STANDING ON THE
SHOULDERS OF GIANTS

RESEARCH METHODOLOGY IN STRATEGY AND MANAGEMENT

Series Editors: Brian Boyd, T. Russell Crook, Jane K. Lê and Anne D. Smith

Recent Volumes:

STANDING ON THE SHOULDERS OF GIANTS: TRADITIONS AND INNOVATIONS IN RESEARCH METHODOLOGY

EDITED BY

BRIAN BOYD

City University of Hong Kong, Hong Kong

T. RUSSELL CROOK

Haslam College of Business, University of Tennessee, USA

JANE K. LÊ

WHU - Otto Beisheim School of Management, Germany

ANNE D. SMITH

Haslam College of Business, University of Tennessee, USA

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ABOUT THE AUTHORS

Chahrazad Abdallah is Associate Professor at Singapore University of Social Sciences (SUSS). Her research focuses on Strategy and Creativity as ambiguous discursive practices in pluralistic organizations and on doing and writing process research. Her most recent publications appear in The Routledge Companion to Qualitative Research in Organization Studies and the Sage Handbook of Qualitative Business and Management Research Methods.

Federico Aime is the Spears Chair of Business Administration in the Spears School of Business at Oklahoma State University. His research on social psychological drivers of organizational decision making and performance appears in journals like the *Academy of Management Journal, the Strategic Management Journal, and the Academy of Management Annals.*

Donald D. Bergh holds the Louis D. Beaumont Chair of Business Administration and is Professor of Management at the Daniels College of Business of the University of Denver. His research interests span research methods and strategic management.

Brian K. Boyd (bkboyd@cityu.edu.hk) is Chair Professor and Head of Management of the City University of Hong Kong College of Business. He has served multiple terms as Associate Editor at Organizational Research Methods, and has held multiple methods leadership roles. He has also served on many editorial boards, including AMJ, JOM, and SMJ.

T. Russell Crook (trc@utk.edu) (PhD, Florida State University) is the First Tennessee Foundation Professor in the Haslam College of Business at University of Tennessee. He has published over 35 papers, involving topics on research methods and those related to why some firms perform better than others.

Kathleen M. Eisenhardt (PhD, Stanford) is the S. W. Ascherman M.D. Professor at Stanford University. Her research is at the nexus of strategy and organization theory, with emphasis on strategy in new markets, use of heuristics in strategy, and creating entrepreneurial firms.

Dennis A. Gioia is the Robert and Judith Auritt Klein Professor of Management in the Smeal College of Business at Penn State University. Previously he worked as an engineer for Boeing Aerospace at Cape Kennedy during the Apollo program and for Ford as corporate recall coordinator. Current theory/research focuses on the ways in which identity and image relate to sensemaking, sensegiving and

organizational change, and also focuses on the development of a systematic approach to inductive research.

Aaron D. Hill (PhD, Oklahoma State) is on faculty of the Warrington College of Business at the University of Florida. His research addresses strategic leadership and governance as well as corporate political activity and appears in the Academy of Management Journal, Strategic Management Journal, and Journal of Management, amongst others.

David J. Ketchen, Jr. serves as a Harbert Eminent Scholar and Professor of Management at Auburn University. He has published more than 160 articles in scholarly journals. Auburn University recently gave him both The Southeastern Conference Faculty Achievement Award and the university's top research award.

Eric Knight is Associate Professor of Strategic Management and Innovation at University of Sydney Business School, Australia. His research focuses on how organizations formulate and implement strategies in the context of tensions arising from strategic change and regional innovation. He adopts qualitative methodologies often deploying a social practice theory perspective. His work has been published in such journals as Strategic Management Journal, Organization Studies, and Human Relations. He currently serves as Associate Program Chair of the Strategy Practice division of the Strategic Management Society.

Ann Langley is Professor of Management and Chair in Strategic Management in Pluralistic Settings at HEC Montréal. Her research focuses on organizational change, leadership, and strategic processes and practices in pluralistic settings, with an emphasis on qualitative research approaches. She is co-editor of the journal *Strategic Organization*, and co-edits a book series *Perspectives on Process Organization Studies* (published by Oxford University Press) with Haridimos Tsoukas. She is Visiting Professor at the University of Gothenburg and Adjunct Professor at Université de Montréal.

