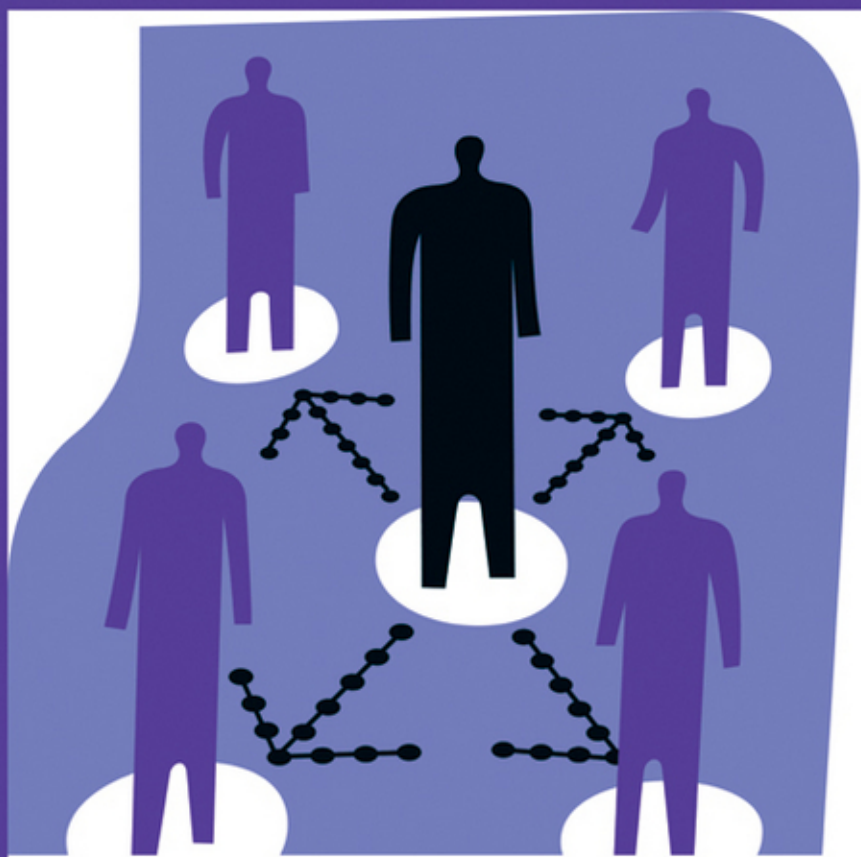


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MANAGEMENT AND ORGANIZATION THEORY




JEFFREY A. MILES

Management and Organization Theory

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Management and Organization Theory

A Jossey-Bass Reader

Jeffrey A. Miles

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Introduction

The purpose of this book is to educate students, faculty members, researchers, practicing managers, and consultants about the past and future directions of the forty most important theories in the field of management and organization. Those who are new to the field can use this book as a valuable tool to learn about its depth and scope, and those who have experience with management and organization theories can refresh their knowledge about those they already know and also learn about new theories that are not in their repertoire.

After reading this book you will be able to: (1) name and describe the forty most important management and organization theories; (2) know both the strengths and weaknesses of each theory; (3) conduct your own research studies by examining one or more of the hundreds of suggestions for further research presented in the book; (4) locate measures and questionnaires from online sources for measuring important variables in each theory; (5) know the five most important references for each of the theories; and (6) help your organization be more effective by applying the major concepts from each theory in your organization.

Theories

Theories are very useful tools that help us accomplish many important outcomes and objectives in an academic field of study. They help us to: (1) organize our thoughts and ideas about the world; (2) generate and explain relationships and interrelationships among individuals, groups, and entities; (3) improve our

predictions and expectations about people, groups, and organizations; and (4) achieve better understanding of the world (Hambrick, 2007).

There is little agreement on a single, universal definition of theory (Abend, 2008). This lack of consensus may explain why it is so difficult to develop strong theories in the social and behavioral sciences (Sutton & Staw, 1995). For this book, I define theory as a statement of constructs and their interrelationships that shows how and why a phenomenon occurs (Corley & Gioia, 2011). A theory can be any coherent description or explanation of observed, experienced, or documented phenomena (Gioia & Pitre, 1990).

