Tracking Methods of External Communication:

The Social Exchange Between Workers and Clients During COVID-19

By

Pada Moua & Emilie DeFazio

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Executive Summary

This report looks at how professional workers have been adapting their work processes due to COVID-19 and the struggles or benefits of working digitally. We are primarily interested in the professional workers' perception of productivity with their clients and the strategies they have developed in order to combat the changes of their daily responsibilities. Our report answers these two research questions:

- How do professionals communicate with clients while working remotely?

- How is productivity through external communication perceived by the employee?

We interviewed 15 professionals working during the international health crisis using a semi-structured interview protocol asking the participants to speak on their pre- and post-COVID-19 experiences in workplace communication. From these 15 interviews, we selected five to analyze as samples of professionals who work with clients before and during the stay-at-home order. Using thematic coding, we found three themes that were present through the five interviews we analyzed: adaptation of work processes during COVID-19, professional workers' loss of perceived productivity, and technology as human connection. We used social exchange theory (SET) to analyze the results of our study so that we consider both the communication issues of this research as well as the socio cognitive effects of remote versus in-person work with clients. As SET acts as a frame of reference that reinforces psychology and microeconomics in social situations, we believe that the solutions to these participants' communication challenges lie in the recommendations of other SET scholars of COVID-19 subjects of study.

Each of the participants indicated their need to adapt to new methods of communication to conduct work with external partners using new means of technology and travel. These participants also indicated a loss of productivity in the workplace because of these new procedures, most often

due to the learning curve of applying the new processes to client relationships. This most often put stress on the worker, but others discovered a newfound appreciation for the human connection in these new means of communication. Technology has been found to be the means to connect with other people in a time of isolation, providing a sense of comfort to those who are either used to remote work or have easily adapted to these new processes. These themes, when analyzed through SET, indicate ways to combat these challenges in the new remote workplace. From the research we've conducted, these are our recommendations for professional workers who are experiencing a change in their work processes but still want to maintain productivity:

- Implement innovative technological skills to solve communication challenges.
- Embrace agile principles and strategic flexibility.
- Recognize workplace emotions and stress.

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Introduction

In March of 2020, millions of Americans were sent home indefinitely for their own health and safety due to the COVID-19 pandemic. This international crisis, which put every individual at risk of sickness and death while in close quarters with carriers, forced professional workers to find a way to continue "business as usual" while abiding by state, federal, and CDC regulations. The solution was to telework more than ever before, which has changed the way they usually communicate with others in their professional workspaces. Workers try to conduct tasks along with implementing new communication processes. While relying on these tools, professional workers are at risk of feeling a disconnect with clients technologically, personally, and professionally. Professional writing researchers are interested in the change of productivity from in-person to virtual communication during COVID-19 and how these changes will affect the future.

In this study, we asked how professional writers interact with their clients while working from home and whether or not their strategies of communication have been productive in this "new normal." This study is interested in occupations where professionals were in direct contact with their clients in-person for extended periods of time. As effective communication plays a vital role in the success of professional work relationships, our research explores how professional communicators adapt to changing circumstances and how professional writing researchers can expect these new strategies to shape the future of technical communication. Researchers want to know how these changes in processes have affected the perceived productivity of external communications in terms of the social interactions that come with work outside of the office.

In one of the interviews used for our research, a participant commented on the technological disconnect they have as a School Psychologist because some parents they work with

struggle with these technological changes since parents are "more friendly with in-person meetings" and "not every parent is tech savvy." Another participant, a Crime Analyst, indicated a challenge in implementing work training for clients, since the clients were now responsible for submitting documentation that they were not before. Another one of our participants, a Real Estate Agent, explained that there is also a personal disconnect between the worker and their clients, stating that emotional face-to-face encounters define the efficacy of their objectives because "people would fall in love" with the homes and "feel attached to them."