Jane K. Lê (jane.le@whu.edu) holds the Chair of Strategic Management at the WHU – Otto Beisheim School of Management. She studies practices and processes in organizations in order to better understand how multiple complex and competing demands are managed. She is passionate about qualitative research and qualitative research methods, and is an editorial board member of Organizational Research Methods.

Petteri T. Leppänen is a PhD candidate in Strategic Entrepreneurship at Technical University of Munich. His research focuses on new business creation, strategy development, and organizational design choices. Specifically, he is interested in the combinative and sequential patterns of entrepreneurial activities as determinants of firm performance.

Maria Lusiani is Assistant Professor in Business Administration at Ca' Foscari University of Venice. Her research deals with planning processes in complex organizations, ranging from the arts field to the healthcare field, with a focus on

profession-management tensions and the role of management tools, from a practice-based perspective and through qualitative research methodologies.

Aaron F. McKenny is an Assistant Professor of Management at the University of Central Florida. His research is primarily focused in entrepreneurship and strategic management with a special emphasis on the involvement of social and other non-economic phenomena in organizational settings (e.g., crowdfunding, social entrepreneurship, family business).

Sotirios Paroutis is Professor of Strategic Management at Warwick Business School, UK. His research interests lie at the intersections of strategy practices and processes in complex firms, with emphasis on the discursive, cognitive and visual activities organizational actors employ when dealing with strategic tensions.

Oleg V. Petrenko is an Assistant Professor of Management in the Rawls College of Business at Texas Tech University. His research interests are on organizations' upper echelons, and he has published articles in *the Strategic Management Journal, Personnel Psychology, and Organizational Psychology Review.* He received his PhD from Oklahoma State University.

Jason W. Ridge received his PhD from Oklahoma State University. His research interests span two areas within the strategic management literature, corporate political activity and strategic leadership, and has been published in premier journals such as the Academy of Management Journal, the Strategic Management Journal, and the Journal of Management.

Torsten Schmid is an Assistant Professor for Qualitative Methods at the University of St. Gallen, Switzerland. His work centers on strategic change processes, with particular emphasis on multi-business firms and the role of top and middle management. He works predominantly with qualitative methodologies and a social practice theory perspective.

Jeremy C. Short is the Rath Chair in strategic management in the Price College of Business at the University of Oklahoma. His research focuses on multilevel determinants of organizational performance, crowdfunding, strategic decision processes, entrepreneurship, franchising, family business and research methods. Short has served as an associate editor for Journal of Management and Family Business Review and a guest editor for Entrepreneurship Theory & Practice, Family Business Review, Organizational Research Methods and Journal of Management. His work has appeared in outlets such as Strategic Management Journal, Strategic Entrepreneurship Journal, Academy of Management Journal, Organization Science, Journal of Business Venturing, Organizational Research Methods, Organizational Behavior and Human Decision Processes, Journal of Management, Entrepreneurship Theory & Practice and Personnel Psychology. Jeremy has also coauthored a low cost strategic management textbook, Mastering Strategic Management along with graphic novel works in management and franchising.

Anne D. Smith (asmith51@utk.edu) (BS, U Virginia; PhD, UNC-Chapel Hill) is the King and Judy Rogers Professor in Business and Head of Management Department, University of Tennessee. Her research focus is qualitative methods, primarily textual analysis. She is the former Associate Editor (current board) at Organizational Research Methods and CARMA fellow.

