

Theorizing in Business Research



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Motivation

Challenges in Theory Development

- Little development of new “indigenous”, “organic”, or “home-grown” theories in marketing scholarship (Coulter 2016, Hunt 2020, Key et al. 2020, Kohli 2009, Rust 2006).
- Differentiations between forms of theoretical contributions (e.g., Jaakkola 2020; MacInnis 2011) and examination of their prevalence (Kindermann et al. 2024) with limited progress in clarifying the nature of theorizing itself.
- Ontological and epistemological foundations often remain implicit or are even inconsistent.

Challenges in the Education of (Young) Scholars

- Limited education in theorizing in PhD courses and advanced (career) trainings – even though core to our trade.

“Students of social science are today primarily exposed to finished theories and are not aware of the process that goes into the production and design of a theory.” (Swedberg, 2016, p. 5)

- Difficulties in getting research projects off the ground, laying the conceptual foundations for studies, designing empirical investigations, selecting the right methods, or creating suitable knowledge artifacts for presenting research results (especially for young scholars).

Why Theorizing?

- The “lack of an explicit discussion about theory and theorizing is not only surprising but also somewhat problematic as it may lead to implicit views and intuitions about theory rather than informed views and more considered perspectives” (Cornelissen et al. 2021, p. 2)
- “Theory cannot be improved until we improve the theorizing process, and we cannot improve the theorizing process until we describe it more explicitly, operate it more self-consciously, and de-couple it from validation more deliberately.” (Weick 1989, p. 516)

Theorizing → Theory → Theory validation



Theory vs Theorizing

What Is a Theory?

- Theory = Formalized and generalized explanatory knowledge
 - 1) “Knowledge” = “Justified, true belief” (Plato, 4th century BCE)
 - Justification and truth are the general criteria for “scientific acceptability”
 - 2) “Explanatory” = Capturing the underlying forces that drive phenomena
 - 3) “Formalized and generalized” = Being formulated in an abstract way (using formulas, visualizations, statements, etc.) to give them relevance beyond a single empirical phenomenon

Characterizations of Theory

- “A theory is a set of statements about the relationship(s) between two or more concepts or constructs.” (Jaccard & Jacoby 2010, p. 28)
- “Theory is a collection of assertions, both verbal and symbolic, that identifies what variables are important and for what reasons, specifies how they are interrelated and why, and identifies the conditions under which they should be related or not related.” (Campbell 1990, p. 65)
- “A theory is a systematically related set of statements, including some lawlike generalizations, that is empirically testable.” (Rudner 1966, p. 11)
- “A theory is an explained set of conceptual relationships.” (Wacker 2008, p. 6)
- “Theory is a statement of concepts and their interrelationships that shows how and/or why a phenomenon occurs.” (Corley and Gioia, 2011, p. 12)

A Theory Is...

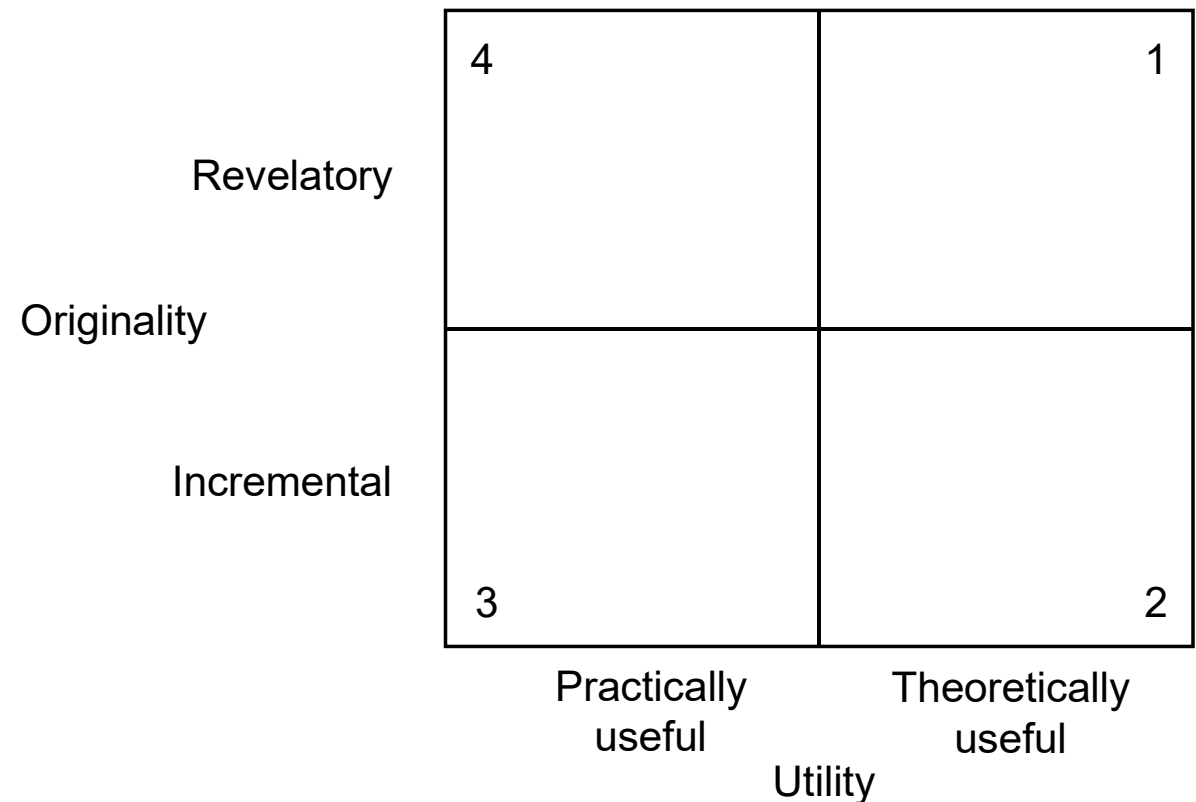
- a generalized and systematic conceptual understanding of a phenomenon,
- manifested in a set of concepts and knowledge artefacts
- that carve out, describe, and explain said phenomenon.