Good theories must contain four essential elements: (1) what, (2) how, (3) why, and (4) who, where, and when (Whetten, 1989). I explain each of these four essential elements in the next sections.

“What” Elements of a Good Theory

Theories help us explain phenomena or patterns. In theory development, researchers observe and then write about interesting phenomena and facts. When documenting, describing, and explaining these phenomena and facts, researchers must select and include the most important factors. These important factors have been called constructs or concepts, and are the “what”—the major building blocks, the primary elements—in good theories.

Researchers cannot include all possible factors derived from their observations, so they must decide which factors are the “right” factors to be included in a theory and which should be excluded. Researchers should strive to include all possible factors (be comprehensive), but should also strive to include only those factors that provide additional value to the theory (be parsimonious). Generally, researchers tend to include many factors in the early stages of theory development and then, through research studies and findings, delete unnecessary or irrelevant constructs.

“How” Elements of a Good Theory

After a list of constructs has been identified in a theory, the next step in theory building is to describe how the constructs are

related and interrelated. Usually, researchers describe these relationships in text form and then operationalize them by drawing diagrams or models of them. In creating a conceptual diagram of a theory, researchers draw a box for each construct and then draw arrows showing how specific factors might influence other constructs in the theory. The arrows among boxes in a conceptual diagram help delineate patterns and flows of direct and indirect influences of constructs on other constructs in the theory.

After a theory is initially depicted in a diagram, further research is then relied on to test out the actual relationships among all the constructs. Constructs and their relationships and interrelationships are retained in theories when research supports them, but are removed when research does not support them.

“Why” Elements of a Good Theory

Taken together, the what and how elements of a theory make up the domain, or the subject of the theory. The “why” parts of a theory help explain the relationships among the what and how elements. More specifically, the why elements help explain underlying psychological, economic, and social dynamics of the constructs and the proposed relationships of those factors.

The why parts of a theory include the researcher’s assumptions. These assumptions are the theoretical glue that holds together all the parts of the theory. In good theory, the researcher clearly describes the logic used to explain why the elements of the theory fit together as they do. Good theories help expand and broaden our knowledge by providing compelling and logically stated reasons that justify the whys underlying the what and how parts of a theory.

Researchers combine the what and how elements of a theory into a model from which testable propositions are derived. Propositions are statements that explain why the constructs of a theory influence each other as they do. The basic elements of a theory are constructs, and the propositions explain the relationships and influences among those constructs.

Researchers test out the propositions of a theory in research studies to determine if real-world or laboratory data support them. Some researchers refer to propositions in a research study

as hypotheses. In a research study, researchers create a working, or operational, definition of a construct, which is called a variable. The variables are measured and data are collected using survey instruments. Researchers then use statistical methods to assess the strength of the research variables and hypotheses in their study in order to support or refute the constructs and the propositions in a theory. Through careful, logical, and systematic research studies, researchers can find support for the constructs and the propositions in a theory or can revise and restate the theory when support for its constructs and propositions is not found.

The “Who, Where, and When” Elements of a Good Theory

The what, how, and why elements of a theory will never hold for all possible conditions. Researchers need to specify the boundaries and constraints that limit the generalizability of theories. For example, the limitations of a theory might include temporal, contextual, and geographical factors. For instance, will the theory hold for American women working in the summer and also hold for Chinese men working in the winter?

When first developing a theory, researchers are unlikely to be able to specify all of the possible who, where, and when factors. However, through careful and logical thought, they should be able to specify an initial list of boundaries and constraints for a theory. Subsequent research studies and their findings are then used to test those boundaries and constraints and to offer additional ones that were not initially stated by the theorist. Subsequent research studies and findings are also used to eliminate boundaries and constraints when no research support is found for them to stay in the theory.

In addition to containing the four essential elements, good theories must also contain well-created constructs. This next section describes good constructs.