ACKNOWLEDGMENTS

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WHY RESEARCH METHODOLOGY IN STRATEGY AND MANAGEMENT REMAINS AS IMPORTANT AS EVER

Jane K. Lê, Anne D. Smith, T. Russell Crook and Brian K. Boyd

ABSTRACT

In this volume, we take the baton from previous editors Dave Ketchen and Don Bergh in the Research Methodology in Strategy and Management series. Our approach is to stand on the shoulders of these editors and authors who have published in the series. So, we begin, in this chapter, by highlighting innovative work published in this volume that has provided actionable and practical suggestions for problems researchers face in their work. We briefly describe the chapters, including the first two chapters in this volume from Kathleen M. Eisenhardt and Dennis Gioia, and introduce new methodologies and tools to guide researchers in their efforts to build high quality, publishable work. We also describe future work that, in our view, needs to be addressed for the fields of strategic management in particular and management more generally to continue to evolve.

Keywords: Research methods; qualitative; quantitative; methodological innovation; rigor; contribution; strategic management

> *If I have seen further it is by standing on ye shoulders of Giants.*
>
> Isaac Newton, (1675)

We are honored to be taking forward the excellent Research Methodology in Strategy and Management (RMSM) book series created by Donald Bergh and David Ketchen, Jr. in 2004. It was their vision to "provide a forum for critique,

commentary, and discussion about key research methodology issues in the strategic management field" (Ketchen & Bergh, 2004, p. IX). They delivered on this vision by seeking chapter contributions from renowned and emerging scholars with methodological expertise across various approaches that could advance strategic management. The result was a book series on methodology whose impact was far beyond the strategy field, with several of the contributions becoming seminal reading. We, the editorial team, can certainly look at our (virtual) bookshelves to find work from this series that has inspired the way we do research and the way we teach methods. We are each passionate about methods and see great value in extending this series and building on shoulders of giants. We are also now in a place in our respective careers where we see this book series as an opportunity to give back to the community by encouraging field-changing excellence and innovation in methods.

In particular, we see RMSM as an essential outlet for contributions about important and timely methodological issues in the strategy *and* management fields. Our key focus is on encouraging innovative work that provides actionable and practical suggestions that solve important problems researchers face in their work. We see the RMSM book series as an important way to develop methodological resources and discourse that address current and future challenges. In so doing, we acknowledge the diversity of the strategy and management fields, spanning micro *and* macro levels of analysis, exploratory *and* confirmatory research designs, qualitative *and* quantitative data, and positivistic, interpretive, *and* critical orientations.

For us, it is important to continue building on the methodological progress that has been made. Herein we want to make sure that a wide variety of approaches have a seat at the table, which means encouraging contributions conducted in the positivistic, interpretive, and critical traditions (see Lê, & Schmid, this volume). We welcome quirky, longer contributions that might not have a natural fit elsewhere because of format, length or novelty. We also welcome brief overviews or research notes. If you look across this volume, you will see that we are not bound by format constraints in the same way other outlets are − which gives us and our contributors room for creativity. We want to use this creativity in a way that complements existing outlets, for instance by allowing for more extensive treatment of topics and trialing innovative formats for presenting methodological ideas. When you read the chapters in this volume, you will not find a standard "cookie cutter" format replicated across them. Rather, we encourage unique formats of expression.

In this first volume of the revived series, it is our ambition to build on some of the outstanding work this series has produced over the years and use this as a means to look forward. We want to give voice to the past by recognizing this work and introducing the reader to some of the "greatest hits" this series has produced (see Table 1). We have also invited the authors of some of the most cited RMSM contributions to contribute new chapters in order to see where their current thinking has moved and what the fields of strategy and management can learn from this. In line with existing tradition, we have also asked seminal scholars to contribute key thinking pieces. And, of course, we feature the

Table 1. RMSM "Greatest Hits."