Purpose of a Theory

- Theory = “the basic aim of science” (Kerlinger and Lee 2000, p. 11)
- A theory provides ...
 - a framework for analysis
 - an efficient method for field development
 - clear explanations for the pragmatic world (Wacker 1998, p. 362)
- A theory ...
 - can function as a lens to describe and analyze certain (research) phenomena,
 - can be used as an analytical tool to unravel novel and important discoveries or insights, altering existing theories.

Types of Theoretical Contributions

- Originality
 - Revelatory
 - Incremental
- Utility
 - Scientifically useful
 - Practically useful

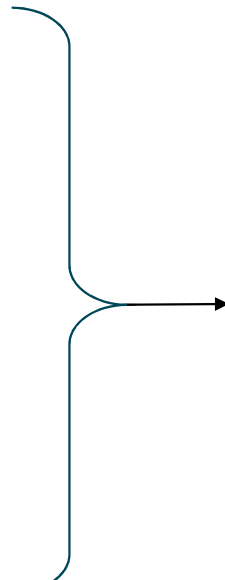


Properties of a Theory

- Who and what: Definitions
- When and where: Domain
- How and why: Relationships
- Should, could, would: Predictions

(Wacker 2008, p. 7)

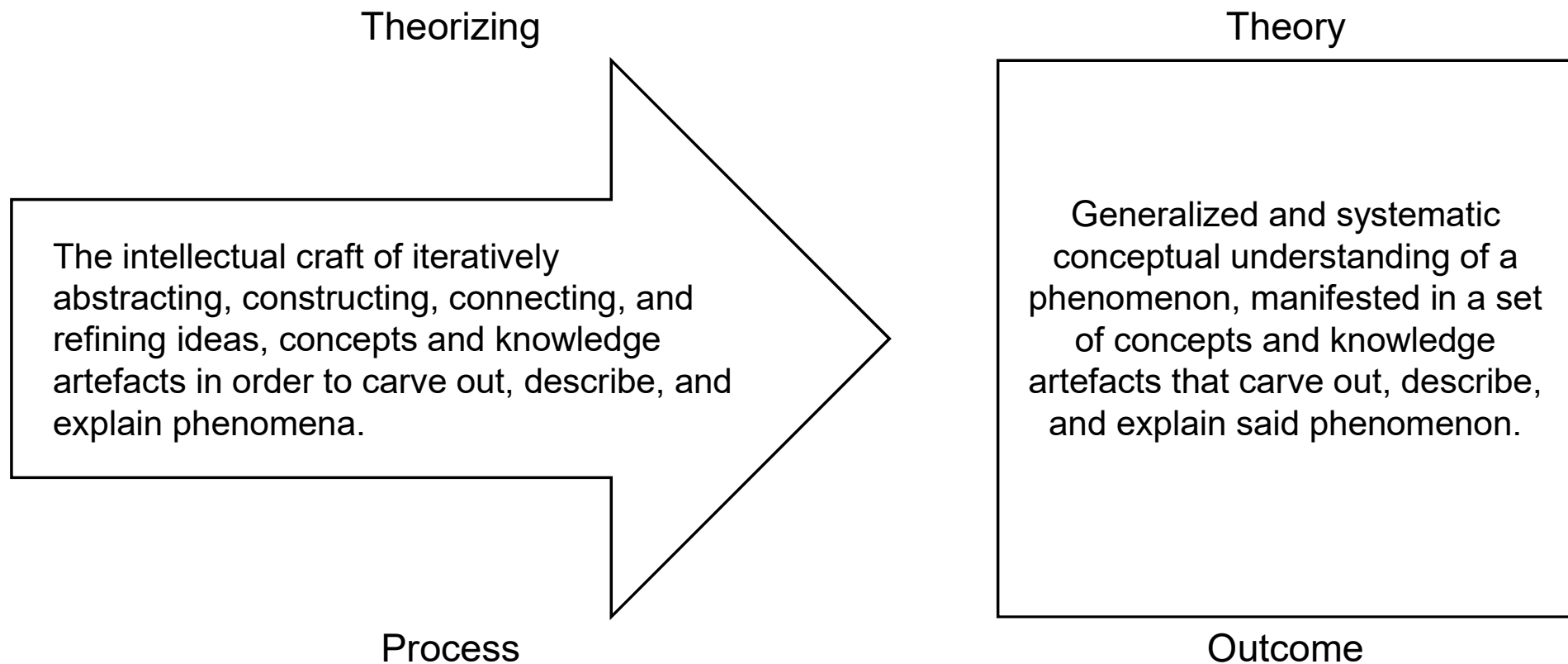
‘Good’ Theories

- ‘Good’ theories are superior to other theories because they possess what philosophers of science call the theory’s virtues (Popper, 1957; Kuhn, 1980; Quine & Ullian, 1980.)
 - Virtues of a ‘good’ theory (Quine & Ullian, 1980)
 - Uniqueness (offering distinct explanatory value)
 - Parsimony (simplicity without oversimplification)
 - Conservatism (consistency with established knowledge where appropriate)
 - Generalizability (applicability across contexts)
 - Fecundity (capacity to generate new insights)
 - Internal consistency (logical coherence)
 - Empirical riskiness (falsifiability)
 - Abstraction (theoretical depth).
- 
- Objectives for theorizing

The Purpose of Theorizing

- “Theorizing emphasizes the process rather than the product of efforts to build intellectual capital.” (Weick, 1974, p. 501)
 - “Identifying interesting problems, developing hypotheses, interpreting data, and deriving implications all involve thinking conceptually. Thus, conceptual thinking is at the heart of the scientific enterprise; it is critical to the development of both an individual scientist and the field of endeavor.” (MacInnis 2011, p. 141)
- Theorizing is at the core of our business as scientists.