As noted, a theory is a system of constructs that are related to each other by propositions (Bacharach, 1989). Constructs tend not to be real observations. Instead, they are conceptual abstractions of phenomena that cannot be directly observed. Constructs are often deliberately and consciously invented by researchers for a specific task or purpose, to represent categories of individual

observations. Constructs are robust, conceptual generalizations or summations of actual, real-world observations. Constructs are strong, useful categories that are invented by researchers to artificially separate real observations into clear, distinct categories. For example, a researcher might make note of all the widely diverse entities in the world and then divide those entities into three arbitrarily created, but extremely useful, constructs—animal, vegetable, and mineral. In another example, a scientist might document all the elements in the world and then create three constructs to categorize all those elements—gases, liquids, and solids (Suddaby, 2010).

Strong and useful theories tend to have well-developed constructs. Constructs that are clear and useful comprise four basic elements: (1) definitions, (2) conditions, (3) relationships, and (4) coherence. A good construct definition should capture the essential properties and characteristics of the constructs as concisely as possible. A strongly written construct should accurately capture the essence of the phenomena without using circular language. (An example of circular language would be stating that a transformational leader transforms organizations.) A well-written construct definition should be as simple, or parsimonious, as possible and use just enough of the right words to accurately describe the construct.

Good theories delineate the conditions or constraints of their constructs. In the hard sciences, constructs tend to be universally applicable, so theorists tend not to set very many conditions on their constructs. In the social sciences, however, most constructs are not universally applicable, so good theorists spell out the conditions, or boundaries and limitations, of their constructs. Examples of conditions on constructs include space, time, and values. A value of a constraint may be that the constraint is from the employee's point of view or from the manager's point of view, but not from both points of view.

Good theorists also specify the relationships among other similar constructs. Rarely are constructs created in a vacuum. Instead, most constructs are derived from, or related to, other similar constructs. A good theory should carefully describe how its constructs are similar to and different from others, and even distinguish its constructs from other uses of the same term in other related theories.

Finally, good constructs should be coherent, meaning that the definitions, conditions, and relationships of the constructs make sense and hang together well as a whole: they all fit together in a logical and consistent manner.

The Importance of Theories

Theory is the most basic and fundamental building block in scholarly research (Corley & Gioia, 2011). Anyone who wants to become knowledgeable about the field of management and organization research must learn about the most important theories in the field.

In the areas of management and organization, all the top journals require that all manuscripts contribute to the development and advancement of theory (Colquitt & Zapata-Phelan, 2007; Hambrick, 2007). Every paper must have a section about the origins and current state of the theory that is being examined in order to explain relationships among variables of interest. It is not enough for a researcher simply to state how a paper contributes to our knowledge or our understanding. Instead, every author of every research paper must state how theory is better off or more advanced because of the findings of that research study.

Most of the top journals, such as the Academy of Management journals, require manuscript submissions to do one or more of the following: (1) challenge existing theory; (2) clarify or improve existing theory; (3) synthesize and integrate existing theories into fresh new theories; and (4) identify and describe new theoretical problems or observations that will lead to the search and creation of new theories (LePine & Wilcox-King, 2010). Articles or manuscripts that clarify or challenge existing theory are often made up of reviews and examinations of existing theory. These articles often reveal inconsistencies in theories or illuminate assumptions that result in the launching of new ways of thinking and new conversations about theoretical constructs. Manuscripts that identify new theoretical problems often provide evidence that existing theories are deficient in trying to explain particular phenomena, and help create fundamental shifts in our understanding. Research that synthesizes and integrates existing theories often provides structure that did not exist before, for example, by repositioning constructs among new antecedents and consequences in a way that generates new communication and attention from scholars. Without such theo-

retical improvements, manuscript submissions will simply not be accepted by the best refereed academic journals.

In addition to helping researchers make contributions to journals and to the field, theories also help practicing managers perform their jobs better. They help managers better describe, understand, predict, and control behavior in organizations. The more that practicing managers know and apply theories, the better able their organizations may be to make progress toward achieving their mission, strategies, and goals.