Authors	Title	Year	Vol	Citations
Combs, J. G., Crook, T. R., & Shook, C.	*The Dimensionality of Organizational Performance and Its Implications for Strategic Management Research*	2005	2	428
Podsakoff, N.P., Shen, W., Podsakoff, P.M.	*The Role of Formative Measurement Models in Strategic Management Research: Review, Critique, and Implications for Future Research*	2006	3	84
*Hitt, M.A., Boyd, B.K., Li, D.	*The State of Strategic Management Research and a Vision of the Future*	2004	1	55
*Langley, A., Abdallah, C.	*Templates and Turns in Qualitative Studies of Strategy and Management*	2011	6	46
Felin, T., Foss, N.	*Individuals and Organizations: Thoughts on a Micro-Foundations Project for Strategic Management and Organizational Analysis*	2006	3	36
Bowen, H.P., Wiersema, M.F.	*Modeling Limited Dependent Variables: Methods and Guidelines for Researchers in Strategic Management*	2004	1	29
Slater, S.F., Atuahene-Gima, K.	*Conducting Survey Research in Strategic Management*	2004	1	28
Williams, L.J., Gavin, M.B., Hartman, N.S.	*Structural Equation Modeling Methods in Strategy Research: Applications and Issues*	2004	1	25
Shaver, J.M.	*Interpreting Empirical Results in Strategy and Management Research*	2007	4	23
Baum, J.A.C., McKelvey, B.	*Analysis of Extremes in Management Studies*	2006	3	22
Ganco, M., Hoetker, G.	*NK Modeling Methodology in the Strategy Literature: Bounded Search on a Rugged Landscape*	2009	5	21
Wiseman, R.M.	*On the Use and Misuse of Ratios in Strategic Management Research*	2009	5	19
Barr, P.S.	*Current and Potential Importance of Qualitative Methods in Strategy Research*	2004	1	18
Ridder, H.-G., Hoon, C., McCandless, A.	*The Theoretical Contribution of Case Study Research to the Field of Strategy and Management*	2009	5	17
Bednar, M.K., Westphal, J.D.	*Surveying the Corporate Elite: Theoretical and Practical Guidance on Improving Response Rates and Response Quality in Top Management Survey Questionnaires*	2006	3	15
*Boyd, B.K., Gove, S.	*Managerial Constraint: The Intersection Between Organizational Task Environment and Discretion*	2006	3	15

Table 1.   (*Continued*)

Authors	Title	Year	Vol	Citations
Venkatraman, N., Tanriverdi, H.	*Reflecting "Knowledge" in Strategy Research: Conceptual Issues and Methodological Challenges*	2004	1	15
Greve, H.R., Goldeng, E.	*Longitudinal Analysis in Strategic Management*	2004	1	14
Hochwarter, W.A., Ferris, G.R., Hanes, T.J.	*Multi-Study Packages in Organizational Science Research*	2011	6	13
Schwab, A., Starbuck, W.H.	*Null-Hypothesis Significance Tests in Behavioral and Management Research: We Can Do Better*	2009	5	13
Wright, R.P.	*Rigor and Relevance Using Repertory Grid Technique in Strategy Research*	2006	3	13
Lajili, K., Madunic, M., Mahoney, J.T.	*Testing Organizational Economics Theories of Vertical Integration*	2007	4	11
Martin, X., Swaminathan, A., Tihanyi, L.	*Modeling International Expansion*	2007	4	10
Miller, C.C., ogilvie, d., Glick, W.H.	*Assessing the External Environment: An Enrichment of the Archival Tradition*	2006	3	10
Hult, G.T.M., Ketchen Jr., D.J., Cui, A.S., Prud'homme, A.M., Seggie, S.H., Stanko, M.A., Xu, A.S., Cavusgil, S.T.	*An Assessment of the Use of Structural Equation Modeling in International Business Research*	2006	3	10

Note: *Work by members of author team also featured in this volume (Abdallah et al.; Hill et al.; Ketchen et al.).

work of new emerging scholars that explores new methodological tools (see, for instance, Knight & Paroutis on visual methods, this volume).

It is really our ambition to bring methods back into focus. As members of our editorial board aptly said in their reflections: "Social science methods need to be taught to OB, OT and strategy students otherwise they end up without a strong understanding of *human* research methods." That means moving away from "boilerplates for conducting and presenting analytic work" in favor of "scientific creativity of action." That is because, ultimately, good research does not mean using the most "recent and complex methods," but actually generating interesting research that has congruence between research objectives and methods; offers transparency; and meets quality criteria appropriate to the method. We encourage such a focus in this book series and welcome contributions from authors who do the same.

WHAT'S NEW?

