Digital Curation and Creative Brokering: Managing information overload in open organizing

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Abstract

While open organizing offers great promise for harnessing diverse and previously untapped knowledge and perspectives in strategy and innovation processes, how leaders manage the fundamental problem of information overload within these efforts remains unexplored. In this qualitative study, I develop a model of digital curation as creative brokering—how leaders strategically select, share, and interpret digital material across a diffuse network of actors to achieve concerted strategic action in the face of information overload. More specifically, I identify five digital curation practices—spotlighting, amplifying, refuting, recapping, and refocusing—and show why and how these practices are used in combination over time to respond to differing information overload challenges arising as open organizing unfolds. The paper's contributions are threefold. First, it advances open organizing scholarship by showing how leaders engage in digital curation to build shared understanding, nurture ownership and ongoing commitment, and foster concerted action in the face of information overload. Second, it springboards research on the behavioral practice and process of brokerage within open organizing networks. Third, it highlights the critical role of managing emotions, in addition to information and knowledge exchange, in brokerage and open organizing processes.

Introduction

Open strategy and innovation—a movement toward greater transparency and inclusion of traditionally excluded actors in organizational processes (Seidl, Whittington, & Von Krogh, 2019)—offers the promise of increased accountability among stakeholders (Janssen, Charalabidis, & Zuiderwijk, 2012; Tapscott & Ticoll, 2003), broader participation in organizational decisions and strategy making (Dobusch, Dobusch, & Müller-Seitz, 2019; Hautz, Seidl, & Whittington, 2017),

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and the potential to harness diverse and previously untapped knowledge and perspectives in deci-sion-making, innovation and change processes (Mol & Birkinshaw, 2014; Von Hippel & Von Krogh, 2003). However, even as open organizing embraces greater and broader exchange of infor-mation and ideas, scholars have raised concerns around information overload that can limit indi-vidual and group capacity to productively process and act upon those ideas (Hautz et al., 2017; Luedicke, Husemann, Furnari, & Ladstaetter, 2017; Stieger, Matzler, Chatterjee, & Ladstaetter-Fussenegger, 2012). Indeed, the volume of information generated in open organizing efforts can be staggering: Wikipedia's open strategy effort comprised over 70,000 edits and 842 proposals (Dobusch et al., 2019); IBM's innovation jam yielded over 46,000 ideas that required text mining software and the focus of 50 executives to filter through and develop actionable proposals for mov-ing forward (Bjelland & Wood, 2008). Excessive information volume can lead to cognitive and emotional fatigue (Bjelland & Wood, 2008; Luedicke et al., 2017; Ripken, 2006); obfuscate salient information that guides idea generation and action (Luedicke et al., 2017; Stieger et al., 2012); undermine actors' ongoing commitment and engagement (Luedicke et al., 2017; Stieger et al., 2012), and result in myriad, competing interpretations of available information (Luedicke et al., 2017; Tsoukas, 1997).

Within open organizing studies, open strategy scholars have begun to illuminate practices for responding to information overload—for example, controlling agenda setting and issue framing (Luedicke et al., 2017; Malhotra, Majchrzak, & Niemiec, 2017) and pragmatically "closing" the process of categorizing and reframing information (Bjelland & Wood, 2008; Dobusch et al., 2019; Dobusch & Kapeller, 2018). However, how practices might be utilized over time as open organ-izing unfolds remains undertheorized. Further, with few exceptions (Luedicke et al., 2017), schol-ars have tended to examine open strategy efforts focused on either internal or external, rather than multiple, different types of stakeholders, such as employees, customers, and vendors, simultane-ously (Von Krogh & Geilenger, 2019). Within the broader field of research on open organizing, scholars have yet to tackle a fundamental question: *How do leaders manage information overload in open organizing processes to foster ongoing commitment and concerted strategic action among a diversity of actors?*

To gain traction on this question, I build on recent work that conceptualizes open strategizing as unfolding within a network of internal and external organizational stakeholders (Hautz, 2017, 2019; Seidl et al., 2019). Within network studies, there is particular interest in the role of "central actors" (Luedicke et al., 2017, p. 374), "crystallization points" that act as intermediaries and ampli-fiers of messages (Kornberger, Meyer, Brandtner, & Höllerer, 2017, p. 187) or "brokers"—those who uniquely span or broker relationships between and among nominally disconnected actors—due to the important role they play in managing the flow of information and "good ideas" across networks (Burt, 2000, 2004). As Hautz notes, "Due to their favorable structural positions. . .these central actors might be the most relevant for achieving distinctive desired outcomes, which are critical in strategy settings" (Hautz, 2019, p. 281). However, while studies have examined the ante-cedents and outcomes of brokerage positions in open organizing, *how* brokers might manage infor-mation overload vis-a-vis a diverse constellation of actors remains a critical yet unexamined question.

The Save Market Basket ("SMB") case unfolding between June 2013 and August 2014 provides an extreme yet useful context in which to study this phenomenon. Market Basket is a family-owned, $4.5 billion, nonunion food retailer, with over 25,000 employees across 70 supermarkets in the New England region of the United States. I examine a period of profound crisis when strategic decisions made by controlling ownership threatened the company's survival. I focus on the efforts of central organizers ("leaders") as they attempted to manage volumes of diverse digital content and guide a network of newly engaged individuals—employees, customers, vendors, truckers, and

politicians—toward the collective goal of influencing strategic decisions and saving their company. Unlike prior studies in which open organizing was strategically planned and bounded within dedicated wikis, platforms, or email listservs, the SMB effort unfolded across an unbounded social media platform (Facebook) and involved managing an array of digital content, including digital videos and photos, online news reports, an array of other social media contributions, websites, emails, and so on. Taken together, the case offers an invaluable opportunity to illuminate the behavioral practices utilized to respond to information overload and guide a constellation of actors towards concerted strategic action.

Drawing from over 40,000 posts and comments on the *Save Market Basket (SMB)* Facebook site, I focus on 1500 posts through which leaders of the SMB initiative—in this case a regional store manager, bakery vendor, and store meat manager—sought to manage a potentially overwhelming volume of often conflicting information among an ever-growing constellation of actors. Through an inductive data analysis, I develop a model of digital curation as creative brokering—how leaders strategically select, share, and interpret digital material across a diffuse network of actors—to achieve concerted strategic action in the face of information overload. My paper offers several contributions. First, it advances scholarship on open organizing by illuminating how leaders engage in digital curation to advance their open organizing efforts through three phases of open organizing—initiating, aligning, and sustaining engagement—amid an expanding set of information overload challenges—the risk of salient information being lost amid volume and noise; diverse and conflicting information; the risk of unproductive tangents; and emotional and cognitive fatigue. More specifically, I identify five digital curation practices—spotlighting, amplifying, recapping, refuting, and refocusing—and show why and how these practices are used in combination over time to: (1) build a shared understanding of the problem or opportunity; (2) nurture ownership and ongoing commitment; and (3) foster concerted action over time in the face of information overload. In doing so, the paper provides a holistic view of how information overload challenges may complicate emergent open organizing efforts, and how leaders can engage in digital curation to respond to those challenges. Second, the paper brings to the fore the role of brokers within open organizing efforts and springboards research that moves beyond structural conceptions of brokerage to illuminate the behavioral and dynamic nature of brokerage action over time. Third, the paper extends brokerage and open organizing literatures by attending to emotional dynamics as well as information exchange.

I motivate the paper by discussing the nascent literature on information overload and brokerage within open organizing, describing my empirical context, and detailing my research methods. I then present my findings, including a rich description of how leaders engage in digital curation throughout an emergent open organizing effort. I conclude by discussing contributions to open organizing scholarship, limitations, and opportunities for future research.

Theoretical Background

Information overload in open organizing

With the rise of digital technology, information overload has become a widespread and increasing concern for individuals and organizations (Edmunds & Morris, 2000). The challenges of information overload in open organizing echo those raised by strategy scholars seeking to understand the role of cognitive load in strategic issue management (Laamanen, Maula, Kajanto, & Kunnas, 2018). Cognitive load theory conceptualizes the limits of actors' "working memory" in attending to and processing information (de Jong, 2010), and especially in the face of different aspects of cognitive load—intrinsic (information complexity), germane (ambiguity in

interpreting information), and extrinsic (the amount of irrelevant, external noise)—that actors may encounter (Laamanen et al., 2018, p. 626).

The greater and broader exchange of information that serves as "the raw material of transparency and inclusion" (Seidl et al., 2019, p. 21) and the escalating volume of information and digital content inherent to open organizing can exacerbate and bring new cognitive, emotional, and action challenges to those involved (Hautz et al., 2017). For example, a mid-size Austrian automation supplier's experiment in engaging employees in strategy development revealed that managers had difficulty processing and interpreting the volume of employees' posts—cognitively, managers could not effectively engage the barrage of ongoing dialogue (Stieger et al., 2012). Non-productive posts spurred voluminous threads of discussion, such as the strategy question that resulted in a flood of postings around canteen food quality (p. 61). Key suggestions and strategic information were thus lost amid the noise. Overwhelming information exchange led to participants' emotional fatigue as they waded through pages of posts, and to alienation as "worthy" ideas were ignored while other sub-par posts received substantial attention. The volume of posts on non-strategic topics also threatened the very legitimacy of the process and ongoing commitment to strategic action. Similar cognitive, emotional, and action challenges were evident in Premium Cola's radical open strategy process (Luedicke et al., 2017). Participants expressed "annoyance" at the sheer volume of emails exchanged (p. 378), and selectively excluded themselves from ongoing immersive participation in response. While Premium Cola leaders utilized "silent assent" to limit email volume, participants recognized that silence did not necessarily translate into ongoing support. Information overload thus presents a fundamental challenge—how can leaders manage information overload while also ensuring actors' ongoing commitment towards strategy implementation and concerted action (Hautz, 2019)?