Theories about organizations and groups of organizations can also help policymakers create and administer organizations more effectively. Some of the theories in this book examine how entire organizations or systems of organizations interact and interrelate with each other. When people who create and set policy know and understand these theories, then their decisions and actions can help those organizations or systems of organizations operate more effectively and efficiently and better accomplish their goals.

Organizations

All the theories in this book examine some aspect of attitudes and behaviors of individuals or groups or some aspect of entire organizations or groups or systems of organizations. Therefore, it is important and necessary to establish a definition for organizations. There is no one definition of organizations that is agreed on by all researchers. For this book, I define organizations as deliberate arrangements and conscious coordinations of people to achieve a common goal or set of goals. Organizations have a distinct purpose and a deliberate structure, and they accomplish specific goals through the work and behavior of people. An organization is not a random group of people who come together by chance; rather it is a consciously and formally established entity that is designed to accomplish certain goals that its members would be unable to reach by themselves. It is a managed system designed and operated to achieve a mission, vision, strategies, and goals.

Management

Almost all the theories in this book also examine some aspect of management. Management is a process that happens inside of, or

as a part of, organizations. The term “management” has three different definitions: (1) the process that managers follow to accomplish organizational vision, mission, strategies, and goals; (2) a specific body of knowledge that examines various methods used by managers and organizations; and (3) the individuals in organizations who guide and direct the actions of others to accomplish organizational goals. The theories explored in this book that examine management processes may do so in reference to one, two, or all three definitions; most often, however, a theory will examine only one of the three.

Management can be described as the process of accomplishing organizational mission, strategies, goals, and objectives through the use of people (human resources), money (financial resources), things (physical resources), and data (informational resources). The people in an organization can be employees or other individuals such as consultants who work part-time, full-time, on a contract basis, or in some other relationship with the organization. The money used in an organization can be any sort of financial resource or capital that the organization uses toward achieving desired organizational outcomes. The things in an organization can include physical resources, such as equipment, computers, desks, chairs, tables, lamps, and even the building where the organization resides. The data or knowledge in an organization can be any sort of information, such as databases or archives that are used by the organization to help accomplish desired organizational goals.

A manager’s job is to achieve high performance relative to the organization’s desired outcomes. Good managers accomplish desirable organizational outcomes both effectively and efficiently. An effective manager constantly and consistently accomplishes organizational mission, strategies, goals, and objectives. An efficient manager accomplishes organizational outcomes with minimal waste of human, financial, and physical resources, making the best possible use of money, time, materials, and people.

The job of managing is typically broken down into four main functions: (1) planning, (2) organizing, (3) directing, and (4) controlling. The planning function of management involves analyzing the current situation and anticipating the future; determining the vision, mission, strategies, goals, and objectives; and determining the resources needed to achieve those desired out-

comes. It also includes selecting tasks that employees perform, indicating when and how those tasks should be done, and coordinating employee activities.

The organizing function of management involves assembling and coordinating the human, financial, physical, informational, and other resources that the organization uses to achieve its desired outcomes. Organizing activities include attracting qualified people to the organization, specifying job responsibilities and assigning specific tasks to employees, arranging and coordinating work assignments and activities, and creating conditions that facilitate the coordination of all the resources to achieve maximum organizational success.

The directing function of management involves influencing employees to perform as well as possible. Directing activities include leading, motivating, and communicating with employees as individuals, in groups, and as an organization as a whole. Effective directing involves guiding and inspiring employees to new, high levels of achievement while accomplishing the vision, mission, strategies, and goals of the organization. Directing activities can also include setting a good example for employees, serving as a role model for appropriate and desired company behavior, and showing others the way to job and career success in the company.

The controlling function of management involves monitoring employee progress toward outcome success and making appropriate changes when necessary. Controlling activities include setting performance standards; monitoring individual, group, and organizational progress toward attaining established goals; providing feedback and information to employees about progress toward goal attainment; identifying problem areas by comparing actual performance levels to performance standards; and solving performance problems once they have been identified, such as by improving employee motivation. Additional controlling functions include maintaining a budget, cutting costs and reducing waste, and taking employee disciplinary action when necessary.