Our goal was to study how workers connect with constituents, consumers, and clients and if these communication strategies are more or less productive in a virtual setting. Specifically, we wanted to find out whether these changes have hindered or benefited the overall efficiency of their work and how professionals have perceived these changes. Most notably, we used social exchange theory (SET) to analyze the results of our study so that we consider both the technical communication issues of this research as well as the socio cognitive effects of remote versus in-person work with clients. SET acts as a frame of reference that reinforces psychology and microeconomics in social situations (Emerson, 1976, p. 336). This social exchange appears as the trade of activity, "tangible or intangible, and more or less rewarding or costly, between at least two parties" (Homans, 1961, p. 13, cited by Cook et al., 2013). This theory relies on trust, flexibility, and responsibility in the relationship between two parties, something more important than ever in a worldwide pandemic. The interpersonal relationships of face-to-face interactions are put to the test in unexpected circumstances. What these transcripts show us is that many professionals across the spectrum have experienced some level of disconnect with their clients in ways that are detrimental to their regular work responsibilities.

We sought a solution to the possible disconnects of the virtual workspace through the application of SET. Since SET is used in the understanding of professional workspaces and the human connections made through shared interests, using this theory gave us insight into how professionals can still keep the integrity of their work without the assistance of in-person personal and professional interactions. Through our understanding of our participants' experiences and the applications of SET, we came to a proposal of three distinct recommendations for professional workers who are experiencing a change in their work processes but still want to maintain productivity. We recommend that professional workers implement their newfound technological skills to solve communication problems, embrace agile principles and strategic flexibility, and recognize workplace emotions and stress.

Research questions

- How do professionals communicate with clients while working remotely?
- How is productivity through external communication perceived by the employee?

Methods

This project takes form through qualitative phenomenological methodologies. In the Spring semester of 2021, 15 professionals were interviewed by professional writing graduate students at Sacramento State University for an IRB-approved research project titled "Professionals' Perception of How Covid-19 Changed Their Work." These semi-structured phenomenological interviews (Seidman, 2006) prompted participants to speak on their job roles, the daily communication with coworkers and clients, and the ways this communication has changed since COVID-19 (Appendix). These interviews were recorded via Zoom video call, transcribed through the YouTube video uploader, and cleaned by the researcher for clarity. All participants gave verbal consent to have their transcripts included in our database. The

professionals' occupations ranged from Management to Education, Business and Finance to Sports and Media, Health Care and Social Science to Office and Administration. From these 15 interviews, we have chosen 5 for the purposes of our study. We chose these transcripts as the participants indicate the communications of professional writers who normally work directly with clients in-person and for an extended period of time.The 5 participants' occupational classifications vary across different types of professional work (see Table 1).

Table 1

Participant Information

Participant ID#	Occupational Classification	Position	Job Description
#134	Arts, Design, Entertainment, Sports, and Media Occupations	Writing Consultant	Conducts writing workshops with departments on site and offer one-on-one consulting sessions. Also works with the market monitors department.
#135	Business and Financial Operations Occupation	Human Resources Consultant	Works with an HR consultancy firm where they work with clients who don't have an HR department or need assistance with their HR services.
#138	Sales and Related Occupations	Real Estate Agent	Acts as a mediator and informant for their clients to aid them in their home buying processes.
#139	Life, Physical, and Social Science Occupations	School Psychologist	Assesses and assists with special education placement for preschool students with disabilities.

#143	Protective Service Occupations	Crime Analyst III	Works with the Criminal Justice Information Systems Bureau where they train and audit police agencies in California.

Coding Methods

After identifying the 5 participants that would work best for this research, we used Google

Documents to code each interview transcript for recurring themes (Richards & Hemphill, 2018).

We began with codes looking for instances of new workplace processes, changes before and after

COVID-19 shift, and technology. We then found codes that more closely identified patterns of

behavior and practices that attempted solutions to challenges. These include meetings (both in

person and virtual), travel, clients, stakeholders, and client responsibilities. After coding our data,

these are the different codes (see table 2) that came up the most across our set of transcripts. These

codes kept our analysis in check with our theory, since the outcomes of beneficial social exchanges

have a direct impact on the perceived efficacy of the interaction between workers and clients (Tsai

& Cheng, 2012). From these codes, we developed three themes: (1) Adapting Work Processes Due

to COVID-19, (2) Professional Workers' Loss of Perceived Productivity, (3) Technology as

Human Connection.