The challenges of information overload are only amplified when a larger variety of internal and external stakeholders are engaged. A more expansive number and range of actors can trigger myriad, competing interpretations of available information (Seidl et al., 2019; Tsoukas, 1997) and a "confusing polyphony" of voices that can make alignment towards concerted strategic action difficult (Heimstädt & Dobusch, 2018, p. 732). Open organizing efforts thus become "arenas for fighting over diverse interests and definitions of reality" (Schmitt, 2010; Seidl et al., 2019, p. 20). The increasing use of social media in open organizing further complicates these dynamics. Online exchanges can spur cycles of contentious conflict arising from knowledge gaps among actors (Malhotra et al., 2017) and cascades of posts focused on escalating emotions (Lingo & Elmes, 2019; Toubiana & Zietsma, 2017). Taken together, research suggests the inherent risk for open organizing to devolve into a contentious information cacophony that can undermine efforts to advance concerted strategic action among a network of newly involved actors. In turn, the lack of concerted strategic action can undermine the ultimate implementation of strategic ideas generated (Hautz et al., 2017). Yet how the volume of digital content might be managed vis-a-vis a constellation of actors—internal and external—over time remains a black box.

Managing information overload within networks

A burgeoning set of open strategy studies hint at how information overload might be managed in practice. For example, scholars have identified practices such as controlled agenda setting and selective participation (Luedicke et al., 2017; Stieger et al., 2012), pragmatically closing participation to move the process forward (Bjelland & Wood, 2008; Dobusch et al., 2019; Dobusch & Kapeller, 2018), and strategically managing impression management by shifting from dialoguing and inclusion to broadcasting practices (Gegenhuber & Dobusch, 2017). However, these studies tend to focus on how leaders with control over open processes "close" them to newly engaged

actors, and do not explicitly address the challenges of managing information overload over time, vis-a-vis an array of diverse actors, and when lacking such formal control.

Research on networks within open strategy studies can provide useful insight as it focuses attention on the structure and dynamics of information and knowledge exchange among a diverse constellation of actors (Hautz, 2019). Within open strategy networks, brokers may play an especially important role in navigating information overload, as brokers uniquely can control information flow among disconnected actors (Burt, 2000, 2004). While extant research typically focuses on the antecedents and outcomes of brokerage positions in open organizing networks (Hautz, 2017, 2019), there is growing call for "a more nuanced understanding of sources of [brokers'] relevance and importance, and their particular impact within these large networks of newly involved actors" (Hautz, 2019, p. 281).

Research on creative brokering (Halevy, Halali, & Zlatev, 2018; Lingo, 2020)—how actors strategically leverage their unique role of spanning relationships between other actors to create novel outcomes—provides useful theoretical and analytical traction as it situates individuals' actions within a complex network of stakeholders, including decision makers, resource gatekeepers, customers, vendors, and other interested parties (Lingo & O'Mahony, 2010; Obstfeld, 2017). An emphasis on brokering moves beyond structural network analyses to illuminate the behavioral practices by which actors leverage their brokerage role—bringing others together or keeping them apart—to advance collective outcomes (Hargadon & Sutton, 1997; Lingo & O'Mahony, 2010; Obstfeld, 2005). Research in this stream has illuminated not only how brokers manage information exchange among disconnected others, but also how brokers negotiate and manage competing interests and interpretations among internal project-based and market actors over time when lacking formal authority over those involved (Lingo, 2020; Lingo & O'Mahony, 2010), and how brokers leverage their role within and between organizations to influence their respective organizations' strategic decision making (DeJordy, Scully, Ventresca, & Creed, 2020). Taken together, these studies suggest that brokering serves as a key resource as actors seek to influence strategic decisions within their organizations. However, these studies of creative brokering have yet to be situated within digital contexts.

Studies of networked protest (Tufekci, 2017) and digital technology and social movements (Carty, 2015; Carty & Barron, 2019; Dolata & Schrape, 2016; Earl, Hunt, Garrett, & Dal, 2015) provide further insight into the array and enormous volume of digital content that leaders may have to manage. For example, strategically developed documentaries and in-the-moment videos are shared broadly to breathe life and immediacy into events and foster awareness and mobilization across otherwise disconnected actors (Canella, 2017; Ting, 2015). The "avalanche of information" available is a central concern (Earl & Garrett, 2017, p. 14) and, as a result, curation of digital content becomes critical (Fotopoulou & Couldry, 2015; Ting, 2015). As described by Ting (2015),

> Curation, as a new media practice, involves finding, categorising, and organising relevant online content on specific issues. . .actors may also curate. . .to filter and amplify useful information for mobilising collective action. . .it may also involve the representation of selected content by telling stories not being told or by telling existing stories in a different way (Fotopoulou and Couldry [2015]) (no page).

However, while providing important insight into the need for digital content curation, extant research has yet to explore how such curation may unfold in practice within a constellation of actors over time. Taken together, further research is needed to address the question: how do leaders of open organizing efforts manage the potential negative impacts of information overload on efforts to advance concerted strategic action among a diffuse network of actors?

Research Setting and Method

Case selection and background

The Save Market Basket ("SMB") case provides an opportune context for examining this question. The case offers insight into how open organizing leaders—in this case a regional store manager, bakery vendor, and store meat manager—wrestle with information overload as they guide a network of newly engaged individuals—employees, customers, vendors, truckers, construction contractors, and politicians—toward the collective goal of influencing their company's strategic decisions. Over a period of 13 months, the central organizers ("leaders"), who lacked formal authority over the array of actors involved, were tasked with managing a growing volume of digital content, including digital videos and photos, online news reports, an array of other social media contributions, websites, and emails across an unbounded social media platform (Facebook). Drawing from over 40,000 posts and comments on SMB Facebook site, I focus on 1500 posts through which leaders sought to manage the potentially overwhelming volume of often conflicting information among an ever-growing constellation of actors. Notably, the SMB site was set up so that only the leaders could "post" to the page; other actors could only comment on these posts. As a result, the case presents a unique opportunity to examine how leaders manage information overload to advance concerted strategic action throughout an emergent open organizing process.

From Market Basket's (MB) founding in 1917, the family-owned business was known for its commitment to low- and middle-income families through generous worker benefits, exceptional service, low prices, quality products, and investment in local communities (Korschun & Welker, 2015). Initial growth of the business was guided by the second-generation Demoulas brothers—their sons, Arthur T. Demoulas and Arthur S. Demoulas became heirs to the Demoulas Market Basket business in 1971. Despite their historical family bonds, the following decades were rife with perceived conflicts of interest, and the two sides repeatedly filed lawsuits against each other, leading to a court ruling in which the Arthur S. side was awarded 50.5% of the company and five out of nine family shareholder positions (Korschun & Welker, 2015, p. 27), which in turn, controlled appointments to the company's board of directors. At that time, however, one of the five family shareholders, Rafaela Evans, allied with Arthur T., enabling him to control the board and embrace the mantle of president and CEO.

Arthur T. was the only Demoulas family member who worked in the business. He learned the business and its core values from his father while working his way up the company ladder from front-line bagger to CEO. He was widely loved and respected by his associates (employees) and customers, who affectionately called him Artie T. or ATD. He was known for greeting associates by name, taking care of employees in times of crisis, offering generous employee bonuses and profit sharing, and advancing a business strategy based on offering low-priced, high-quality goods to customers. Despite the deep divisions within the Demoulas family, MB experienced tremendous debt-free growth in revenues and profits under ATD's leadership. Nevertheless, animosity between the two sides grew, setting the stage for the crisis that would emerge in June 2013 when Evans changed her vote, giving Arthur S. board control. Within weeks, he and his appointed board made plans to remove ATD as president and CEO, distribute financial assets to shareholders, and potentially sell the company. After learning of the plan through reporting at the region's flagship newspaper, the *Boston Globe*, ATD held a meeting with senior MB managers on July 10 to inform them that board control had changed, and it appeared likely that he would be removed as CEO. In response to the emotional shock, the regional manager and bakery vendor set up the *SMB* Facebook site, initially trying to connect with associates and employees across New England and explore how they could collectively prevent this strategic decision.

Data collection

The primary data source for this paper—posts and comments on the *SMB* Facebook site during the crisis period—provided a lens into participants' experience and perceptions of the crisis as they experienced it in real time. To complement my understanding of the case, I drew from multiple archival and media sources, including: (1) over 50 SMB-referenced newspaper articles from the *Boston Globe*, *Lowell Sun*, and *Wall Street Journal* from June 2013 to September 2014; (2) the book *We Are Market Basket: The Story of the Unlikely Grassroots Movement that Saved a Beloved Business* (Korschun & Welker, 2015); and (3) the documentary *We the People: The Market Basket Effect* (Reid, 2016). The book and documentary draw heavily on interviews with case participants, newspaper articles, and transcripts of various MB board meetings and further brought to life participants' emotions and perceptions that I could not glean through Facebook data. Additionally, despite an official MB policy to no longer conduct interviews, I secured interviews with three key participants—one of the SMB leaders, the news journalist who had first-hand, insider perspective of the lived experience and action of both open organizing leaders and other stakeholders, and a MB employee. While limited in number, these interviews proved invaluable for my understanding of how and why leaders used their posts to manage information overload throughout the crisis.