Theorizing: The Process of Developing (the Elements of) a Theory



A Theorizing Framework

Theorizing Framework

A combination of *theorizing practices* and *theorizing styles* (determining how the various theorizing practices are performed)

- Structured understanding of how scholars can generate, refine, and connect ideas into coherent theoretical contributions.
- Offering an actionable account of theorizing that can guide researchers – especially early-career scholars – in designing and executing conceptual and empirical studies.
- Shifting attention from theory as a static end product to theorizing as a dynamic, ongoing practice central to the creation of impactful marketing knowledge.

A Theorizing Framework

Theorizing styles

Particular forms of argumentation used to structure thinking and express ideas about a phenomenon in a common idiom

Theorizing practices

Specific activities (representing different steps) in the process of theory development

Carving out phenomena

Making ontological commitments

Making epistemological commitments

Deriving foundational premises and defining concepts

Gathering and analyzing data

Creating knowledge artefacts

Propositional theorizing

Configurational theorizing

Typological theorizing

Processual theorizing

Refigurative theorizing



Theorizing Practices

Theorizing Practices

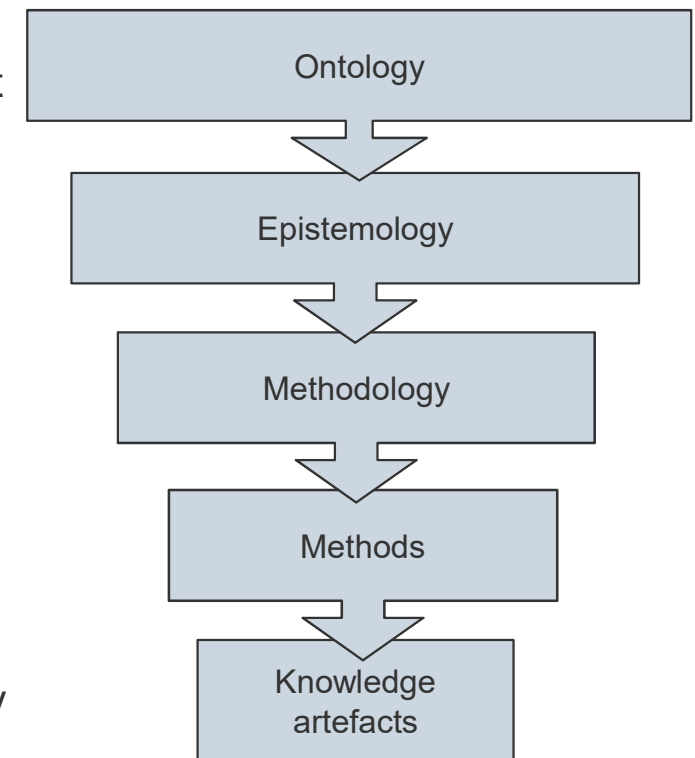
- Specific sub-processes of theorizing that represent different steps in the process of theory development.
- Theorizing practices refer to a phenomenon that is to be examined and explained. The carving out of a phenomenon is therefore the central theorizing practice (sub-process) to which all other theorizing practices relate.
- These other theorizing practices result from the relationships between ontology, epistemology, methodology, and methods.

Theorizing Practices



Relationships between Ontology, Epistemology, Methodology, and Methods

- **Ontology**
Assumptions about the nature of reality, what exists and what does not
- **Epistemology**
Assumptions about how one can recognize reality, i.e. the theory of knowledge that is applied
- **Methodology**
Research strategy through which knowledge about a phenomenon is generated
- **Methods**
Specific techniques for gathering and analyzing data
- **Knowledge artefacts**
Verbal, numerical, or graphical representations of the results of a study



Based on Crotty, 1998, p. 12

Ontological Perspectives in Business Research

Substance ontology	Relational Ontology	Process ontology
Substance ontology is a type of metaphysical perspective that asserts the existence of substances or 'things' that have an independent existence and persist over time, even as their properties may change. According to substance ontology, things have a 'substantial' existence, meaning that they are ontologically basic and cannot be reduced to or explained by anything else.	Relational ontology emphasizes the importance of relationships between entities, rather than the entities themselves. It suggests that things only exist in relation to other things, and that the nature of those relationships determines the nature of the entities involved. In a relational ontology, the world is seen as a web of interconnected relationships, rather than a collection of isolated objects.	Process ontology is a type of ontology that focuses on the idea that reality is composed of processes or events, rather than discrete objects or substances. Things are seen as temporary or emergent properties of ongoing processes, rather than as ontologically basic entities.

