

MATTERS FOR JUDGEMENT:
SOME THOUGHTS ON METHOD IN MANAGEMENT HISTORY

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Paper Type: Conceptual

Purpose: This paper reflects on some aspects of method in management history and the importance of the self-reflection on their world-view that must accompany authors' endeavours, in order to be articulated in the matters they proffer for the reader's judgement.

Approach: Drawing on the insights proffered by Evans (1999:1) about how to study, research, write about and read history, this paper offers some thoughts on the importance of giving due consideration to method in management history.

Research & Practical Implications: Thomas Hobbes (1660/1994:32) observed that "Out of our conception of the past, we make a future". It behoves us then, as managers and management scholars, to be satisfied that our conceptions of the past are developed in ways that, as far as possible, avoid the problems that would make them less than useful in creating that future. This paper identifies some of the issues of which those seeking to create the future must be cognisant.

Value: If knowing accurately the history of management thought is of importance to scholars and practitioners, then this paper alerts practitioners and commentators to the need for a sound method in producing, and learning from, the lessons of management history.

Keywords: Management History, Method, Ontology, Epistemology.

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“History rests on the belief that the present differs from the past and derives from it; it also points to the future, which will be different again”

(Evans, 1999:134)

INTRODUCTION

The first issue of *JMH*, in its reincarnated form, was styled as a tribute to the “worthy endeavour of the scribe”, that person described by Kemp (1989:111) not just as “writing man” but as part mathematician, part logistician, part measurer, part mobiliser, part manager and part historian. This tribute was paid through the presentation of the endeavours of the modern scribes proffered in that issue. It was a tribute comprising papers with quite different topics, from different parts of the globe and from different points in time. There was also a mixture of methods – case studies, quantitative analysis, longitudinal analysis, theoretical analysis – appropriate to their respective subjects of interest, but different nonetheless.

Such an assortment raises the question, quite reasonably, as to whether all, or any, of these different approaches belong in a journal with a self-styled remit to “to examine more closely the historical development of management concepts and practices, with a view to how they inform the present and ‘shape what we are and what we do’”. In other words, what are the legitimate methods of examination and do they include, for example, case studies, quantitative analysis, longitudinal analysis, theoretical analysis?

At this early stage in the journal’s new life, it seemed appropriate to devote some space to this question, along with some possible answers. This is an important task in light of the lack of attention that has been given to the question of method/methodology in management history. A recent Google Scholar search found that, while the term “management history” produced 194,000 hits and “method in history” resulted in 674 hits, the terms "methodology in management history", "method in management history", "management history methodology", and "management history method" produced no hits at all.

One might reasonably observe that management history is simply a subset of the wider discipline of history and that any discussion of method/methodology, therefore, should simply point the reader in the direction of those more generic discussions (see, for example, Evans, 1999). On the other hand, as Evans (1999:147ff) observes, history is a much more expanded and diverse profession than it was 50 or 100 years ago and the idea that one method (and therefore one methodological discussion) is appropriate for the collection of social, intellectual, political, labour, economic and other histories that populate the field seems, *prima facie*, no longer defensible.

It is not the purpose of this paper, though, to add another to the list of works on the historical method. There are already useful texts in the broad area of historical research, not the least of which is Evans' (1999) *In Defense of History*, "a spirited defense of the search for historical truth". Among the range of available texts, Jenkins and Munslow (2004:2) offer "a collection of readings that [they] hope is sufficient to allow students of history to reflect upon the way histories are written, taught and thought about today". In his introduction to *History and International Relations*, Smith (1999:1ff) provides an overview of the "historical problem", drawing the reader's attention, *inter alia*, to the historical "challenges" of selection bias, anecdotalism, and ahistoricism, while Green (1993) highlights the many pitfalls of historical writing. Hardy and Jarausch (1991) and Darcy and Rohrs (1995) both provide guides to the historian interested in quantitative methods. Rather, I take this opportunity to reflect on the range of methods utilised by the authors in these first three issues of the *Journal of Management History* by way of introduction to the topic.