Data analysis

I utilized a twofold analytical strategy that enabled me to both ground my emergent findings in data and develop new theoretical insights (Gioia, Corley, & Hamilton, 2013; Strauss & Corbin, 1990). First, I engaged a process perspective (Langley, 2009) to examine how leaders responded to the overwhelming volume of digital content over time. A process perspective is useful as it considers "phenomena dynamically—in terms of movement, activity, events, change and temporal evolution" (Langley, 2007, p. 271), and enabled me to understand how posts made earlier in the crisis shaped and informed those occurring later on in the crisis (Langley, 1999; Van de Ven & Poole, 1995). This approach is particularly appropriate as scholars have characterized open organizing as a fluid, emergent process (Dobusch & Schoeneborn, 2015). Second, because research on how actors central to open organizing manage information overload within networks is limited, I used an inductive approach to theory development (Creswell & Poth, 2016; Edmondson & McManus, 2007; Maxwell, 2013). More specifically, I utilized the constant comparative technique to analyse and interpret data (Gioia et al., 2013; Strauss & Corbin, 1990), iteratively moving back and forth between different sources of data, the emerging codes and themes, and extant theory to develop the insights presented here. Figure 1 summarizes the data analysis structure, details of which are further provided below.

I first oriented myself to the over Facebook 40,000 posts and comments by developing my own narrative and timeline of key events unfolding in the crisis and actors involved. As needed, I filled gaps in the process map using archival data and interviews. Then, using a combination of *ATLAS. ti* coding software and handwritten notes, I inductively analysed the 1500 posts made by leaders from crisis inception to its culmination. I first developed an expansive list of first-order codes from these posts (Strauss & Corbin, 1990), continuing until no further new codes were apparent in the data.

Second, I engaged in an iterative process of axial coding—identifying patterns in the codes, triangulating across data sources where possible, assessing codes vis-a-vis relevant literature, and ultimately collapsing and combining codes until they reached a level of differentiation and meaningfulness to become second-order concepts. Through this analysis, I found that posts involved brokering information across disconnected actors (for example, connecting local associates with
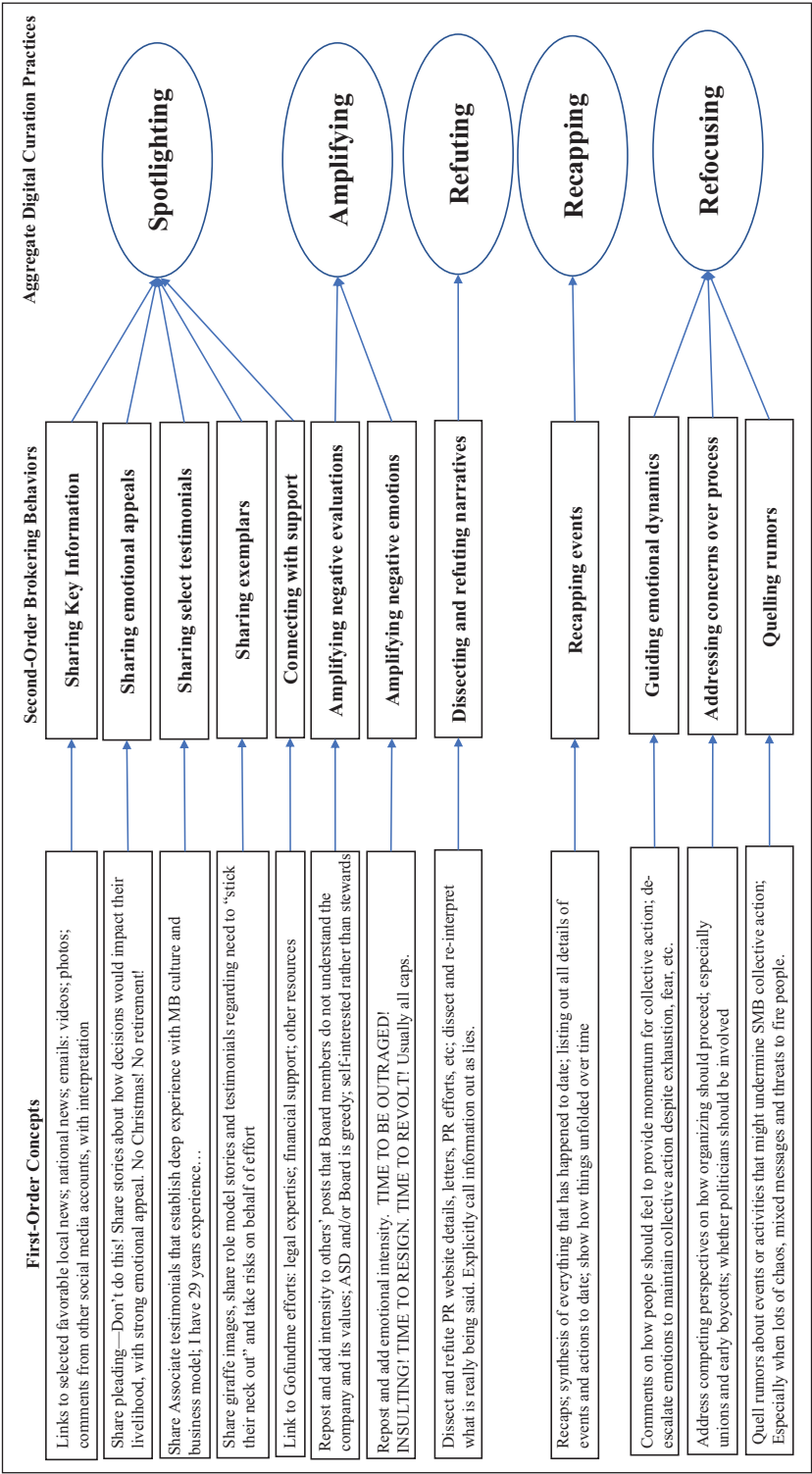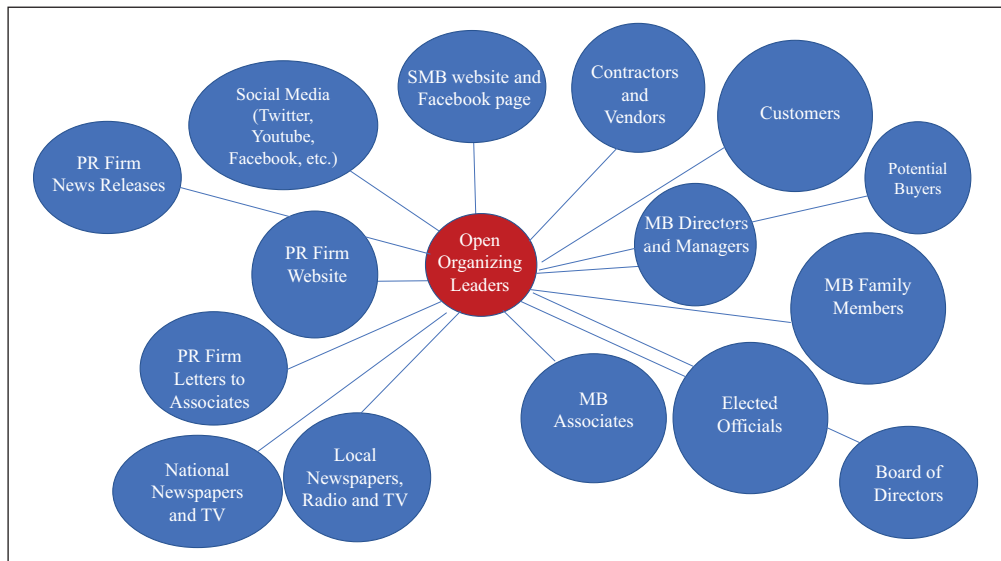
First-Order Concepts

Links to selected favorable local news; national news; emails; videos; photos; comments from other social media accounts, with interpretation

Share pleading—Don't do this! Share stories about how decisions would impact their livelihood, with strong emotional appeal. No Christmas! No retirement!

Share Associate testimonials that establish deep experience with MB culture and business model; I have 29 years experience…

Share giraffe images, share role model stories and testimonials regarding need to "stick their neck out" and take risks on behalf of effort

Link to Gofundme efforts: legal expertise; financial support; other resources

Repost and add intensity to others' posts that Board members do not understand the company and its values; ASD and/or Board is greedy; self-interested rather than stewards

Repost and add emotional intensity. TIME TO BE OUTRAGED! INSULTING! TIME TO RESIGN. TIME TO REVOLT! Usually all caps.

Dissect and refute PR website details, letters, PR efforts, etc; dissect and re-interpret what is really being said. Explicitly call information out as lies.

Recaps; synthesis of everything that has happened to date; listing out all details of events and actions to date; show how things unfolded over time

Comments on how people should feel to provide momentum for collective action; de-escalate emotions to maintain collective action despite exhaustion, fear, etc.

Address competing perspectives on how organizing should proceed; especially unions and early boycotts; whether politicians should be involved

Quell rumors about events or activities that might undermine SMB collective action; Especially when lots of chaos, mixed messages and threats to fire people.

Second-Order Brokering Behaviors

Sharing Key Information

Sharing emotional appeals

Sharing select testimonials

Sharing exemplars

Connecting with support

Amplifying negative evaluations

Amplifying negative emotions

Dissecting and refuting narratives

Recapping events

Guiding emotional dynamics

Addressing concerns over process

Quelling rumors

Aggregate Digital Curation Practices

Spotlighting

Amplifying

Refuting

Recapping

Refocusing

Figure 1. Data structure.

Figure 2. Information and Actor Network.

national news sources), which inspired engagement with the brokering literature. As such, I analysed posts in terms of what information and actors were being brokered and why, to develop a set of second-order brokering behaviors. Figure 2 provides a visual overview of network actors involved.

Analyses also revealed that posts involved strategically sharing and interpreting select news articles, photos, websites, and videos from the vast pool of information available via social media, or the web, select comments made on the SMB site, and inviting others to be guest posters. I recognized that leaders were leveraging their brokerage role to engage in digital curation (Antonio & Tuffley, 2015; Fotopoulou & Couldry, 2015; Ting, 2015)—selecting, sharing, and interpreting digital material—among a diffuse network of actors to manage information overload and its potential to undermine efforts to advance concerted collective action. Notably, leaders did not post anything critical of the SMB effort or sympathetic to Arthur S., despite local news articles and radio shows that offered this perspective, indicating that leaders were indeed selecting from myriad options when curating posts.