As we hint at above, an impetus to continue this RMSM edited book series was to provide a space for experimentation − one that tries novel formats, offers diverse

voices, and discusses innovative methods. We want to push the boundaries not only in thinking about methods and doing methods but how we talk to each other through this edited book medium. To this end, in this volume, we have tried some experiments that, we hope, engage the reader and lead to new insights.

Keynote Contributions

First, we decided to tap into a fantastic resource: keynote addresses at the *Academy of Management* (AOM) Annual Meeting. For instance, the Strategizing, Activities, and Practices interest group has had such distinguished scholars as Robert Burgelman, Dennis Gioia, Kathleen Eisenhardt, Jean Bartunek, Henry Mintzberg, and Ted Schatzki give keynote addresses over the years. While these were amazing speeches, only a small number of people were able to attend during the busy Academy meetings. Hence, we decided to share some of these speeches, initially selecting Dennis Gioia and Kathleen Eisenhardt (see Hill et al., & Kitchen et al., this volume) to see if they would be willing to mold their ideas from these speeches into chapter-length contributions. They were both open to reshaping their speeches into contributions. We started by having each presentation professionally transcribed and copyedited. The contributions were then reviewed by two RMSM editorial team members and revisions were made to produce the final pieces you see in this volume. When you think about the volume of interviews, panels, and speeches that exist online or in archives, there is a strong likelihood that these contain important contributions. For instance, the 2015 award-winning *Organizational Research Methods* (ORM) paper by Walsh, Holton, Bailyn, Fernandenz, Levina, and Glaser (2015) also has its origins in a transcribed AOM panel. Inspired by these ideas, and recognizing the benefit of bringing existing conversations and interviews into broader readership, we created the "keynote contributions" format. Our hope is that future contributions to RMSM volumes will tap into rich existing archival resources in innovative ways in order to bring interesting themes and ideas to a wider audience.

Visual Elements

Second, even though images are one of the most powerful forms of communication, they only rarely find their way into our methodological articles or published strategy and management papers (Bansal & Corley, 2011; Price, Gioia & Corley, 2008). In this volume, we make a concerted effort to bring in the visual into the fold in two ways. One way was to include chapters in this book about visual media and research. To be specific, Eric Knight and Sotirios Paroutis contributed a chapter on visual methods (p. 77). In their chapter, they review various ways in which researchers can conceptualize visual materials and the implications these conceptualizations have for the ways that we conduct research. Similarly, in their chapter, Hill et al. talk about the value of studying moving images and suggest one particular approach — videometric measurement — that holds much promise for the study of strategy and management. And, of course, another way to include images is by actually including images, which we discuss next.

On the Bookshelf

Third, we will introduce a "on the bookshelf" feature. In these short articles, we plan to reproduce images of eminent scholars' bookshelves, prompted by the question, "What's on your bookshelf?". We showcase the image scholars share with us alongside their explanation of why they continues to reserve precious space in her office for books and the importance of these resources in their ongoing research. Alongside these more detailed explorations, we also use this section to profile the books that many of our distinguished RMSM editorial board members identified as important. While we won't have images of all of their bookshelves, we hope descriptions will allow you to "see" the ragged used referenced books that they mentioned in contributions to this section. While many academics are moving toward fewer atoms and books on the shelf, other academics hold onto classics. We plan to develop this new "on my bookshelf" format and perhaps even move beyond it by more broadly looking at how prolific researchers work, showcasing their work space, practices, tools, etc. Submissions that resonate with these themes of images, spaces, and books are welcome by us in order to advance our desire to push boundaries.

Prospective Retrospectives

Fourth, we look back and project forward by drawing on some of the excellent work published in previous volumes of RMSM. We rarely take the time to look back what we published and its impact or how our thinking has changed over time. Wishing to address this, we asked authors of highly cited RMSM chapters to reflect back on their articles and write new contributions building on that work either directly or indirectly. We see this with Chahrazad Abdallah and Ann Langley taking forward their much cited "template and turns" piece, together with Maria Lusiani, by turning their focus toward the different ways in which authors "perform" process research. Another example is the research design canvas piece by David Ketchen, Donald Bergh and Brian Boyd, which takes forward ideas from multiple previous papers. These chapter treatments allow for in-depth reflections and ruminations that may not perfectly fit other outlets. We also welcome new work in this area, work that maps the state of the existing literature and signals promising ways forward. For instance, Lê and Schmid's review of qualitative methods in strategy provides a comprehensive overview of the works published in top journals over the past 17 years, using this as inspiration to look forward.

