# Social Optimization Theory
by Heidi Forbes Öste

The lightbulb went off as if by a switch. I live and breath the concepts behind *social optimization* in my work, and have for many years. In the context of my work, providing a definition as "the building and maintaining of mutually beneficial and effective relationships" sufficed. In 2009, I coined the term social optimization, for this purpose when presenting at a conference in Stockholm. Yet, definition of a term limited the understanding of its potential. I was sure that there was an evolutionary process to it. In the context of the new social paradigm, social technologies connect most everyone and everything. When faced with the challenge of explaining the stages and breaking it down I was stuck. Until, I was introduced to and inspired by Erikson's psychosocial stages. "Ah ha!"

FIG.1 FORBES ÖSTE'S SOCIAL OPTIMIZATION STAGES MAPPED TO ERIKSON'S PSYCHOSOCIAL STAGES
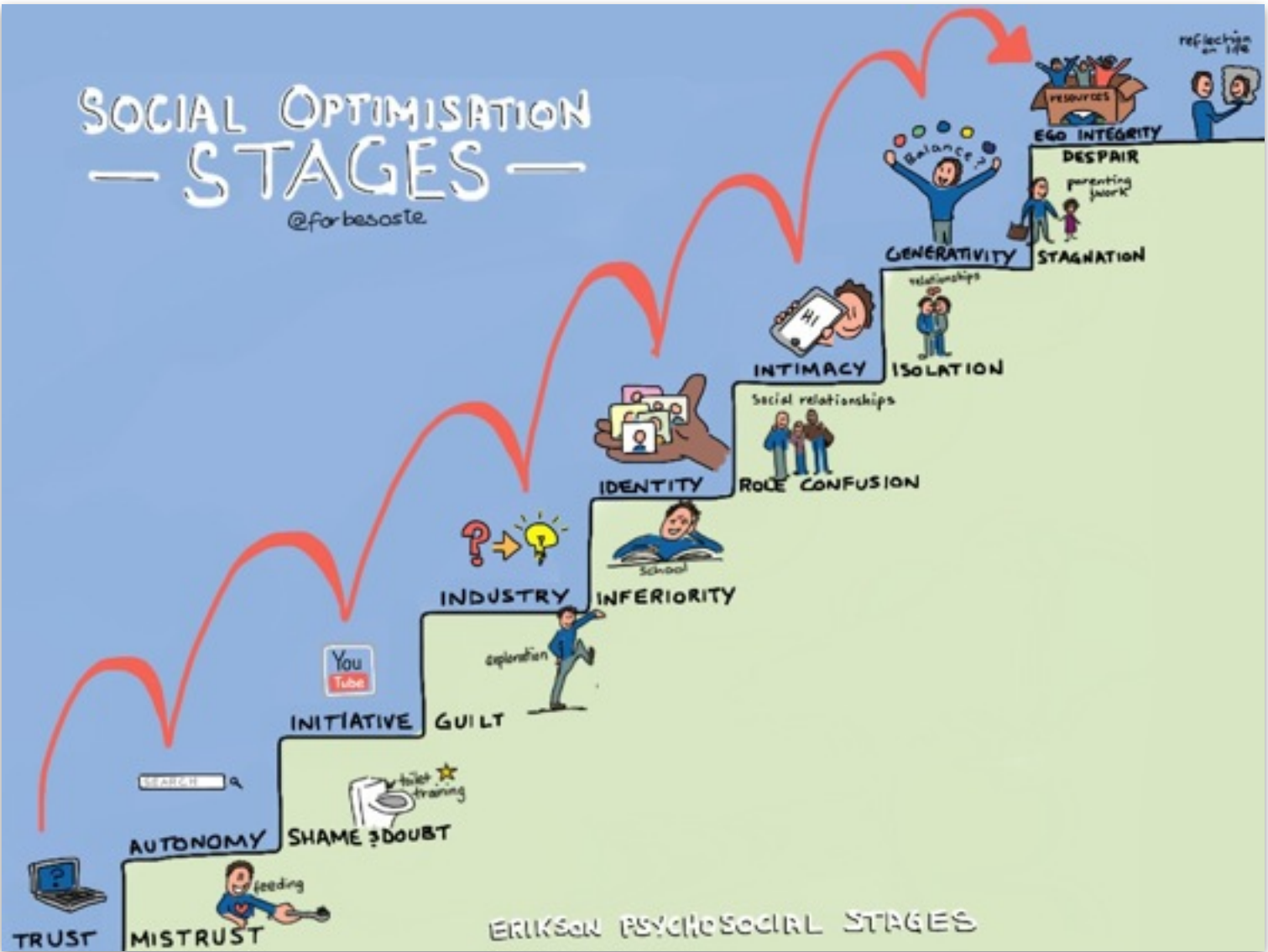
The working environment, roles and expectations of leaders have changed. This is a direct effect of rapid adoption of new social technologies both in the workplace and interpersonal communication. Note: adoption of and adapting to these new conditions is occurring on both on a conscious and unconscious level. Even passive or secondary use as observers is included as adoption in this context (for example, following suggested readings based on what one is reading, or film reviews).