I then further abstracted the second-order brokering behaviors into five digital curation practices—spotlighting, amplifying, refuting, recapping, and refocusing. More specifically, *spotlighting* highlights certain information to make sure that it is not missed amid volume and noise; *amplifying* elevates the intensity of digital content's message or emotions; *recapping* summarizes information in one place so the larger picture is not lost amid granular detail and volume; *refuting* addresses conflicting information and provides corrections and reinterpretation; and *refocusing* redirects unproductive tangents or escalating emotions towards more concerted strategic action. Table 1 offers definitions and supplementary evidence of digital curation practices.

As a final step, following Gioia and colleagues (2013) and Charmaz (2003), I then considered how digital curation practices were used in combination with each other, with whom, when, how, and why to develop the model of digital curation as creative brokering summarized in Figure 3. Through this analysis, I found that digital curation practices were used individually and in

Table 1. Definitions, supplementary quotes, and counts per phase.

Digital curation practice and definition	Illustrative quotes	# times observed per phase		
		1	2	3
Spotlighting Highlighting certain digital content to make sure that it is not missed amid volume and noise	"If you read today's Lowell Sun Article (posted) you will see that we are getting their attention. Their lawyer has stated that the money they want to go into debt for is not to line the shareholders pockets . . ." "The grocery workers' union has established a fund to help [MB] families who have lost their paycheck due to recent scheduling cutbacks at [MB] stores. We support your fight to keep [MB] jobs good jobs, and we don't want to see anyone who works in a grocery store struggling to buy groceries for their families."	313	412	279
Amplifying Elevating the intensity of digital content's message or emotions	"But here's an interesting fact in case you don't think that petitions and public outrage works: The board does NOT like the fact that they are being portrayed as bad guys here. In fact some of them are very put off by the negative feedback and don't understand why they're on the receiving end of all this. Public outrage DOES work—keep it up! (Leader, amplifying social media comments critiquing board actions) "In reading all of the testimonials that have been posted by associates, customers and other supporters over the past few months, the stories all sound very much the same. . .The 'A' shareholders and their puppet Board would have us become a Wall Street corporation . . .not to mention all of the associates and customers that would be steamrolled in the process. . . these people care only about themselves and fattening their already overstuffed wallets. . . not about the hard-working associates who go to work every day to sell groceries and provide outstanding service to 2 million customers a week. . .They are greedy and they want more . . ."	98	171	75
Recapping Summarizing information in one place so larger picture is not lost amid granular detail and volume	"'Long and eventful week. First we had the BS letter from the 'independent Board members' then there was the 'We Are MB' response to that letter (mailed to all 7 board members). Then the profit-sharing letter from BM. Then the lawsuit challenging Cowan's independency then the shutdown of the Waltham site on Friday. We also learned that the money grab, also called a dividend, was actually $300 million instead of the $250 million that we initially learned in the news. Let's hope that this coming week brings more positives and less negatives."	1	20	4

Table 1. (Continued)

Digital curation practice and definition	Illustrative quotes	# times observed per phase		
		1	2	3
	"The connections between. . . [Co-CEO] hired by the BOD), Delhaize (Hannaford) and JP Morgan (investment bank hired by 'A' [ASD] shareholders) are many, coincidence? You can connect the dots yourself. . . . 2006 [Co-CEO] hired by Radio Shack; CFO reports directly to [CEO of Radio Shack]. [CFO] currently serves on the Board of Directors for Delhaize (Hannaford). [Board Chairman] of Delhaize (Hannaford) since 2012. Also serves as a member of JP Morgan's European Advisory Council. 'A' (ASD) Shareholders hire JP Morgan to represent the sale of [MB]."			
Refuting Posting select conflicting information and forcefully providing corrections and reinterpretations	"The Board voted a 15% contribution to eligible associates and put it up on their website as an increase over the prior year. Of course the amount put in was an increase over the prior year, it has always increased every year due to more eligible associates and higher wages. What they did not tell you was they voted down the 20% contribution that ATD proposed to them. The Board also voted to compensate a trustee, the first time since the inception of the plan that a trustee received compensation." (Leader, referring to content on the board-controlled MB website)	0	62	19
	"This letter tells you that everything will be the same. . .really then why no mention of bonuses? perhaps the 'compensation committee' will take care of that. Why no mention of ATD staying on as CEO? the executive search firm that isn't mentioned will take care of that. Why no specifics on Profit Sharing? They say contributions will continue but what percentage? 1%?. . ."			
Refocusing Redirecting unproductive ideas or escalating emotions towards more productive action	"I'm seeing a lot of pissing and moaning about the time and day of the rally, really people a lot of work and planning went into this by Lisa and Cindy. You should be thanking them, if you can do better then step up and plan the next one."	0	30	31
	"It has been reported. . .by several associates that they have been getting messages on their newsfeed from the UFCW union making it look like they support ATD and will help you keep your benefits etc. . . Please know that NO union is stronger than our solidarity and the UCFW union is only interested in increasing their membership and taking union dues out of your paycheck."			
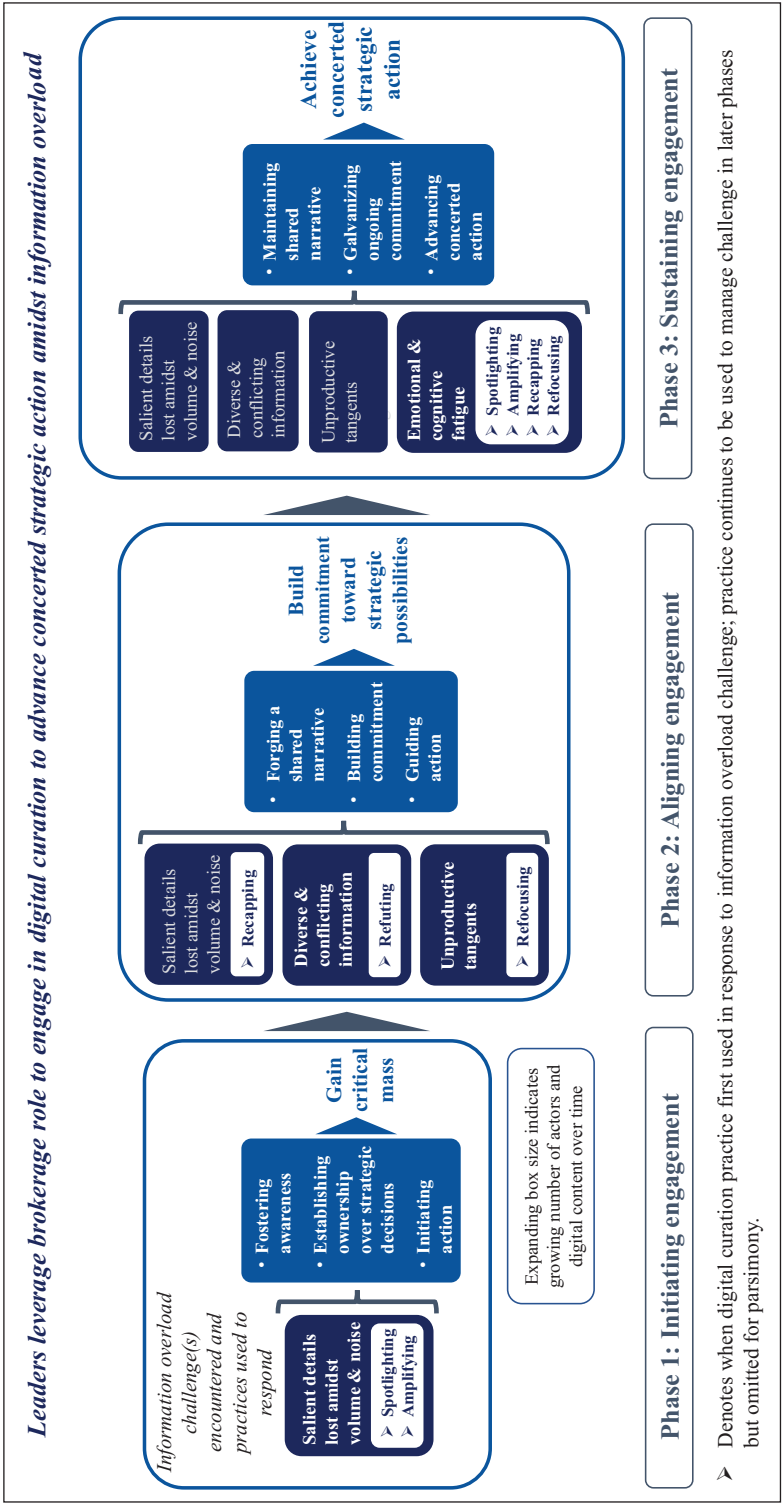
Figure 3. Managing information overload in open organizing through digital curation.

combination to respond to different information overload challenges that became acute and built upon each other as the open organizing process unfolded—the risk of salient information being lost amid volume and noise; diverse and conflicting information; the risk of unproductive tangents; and emotional and cognitive fatigue. Further, I was able to identify three phases of digital curation in the MB crisis—initiating, aligning, and sustaining—given clear "continuity in the activities within each period and. . .certain discontinuities at [their] frontiers" (Langley & Truax, 1994, p. 703), the differences in actors involved, the volume and content of information curated, and when certain digital curation practices were most prevalent (see Table 1). For example, I found that the volume of information solely on the SMB Facebook page escalated over the three phases—from approximately 2500 comments in phase 1 to ~8300 in phase 2, and ~28,000 in phase 3.