Contemporary Methods

Last but not least, we include chapters featuring contemporary methods in this volume. This includes treatments of the increasingly popular qualitative comparative analysis (QCA; see Leppänen, McKenny, & Short, this volume). We hope this signals our openness to chapter treatments of other novel methods, including, but not limited to, specific research methodologies, coding techniques, statistical analyses, and research training approaches. We believe that truly novel

contributions happen at the intersection of rigor and innovation, so we welcome chapters introducing new approaches, critiquing and adapting existing approaches, and refining established methods.

(Method) Book Reviews

As the volume of books on research has increased, one thing that we have noticed is that there are fewer and fewer reviews available for researchers to glean insights into what the next book on their bookshelf should be. We would like to fill this marketspace, so are also amenable to syntheses of books that describe strengths and weaknesses and provide a compelling reason for buying (or not buying) a particular book. We think there is a place for book reviews that are unbiased, peer-reviewed, and interesting!

WHERE TO FROM HERE?

We want RMSM to continue to be an encyclopedia of methods knowledge − a "go to" resource for researchers in strategy and management to learn and grow from. That is why we actively encourage submissions of RMSM chapters by past, current, and new authors. In order to inspire these potential authors, we would like to provide some suggestions for potential contributions based on opportunities we currently see in the field. The first set of opportunities stems from a fundamental paradox in management research: On one hand, comments from our editorial board members suggest that there are pervasive problems with the infrastructure of research practices. Concurrently, however, researchers are confronted with a wealth of sophisticated research tools − e.g., meta-analytic effect size repositories; sophisticated tools to analyze text, images, and videos; drop-and-drag causal modeling; and the ubiquitous presence of big data. We believe that future RMSM chapters can be equally influential by focusing on the Next Big Thing or by providing action-oriented advice on fundamental topics. If in doubt, sound us out!

Methods Flaws

One area in which there continues to be significant room for improvement is the highlighting and, ideally, correction of flaws in existing methods. There is substantial evidence supporting concerns by our editorial board members and others regarding the rigor of management research. Bergh, Perry, and Hanke (2006), for example, reported that relatively few macro studies addressed threats to validity − e.g., most samples in strategic management articles were convenience-based, with no evidence of representativeness. A more recent analysis of micro studies drew similar conclusions − a wealth of design concerns was found in reviewer letters, as well as frequent problem with measurement, use of control variables, and related issues (Green, Tonidandel, & Cortina, 2016). It is critical that we continue to surface such issues in order to appreciate limitations to our claims *and* move forward as a field by improving research design.

Research Training

We also welcome chapter contributions that address issues relevant to research training. We see this as a major and highly generative area for improvement. We have known for many years that constraints on doctoral methods training threaten validity. Indeed, nearly two decades ago, most recent doctoral graduates reported having little confidence in their ability to use key methodological tools (Shook, Ketchen, Cycota, & Crockett, 2003). This may be partially due to the unchanging nature of doctoral programs. For instance, Aiken, West, and Millsap (2008) characterized doctoral training in psychology as largely unchanged since the 1960s. More recently, Aguinis and colleagues (2018) note that concerns around methods training are pervasive among editorial board members, echoing an earlier point by Bergh and colleagues (2006). As a result, there is a pressing need for chapters that can supplement gaps in training and help clarify best practices in different topic areas. Several of the most influential RMSM chapters explore problems and offer recommendations on a variety of key topics, including macro survey work (Bednar & Westphal, 2006), misuse of ratio variables (Wiseman, 2009), and the application of SEM in international business studies (Hult et al., 2006). We would love to see more work like this!