Theorizing Practices

- **Carving out phenomena:** Identifying and delineating the object of investigation, i.e. the problem, question or topic to be studied
- **Making ontological commitments:** Dedicating a study to ontological assumptions regarding the nature of reality
- **Deriving foundational premises and defining concepts:** Identifying and delineating the elements of a phenomenon from ontological assumptions or empirical observations
- **Making epistemological commitments:** Aligning the theory of knowledge and the methodology of a study with the underlying ontological perspective
- **Gathering and analyzing data:** Collecting qualitative or quantitative data from various primary and/or secondary sources and examining, cleaning, transforming, and interpreting the data by applying statistical, logical, and computational techniques
- **Creating knowledge artefacts:** Creating verbal, numerical or graphical objects that capture and display information from the data analysis

Theorizing Styles

Theorizing Styles

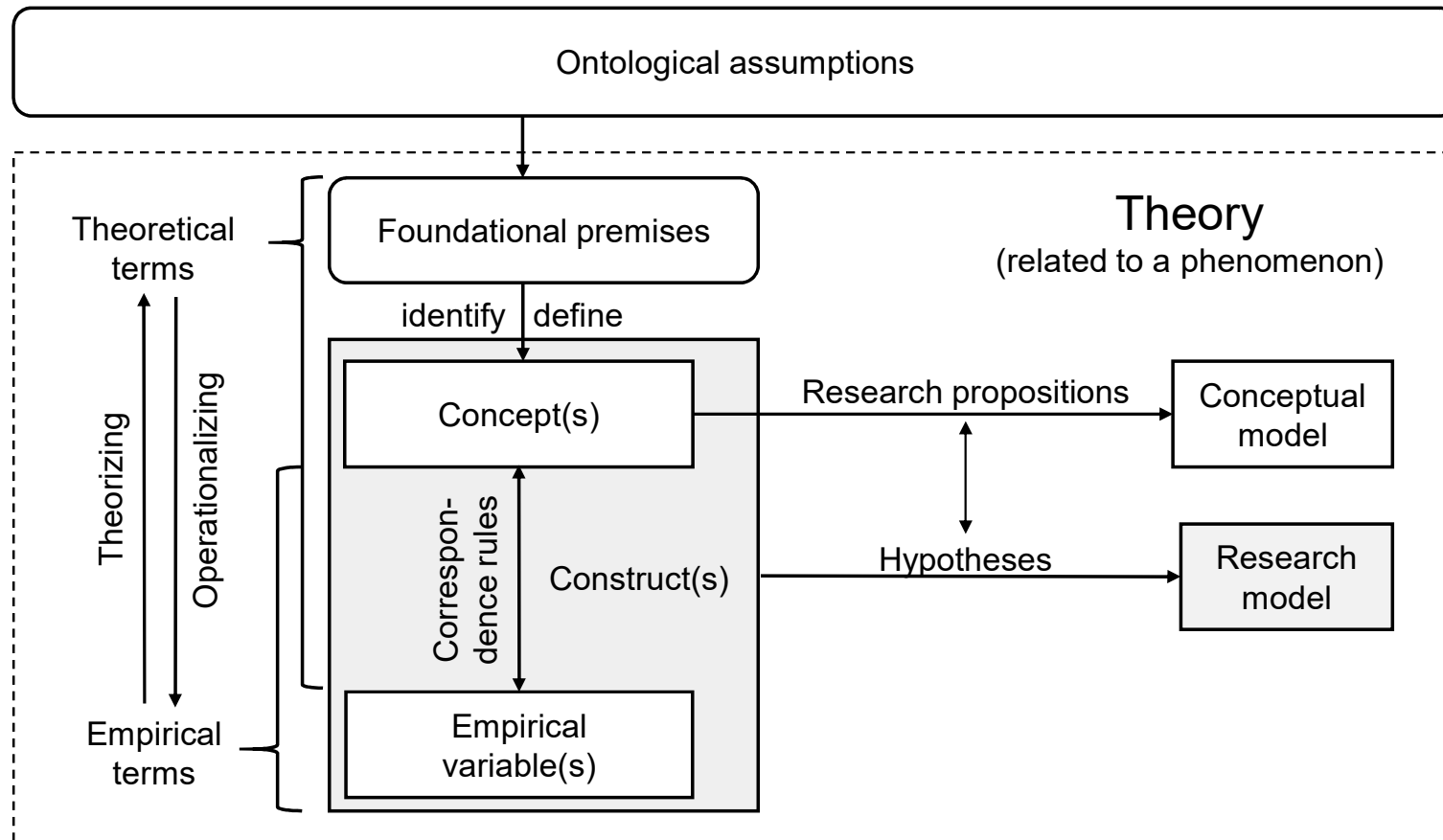
- Particular forms of argumentation used to structure thinking and express ideas about a phenomenon in a common idiom.
- “distinct forms of developing theoretical arguments and writing theory papers” (Cornelissen 2017, p. 1).
- Representing different approaches, habits, or strategies scholars use when constructing theory.
- Influencing how a person asks questions, selects evidence, builds arguments, and connects ideas.
- Shaping the ways the various theorizing practices are performed.

Theorizing Styles: Propositional Theorizing

Propositional Theorizing

- Building theory by creating consistent and testable statements (propositions) about relationships between concepts.
- Often associated with positivist or post-positivist traditions in science and social science, where the goal is to formalize knowledge into structured statements that can be tested, confirmed, or falsified.
- Dominant theorizing style in marketing research.