In phase 1, initiating engagement, leaders engaged in spotlighting and amplifying to gain a critical mass of engaged associates amid a noisy information environment in which salient details could easily get lost. In phase 2, aligning engagement, which was triggered by the board's hiring of a PR firm, leaders sought to build shared commitment toward strategic possibilities amid a growing number of information overload challenges: escalating information volume and noise, conflicting information, and potentially unproductive tangents. Leaders utilized an expanded set of digital curation practices targeting a growing network of newly engaged actors, including customers and vendors. In phase 3, sustaining engagement, triggered by the firing of ATD, leaders sought to advance and sustain concerted action among a yet larger constellation of actors while an additional information overload challenge—emotional and cognitive fatigue—became acute. Taken together, leaders interwove digital curation practices over time to: (1) build shared understanding of the problem and opportunity; (2) nurture ownership and ongoing commitment; and (3) foster concerted action—in the face of increasing information overload complexity.

I engaged several strategies to ensure my findings' validity (Creswell & Miller, 2000). I triangulated between different types of data throughout my analysis. I drew upon interviews and archival sources, including the documentary, that focused on the crisis in its entirety, and which helped more fully reflect actors' perceptions, intentions, and emotions throughout the crisis. Finally, I shared emergent findings with my interviewees and other individuals with prolonged immersion in the MB case, who in turn confirmed my data interpretation (Maxwell, 2013).

Findings

In this section, I develop a model of digital curation in open organizing: how leaders select, share, and interpret digital material to manage information overload and guide a diverse network of actors towards concerted strategic action. I show why and how leaders engage in digital curation practices over time, and in combination, to advance through three phases of open organizing—initiating, aligning, and sustaining engagement—in the face of an expanding set of information overload challenges. For parsimony, I illustrate practices when they are first engaged in the process.

Phase 1: Initiating engagement

Save Market Basket (SMB) leaders were shocked by the news that ATD might be fired. They established the SMB site with small ambitions—to gather 400 petition signatures to push back on the board's strategic decision. Overnight, leaders secured over 10,000 signatures and local news media outlets began covering the story in earnest. In phase 1, leaders sought to secure a critical mass of engaged participants from across the nascent network by fostering associates' awareness of the board's actions, establishing associates' ownership of and expertise vis-a-vis the company's strategic direction, and initiating action. However, leaders faced a growing cascade of digital content and

a fundamental information overload challenge—the risk of salient information being lost amid volume and noise. In response, leaders utilized two digital curation practices: *spotlighting* and *amplifying*.

Fostering awareness, establishing ownership over strategic decisions, and initiating action

Spotlighting. In this early phase, leaders sought to foster awareness primarily among the 25,000 associates across the New England region—most were not aware of how board decisions could ultimately affect their way of life. Leaders acted as brokers—connecting a highly diffuse array of associates with select news articles regarding board activities via the Facebook page and establishing a central place where associates could gain curated information that otherwise would not be on their radar. In doing so, leaders engaged in spotlighting—highlighting certain digital content to make sure that it was not missed amid volume and noise. For example, early in phase 1, leaders spotlighted select news articles from the *Lowell Sun, Nashua Telegraph*, and *Boston Globe* and highlighted how the board's strategic decisions would personally affect both customers and associates:

> Market Basket Supermarkets is a locally grown, American success story. More for Your Dollar is more than just a slogan, it is a way of life for tens of thousands of loyal consumers in MA and NH. The company is on the verge of a major shakeup which will change the whole business model by raising prices so that shareholders may realize bigger gains. . .all at the expense of the employees and the consumers. They could proceed to sell the company and then we will all be getting Less for Our Dollar.

Leaders also spotlighted emotional appeals from associates asking the board (and other associates) to sympathize with associates' plight as family wage earners:

> I wanted to write you a letter and let you know how your decision my [sic] effect my life. . .I am a mother who at this time is head of the household due to my husbands [sic] lay off, and he now watches our son. To get rid of profit sharing would be getting rid of my future, I do not have extra money just to put away into a 401K. . . . Please on behalf of my family do what's right for the company as a whole and it's [sic] employees. . .I can't stress this enough I may just be 1 employee out of 21,000 but your decision effects the rest of my life. (excerpt from "Guest Post," associate letter to board)

Spotlighting thus involved not only sharing news stories, but also front-line worker voices and perspective that would otherwise not be conveyed or would be lost amid the growing volume of news media and social media posts emerging at this time. Leaders shared many of these emotional, heartfelt appeals on behalf of associates, detailing their lived experiences and personal implications of the board's decisions. The emotional nature of these initial appeals helped illuminate what was potentially at risk for associates and their families if the board moved forward with their decision and helped lay a foundation for future action.

Leaders also spotlighted digital content, including selected associate emails or social media posts, to establish associates' collective deep expertise with MB's unique business model, and their relative expertise vis-a-vis board members:

> For 27+ years I have seen our company grow and grow. . . No ivy league school will teach you the thousands of things that are happening at one second, every second, of every day in your store. You have to live it to know it. (excerpt from Guest Post, front end manager letter to board)

Through spotlighting these selected posts, leaders established associates' claims to expertise and their right (and obligation) to contribute to MB's strategic decisions. These posts also drew
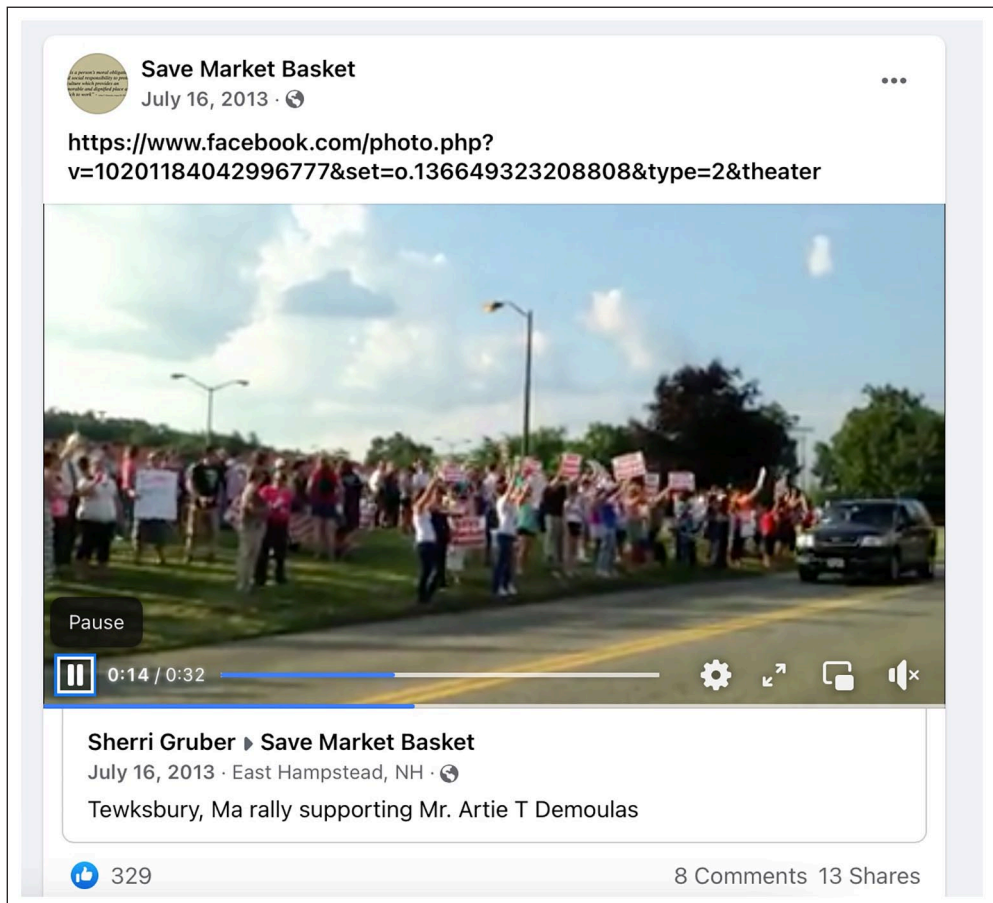
Image 1.

pointed contrasts between associates' deep expertise regarding the micro-decisions and actions which translated into MB's competitive edge and that of the board, which comprised accountants, lawyers, and MBAs, who had little or no lived experience with the company's actual day-to-day operations. These spotlighted posts were in turn commented upon by other associates and their family members, resulting in a reinforcing cascade of testimonials establishing associates' expertise and experience.

Finally, in addition to news articles, leaders also spotlighted details of specific times, locations, and logistics for associates to help foster initial action in support of ATD. In addition, leaders posted comments, videos, and photos from social media that helped demonstrate the broad support and legitimacy of the SMB effort. For example, leaders spotlighted an associate's video of employees rallying and customers in cars honking enthusiastically in support, a screenshot of which is shown in Image 1.

Amplifying. To foster awareness of the board's actions and elicit associate's engagement in strategic decision making, leaders also engaged in amplifying. Amplifying involved connecting associates with certain information and simultaneously elevating the intensity of the digital

content's message or emotions. As demonstrated in the post below, leaders not only shared links to news articles but also invoked strong emotions to reinforce leaders' interpretation of events:

> WE ARE OUTRAGED!! Read the article below posted from today's *Lowell Sun*. In a nutshell this article states the following facts;
>
> 1. They have hired Spencer Stuart (a Boston based executive search firm). Who are they looking to replace?
> 2. They want to change the profit sharing plan in place since 1963. The same plan that has allowed hundreds of associates to retire in comfort and dignity without being a burden on the government.
> 3. The article further states that we won't be able to rally at this meeting. Really??. . .
> 4. This part should really piss you off. They "are aware" of the public outcry yet think all of those associates, vendors, charities and customers were paid to be there and the whole thing was orchestrated by the company. BOY THEY REALLY, REALLY DON'T KNOW US and IT'S REALLY NOT A GOOD IDEA TO PISS US OFF!

