

**Developing Theory and
Theoretical Contributions
Session 3 – Borrowing and
Blending Theories**

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Topics for today

- 1. when and how can we import theory into management and organisation studies?
- 2. how can we combine and blend theories in an effective manner?

...next session: counter-factual reasoning...

The paradoxical state of OMT

Grown in dominance within business and management research,
but...

...dearth of novel ground-breaking theory since 1970s (Davis,
2010; Suddaby et al., 2011)


...proliferation of theories and an obsession with novelty
(Hambrick, 2007; Leavitt et al., 2011)

...and mostly a case of one-way borrowing from the social
sciences (Oswick et al., 2011)

What to do?



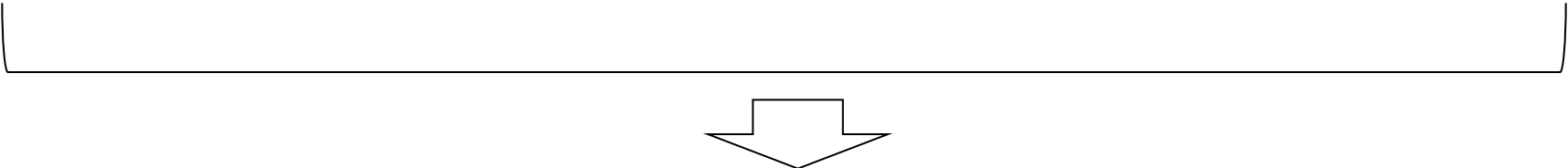
**Contrastive
explanations**



**Disciplined
imagination**



**Problematizing
assumptions**



How are theories developed and
strengthened, or improved?

- Theory broadly defined as analytical structure or system of causal associations that accounts for, explains and predicts empirical phenomena
- Theoretical tradition → construct (and measure) → model (relationships/processes)

Theorizing as Thought Experiments

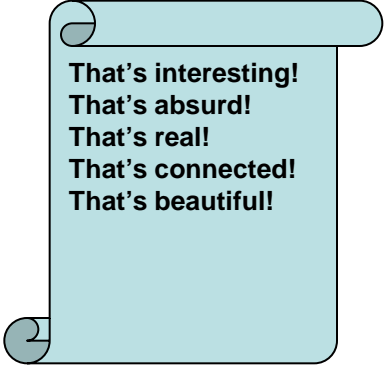
Thought experiments: the active construction and manipulation of abstract conceptual frames or candidate assumptions, constructs and explanations, as the feedstock for new theory (Folger & Thurillo, 1999).

Feyerabend (1975) famously referred to such an active use of thought experiments as embodying a 'pluralist methodology' where a theorist constantly maneuvers between conceptual representations, and even constructs imaginary 'dream-world' frames (page 15), to tease out the potential for an alternative theorization of the phenomenon at hand.

Disciplined Imagination

- Weick (1989, AMR), “Theory construction as disciplined imagination”
- Critique of rule-based and data-driven accounts
- Theorists iterate between data and theory
- “when theorists build theory, they design, conduct and interpret imaginary experiments” (Weick, 1989, p.519)

Exercise



That's interesting!
That's absurd!
That's real!
That's connected!
That's beautiful!

- 1. state a problem
- 2. engage in a brainstorm to think about alternative ways to conceptualize the problem
- 3. select a conceptualization
 - Hint 1: cross theoretical traditions/literatures/disciplines
 - Hint 2: focus can be on a construct or model/relationships, or both

- Locke and Golden-Biddle (1997): framing and positioning theoretical contribution -- synthesize prior research and show how existing research is wanting in some respects → sets up opportunity for advancing knowledge (contribution)
- Locke and Golden-Biddle (1997)
 - Synthesize prior research as incomplete (need for further development/specification)
 - Synthesize prior research as inadequate (extant literature does not sufficiently incorporate different perspectives on the phenomenon under investigation)
 - Synthesize prior research as incommensurable (extant literature not only overlooks relevant perspectives but is also simply wrong)

Soapbox!

Okhuysen and Bonardi (2011)

Combining and integrating theories

Conceptual blending: (a) combining theories

Close/distant areas of research and (in)compatible underlying assumptions (Okhuysen & Bonardi, AMR, 2011)

- → examples from your own work (in relation to your topic)
- → single vs. double scope blends
 - Projection of a single new frame (accommodated to management or organizational context)
 - Incorporating a new part (construct and/or relationship) into existing theoretical frame
 - Integration of two frames into one, leading to a new emergent theory

Three steps (Cornelissen, 2005, AMR)