Building Blocks of Propositional Theorizing



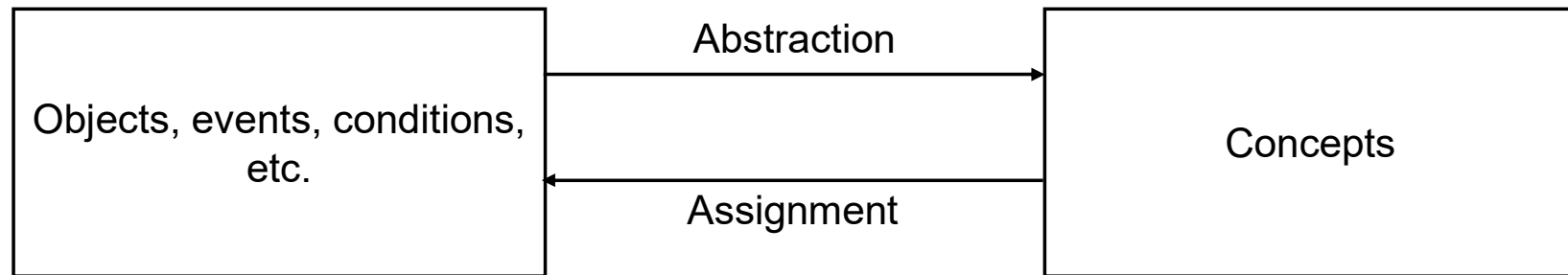
Based on Ulaga et al. 2021, p. 398

Building Blocks within Propositional Theorizing

Type of Statement	Definition	Outcome
Ontological assumptions	Sets of beliefs or presuppositions about the nature of reality and existence, capturing the foundational perspectives from which individuals or groups interpret the world around them.	Theoretical perspective, paradigmatic “lens”
Foundational premises	Statements identifying and defining the core elements of a theoretical perspective or a phenomenon	Concepts
Research propositions	Novel statements specifying relationships between concepts	Conceptual model
Hypotheses	Empirically testable statements specifying main, mediating, and moderating effects between constructs or empirical variables	Research model