Social technologies in this context are any technology that enable interaction between people: smart phones, social media, wearable tech, tablets, social gaming, augmented reality, music sharing, social shopping, social search, location based services, etc… By developing visuals, my aim is to provide clarity to a complex concept. Just because it is scholarly, should not mean it can only be appreciated by scholars. After all, that would not be applying the principals of social optimization and walking my talk.

The Stages

Evolution from one stage to the next is a result of a kairotic (opportunity) or crisis. Depending on the response, it can lead to metanoic (regret) or evolutionary development through the stages. In both cases (social optimization and psychosocial stages) the learning takes place as a result. This leads to either rising to the next stage or regret from inability to rise. Each stage correlates with the mutually beneficial relationship between humans and the technology required to evolve to the next stage.

Table 1: Forbes Öste's Social Optimisation Stages: inspired by Erikson's Psychosocial Stages

Stage Virtue	Entry	Social Optimization evolution characteristic display	Erikson's Psychosocial Stages	Evolution
1 **Hope**	Mistrust	State: Presence of technology and the Internet of things. Need: Interaction for entertainment or task based. Challenges: technology is great…when it works. Frustration at this stage can lead to a dissociation that will result in difficulties later	Develop a sense of trust when interactions provide reliability, care, and affection. A lack of this will lead to mistrust.	Trust
2 **Will**	Shame and Doubt	State: Answers to questions or challenges immediate. Dynamic of debate changes, "Tomato is a fruit." Access to expert knowledge. Need: Access to answers and world of knowledge… google it. Challenges: "Everyone is an expert." User generated knowledge not always accurate,… Wikipedia	Develop a sense of personal control over physical skills and a sense of independence. Success leads to feelings of autonomy, failure results in feelings of shame and doubt.	Autonomy

Table 1-cont. Forbes Öste's Social Optimisation Stages: inspired by Erikson's Psychosocial Stages