Methodological Innovation

Another type of contribution we invite are chapters that either examine a novel method or apply a method that has largely been used outside of the realm of management. Examples from Table 1 include repertory grid modeling (Wright, 2006) and NK modeling (Ganco & Hoetker, 2009). Generally, strong contributions of this type of chapter will provide conceptual and empirical illustrations; demonstrate comparative benefits relative to existing methodologies; and offer specific and actionable guidance for implementing these tools. Again, Wright (2006) is a strong example of this format − his paper offers a conceptual discussion, an empirical analysis, and a detailed framework for conducting repertory grid analysis.

Areas of Contention

We also welcome contributions that deal with areas of methodological controversy. In particular, we invite chapters that examine methodological topics characterized by ambiguity, lack of consensus, or even disagreement. For example, consider two closely related topics in structural equation modeling: partial least squares (PLS) modeling and formative indicators (FI). PLS is viewed as an alternate approach to structural modeling in the face of small samples, non-normal data, and related issues. Formative indicators are often used in conjunction with PLS and reverse traditional logic associated with constructs and indicators − e.g., rather than having a latent construct whose indicators are reflective of this unobserved phenomenon, formative indicators "drive" the ensuing construct. In a traditional factor model, the arrows show causality flowing from the construct to the indicator. In an FI model, the directionality is

reversed. The dual issues of PLS and formative indicators are highly divisive among management scholars. On one hand, they have been billed the silver bullet to resolve an array of methodological issues. On the other, each approach has been characterized as fundamentally flawed (see Diamantopoulos & Siguaw, 2006; Edwards, 2011; Ronkko, McIntosh, Antonakis, & Edwards, 2016; and Hair, Sarstedt, Pieper, & Ringle, 2012 for representative perspectives of each side of the debate). We believe that the chapter format of RMSM is particularly well suited to addressing these types of scholarly disagreement. Indeed, there may be little surprise that one of the most influential chapter of RMSM series to date is the paper by Podsakoff, Shen, and Podsakoff (2006) on formative indicators. Another interesting area is endogeneity, as it elicits polar opposite responses. While one of our editorial board members said that "I used to worry that endogeneity was trotted out at every turn to kill papers, it is [a] real [problem]," another lamented the "overzealous endogeneity policing […] which has narrowed the range of accepted methods while diluting the content of major strategy journals." We would love to see papers that engage in such debates!

ON METHODOLOGICAL PET PEEVES

As we thought more deeply about the future of the RMSM book series and the direction in which we wanted to take it, we reached out to our esteemed editorial board and asked some questions to guide our thinking. Our board is represented by outstanding researchers who would likely identify as either quantitative or qualitative in their methods orientations (see Board Membership on inset). Using two prompts, we generated additional areas of opportunity for future papers that we would like to see published in the series. Specifically, we asked: (1) What irritations or skepticisms are common reasons for rejecting a paper?, and (2) What are your current worries about research methods? Perhaps surprisingly, we found that there was much commonality across the irritations, skepticism and worries from both qualitative and quantitative researchers. We believe this common ground is worth exploring.

Unforced (Common) Errors

One of the core reasons for rejecting a paper is what tennis players refer to as "unforced errors." These errors represent areas that can be easily corrected and, with a little extra time, can be avoided by researchers. For example, one editorial board member responded that they mainly reject papers when, after reading the paper, they think to themselves, "I have no idea what you've done here" and are left feeling that more explanation is needed about the sample selection, choice of measures, and analytical technique. Other editorial board members were also tired of authors using buzzwords and making generic statements such as "we used the Gioia method for data analysis" without describing what they actually did. This is closely linked to an issue that is beginning to take center stage in methodological debates: transparency, which is defined as "the degree of detail and disclosure about the specific steps, decisions, and judgment calls

made during a scientific study" (Aguinis, Ramani, & Alabduljader, 2018, p. 1). Lack of transparency is especially problematic as many researchers have been unable to successfully replicate others' work using similar data (e.g., Berry & Kaul, 2016; see Aguinis et al., 2018 for guidance on how to resolve this issue). Others pointed out the lack of fit between theory and empirics and "thin" empirical models. Still, perhaps the biggest reasons for rejection were either not understanding a paper's contribution or overselling the contribution. To the extent that these errors are "unforced," we see opportunities for future papers that help researchers improve in these areas. For instance, a chapter might highlight some of the common "pitfalls" in using a particular method and provide guidance on how to address these.

