the movement of goods. [We use] market research to see which are the brands they prefer, remember, and consume. We are in constant contact with the consumer and this is a way to measure customer engagement.

Stage 1 – Informant 10 [Household Cleaning Products]

Along with customer interactional value generated through customer action towards the firm, competitive advantage is also built through behavioral relationships between (existing or potential) customers. Customer multiplier value addresses actions between customers that provide leverage to the firm’s marketing efforts, such as referrals and other types of positive word-of-mouth communication. Specifically, our informants explained that referrals constitute an important type of positive word-of-mouth communication generating competitive advantage. This type of positive CE outcome is more difficult to measure and control, but provides important opportunities to exploit multiplier effects, which have the potential to go viral through the catalyzing effects of social media (Brodie et al., 2011).

An interpretation of our informants’ testimonials through the lens of SET suggests that both customer interactional value (e.g., purchases, feedback towards the firm, or value co-creation) and customer multiplier value (e.g., referrals) generate positive returns and competitive advantage for the company. Potentially, multiplier value may generate more momentum if content appropriated and shared among customers goes viral. However, the inherent risk of such a strategy is losing control of content (compare Gensler et al., 2013). Thus, whether firms seek customer interactional or customer multiplier value depends on the company’s level of risk aversion and their comfort with uncertainty. Risk averse firms may strive to focus on customer interactional value, while those more comfortable with uncertainty and willing to accept the risk of losing control of appropriated content may seek customer

multiplier value.

## 5. Implications for marketing theory and strategic decision making

While previous research has acknowledged the importance of CE (e.g., Brodie et al., 2011; Hollebeek, 2011a; van Doorn et al., 2010; Vivek et al., 2012), managers need direction in creating engagement-oriented organizations (Venkatesan, 2017) through firm-initiated customer engagement marketing (Beckers et al., 2018; Harmeling et al., 2017). Responding to this call, the current study adds to the emerging stream of research on CE by introducing an actionable, theoretically-grounded CEM decision making framework. By integrating the firm-initiated perspective of CE with SET, the current research provides insights that are relevant not only for marketing theory, but also for the broader field of social exchange and engagement in general. For example, several of the mechanisms we identify in this research, such as absorption/appropriation or interactional/multiplier value, may be transferred to other disciplines like social psychology, organizational behavior, and education. The findings also illustrate how fundamental tenets of SET, such as reciprocity, interdependence, shared values, resources, trust, risk, and commitment (Blau, 1964; Cropanzano & Mitchell, 2005; Molm, 2006), relate to CE. Our framework thus holistically integrates critical CEM decisions and avoids the pitfalls of isolation and fragmentation.

In the section that follows, we provide initial guidance regarding potential moderators that marketing practitioners may consider when making strategic CE decisions. Our observations build on the fundamental tenets of SET that a) actors are self-interested entities whose behavior is motivated by the need or desire to obtain valued benefits, b) resources are possessions or behavioral capabilities that are valued by actors, c) social exchange depletes resources and thus incurs some form of cost, and d) all social exchange entails opportunity costs (Molm, 2006).

For CE Conceptualization, the data suggest that a holistic approach to CE consisting of both psychological (e.g., commitment) and behavioral (e.g., referrals, feedback, purchases) dimensions has advantages for long-term relationship building. Specifically, resonating with Brodie et al. (2011) and Hollebeek (2016), most informants felt that “true” CE only occurs when customers are activated emotionally, cognitively, and behaviorally. However, our analysis suggests that building trust through commitment (an important building block in SET) is particularly important in B2B relationships where trustworthiness is generated via prolonged mutual reciprocation. For example, one of our stage 2 informants from the brewery emphasized the importance of emotional and cognitive commitment with key account retailing clients, including the sustained assurance of relationship maintenance. This perspective emphasizes the importance of CE as a psychological state (Vivek et al., 2012). On the other hand, initial evidence from our study indicates that for many consumer goods, and especially for those with lower perceived risk, marketers may want to focus more on generating behavioral engagement such as inviting customers to participate in sweepstakes, contests, or the product development process.