As this quote indicates, amplifying not only connected associates and their family members with specific information within the digital landscape, but it also sought to spark strong emotions and their commitment to the SMB effort. In phase 1, amplifying combined links to "objective" news stories with strong negative interpretations and emotions. In another example, leaders amplified a link to a news article with calls for "Time to be mad as hornets! Mad as hell! Furious!!"

In summary, in phase 1, SMB leaders sought to gain a critical mass of engaged participants. To foster associates' awareness of the crisis, ownership of strategic decisions, and initiate action amid a growing digital information landscape where salient information could easily be missed, leaders engaged in the digital curation practices of spotlighting and amplifying. Despite their lack of authority over those involved, SMB leaders were successful in gaining a critical mass—engaging in digital curation to advance a series of rallies and protests at board member meetings, including one with over 4,000 associates that preserved ATD's job—for the time being.

Phase 2: Aligning engagement

Phase 2 was triggered when the board hired a public relations (PR) firm to flood the information space with radio interviews, emails to associates, a board-sponsored MB website, and news releases that underplayed the crisis. This digital content was in turn reported on by media outlets, triggering further cascades of competing information. A greater number of actors, including customers, vendors, and contractors joined the SMB network—further increasing the potential for differing interpretations, disparate ideas for moving forward, and unproductive tangents.

As such, in this phase, two additional information overload challenges became acute: (1) managing diverse and competing information and (2) the potential for unproductive tangents. As illustrated below, leaders utilized not only spotlighting and amplifying practices to respond, but also three additional digital curation practices: *recapping, refuting*, and *refocusing*. To provide narrative clarity given the complexity of this phase, below I detail under different subheadings how leaders engaged in digital curation to forge a shared narrative, reinforce actors' commitment, and guide possibilities for strategic action in the face of information overload—to build commitment towards strategic possibilities among the emerging network.

Forging a shared narrative

To forge a shared narrative during phase 2, leaders continued to spotlight and amplify news articles and testimonials. To prevent salient details from becoming lost over time amid a growing volume of digital content and as new actors joined the SMB network, leaders utilized a third digital curation practice, recapping, to help ensure the larger narrative was not lost amid granular detail and volume.

Recapping. Recapping involved leaders leveraging their brokerage role to connect individuals with specific information while also summarizing how everything fit together—to forge a cohesive, shared narrative. For example, leaders offered this recap during a quiet period in the 2013–2014 winter, summarizing details from the flood of digital content around the board's actions earlier that fall:

> It all began on July 11, when we were informed that ASD had gained control of the BOD. . .The BOD has also continued along with their agenda. . ., stripping $300 million from cash reserves, halting construction on Waltham and Plymouth and allowing Revere to sit finished but empty and closed. They have wasted hundreds of thousands on the executive search firm Spencer Stuart, the PR firm KEKST and lawyers and consultants.. . .It is important to note that the BOD hired KEKST, launched their website and sent associates two letters all in a vain attempt to improve their image to the 25,000 associates.

Recaps were used to remind the SMB network of the entire series of grievances—a pattern of action and events that were cause for grave concern and concerted action.

Refuting. In the face of the flood of conflicting information generated by the PR firm, leaders also engaged in refuting PR-generated alternative websites, news releases, and correspondence from the board to associates. Refuting involved forcefully and granularly dissecting, translating, correcting, and clarifying conflicting information to create separation between actors and certain information, as shown by this fine-grained dissection of board correspondence to associates:

> LETTER: "[The Board] has formed and staffed Board committees to focus on audit, compensation, governance, finance and real estate-all with a goal of ensuring that Market Basket has a sound strategy to grow its business and value, with the right team to execute the strategy and with the proper plans and capital structure to support future growth."
>
> TRANSLATION: . . . Audits = watching every dollar spent; Compensation = deciding what associates should be paid based on national average; Governance = making CEO go to board for most decisions first; Finance = investing and debt payments and dividends to shareholders; Real Estate = no more grabbing a good site before its scooped up by someone else, board will decide. . .

Refuting often carried strong emotions and pointed to the insulting nature of the board's digital content:

> The only reason this letter went out was because they do not like their reputations being tarnished. This letter is a SNOW JOB to quiet the lambs before slaughter. . .throughout the day we will tear the letter apart line by line and tell you what every line actually says. Every associate of MB should be INSULTED that they think we are that stupid.

Thus, refuting served not only to forge a shared narrative among the SMB network amid the flood of conflicting information produced by the PR firm, but to also escalate emotions and focus SMB network members' attention on what was at stake for them and their families.

Building commitment

Seeking to build the expanding network of actors' commitment to strategic action amid the cascading volume of conflicting information, leaders continued to engage in spotlighting, amplifying, and recapping. For example, leaders spotlighted digital content that highlighted the board's lack of expertise regarding the business, and that included strong negative emotion and explicit mention that the board "did not understand MB values," "were evil," and "were motivated solely by greed." Leaders amplified others' negative assessments, "In a time where other chains are closing stores, and Market Basket is expanding, they [the Board] really want to change things and put the company in debt? . . . SO GREEDY!!!" Recaps served as reminders of the outrageous pattern of grievances and attacks on associates' livelihoods and helped build commitment and an ongoing sense of outrage—"to keep the fire burning." Taken together, these curated posts in turn spurred a series of echoing responses from other associates, family members, and increasingly customers. These helped reinforce associates' ownership over MB's strategic direction and escalated emotions to solidify their commitment to the SMB initiative.

Guiding action

As phase 2 progressed, leaders faced the potential for concerted action to unravel into disarray—driven by fear of negative repercussions fueled by conflicting information and by alternative ideas for action floated broadly on various digital channels. In response, leaders continued to engage in spotlighting to encourage individuals to take a personal risk on behalf of the collective. For example, a motto had emerged over the past months—"stick your neck out"—often accompanied by images of giraffes sticking their long necks out. To encourage ongoing commitment, leaders spotlighted store managers' "calls to action" and descriptions of what "sticking their neck out meant to them." They also spotlighted social media content of people holding signs or wearing t-shirts with giraffes sticking their necks out.

Refocusing. To address unproductive tangents and conflicting information, leaders utilized an additional digital curation practice—*refocusing*. Refocusing involved explicitly addressing, truncating, and redirecting attention away from disruptive rumors, unproductive ideas, or escalating emotions—to guide network actors towards more strategic and concerted action. Refocusing was used at key moments to help shift actors' attention away from digital content that was devolving into negative emotional spirals or towards actions that would not support SMB's larger strategic goals—for example, when the board made additional strategic decisions and switched meeting locations to prevent associates from rallying. Leaders reinforced their role as honest, empathetic brokers of information as they engaged in refocusing ". . .we will be frantically working all sources to find out what we can and will let you know as soon as we hear anything."

As phase 2 progressed, leaders faced digital content that promoted alternative ideas for potential SMB action, including union organizing and boycotts. Leaders saw these as unproductive paths forward that would threaten the support of customers who were newly coming on board to SMB or potentially undermine SMB's leverage with the board. Leaders took quick action in response to competing possibilities for action—refocusing digital content away from alternative approaches and offering what they saw as more productive courses of action. Importantly, as they engaged in refocusing, leaders explained why such approaches would be unhelpful from a strategic

perspective, "People saying these things obviously don't get the big picture here. . .Boycotts would hurt our customers and would give the Arthur S. side the bullets he needs for his gun to get rid of ATD." Further, they later re-posted others' comments that reinforced this refocusing. From the leaders' perspective, it was essential that the group was united in their approach.

On social media, tangents and rumors could potentially spread like wildfire and drown out strategic information and strategies for action. Despite their lack of formal training in leading open organizing efforts, leaders were particularly savvy at refocusing at critical times—recognizing the need to address unproductive tangents as soon as possible. Through refocusing, leaders were also able to establish themselves as having a sage perspective on the organizing process—as a voice of reason when emotions and fears were running high. This became particularly important as the volume and disparity of information exponentially increased in the third phase, requiring even more expansive digital curation.

Taken together, in phase 2, leaders engaged in a more expansive set of digital curation practices as additional information overload challenges came to the fore—escalating information volume, diverse and conflicting information, and unproductive tangents and alternatives for action. Digital curation involved interweaving brokering practices that forged connection between individuals and certain digital content (e.g., spotlighting, amplifying, and recapping) and that sought to create separation between them (e.g., refuting and refocusing). Through their digital curation in phase 2, leaders successfully built a shared commitment toward strategic action, as evidenced by the swift, concerted action taken by SMB members in response to the firing of MB-owned golf course employees at the end of phase 2. Leaders also laid the foundation for navigating further escalation of digital content and crisis in phase 3.

Phase 3: Sustaining engagement

Phase 3 was triggered by the firing of ATD and two key senior management leaders. Spurred by the warehouse crew's decision not to unload delivery trucks, associates mobilized to strike. Over several sweltering weeks, customers boycotted stores in solidarity with associates and the company began hemorrhaging money. Replacement CEOs were brought in; rumors of permanent layoffs ran wild. Hour-to-hour boycott updates were featured in local and national news (via newspaper, radio, social media, and television); hundreds of editorial and analysis articles flooded the information landscape (Korschun & Welker, 2015). Leaders sought to sustain engagement among an expanding network of actors, including customers, vendors, truckers, and politicians, amid an escalating and dynamic information environment. The risk of key details being lost amid information volume escalated. For example, as the strike intensified, single posts on the SMB Facebook page alone could spur 500–700 comments. For example, on August 7, 2014 one post spurred a conversation of 582 comments, of which 86% were from unique posters. Conflicting information and the risk of unproductive tangents continued, and an additional challenge—managing emotional and cognitive fatigue arising from information overload—came to the fore. To respond to this complex set of challenges, leaders engaged the full complement of practices—spotlighting, amplifying, recapping, refuting, and refocusing. Below I detail how leaders engaged in digital curation to maintain a shared narrative amid chaos, galvanize ongoing commitment, and advance concerted action—to achieve collective strategic impact in the face of information overload.