Operating beyond the Knowledge Border

Another key concern for the experienced methodologists on our editorial board is the increasing (and often unnecessary) sophistication of research design. In particular, there was concern that "people don't know what the heck they are doing with these advanced point-and-click tools." Given the increased specificity, there was concern that this might generate serious problems for authors and reviewers alike, "I worry that there are all kinds of neat things that you can do and not many people know what these procedures do" and that just because software exists to guide the process "[it] doesn't mean you can't screw it up." So, understanding the techniques and the software that supports it, as well as the reasons for engaging in such techniques, is critical for the integrity of the field.

Losing Sight of the Goal

In part as a result of these issues, there sometimes appears to be little "deep thinking about exactly what you are finding and why." As a field, this has led to more of a "boilerplate" mentality for conducting and presenting research, striving for lines on CVs over quality work. Given these concerns, there is much work to be done, and we see RMSM playing an important role in this area. However, at the fore of all of our research work lies the quest for knowledge. It is our responsibility to ensure that we engage in this quest in a meaningful way. Indeed, it is our hope that RMSM papers can act as resources to guide future researchers in designing their studies in ways that address these issues and generate more meaningful research.

Boilerplates and Default Preferences

We also want to highlight an issue that we see as a key field issue in macro organizational inquiry. Foreshadowed by the criticisms and concerns of our board members, along with what we have seen ourselves, these issues appear to be "having a hammer and treating everything as if it is a nail." One result of this mentality is demanding that, as reviewers and editors, everything be done a particular way (e.g., using instrumental variables to examine potential endogeneity or insisting on a Gioia display of first- and second-order concepts when that

does not fit the qualitative methods used). We would welcome papers that trace the rise in use in certain "hammers" or methodological approaches which then tip into mindless or inappropriate application. Making more scholars aware of these uses and tendencies would be an area that RMSM would be well suited.

Ethics of Research Practice

Another one of our key concerns is what O'Boyle, Banks, and Gonzalez-Mulé (2017) refer to as questionable research practices. They found that many results found in dissertations were different from results that were published in journals based on the same datasets used in the dissertation. Drawing on the metaphor of how (less attractive if not ugly) caterpillars transform into beautiful butterflies, or the "Chrysalis Effect," they rightfully question how so many non-results found in dissertations later became "significant" in published work. While potentially problematic, we caution against making accusations about authors and teams that have published such work. We do not know what drives this dynamic but are well aware that many discussions happen "behind the scenes" of review processes, where authors and review panels use the response process to discuss methodological details. Additionally, journal space is limited and, as all authors can contest, we are often told to "cut down on the detail" to get a paper to comply with article-length restrictions (e.g., one of the editors once published an entire methods section as an online appendix – see Lê & Jarzabkowski, 2015a, b). There may thus be harmless explanations for these changes, at least in some of the cases. Nevertheless, we continue to see a place for resources that reveal such research practices in detail, so that questions about such practices can be resolved by researchers who would like to assess an individual article's evidence.

Thus, we are open to additional work in a number of areas, including but not limited to (1) common misuses or mindless application of current tools and key steps researchers can take to better understand how to use the tools more effectively, (2) level of analysis issues and how much or how little has been done since Rousseau's (1985) pioneering work, (3) a revised checklist of what needs to be in papers that build on Bem's (1987) work, etc., and (4) perhaps a paper that is similar to Dick Daft's (1995) paper on "why I rejected your paper and what you can do about it."

CONCLUSION

In Kuhn's (1962) classic model of scientific progress, fields advance only by continually questioning conventional wisdom and prescriptions for best practices. While more attention is typically placed on debate over theory, Kuhn (1962) noted that methods must advance as well. We see future RMSM volumes as an opportunity to stimulate such debate and further advance the ability of management scholars to ask interesting, rigorous, and innovative questions.

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