Table 2

Codes Description

Themes	Codes	# of Occurrences
Adapting Work Processes Due to COVID 19	Change in work processes	108
	Client	13
	Travel changes	33

Professional Workers' Loss of Perceived Productivity	Preference for in-person work	18
	Service	11
	Authoritative relationship	11
Technology as Human Connection	Preference for remote work	11
	Stakeholder	13
	Client responsibilities	7
	Personal relationship	17

Results

By analyzing these selected transcripts, we came to understand how workers from diverse fields have adjusted their external communications in this new virtual landscape. Through thematic coding we discovered three recurring themes across these six interview transcripts. We found that, in the age of COVID-19, these participants had to develop new and unfamiliar work processes to go about their daily tasks. We also discovered that these new processes led workers to feel that their external communications were less productive than when done in-person. However, these participants also indicated that technology helped them create more human connections than other remote work would have lent them.

#1: Adapting Work Processes Due to COVID 19

We found that each of our participants had to change their work processes in some way during the pandemic. Within these changes, most of them note that there were a lot of additional steps that needed to be taken in order to complete their normal work responsibilities. These additional steps ranged from extra meetings, documation, and technological training.

For example, participant #138, the Real Estate Agent, stated that they enjoy working from home because they are now aware of how much unnecessary time they spend in the office when

they could be achieving the same productivity at home. Due to these changes in their work processes, they realize now how independent their work can be. On the other hand, participant #143, the Crime Analyst, had a more negative experience with their change in work processes because the efficacy of their job depends on their hands on in-person training. Working remotely causes issues for their work processes because their clients have more responsibilities to send in documentation. These clients would end up sending incomplete reports, "causing a problem" because now the Crime Analyst can't "report it accordingly." This compromises the analyst's productivity because they don't have the information they need to complete their work. Compared to if they did the training in person, the analyst notes that they can just "speak to them directly and clarify," but that's not the case in this situation. SET calls the interaction between professional and client a shared responsibility of services (Sierra & McQuitty, 2005). This responsibility, when taken into a new context, skews the client reception of what they need to do to conduct a fair exchange.

All participants note about having to spend more time in the day learning and teaching new processes and mitigating client responsibilities. These changes deal largely with having to learn some sort of online tool like Slack, Zoom, or otherwise. Participant #139, the School Psychologist, notes how their assessments relied on meeting with their clients in-person so that they can administer placement tests themselves. However, they state that the stakeholders (the childrens' parents in this case) now have a larger role in their overall work processes. Parents have a responsibility to administer the assessments remotely, and the participant notes that the challenging part about this is having to explain the assessments to the parents because they have had to "sit with parents for 30 minutes to an hour and explain to them how to do these rating skills." With that being said, the participant states that they now have to spend more time communicating with

parents through phone calls or emails in order to ensure that all components are completed for their remote assessments. The Real Estate Agent states that they also had to learn new technological tools like Zoom and social media. Because they can't meet with clients in-person, they've had to substitute their meetings with Zoom, but the participant notes that this is a better option than phone calls because they still get face time with their clients. They also noted that they started using social media more in order to promote their business, posting everyday or every other day about their available listings and appointments. However, the participant did have some positive feelings about this because marketing their work online and from home showed that they "don't necessarily have to be in office at all times." This, as a whole, disrupts the rules and processes of expected social exchange (Cropanzano & Mitchell, 2005). When the professional adapts to these new technologies, the relationship with the client changes, therefore changing the exchange of services from what was expected prior to COVID-19.

Travel changes are also tied into change of work processes as all five participants note having to spend less time traveling to work than they normally do. The nature of their work before COVID-19 relied on them traveling in some way to meet with their clients in-person. Participant #134, the Writing Consultant, used to fly around to meet with clients, but since COVID-19, they have been meeting with their clients through Zoom. Not only that, but they have managed to use Zoom to host virtual launch parties when they used to have in-person book launches at bookstores. This participant notes that working remotely has actually benefited their work processes because they "would be free to go to a coffee house to write." Participant #135, the HR Consultant, states that some of their work pre-COVID was in the office or their clients' offices, but most of their time was already spent working remotely. Since COVID-19, they have moved their services online and note that several of their clients have moved to a completely remote workforce. That is, their

clients seem to prefer a permanent shift to online work only even after COVID-19. This participant also notes that the benefit of working remotely is less commuting, but they state that there has been an "upswing in meetings in general" to make up for lost in-person communication.