Maintaining a shared narrative

In phase 3, leaders spotlighted and amplified national news stories that helped weave an overall narrative that the SMB network was taking courageous and thought-provoking action to preserve

their business and working-class way of life. Leaders continued to offer recaps to capture details and the big picture within a rapidly shifting and uncertain environment. Through recaps, leaders also sought to convey to potential corporate buyers that MB's value would be decimated if ATD was not reinstated as CEO and that customers, associates, and other actors were aligned in their efforts to save MB.

Interestingly, amid all the chaos and rumors, leaders paid close attention to buttressing their role as brokers of correct and fairly represented information lest they trigger unwarranted negative escalation and undermine their legitimacy as digital curators. Notably, as shown in this post, leaders corrected details of prior recapping amid the confusion precipitated by the strike/boycott:

> Clarifications and Corrections: Not being journalists but understanding that we have many readers, we want to be sure that what we post is accurate, especially when it might be inflammatory. . .We apologize for being erroneous on that post as it garnered serious rage against [law firm] and brought many to think that conflicts of interest were rampant. We'll try to do a better job keeping the facts factual!

As this post suggests, successful digital curation required effort to not only curate digital content, but to also burnish one's role as *the* broker and source of facts within the network.

Galvanizing ongoing commitment

After over a year of open organizing and amid the tremendous volume of digital content—including conflicting information, rumors, and content laden with escalating emotions—that accumulated daily and over time, leaders faced the challenge of managing emotional and cognitive fatigue arising from information overload. To prevent such fatigue from undermining individuals' ongoing commitment to implementing strategic action, leaders engaged in spotlighting, amplifying, and recapping digital content that buoyed actors' emotions and helped galvanize perseverance. For example, leaders spotlighted posts of calls to "Keep Calm and Carry On," humorous videos, protest parody songs, evidence of customer support, and screenshots of key actors supporting SMB on various media platforms. Image 2, for example, is post spotlighting the support of the Dropkick Murphy's, a famous Celtic punk band from the region.

Importantly, leaders also leveraged their brokerage role to connect associates with key resources needed to sustain their commitment. For example, leaders spotlighted links to GoFundMe pages raising funds for striking employees and to state employment offices: "For any associate who has not received his or her paycheck yet this week, we urge you to call the office of Attorney General Martha Coakley in MA or Joseph Foster in NH. [The new CEOs] are violating your rights. [Includes numbers and website address to file a complaint.]" By linking to GoFundMe pages and connecting associates with legal and employment resources, leaders further strengthened associates' sense that they were broadly supported. This was further reinforced by spotlighted videos and photos of multi-thousand person rallies over the strike.

As the crisis reached its final weeks, refuting and refocusing also became particularly important as desperate associates awaited news about board meetings that would hopefully resolve the crisis. In response to a flood of comments around awaiting news from one meeting, leaders refuted the myriad misreporting and refocused the network's attention on sustaining their commitment and the current line of strategic action in the face of emotional and cognitive fatigue:

> Please do not panic and do not listen to rumors or the media for that matter. Seems like every channel and every publication is reporting something different. . .Stay on this page and we will let you know what we know as soon as we know it. We have been telling you the truth now for 13 months and we are still very confident.
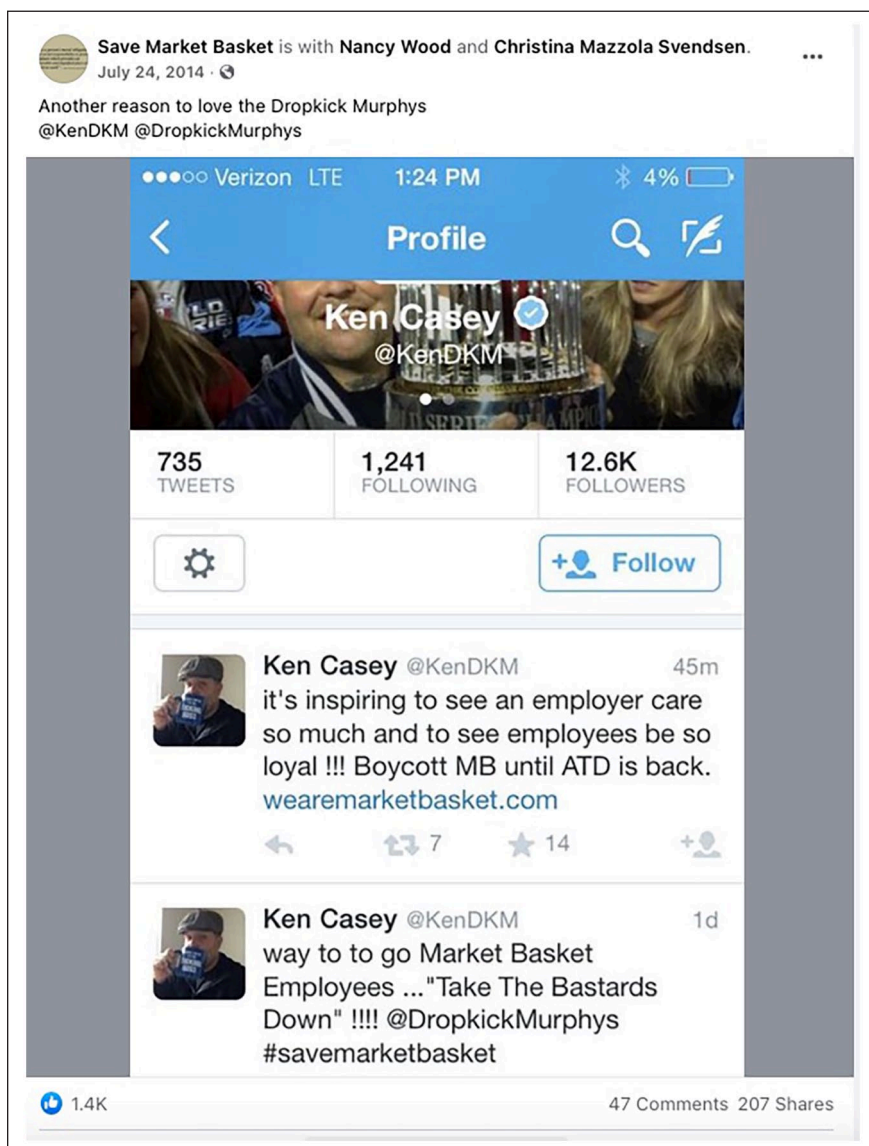
Image 2.

Through the careful curation work they had enacted throughout earlier phases of the crisis, leaders were seen as trusted providers of information and this, in turn, enabled them to galvanize commitment, even as rumors swirled.

Advancing concerted action

Amid the heightened chaos of the strike and boycott, leaders continued to re-post pictures of giraffes sticking their necks out and to amplify digital content supporting the ongoing strike/boycott. They also immediately addressed competing ideas around strategy that were circulating on

social media. Leaders engaged in refocusing to keep everyone aligned, and reinforce the values that undergirded the SMB effort:

> We fully understand people not wanting politicians involved in this but we believe that all stakeholders should be applying pressure on the Board. . .We need Every voice to be heard. Our battle has been all-inclusive from the start and we will always encourage those who wish to speak up to do just that. We cannot afford exclusion.

During phase 3, potential threads around how action might proceed were refocused immediately, but again with thoughtful explanation to maintain actors' engagement and commitment.

Taken together, phase 3 required the most expansive use of digital curation practices to sustain engagement in the face of an increasingly complex digital curation. Leaders' efforts to navigate the multiple information overload challenges and achieve concerted strategic action to impact their organization's future were successful. In late August the board finally agreed to sell Arthur S.'s shares to ATD. The SMB site, national and local traditional media, and social media exploded with celebratory articles, posts, and comments—Market Basket had been saved.

Discussion

In this paper, I develop an inductively derived model of digital curation as creative brokering—how leaders strategically select, share, and interpret digital material across a diffuse network of actors to achieve concerted strategic action in the face of information overload. As summarized in Figure 3, leaders engage in digital curation to manage a growing set of information overload challenges—the risk of salient information being lost amid volume and noise; diverse and conflicting information; the risk of unproductive tangents; and emotional and cognitive fatigue. I show how these challenges become acute as leaders advance their open organizing efforts through three phases of open organizing—initiating, aligning, and sustaining engagement—towards achieving concerted strategic action and impact. More specifically, I show how leaders leverage their brokerage role to engage in five digital curation practices— spotlighting, amplifying, recapping, refuting, and refocusing—in combination and over time to manage information overload challenges and (1) build a shared understanding of the problem or opportunity among a diverse network of newly involved actors, (2) nurture ownership and ongoing commitment, and (3) foster concerted action. I discuss the contributions of this model to scholarship on open organizing and brokerage, opportunities for future research, and implications for managers below.

Contributions to scholarship on open strategy and innovation

Open organizing aspires to harness diverse and previously untapped knowledge and perspectives to foster implementable novel solutions, promising new market possibilities, and transformative change. As leaders and scholars are increasingly realizing, however, the staggering volume of information generated in open organizing can undermine the realization of its potential benefits (Hautz et al., 2017; Luedicke et al., 2017; Stieger et al., 2012) due to cognitive and emotional fatigue (Bjelland & Wood, 2008; Luedicke et al., 2017), the obfuscation of salient information (Luedicke et al., 2017; Stieger et al., 2012), the potential to undermine actors' ongoing commitment (Luedicke et al., 2017; Stieger et al., 2012), and competing interpretations of available information (Luedicke et al., 2017; Tsoukas, 1997). Given that social media and digital platforms likely exacerbate these dynamics (Edmunds & Morris, 2000), the increasing use of these platforms to

support open organizing only intensifies the need to understand how and why information overload might be managed in practice.