For CE Target, our interpretative analysis suggests that marketing practitioners should attempt to build engagement with both end-users and intermediaries. Due to the opportunity costs and resource limitations emphasized by SET, the question arises under which conditions marketers should shift budgets away from end users towards distributors, retailers, or other channel intermediaries. We argue that engagement should be fostered with intermediaries most likely to reciprocate positive behaviors and to commit to long-term exchange relationships built on shared values and mutual trust (Molm, 2006). Whenever retailers or distributors have increased influence on the final customer's decision making, intermediaries may be a more viable target. For example, brands that are typically sold under exclusive contracts, such as cars at car dealerships, would warrant increased

intermediary engagement. Following SET's emphasis on trust and interdependence (Cropanzano & Mitchell, 2005), fostering intermediary engagement in markets that require extensive customer guidance can provide a positive cost-benefit relationship for both the end customer and the intermediary.

A similar picture emerges for CE Domain. Integrating the accounts from our informants and the extant literature on omni-channel retailing (e.g., Verhoef et al., 2015), companies should provide engagement experiences in both online and offline channels. Such omni-channel initiatives can indeed be observed in the fast-changing retailing landscape. Traditional brick-and-mortar stores such as Walmart are expanding aggressively into the online space (Peltz, 2017) while pure online retailers such as Amazon are building brick-and-mortar stores to provide tangible, physical experiences (Zaidi, 2017). Nevertheless, this decision may be moderated by company size and the overall scope of the company. Whereas a simultaneous online and offline engagement may be advised for larger business with a broader scope, an increased focus on offline engagement may make sense for specialized high touch products or services that build on physical contact and the showroom experience, such as upscale fashion products, furniture, cars, or more complex banking and investment services.

For CE Experiential Routes, the findings suggest that companies should consider important trade-offs in their decision making. Based on the terminology suggested by Gensler et al. (2013), we refer to absorption as a consumption of content without altering meaning or appearance. On the other hand, consumers change or co-create meaning in appropriation. From an SET perspective, companies need to consider the trade-off between potentially increased efficiency and lower costs versus a loss of control through appropriation. Facilitating absorption allows the firm to retain control, but it may increase cost and decrease responsiveness to market change.

Finally, an SET perspective suggests that both customer interactional value and customer multiplier value provide favorable cost-benefit relationships for companies. Recommending a focal process for CE Value may depend largely on the specific internal and external conditions faced by the firm. As customer multiplier value (e.g., referrals and other types of customer-to-customer communication) may result in a loss of control, risk-averse companies may want to focus on customer interactional value by embracing direct customer-firm interactions.

## 6. Limitations and avenues for future research

Drawing on SET, our research provides important insights regarding strategic customer engagement marketing through a qualitative research perspective based on empirical evidence from the field. Nevertheless, additional research is needed to address voids that remain. First, although our research delineates how managers conceptualize CE, it remains unclear how companies arrive at these conceptualizations. For example, academic research may explore the specific types of market information used to define CE across firms or industries. Second, management styles in Mexico tend to be more authoritarian and top-down than those utilized in other countries (Gómez, 2004). In the methodology section of this paper, we argued that a majority of our informants were recruited from firms with an international or global presence and thus represent perspectives of engagement practices from both advanced and emerging economies. Nevertheless, it is possible that the more authoritarian management style of Mexican marketing managers magnifies a reluctance to accede control to customers. Further research could investigate whether different management styles influence firms' preferences (absorption or appropriation) for CE Experiential Routes.

Finally, the current research discriminates between end-users (consumers in B2C markets or industrial clients in B2B markets) and intermediaries (retailers and distributors) as potential targets. CE is frequently discussed in relation to social media marketing, and research



in this field has highlighted the role of multiple stakeholders (Felix, Rauschnabel, & Hinsch, 2017). Investigating CEM towards intermediaries and other stakeholders in more detail could reveal opportunities to broaden and extend the current operationalization of CEM (Beckers et al., 2018; Chandler & Lusch, 2014).

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