With all of these new changes in work processes, some participants express a negative outlook for returning to normalcy anytime soon. The Real Estate Agent states that open houses are the "bread and butter" to their work, but with the COVID-19 regulations, open houses are only available for clients who are interested in buying. They express that new Real Estate Agents will suffer from this the most because they don't have the opportunity to build up their business through in-person interaction and promotion. The School Psychologist also expresses similar concerns about returning to normalcy because they state that even as they return to in-person assessments, the nature of their tests will be completely changed by all of the COVID-19 safety protocols. This participant says they don't think "things will ever be normal again." It's these concerns and the issues of unfamiliar new rules of exchange, nature of the resources being exchanged, and the relationships between workers and clients in this exchange (Cropanzano & Mitchell 2005) that force these professionals to question their productivity in the current economic climate.

#2: Professional Workers' Loss of Perceived Productivity

Changes in work processes deeply impact the efficacy of professional relationships, especially those that were conducted primarily in-person before the pandemic. The participants indicated that because of this altered work process, they perceive their work to be less productive on a daily basis. Though all of the participants still largely provide the same service, they all note that their patterns of work processes have changed, resulting in the majority of them feeling negatively about their productivity due to these changes.

For example, the School Psychologist states that they spend less time speaking with parents and spend more time trying to reach out to them instead. They would have to schedule phone calls with the parents to go over information about the assessments, but they state that the "most challenging thing in this whole process is actually reaching parents when they're available." When a parent has to reschedule a phone call, this pushes the participant's entire schedule back, affecting productivity negatively as they still have to meet their deadline for each case. Similarly, the Real Estate Agent and Crime Analyst mention having difficulties with client communication in order to complete other daily tasks. The Real Estate Agent noticed a decrease in communication with their clients because they can't get to the office. What this means is they must rely on phone calls or appointments, affecting their workflow negatively because their response can take 15 minutes to a few hours. Not only that, but this participant states how a big component of their job is the emotional reaction that clients have when they walk around the house in person. The agent states, "If I could show a house, people fall in love with it, they feel attached to it. That communication, personal communication, physical interaction with individuals has gone really low. I feel that working as an independent contractor, that's what makes or breaks it." This affects productivity because it's easier to sell to clients when they have an emotional connection to the home, but this has been largely limited or substituted because of COVID-19. The Crime Analyst states that in order to ensure productivity, they set tasks to complete for the day. Completing these tasks lets them know they are on track for the day, but this becomes complicated when their clients don't respond immediately. This ends up affecting their productivity negatively because they find that they have to wait on others in order to complete certain tasks, pushing their schedule back a few days.

SET emphasizes the need for constructive give-and-take of services and products in a healthy client-to-worker relationship. In one study, trust was found to be positively related to a flexibility of social exchange in the workplace, while it also resulted in overdependence in the exchange itself (Young-Ybarra & Wiersema, 1999). This factor complicates the productivity of a professional social exchange, since the communicative relationship is so reliant on this human connection and trust. These workers and customers are searching for reciprocity (Göbel et. al, 2018). In the current economic climate, newfound ways of conducting external communication with clients must be implemented in order to combat this subjective question of perceived productivity.

#3: Technology as human social exchange

Due to COVID-19 and remote working, our 5 participants noted that not only have their work processes changed, but productivity has been affected as well. With that, all participants had to substitute technology as means for some sort of human social exchange with their clients in order to ensure their efficiency. The Real Estate Agent started utilizing 3D house tours in order to show their homes remotely, but they state that they had a challenging time with learning how to use the cameras, getting a good shot, and editing the videos in a way that feels realistic to their clients. This creates an emotional connection for the clients which affects success of sales.