The model offers a holistic approach to understanding how information overload challenges become acute over time and how digital curation can be used throughout an emergent open organizing process to guide a network of actors from initial engagement toward concerted strategic action. More specifically, the model reveals how digital curation supports leaders' effort to: (1) build a shared understanding of the problem or opportunity; (2) nurture ownership and ongoing commitment; and (3) foster concerted action. In doing so, the model helps illuminate the dynamics of not only eliciting newly engaged actors' involvement in these processes but also maintaining their commitment to implementing strategic action in the face of information overload. As such, the paper highlights the importance of studies that focus not only on idea generation, but also the long arc of the open strategy and innovation process—from initial conception to implementation.

This study also helps extend a burgeoning research stream illuminating practices that support open organizing (Seidl et al., 2019), and more specifically those that tackle fundamental dilemmas arising as decision making and innovation processes are opened up to expanded sets of actors (Hautz et al., 2017). Building on work that has highlighted the role of mitigating practices (Malhotra et al., 2017), counterbalancing practices (Luedicke et al., 2017), openness and closure (Dobusch et al., 2019), and impression management practices (Gegenhuber & Dobusch, 2017), this paper explicitly addresses how leaders can manage the overwhelming volume of information inherent to open organizing through digital curation practices. Unlike prior studies in which open organizing was bounded within dedicated wikis, platforms, or email listservs, this study served as an extreme but useful case for understanding the challenges of organizing within radically unbounded information contexts and within organizing processes that engage a myriad of internal and external stakeholders. This paper suggests that when leaders lack authority over those involved, when the path forward to success is not clear, and when stakeholders bring competing perspectives to the information context, achieving concerted strategic action requires ongoing awareness and curation of information across a constellation of digital content (e.g., social media, news media, websites, emails, videos, photos) and vis-a-vis multiple target network actors throughout the open organizing process.

Managing information overload through digital curation also requires close attunement to and micro-management of emerging digital content—for example, spotlighting key digital content to spur productive threads and provide salient information, refuting select misinformation before it precipitates further dialogue, and refocusing on the fly as needed to help guide the direction of subsequent idea generation and prevent dysfunctional conflict and unproductive tangents. Navigating information overload also requires ongoing synthesis—for example, recapping serves an essential role in ensuring that specific granular details are not lost within information cascades, while also fostering a shared sense of how details fit into a larger strategic whole. Recapping is especially important to engage actors as they move in and out of open organizing efforts, and to help avoid emotional and cognitive fatigue in times of rapid information volume escalation. Taken together, the paper adds further insight into the lived experience and daily challenges faced by those seeking to advance open strategy and innovation efforts, and the practices utilized to respond to their inherent complexity.

Finally, this paper extends existing research that theorizes open organizing as an emergent process, in which governance systems (Aaltonen & Lanzara, 2015; O'Mahony & Ferraro, 2007), strategy-making processes (Dobusch et al., 2019), participation structures (Massa & O'Mahony, 2021), and organizationality itself (Dobusch & Schoeneborn, 2015) evolve and are negotiated over time. This paper examines the fundamental challenge of managing information flows within open organizing—and how digital curation serves as a resource for advancing concerted strategic action

within an increasingly complex informational landscape. The paper also illustrates the dynamic nature of digital curation—how actions taken early on shape those occurring later. For example, initial efforts to spotlight and amplify key information helped provided a foundation for leaders to forge shared understanding across an expanding network of newly engaged actors in the face of an escalating and conflicting information landscape in phase 2. Refocusing rumors and unproductive process alternatives in earlier phases helped leaders build credibility and sustain open organizing in phase 3 as the crisis wore on, emotions wore thin, and livelihoods were on the line. As this was a single successful case, future research could examine whether and how the nature and timing of digital curation practices described here are evident in less successful cases, and the extent to which use of specific digital curation practices help drive success over time.

Contributions to scholarship on brokering and open organizing

With few exceptions (Luedicke et al., 2017), scholars have only just begun to examine open strategy efforts that engage multiple, different types of stakeholders (e.g., employees, customer, vendors) simultaneously (Von Krogh & Geilenger, 2019). The focus on "central actors" within networks (Hautz, 2017, 2019) embraced here provides useful theoretical and analytical traction as it situates leaders' actions within a complex array of perceptions, interests, and levels of engagement. Further, by theorizing brokerage as creative brokering (Lingo, 2020)—as behavioral practice and process—this study helps illuminates the micro-interactions that comprise leaders' efforts to guide idea evolution in open networks (Hautz, 2017, 2019). The model also highlights how leaders might leverage their brokerage role in different ways over time, for example, when the digital curation practices of spotlighting, amplifying, and recapping involve leaders leveraging their brokerage role to strategically forge connection between network actors and select information (Obstfeld, 2017). In contrast, the refuting and refocusing practices involve leaders leveraging their brokerage role to create distance or separation between actors and digital content. Thus, digital curation involves deft interweaving of brokerage practices that both connect and foster separation among actors and information—to manage information overload and guide a network of actors towards concerted strategic action. Digital curation thus provides an interesting twist on current conceptions of open organizing as iterating between open and closed practices (Dobusch et al., 2019; Dobusch & Kapeller, 2018)—highlighting how brokers iterate between fostering connection or disconnection across a network as well.

The model also illuminates how brokers might leverage digital platforms to forge and harness a network of actors to exert influence over their organizations' strategic direction. In doing so, this model contributes to research on the micro-interactions that undergird network dynamics and power (Clegg, Josserand, Mehra, & Pitsis, 2016; Maclean & Harvey, 2016). By focusing on the actions taken by traditionally low-power—rather than elite—actors to exert agency through networks, the paper extends research that shows how middle managers can impact their organization's strategic decision-making by leveraging their brokerage role within and across organizational boundaries (DeJordy et al., 2020), and especially when leaders lack formal authority over the array of actors involved (Lingo & O'Mahony, 2010). As this paper suggests, leveraging one's brokerage role within the network offers the opportunity for leaders lacking formal authority to manage information and exert power over meaning, emotions, and action within a network. Finally, this paper brings studies of brokering practice and process into the digital realm and explores how digital content can be curated to advance change within and across organizational boundaries. As network organizing is increasingly done via digital platforms, further research is needed to tease out how digital curation practices enable productive idea generation, synthesis and implementation of novel solutions, strategies, and transformative social change across contexts.

Illuminating the role of emotions

The paper also contributes to an emergent stream of research which illuminates the importance of attending to emotions in open organizing (Endrissat & Islam, 2021). Studies have pointed to individuals' emotional fatigue and frustration in the face of overwhelming information, and alienation when their ideas are not advanced through the process (Bjelland & Wood, 2008; Luedicke et al., 2017; Ripken, 2006). Building upon insights from the social movements literature (Goodwin, Jasper, & Polletta, 2001) and studies of institutional repair via social media platforms that have highlighted the role of fostering and escalating emotions of betrayal, outrage, and hope (Lingo & Elmes, 2019; Toubiana & Zietsma, 2017), this paper reveals the key role that digital curation plays in triggering, harnessing, and guiding emotions in open organizing. Digital curation was used to guide emotional rhythms over time—calming the fire when emotions risked spiraling out of control or igniting them as needed to ensure actors' ongoing engagement. These findings suggest that future research should consider how emotions, and efforts to guide them, shape the emergent process of open organizing.

Finally, this paper also highlights the need to attend to the role of emotion in brokerage scholarship (Halevy et al., 2018). Digital curation involved an intricate dance of naming, escalating, and de-escalating both positive and negative emotions so that emotions did not undermine collective action. Future research on the behavioral study of brokering could explore how brokers engage in harnessing both positive and negative emotions as they advance collective creative outcomes, and the critical moments in which brokers can leverage their role to keep emotions from spiraling out of control. Future research could also analyse more specifically the relation between leaders' emotion-laden actions/posts and other actors' responses. This granular analysis was not in the scope of this paper but could provide useful insight to our understanding of the interplay between brokering action, emotions, and network micro-outcomes within open organizing efforts (Hautz, 2017, 2019).

Generalizability and managerial implications

While my research focused on an extreme case, I expect that this model of digital curation will be generalizable to other open organizing efforts, given the fundamental challenge of escalating information volume inherent to open organizing. As noted earlier, certain aspects of the case setting, however, warrant future research to further refine and examine the model's generalizability. For example, the MB organizing effort was embedded within and engaged a community of actors (Dobusch & Kapeller, 2018) that had benefited from and shared MB's commitment to low prices, quality food, and great customer service. MB's standing in the community and individual customers' relationships with individual associates could have predisposed the broader network of customers to respond favorably to the digital curation efforts observed here. Future research could thus explore whether and how relational embeddedness might shape digital curation. Further, while this study focused on curation of digital content, the curation practices identified here may speak to the general challenge of curating information online and in-person at rallies, strategy meetings, or key events. Future research could extend this model to explore curation as a response to information overload more generally within open organizing, and the interplay between digital and in-person curation efforts.

Finally, this paper responds to calls to better understand the managerial implications of open strategy initiatives (Whittington, Cailluet, & Yakis-Douglas, 2011), and especially the process management and communication practices required (Hautz et al., 2017). The model suggests that for the sake of openness, leaders might need to take a more active role in curating digital content throughout the emergent process of open strategy and innovation development, and pay closer

attention to relational and emotional dynamics in addition to idea and information exchange. Deftly engaging in digital curation may be especially important when leaders lack authority over the array of actors involved—as was the case in the SMB effort—and in many open organizing efforts that unfold across networks of loosely affiliated actors, whose expertise, resources, and passion are needed to advance change and strategic possibilities.

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