Stage	Entry	Social Optimization evolution characteristic display	Erikson's Psychosocial Stages	Evolution
3 **Purpose**	Guilt	State: Becoming part of the content, commenting, playing, creating metadata. Sharing content generated or even creation of new…push. Need: A desire to be heard. Curiosity and exploration result in new discovery. Challenges: Addiction to devices, seeking feedback. Constantly "on" but not present "here and now."	Begin asserting control and power over the environment. Success in this stage leads to a sense of purpose. Those who exert too much power experience disapproval, resulting in a sense of guilt.	Initiative
4 **Compent-ence**	Inferiority	State: New technologies replace former communications methods and modes. Need: Humility and interest for learning. Understanding and acceptance of adequate competence critical. Challenges: Pre-learned notions of time and space (both personal and organizational) changed Mastery impossible as constantly changing.	Cope with new social and learning demands. Success leads to a sense of competence, while failure results in feelings of inferiority.	Industry
5 **Fidelity**	Role Confusion	State: Expectations of personal engagement change. Blurred lines between private and public. Need: Authentic engagement. policy for participation. Self-Awareness Challenges: Public interaction open for discourse and challenges, miscommunication	Develop a sense of self and personal identity. Success leads to an ability to stay true to yourself, while failure leads to role confusion and a weak sense of self.	Identity
6 **Love**	Isolation	State: Mapped and access to/ from global networks of interest, integration in daily life Need: Strategy, time management, boundaries, listening Challenges: Fear of loss of control, balance, voyeurism	Need to form intimate, loving relationships with other people. Success leads to strong relationships, while failure results in loneliness and isolation.	Intimacy

Table 1 cont. Forbes Öste's Social Optimisation Stages: inspired by Erikson's Psychosocial Stages

Stage	Entry	Social Optimization evolution characteristic display	Erikson's Psychosocial Stages	Evolution
7 **Care**	Stagnation	State: Content generation based on needs of audience and network. Need: Listen to network needs and respond where contextually appropriate. willingness to share network. Collaboration Challenges: Push sharing only. Hoarding and protectiveness.	Need to create or nurture things that will outlast them, often by having mentees or creating a positive change that benefits other people. Success leads to feelings of usefulness and accomplishment, while failure results in shallow involvement in the world.	Generativity
8 **Wisdom**	Despair	State: Co-creation for the greater good Need: Global interest, mentoring, altruistic intentions, satisfaction derived from others success Challenges: Fear of change or loss of power.	Need to look back on life and feel a sense of fulfillment. Success at this stage leads to feelings of wisdom, while failure results in regret, bitterness, and despair.	Ego Integrity

In social optimization stages, the individual may be cast back, unlike in psychosocial, as the conditions in the new social paradigm shift. For example from *generativity* to *industry* as new technologies change the conditions in which one exists and operates. Depending on whether they embrace the new industry or deny it, they will rise or remain at their new stage. Upon descending they will have to rise again in the new conditions, which are ever changing. Just as in their first ascent, they cannot skip stages as the conditions in the new paradigm have changed.

Erikson recognize the human propensity for detachment as a result of crisis, which leads part of the individual in an earlier development stage. In the ultimate nurturing environment, the ability to ascend the stages intact is more feasible. Erikson's term epigenesis derived from "upon" and "emergence" to explain the intended path. In human development the referred to the rising of the parts although not synchronized, nonetheless along the same trajectory. The final objective being the parts rising to Ego Integrity (Stage 8) functioning as a whole (Roazen, 1976).

Cognitive growth versus moral ethical development (just because one can teach stages intellectually does not mean that they are at the highest stage). Personality factors into development. In other words, learning the technology does not inherently mean that one can apply it in the context of interpersonal connection. Digital natives are not necessarily pre-disposed to achieving the highest level of social optimization. Those who have developed psychosocially have a higher likelihood of achieving SO in the new social paradigm. They descend the spiral to adapt to the new conditions in which the interpersonal interactions take place. Once they have adjusted to the new conditions, they are able to rise to again.

In social optimization, one can evolve in some areas and not in others. For example, the CMO in an organization can have the capacity both intellectually and ethically, but does not apply it to their own life and interactions. With regard to Erikson himself, we assume that he has achieved ego integrity as a whole. Professionally, perhaps he did. However, personally, his own daughter suffered the consequences of his detachment. She writes this in her memoir of growing up in the

"shadow of his fame". This is not unique to academia. Systems thinkers who are focused on the big picture often results in neglect of their near relationships.