The nature of our 5 participants' jobs relied on the emotional components of in-person meetings because they find that it's easier to communicate with clients and get their jobs done when they are actually present to facilitate interaction. The School Psychologist notes that "parents are definitely more friendly with in-person meetings just because not every parent is tech savvy," stating that parents get frustrated more easily with the new responsibilities they now have. This can affect productivity too because if a parent is feeling impatient with the assessment process,

this can ultimately slow down the work processes. Communicating via online platforms can hide meaning in facial experiences, vocal tones, and other nonverbal gestures, which then confuses the communicators (Mora Cortez & Johnston, 2020, 4.2.1). The Crime Analyst notes that "some agencies are still wary and they redact the information prior to sending it over." The productivity of their job pre-COVID-19 relied on these in-person trainings and workshops because, in person, they are able to assert authority and build trust with the clients they work with. When left to complete their own documentation, this participant finds that sometimes clients will withhold information they don't want the crime analyst to know about. This is something that threatens social exchange theory's application of trust, which is necessary for workplace client relationships (Young-Ybarra & Wiersema, 1999).

However, there are some silver linings with using technology to foster human social exchange. The Writing Consultant notes that they prefer remote work because they have more free time to write. Not only that, but "Zoom has been very important" to them because it has enabled them "to get human feedback" and collaborate like they used to pre-COVID-19. The HR Consultant also expresses similar feelings because there are fewer office space distractions. The HR consultant states that "it is a lot easier to actually complete your work when there are fewer people stopping by your office." Both of these participants have been able to find new processes that improved their workflow while working remotely.

There are some studies in SET that propose that new workplaces do not need to frequently adjust their processes for client communications and other exchange relationships (Chernyak-Hai & Habdenu, 2018). However, given the current climate of workplace accessibility and performance, it is essential to make adjustments to professionals' relationships to technology as a

means of connecting with other individuals, including clients. In the next section, we propose three specific recommendations to do this work.

Recommendations

Our list of recommendations refers back to a 2020 research study that used SET to observe business-to-business interactions during COVID-19. Mora Cortez and Johnston (2020) proposed a model of four interconnected areas to prevent the inevitable strain on what would have otherwise been seen as strong workplace relationships. This model proposed that digital transformation, decision-making processes, leadership, and emotions are intertwined in the maintenance of business-to-business relationships (Mora Cortez & Johnston, 2020). While this model focused on business-to-business interaction, its 22 recommendations are often focused on individual worker processes. In reference to Mora Cortez and Johnston, we propose a framework for combating challenged worker-to-client exchanges. In this, we recommend that individual professionals apply technological processes that work within their skills and workplace interests, embrace strategically flexible patience for conducting interactions with clients, and prioritize the reactive stress and emotions resulting in client communication. These recommendations, when applied with reflective actions that influence "how the social exchange can be conducted and/or improved" emphasize "the rewards and satisfaction from social exchange" (Mora Cortez & Johnston, 2020, 4.2).

Our digitally transformative recommendations (Mora Cortez & Johnston, 2020, 4.2.1) center the technological advancement practiced in the 14 months since the stay-at-home order was implemented in the United States. Our participants indicated belief that learning new technologies and processes while adapting to remote work was one of the major challenges of conducting client communications in a productive manner. We recommend, then, that these participants and others in similar situations attempt to use their new technological abilities to extend the productivity of

their work. For participants who did not use websites, we recommend they look towards digital communication professionals to develop new interfaces to display their work in an all-in-one platform that highlights work, processes, and communication opportunities instead of clogging up the workday with virtual meetings, missed phone calls, and unattended webinars. We also recommend outsourcing or taking the opportunity to attend virtual classes on the use of social media marketing and communication, as sites like Instagram, Facebook, and Twitter have shown to be helpful in the attainment of client communications. And for those who have not practiced the now common applications of technology that have permeated other professional spaces, we recommend they research solutions in the user-friendly applications now practiced by several clients and professionals alike, such as Zoom, Blue Jeans, Slack, Microsoft Teams, and Google Suite. These collaborative systems streamline the productivity of workplaces that may resist any changes to their external communication strategies.