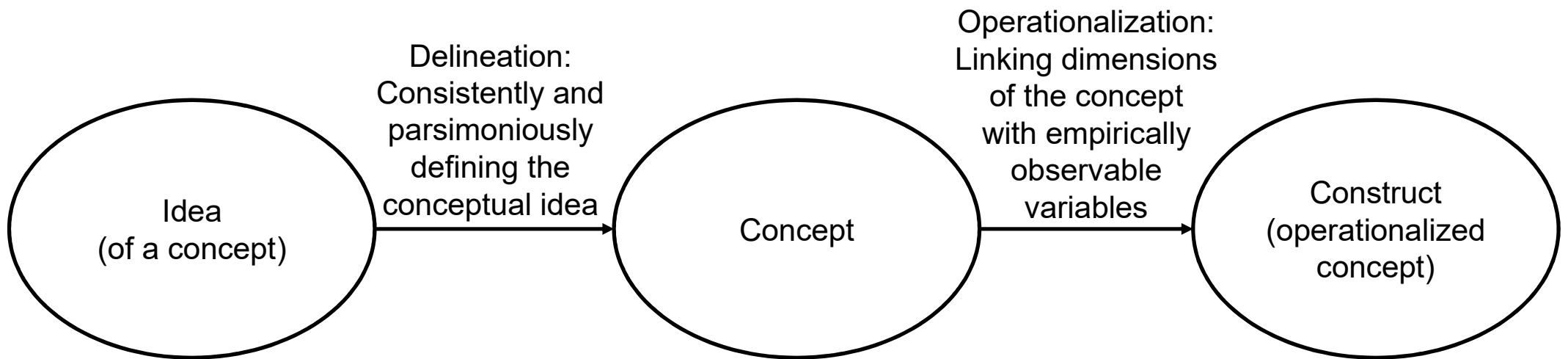
Based on Ulaga et al. 2021, p. 398

Concepts as Abstractions and Labels

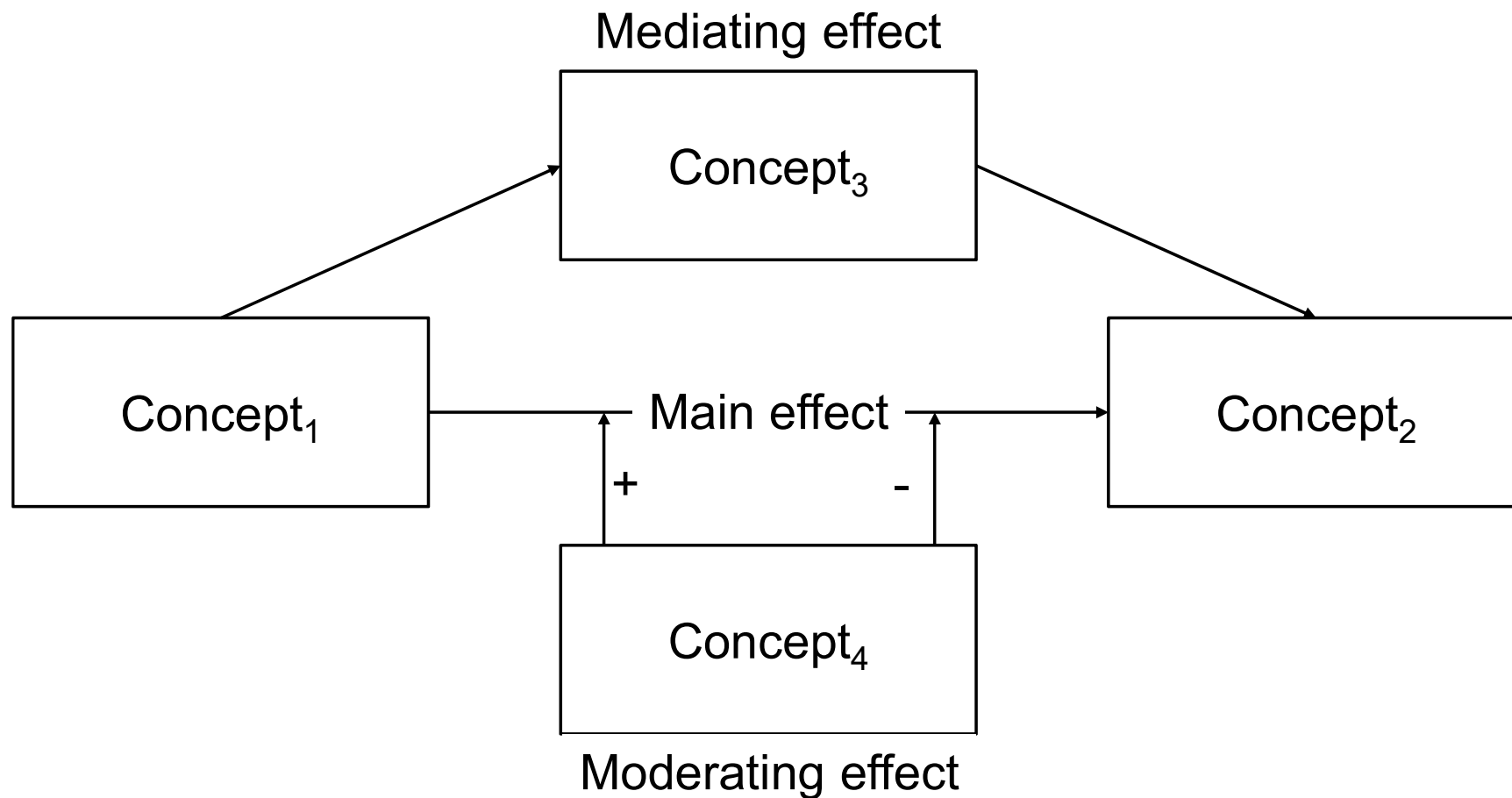


Based on Zaltman et al. 1973, p. 28

Conceptual Idea, Concept and Construct



Possible Relationships between Concepts



Example “Market Orientation” (1990)

Ajay K. Kohli & Bernard J. Jaworski

Market Orientation: The Construct, Research Propositions, and Managerial Implications

The literature reflects remarkably little effort to develop a framework for understanding the implementation of the marketing concept. The authors synthesize extant knowledge on the subject and provide a foundation for future research by clarifying the construct's domain, developing research propositions, and constructing an integrating framework that includes antecedents and consequences of a market orientation. They draw on the occasional writings on the subject over the last 35 years in the marketing literature, work in related disciplines, and 62 field interviews with managers in diverse functions and organizations. Managerial implications of this research are discussed.

Journal of Marketing,
54 (2), 1-18

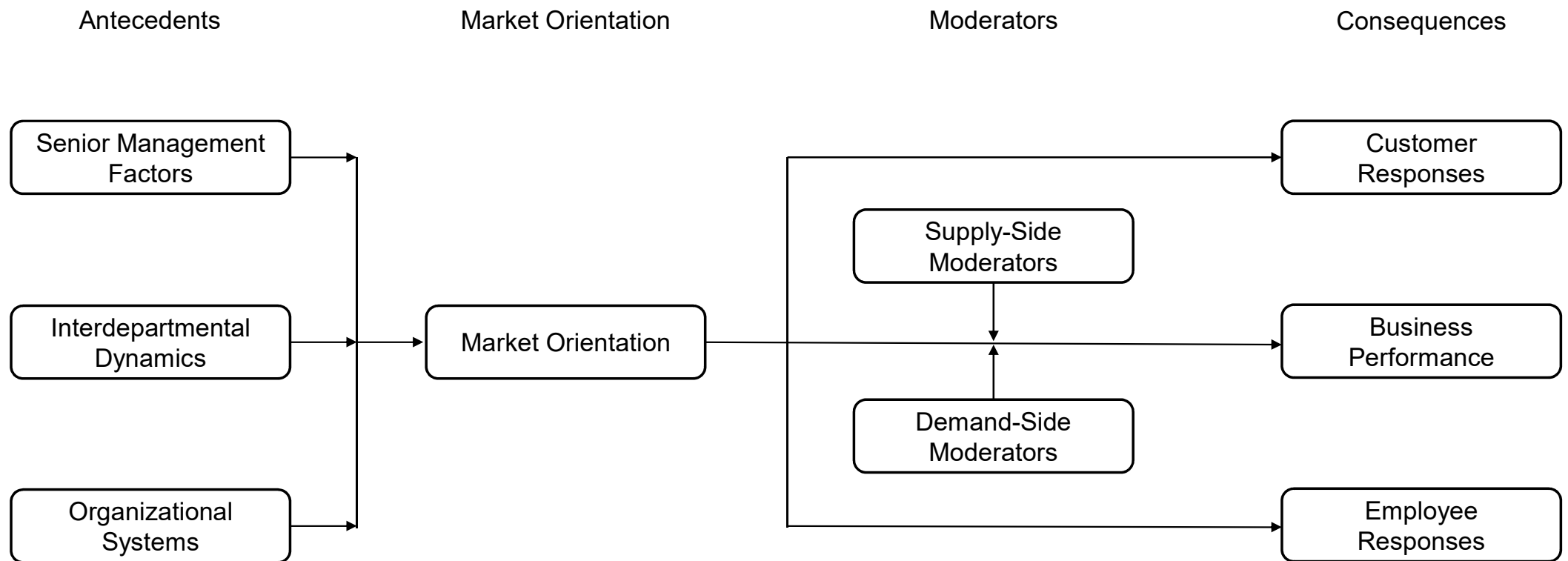
Method

- Review of literature from previous 35 years (1955-1990)
- Qualitative research comprising questions regarding the meaning of market orientation, organizational influencing factors, positive/negative consequences, business situations
- Theories-in-use approach: Eliciting, evaluating, abstracting and extending what researcher “hear” from managers
- Sample
 - 62 marketing-/ nonmarketing managers from 47 organizations (industrial, consumer and service industries, large and small firms, senior management positions and other positions)
 - Ten business academicians from two large U.S. universities

Definition of „Market Orientation“

Market orientation is the organization-wide generation of market intelligence pertaining to current and future customer needs , dissemination of the intelligence across departments, and organization-wide responsiveness to it (Kohli & Jaworski 1990, p. 6)