It is common in the business of yoga, that the guru becomes addicted to ego. This directly counters the teachings of yoga. Despite that, the irresistible draw of fame and inflation of ego for successful yoga instructors results in a loss of the moral compass that drove them to the practice in the first place. Social Strategists often suffer from their own "cobbler's kids" syndrome while maintaining their clients interactions. They neglect their own interpersonal connections, both online and off. Despite one's intellectual understanding of social optimization, they may not embody it themselves. It is easy to teach the principles, but to adopt them to one's own way of thinking, living and interacting with others…this is another matter.

The physical interactions, are as critical to social optimization as the sense of global interconnectedness. Detachment often takes place in Stage Three, (Purpose) as new users of sharing based technologies obsess over the need to accumulate followers. The game or sharing often becomes secondary. The consequence is the face-to-face interaction suffers. In other words, the need to tend to the online world overshadows the value or even the desire for feedback in the real time face to face. Another common risk for detachment is at Stage Six, (Love), a stage abundant with opportunity for crisis.

Erikson's work with psychosocial stages influences many others in varying fields of social sciences. For example, Robert Kegan's work resonated in regards to social optimization, particularly when it comes to consciousness (1995). Jürgen Habermas is another scholar who touched on the importance of the mutual benefit piece, often overlooked (Eriksen & Weigård, 2003). Held (1995) took Habermas' cosmopolitanism one step further, recognizing the complexity of multi-layered identities. This piece is very important when taking into account the pronounced difference in how individuals engage in different communities both online and off, based on their purposes and roles.

Critics of Erikson, Habermas and Kegan perceive their developmental or organizational utopia as naïveté of the real life world. Can this be a result of the cynical worldview that derives from fastening in the middle stages (between Erikson's industry/inferiority and intimacy/isolation or level 3 in Kegan's consciousness)? No matter the answer, the utopia is achievable, but must be recognized as a pliable state.

Interestingly enough, the above scholars are all white men of european descent who were pioneers of the "old school model". Had they been women or digital natives, would their theories have been different? Do any of them use social technologies or are they stuck at the industry - inferiority stage? Erikson, late in life, felt the world had dismissed him. He spent less time sharing his work, thereby losing the benefit of interaction. Nevertheless, his work is still very relevant and of value today.

While working on the film project, I had many conversations with different types of leaders (both social and traditional). I was struck by those who believed themselves to be of a higher stage, were quite clearly not, both personally and professionally. Some were in highly advanced in one area of their lives, but on a completely different level in the other. They were not bipolar or schizophrenic. In fact, they were highly functioning successful leaders with stable family situations. Nonetheless, they had fallen into the power trap that is very much a part of Western thought, "what's in it for me" comes first and foremost. Their denial of the shifting social paradigm was blatant. I had to stifle my commentary for not wanting to start a heated debate.

Erikson believed in the connection between development and culture. The question is open to see if leaders from a non-Western culture, might have responded differently? My experience working with leaders in the Middle East and Africa leads me to assume that, yes, they would have. As the conditions of the new social paradigm become more ingrained in our society and culture, we see a

rise in conscious capitalism. This is displayed strongly in the Millennial generation that, so far, seems to be less motivated by money and more by making a difference.

There is a rising need for fully evolved futurists who grasp the human and technological implications of the new social paradigm. They can help us chart the course, advise the leaders or become them. In most cases, I believe those fully evolved work best collaboratively, and need not be THE leader. We may not recognize them as they are often the better-halves, partners, advisors, board members, the indispensable side-kicks that are often unsung.

Admittedly, This theory is far from complete. This paper is an effort to provide structure from which to further develop social optimization theory. It is also an effort to walk-the-talk of it, by sharing what I have already learned and opening the conversation. There is much to be learned as the new social paradigm continues to evolve. The agility to support its evolution, is one of the key conditions of this paradigm. One thing is for sure, ascending is not a solitary process. Social optimization is dependent on the interaction with others. Together we are one and many, and thereby better off. The new social paradigm will continue to evolve and with it, so will the theory of social optimization.

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