PERSPECTIVES AND METHODS

History of Ideas

The approach to a history of ideas can take several forms, from a relatively straightforward chronicling of those ideas over time, through a more detailed analysis of the ideas in their context, to efforts at incorporating those ideas in one or more combinations as more comprehensive understandings of contemporaneous or contemporary events and processes. The *Journal of Management History* has been pleased to publish this variety of approaches, and even to entertain a new analytical process for consideration (Towill, 2006).

Murphy, *et al* (2006) traced the conceptual development of entrepreneurship through history. For their interpretive and explanatory historical analysis of concepts, they used the logic-based deductive principle of conjecture and refutation, while, for the purpose of framing, organizing, and describing the conceptual history of entrepreneurial thought, they used sociological-based descriptions of multiplicities of subjective views. Over a shorter period of time, Gollakota and Gupta (2006) followed the evolution and persistence of different forms of business ownership in India, from pre-Independence (prior to 1947) to the present time, in conjunction with the values and institutions that shaped those forms, and discussed the implications for corporate governance in India.

In this issue, Hartley's (2006) is a synthetic approach, standing on "the shoulders of giants" to bring together a collection of approaches to "management style" under the broad rubric of McGregor's (1960) Theory X and Theory Y. One might note in passing Hartley's approving citation of the wish attributed to Mary Parker Follett (Anon, 1943:208) that "when a principle has been worked out, say in ethics, it didn't have to be discovered all over again in psychology, in economics, in government, in business, in biology, and in sociology. It's such a waste of time." At the same time, Denis Towill (2006) has proffered a new methodology in the history of ideas, for determining how and when a management fad has become an established paradigm. His "penticulation" approach (an extension of the notion of triangulation) compares the outputs from the five separate research sources of horizontal surveys, experiential rules-of-thumb, theoretical models, quick scan audits, and vertical case studies. He uses his penticulation process to demonstrate how the Total Cycle Time Compression (TCTC) concept has moved from fad to paradigm.

Primary source examination

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“Archives”, says Evans (1999:75), “are the product of the chance survival of some documents and the corresponding chance loss or deliberate destruction of others”. Nonetheless, documents are the “bread and butter” of the historical method (if that’s not mixing too many metaphors). A number of the contributions to *JMH* have made extensive use of these primary sources in the development of their theses.

It was the custom of Albert Thomas, inaugural director of the *Bureau international du travail* and co-founder of the International Management Institute as a centre for the collection and dissemination of advanced management thought and practices, to direct the work of his collaborators by dictating dozens of daily memos. In his *homage* to Albert Thomas, Walter-Busch (2006) was able to take advantage of the 6,500 memos which are preserved in the *Archives nationales* in Paris. In the same way, in “Origins of Lean Management in America: The Role of Connecticut Businesses”, Emiliani (2006) was able to survey published and unpublished records, as well as benefit from personal communications with key figures in establishing the role and importance of Connecticut businesses and business leaders in the discovery and dissemination of lean management in America since 1979. In this issue, Novicevic, *et al* (2006) utilise Chester Barnard’s works to demonstrate how the roots of customer relationship management can be found in his earlier work.

Wright’s (2006) work aimed to better understand the contextual framework for how the fascination with job satisfaction and its measurement has developed over time. To that end, and using important early, but now mostly forgotten, research on employee boredom, fatigue and customer satisfaction, his paper proposes a ‘missing link’ explanation for why job satisfaction became the most widely used attitudinal measure in organizational research. Meanwhile, Kidwell and Kidwell (2006) used two modern models of managing and coping with the stresses of dual careers as the means to examine and then consider the early 20th century family of Louise and Sydney Homer, to determine whether they employed similar strategies. The Kidwells used letters from the Homers and their children, along with other original documents, in investigating the couple’s efforts to handle the challenges of dual careers when the concept of a woman pursuing a profession outside the home was a novelty. Their findings underscore the idea that challenges which may be perceived as unusual and unique to one generation may already have been dealt with successfully by past generations.

Social history and social constructionism

The history of the great majority of human beings has been dismissed by many historians as “trivial, meaningless or impossible to study” (Evans, 1999:140). Evans (1999:140) characterizes this attitude, that the point of history is to study “people who mattered”, as “rather snobbish and elitist” and notes the major influence in the broadening of the historian’s perspective has been the rise of social history. Authors in *JMH* have moved through the “great man” approach to history and incorporated social history and a social constructionist approach to history in their analyses.