We present our next recommendation as a solution to the frustrations that come with online, remote, or at-home work. As Mora Cortez & Johnson outline in their 22 recommendations for business-to-business communications, individual professionals should embrace the agile principles and proactive strategic flexibility (4.2.1). This agility and flexibility is both a product of the mindset and practices of remote communication. By inhabiting a flexible strategy of communicating with clients, the professional widens their expectations for the interaction and therefore prioritizes the meeting of minds, rather than the product of the interaction. For example, approaching a client through email communication that gives clients a list of options to choose from in order to move forward with a service gives the client the opportunity to pick a process that works best for them, rather than articulate a need that the worker then needs to address. This agile approach prioritizes the individual interaction over a process or tool and allows for extensive

documentation (Mora Cortez & Johnston, 2020, 4.2.1). These interactions, then, act as a recorded collaboration rather than a give-and-take solution and leave more opportunities to change the approach to a client as needed (Mora Cortez & Johnston, 2020, 4.2.1). This interaction then gives the client more agency in the exchange. This recommendation also prepares the professional worker to anticipate long-term solutions to these client exchanges, rather than temporary holds on communications as brought on by COVID-19. Efficiency is a priority of workplace business, so applying long-term strategic goals with documentation and flexibility can prepare a business to enter a new plane of remote (and eventually optional in-person) client communications.

Our final recommendation is for the individual professional to recognize the emotions, stress, and cognitive labor put into these altered social exchanges. While the address of mental health has increased over the course of the pandemic in American society, regulating stress and reactive tendencies in the workplace needs new and direct implementation in assistive processes. Regulating tiredness and a lack of choice can better the relationship between client and worker in that they both recognize the other's performative labor (Mara Cortez & Johnston, 2020, 4.2.4). Workers and clients can both approach these interpersonal challenges through the implementation of technology as human connection. Addressing the shared anxieties of the world at hand, commiserating over interruptions in Zoom meetings, and even complaining about workplace flow and efficiency with grace and candor can exchange more than just workplace trade-offs. They can exchange the personal life changes that bind individuals together under a shared experience that has otherwise not been available before. These positive emotions, then, have been seen to increase loyalty to the service provider (Sierra & McQuitty, 2005). This, as we like to call it, is a way to make the best out of an unideal situation. When we focus on the human aspects of the solutions to

workplace problems, we can create new opportunities for social exchanges that help the individual as well as the business conducted.

Conclusion

Social exchange theory demonstrates how a moral-oriented relationalist concept of reciprocity can benefit both the worker and the client (Göbel et al., 2013) in external communications. With these findings, we propose that our recommendations for better workplace communication—including adapting individualized technological skills, applying flexible short and long-term solution strategies, and addressing emotions and stress to develop human connectivity—can benefit the efficacy of professional goals and intents. In the event that these virtual new communications become permanent processes, this report shows how professionals communicate with clients now and how they can communicate with them in the future.

APPENDIX

Semi-Structured Interview Protocol

1) Before we begin the interview, I want to confirm that I have your permission to record this interview (wait for an answer). I also want to ask if I have your permission to include an anonymous transcript of this interview in a class database of interviews so my classmates and professor can also use it for their research (wait for any answer).

2) Tell me about your job.
    a. What is your current title?
    b. How did you get into this profession?
    c. How long have you been doing this job?
    d. What are your primary responsibilities?
    e. What kind of writing is required for this job?
    f. How do you work with other people?

3) Tell me about what a typical day looked like for you at work before Covid-19.
    a. Where did you usually do your work?
    b. What did you spend the most time on?
    c. What did you spend the least time on?
    d. What kinds of tools did you use to do your work? (i.e. technologies, computer programs, materials, etc.)

4) What changes to your work did you notice due to Covid-19?
    a. How long did the impact last? Or is it still ongoing?
    b. What did a typical look like for you during Covid-19?
        i. Where did you usually do your work?
        ii. What did you spend the most time on?
        iii. What did you spend the least time on?
        iv. What kinds of tools did you use to do your work? (i.e. technologies, computer programs materials, etc.)
5) What strategies did you use to make the changes you had to make due to Covid-19?
6) Which strategies proved most helpful?
7) Which strategies proved less helpful?
8) What advice would you give to students who hope to have a career like yours to help them prepare for something like Covid-19?

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