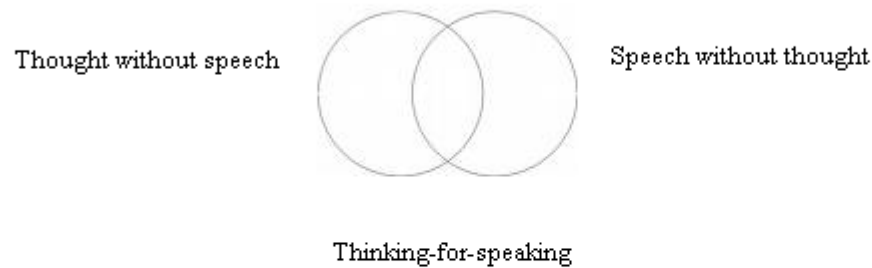
**1. Development of a generic structure
(analogical correspondence)**

2. Development and elaboration of the blend

3. Emergent meaning and inferences

→ hygiene check!

Example: blending of entrepreneurship theories (Cornelissen & Clarke, 2010)



Soapbox!

**Cornelissen and Durand (2014),
moving forward**

A Typology of Theorizing

Analogical reasoning (Boxenbaum & Rouleau, 2011; Weick, 1989; Oswick et al., 2011; Shepherd & Sutcliffe, 2011)

Analogies (and metaphors) are principally a way of seeing correspondences between conceptual frames and of conceptualizing and understanding a particular subject in terms traditionally associated with another subject or domain of knowledge.

1. Heuristic analogy (e.g., Bacharach, 1989)

Example in OMT: sensemaking

2. Causal analogy (e.g., Hannan & Freeman, 1977)

Example in OMT: population ecology

3. Constitutive analogy (e.g., Boyd, 1979)

Example in OMT: behavioral theory of the firm

1. Heuristic or spotlight counter-factual (Turner, 1996)

Example in OMT: situated leadership

2. Causal or lab-rat counter-factual (Turner, 1996)

Example in OMT: transaction cost economics

3. Constitutive counter-factual (Goodman, 1947)

Example (in OMT): prospect theory

Table I. An overview of reasoning and theory development

<i>Mode of reasoning</i>	<i>Analogies</i>	<i>Counterfactuals</i>	<i>Typical application</i>	<i>Illustrative references in management studies</i>
Heuristic reasoning	<i>Heuristic analogy</i> The extension of ideas and assumptions from other contexts into management studies for the purpose of suggesting new and alternative assumptions	<i>Spotlight counterfactual</i> The challenging of default assumptions through contrastive questioning	<i>Theory building</i> The development of new constructs in relation to a target phenomenon, possibly through rewriting default assumptions around a target phenomenon in alternative terms	<i>Heuristic analogy:</i> Bacharach (1989), Boxenbaum and Rouleau (2011), Shepherd and Sutcliffe (2011), Weick (1989) <i>Spotlight counterfactual:</i> Alvesson and Sandberg (2011), Oswick et al., (2011)
Causal reasoning	<i>Causal analogy</i> The extension of causal models from other contexts into management studies for the purpose of suggesting new hypotheses and explanations	<i>Lab-rat counterfactual</i> The identification of important causal factors and causal patterns through contrastive questioning and testing	<i>Qualifying theory</i> The development and refinement of explanations of a target phenomenon by reducing the causal field of factors around a target phenomenon to a more parsimonious set	<i>Causal analogy:</i> new <i>Lab-rat counterfactual:</i> Durand and Vaara (2009), Tsang and Elsaesser (2011),
Constitutive reasoning	<i>Constitutive analogy</i> The alignment and integration of management constructs with constructs from other contexts for the purpose of providing an integrated conceptual model with coherence in its base assumptions, default logic, and hypotheses	<i>Constitutive counterfactual</i> The alignment and integration of a default theory with an imagined counter-alternative model with attendant assumptions and a causal logic	<i>Theory expansion</i> The insertion of a radically new theoretical perspective and vocabulary for advancing our understanding of a target phenomenon	<i>Constitutive analogy:</i> Cornelissen (2005), Morgan (1980), Okhuysen and Bonardi (2011), <i>Constitutive counterfactual:</i> new

Counter-factual reasoning: imagining alternative hypothetical scenarios which serve as foils to a received or orthodox theory (Folger & Thurillo, 1999; Tsang & Elsaesser, 2011).

Folger and Thurillo (1999: 745); “thought experiments thereby zero in on problematic assumptions and help theorists to construct imaginary worlds to draw out implications of new assumptions”.

Tsang and Elsaesser (2011): counter-factual reasoning may help in establishing causality by contrasting a given theoretical explanation of an actual scenario with a reasonably different imagined explanation so as to isolate some causal factors from others in the actual situation of interest and to determine precise causal relations (see also Durand & Vaara, 2009).

Reflective exercise

- What analogies or counter-factuals do you use in your study
- At what level?
- Is the reasoning coherent, in terms of underlying assumptions and logic?
- What new candidate inferences does it provide?