Topping and Duhon (2006) described the use of oral history to teach students about management history and the implementation of principles of management over the evolution of an organization. Stories of businesses, their structures, incentive systems, staff and recruiting policies, organizational cultures, and so on, were told by the business founders to students, who were able to see first-hand the historical impact of the people who started their companies. Kent and Brown (2006) added spice to *JMH* 12(2) with their examination of erotic retailing in the UK from 1963 to 2003. They combined a social history approach with

the lens of marketing's "4 Ps" to trace the changes in the retail outlets that supply erotic products and toys – from backstreet to online – and explore changes in attitude towards these products over the four decades under review. “

Doherty's (2006) use of collected visual art images pertaining to work during the Depression era, and the resultant contrasting characterizations of workers – the “manly worker” and the “beholden worker” – showed that new management visions and understanding of workers experiences can come from revisiting the past and considering other disciplines. Dagnino and Quattrone (2006) drew on a constructivist epistemology to undertake their critical comparison between the institutional approaches developed by Gino Zappa and his US contemporary, John R. Commons. Noting the lack of historical perspectives in the strategic management literature, Ericson (2006) provides an alternative, nonlinear conception of time in her study on strategic change, informed by the viewpoint of philosophical hermeneutics. She presents an empirical example of strategic change within the Scandinavian consumer co-operatives, illustrating the exploration of business opportunities and the exploitation of socially and historically rooted values and principles.

Quantitative Methods

In discussing quantitative methods of historical analysis, Evans (1999:33) notes Emmanuel Le Roy Ladurie's 1979 comment that “Tomorrow's historian will have to be able to programme a computer in order to survive”. Recent experience says that Ladurie's prediction was pessimistic, but several contributors to *JMH* have taken advantage of the technology for their analyses.

McNaughton and Green (2006) examined the ownership networks of medium-sized and large Canadian corporations over a 20-year period (1976-1995) in order to test the hypothesis of increased specialisation during the 1980s in the aggregate pattern of intercorporate ownership in the Canadian economy. They found that aggregate diversification declined slightly over the period, at least in terms of the average number of industry groups in which enterprises had subsidiaries. Meanwhile, in this issue, Halbesleben and Buckley (2006) use multiple regression analysis and an innovative combination of Gross Domestic Product (GDP), Disposable Personal Income (DPI), and Unemployment Rate and Union membership by gender to show that that unemployment rates influence the percentage of both employed men and women in unions. Whiteley's (2006) report on unwritten rules presented findings from contemporary focus groups supported by Group Support Systems (GSS) technology – that rules exist, are acted upon, and require a view of the rule-implementer as complex and holistic – embedded in a review of the theoretical scholarly writings on rules as social structures, from the early sociology of the 19th.century to the organizational theory of the present day.

Case studies

That the past “does speak through the sources and is recoverable through them” (Evans, 1999:108) means that comparative works that seek to understand events and processes in different times and different places are appropriately included in the historical method. Two case studies in *JMH 12.1* illustrate the point.

Kreiser and his colleagues (2006) sought to better understand the strategic process that occurs within family firms, by way of an intergenerational and intercultural case study analysis of the historical development of the growth strategies of four family firms in the United States, Finland, and Sweden. Govekar and Govekar (2006) brought two separate fires some 80 years

apart (and identified as the worst and second-worst industrial accidents in the US) into juxtaposition. Using contemporaneous and more contemporary sources, the Govekars explored the parallels between the two fires, separated by 80 years and hundreds of miles, and found that a failure of regulation and regulatory effort were found to be significant contributors to the Triangle (1911) and Hamlet (1991) fires and their consequences.

CONCLUSION

This article has not been about reciting the works of others as if they are new discoveries in the context of management history. Rather, it has been an introduction to the matter of method in management history and the demonstration of the range of perspectives and styles that can be, and are being, brought to the various subjects of study here in *JMH*. It is also a call to encourage those whose work is about the history of management, and the rest whose endeavours necessarily incorporate the history of management ideas in their work, to ensure that they have thoroughly considered and employed appropriate historical method consistent with their espoused (although more often implicit) ontological and epistemological positions. We look now to authors who seek to make an extended contribution in this important area to do so, perhaps even in the form of a special issue on method in management history.

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