How the Theories Were Selected

An important part of writing this book was selecting the management and organization theories that would be included. I began

the process of theory selection by making a list of all the theories that have been published in articles contained in the EBSCO Business Source Complete database of management and organization journals. Next, I reduced this list of theories by following the decision rules stated by Miner (1984, 2003) in his classic works on establishing the validity and usefulness of management and organization theories. First, the theories had to be at least ten years old. Miner (2003) noted that it takes roughly ten years for a theory to generate sufficient research to emerge as an important theory in the management and organization area. Second, the theories have all been found to be useful in understanding, explaining, and predicting the functioning of organizations or the behavior of people in them. The theories selected for this book have received the most research attention and are the subjects of the most publications, most interest, and most discussion of all the theories. Third, the theories all have been shown to have clear implications for practice and application in some area of management and organization functioning. They all are excellent means of effectively analyzing and solving management and organization problems and challenges. Fourth, the theories have all generated significant research, have become well established, and have been thoroughly examined, analyzed, and tested by researchers.

I created my own fifth decision rule for selecting the best theories for this book: the theories had to be both “classic” and “current.” My definition of a classic theory is one that has stood the test of time and has become well established, well known, and influential. My definition of a current theory is one that has an active, ongoing research stream in the major management and organization journals to which a researcher could contribute in the present.

Why I Wrote This Book

I wrote this book for many reasons, the first of which is a selfish one. When I was a student, I wished that there was such a book to help me quickly and easily see and understand the major management and organization theories. Unfortunately, there was no such book, so I was left to my own devices. Since that time, no one has written such a book, so I finally decided to just go ahead

and write one myself. I describe my other reasons in the following sections.

Review of the Literature

When I conducted the research for this book, I searched the literature for all the relevant books and articles I needed for each of the forty theories. I printed out each of the journal articles, as I prefer to have the actual articles in my hands rather than to read them off a monitor. I also went to the library and checked out each of the books needed for each theory. In total I collected over fifty linear feet of journal articles (if I made one giant stack of all of the articles) and 122 books! This was a massive amount of material to organize and store, so I ended up taking a spare room in my house and stacking the articles and books for each theory on the floor, putting a label with the name of each theory on top of each stack. The result was a massive set of forty stacks of articles and books.

When I looked at these forty stacks, I realized that this was an excellent review of the field of management and organization. I saw the collection of forty theories as a sort of picture puzzle that enabled me to see the entire field of research in this academic field all in one place and at one time. I began to mentally move the theory puzzle pieces around in my mind. I tried to imagine how the pieces fit together, how they overlapped, how some pieces seemed smaller and some larger than the others. I also realized that there seemed to be some holes among the pieces where further research needed to be done to bring the pieces together and to integrate the theories. It is my goal that this book will enable you to see the overall field of management and organization in the same way I did.

Ideas for Further Research

One of the most important parts of this book is the collection of over four hundred ideas (ten or more ideas for each of the forty theories) for further research. I don't know how many times I have heard from students and faculty over the years that they can't think of anything about which they want to conduct a research study. Therefore, one of my goals was to provide the most

up-to-date research ideas for each of the theories. These ideas were all derived from the “suggestions for future research” sections of the latest three years of journal articles for each of the forty theories. The suggestions for further research in this book should be an excellent starting point for anyone trying to find a great research idea for his or her own research project, thesis, or dissertation.

Five Most Important Works for Each Theory

Anyone who wants to become knowledgeable about theories in the field of management and organization or who wants to earn a degree in the field will need to know the names of the most significant works associated with the most important theories. Therefore, this book includes the five most frequently cited works for each theory, or what are called the seminal works for each theory. When I was earning my degrees, I had to find these works myself, which took a great deal of time, so I wanted to be sure to include this information in this book to save you the time and trouble of finding these seminal works yourself.

Survey Instruments for Each Theory

Probably the second-most-frequent comment I’ve heard from students is “How do I measure variables in my theory?” For this reason, I was sure to include hundreds of survey instruments, questionnaires, and measures for the most important constructs for each theory. All the instruments in this book are available through almost every academic database, such as EBSCO.