Conceptual Model

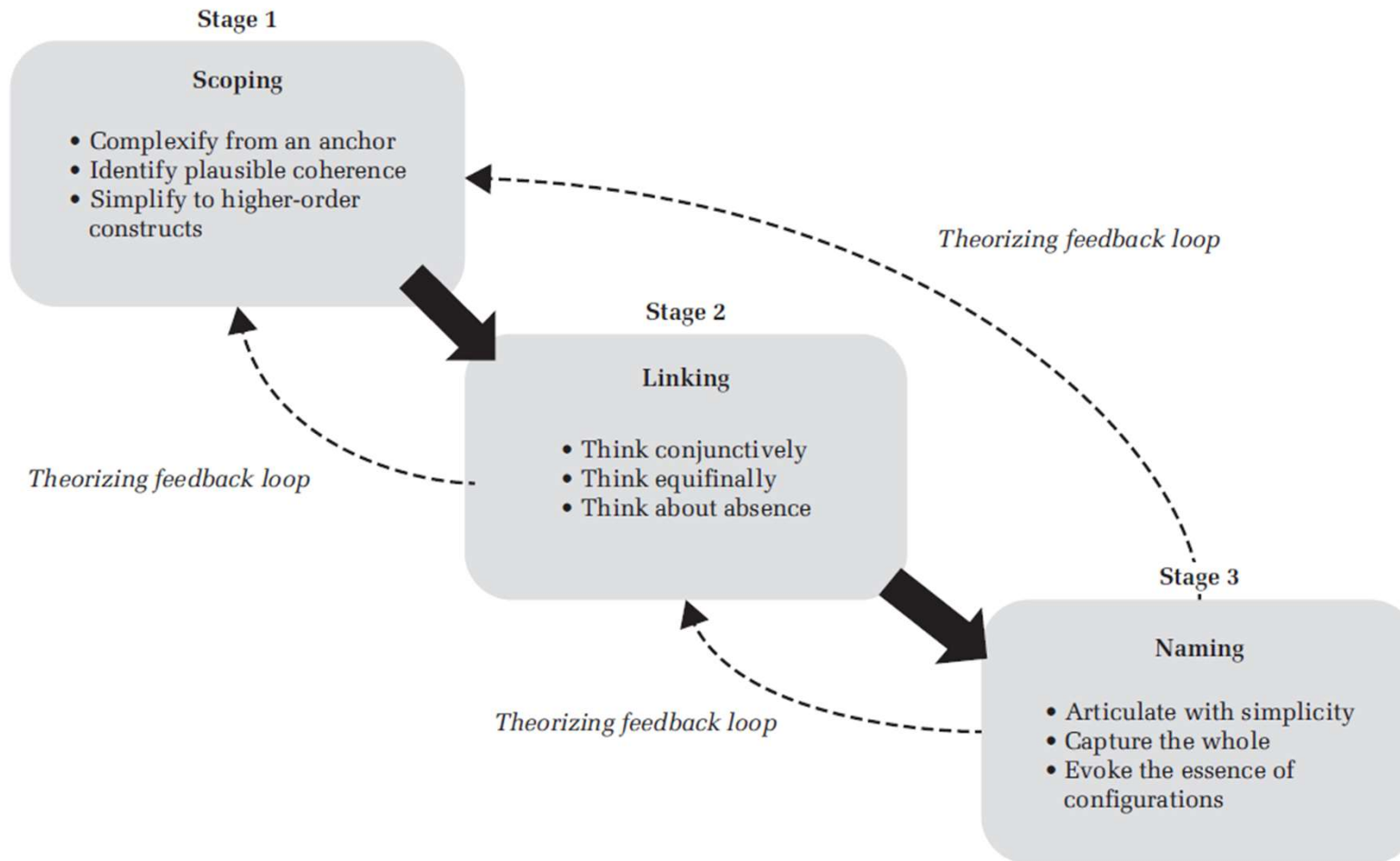


Theorizing Styles: Configurational Theorizing

Configurational Theorizing

- Explaining outcomes by examining how combinations of conditions (or variables) work together as configurations that lead to specific outcomes, rather than focusing on the independent effects of individual factors.
(Instead of asking, “What is the effect of X on Y?”, configurational theorizing asks: “What combinations of X, Y, and Z lead to a specific outcome?”)
- Helping understand how different pathways and complex combinations of factors lead to specific outcomes.

Configurational Theorizing Process



Furnari et al. 2021, p. 783

Example Output fsQCA

		<i>Core learning offering</i>			<i>Learning support environment</i>			<i>Learning support + extended university environment</i>		
	Resources	1a	1b	1c	2a	2b	2c	3a	3b	3c
<i>Core learning offering</i>	Teaching staff	●	●	●	⊖	⊖				●
	Course materials	●	●	●	⊖	⊖	●	⊖	⊖	
<i>Learning support environment</i>	Admin. support	⊖		●	⊖	⊖	●	●	●	●
	Facilities		●		●	●	●	●	⊖	
<i>Extended university environment</i>	Campus life		●		⊖		●	●	●	●
	Industry linkage	⊖		●		●	●	⊖	●	●
	Raw coverage	.14	.44	.44	.12	.13	.39	.12	.14	.44
	Unique coverage	.03	.05	.04	.02	.01	.03	.02	.01	.02
	Consistency	.76	.90	.90	.81	.81	.92	.88	.92	.92
	Solution coverage	.74								
	Solution consistency	.80								

Configurations for achieving high levels of higher education institution reputation (domestic student)