Implications for Managers

Academia has often been criticized for writing theories that have no relevance to the real world. I was a practicing manager myself, so I was careful to provide a section on the implications for managers for each of the forty theories in this book. My goal was to provide managers with a short summary of the major implications of each theory that they could immediately take back to work and apply on the job that day.

Organization of the Book

Each of the theories in the book will be briefly reviewed and examined in about six pages. For ease of reference, they are presented in alphabetical order. The discussion of each theory will follow a simple format, or template, made up of six sections:

1. Brief description of the theory
2. Criticisms and critiques of the theory
3. Measuring variables in the theory
4. Suggestions for further research
5. Major references to know for the theory
6. Implications of the theory for practicing managers

Brief Description of the Theory

Each theory is briefly described in a few easy-to-read pages. The short description of each theory identifies and explains the major constructs in the theory and describes the most important relationships and interrelationships of those constructs. The brief description will not be a thorough and exhaustive explanation of every aspect of the theory, but will be a quick review of the most important, helpful, and useful aspects of the theory.

Criticisms and Critiques of the Theory

The theory description is followed by a short discussion of the major criticisms and critiques of the theory. It may seem strange to some readers to have a section of criticisms for each theory, because the theories are such useful tools for analyzing and solving management and organization issues and problems. However, every useful tool has both strengths and weaknesses, and these theories are no different. To use an analogy, a hammer is a very useful tool; it has many strengths, such as enabling us to efficiently and effectively drive in and remove nails. However, hammers also have some weaknesses: for example, if you don't pay attention when using them, you can smash your thumb. Despite these weaknesses, we wouldn't stop using hammers; they are still very useful tools. The same is true for the theories

presented in this book. Even though they all have some weaknesses, we wouldn't stop using them to help analyze and solve our important management and organization problems and challenges.

Also, each of the theories in this book has been extensively studied and has been found to be highly successful and valuable for organizations, so although the criticisms and weaknesses of each theory are important, they are not major enough to prevent use of the theory by researchers or practicing managers. The discussion of the weaknesses of each theory should be used as a guide for determining limitations and constraints when applying or using the theory.

A final point here is that being an expert in a field means that one knows both its strengths and its weaknesses. This means that if you want to be an expert in the field of management and organization theories, you will need to know both their strengths and their weaknesses.

Measuring Variables in the Theory

The next section of each theory discussion is a list of published survey measures or instruments. Theories describe and explain the relationships and interrelationships of constructs. However, when people conduct research, they convert constructs into measurable variables. The measures for those variables are called survey instruments. This section provides references for published survey instruments for the theory. The survey instruments include the actual questions or items in those instruments. You can locate the survey instruments through an academic database such as EBSCO Business Source Complete, and then use them to conduct your own research into a theory.

Suggestions for Further Research

As I noted earlier, one of the most difficult aspects of conducting original academic research in the area of organization and management is creating an original research idea. This section of each theory discussion will list ten or eleven areas where further research can be conducted by students and faculty.

Major References to Know for the Theory

Every person who wants to become an expert in the field of organization and management must learn the most important references for the most important theories. This section of each theory discussion provides a quick way to learn the most important, or seminal, references for each theory. These are not exhaustive or totally comprehensive lists, but they are a very helpful and easy way to learn some of the most important references. The lists were derived from the most-often-cited references for each theory or from the references most often used by the authors of the theories themselves in their own research. These sections contain five seminal references for the theory.

Implications of the Theory for Practicing Managers

All forty of the theories presented in this book are extremely practical and useful for solving management and organization problems, issues, and challenges. Indeed, Lewin (1945) noted that “nothing is as practical as a good theory” (p. 129). Therefore, the last section of each theory discussion is a short explanation of the implications of applying the theory to situations with real employees in real-life organizations.

In summary, this book is an excellent tool for teaching, research, and practice that can be used by students, teachers, researchers, consultants, and practicing managers in their quest to know, understand, apply, and advance the most important theories in the field of management and organization research.