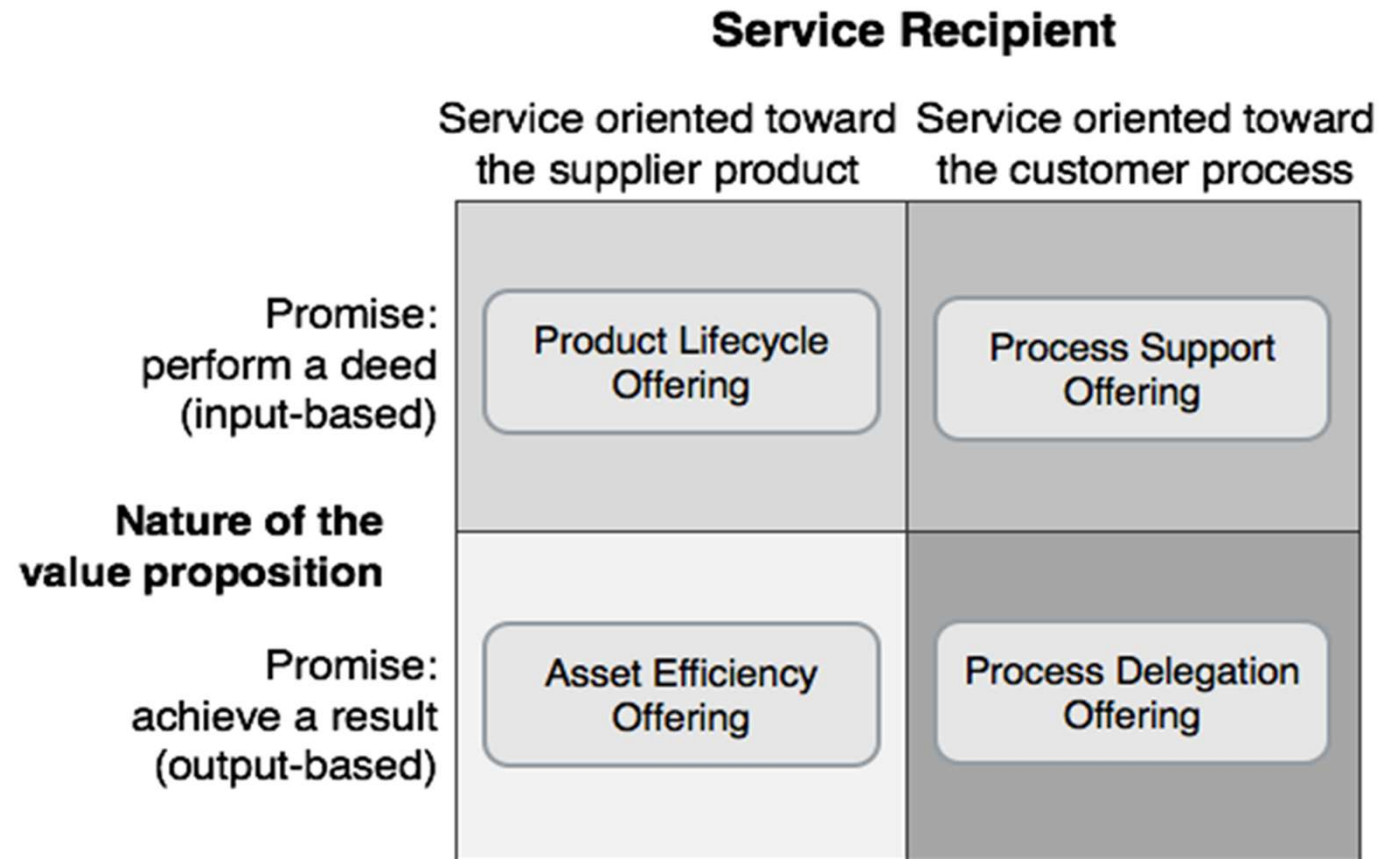
Plewa et al. 2016, p. 3091

Theorizing Styles: Typological Theorizing

Typological Theorizing

- Constructing (and using) conceptually and/or empirically derived types made from combinations of causal conditions that lead to distinct outcomes across those different types of cases.

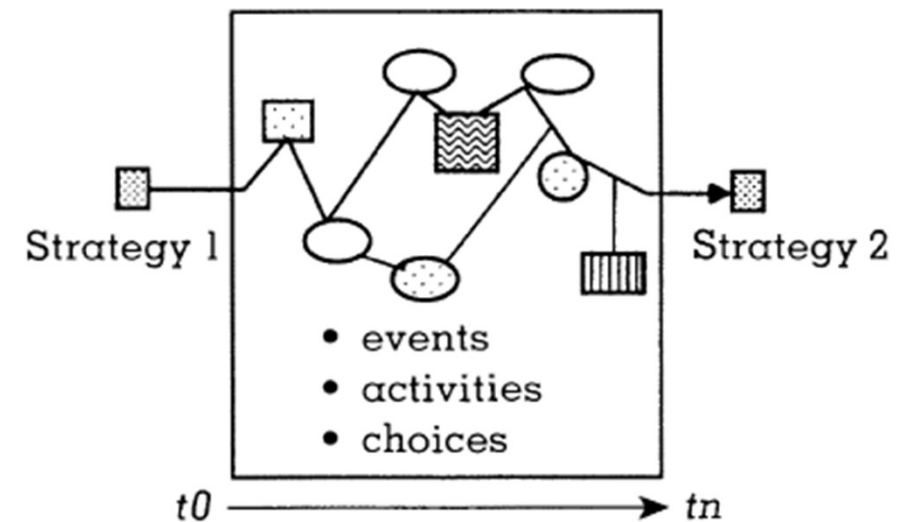
Example: Hybrid Offerings



Theorizing Styles: Processual Theorizing

Processual Theorizing

- Seeking to explain how and why things evolve over time.
- Focusing on sequences of events, interactions, or changes rather than static relationships between variables.
- Emphasizing sequences, dynamics, and mechanisms rather than just static cause-effect relationships.

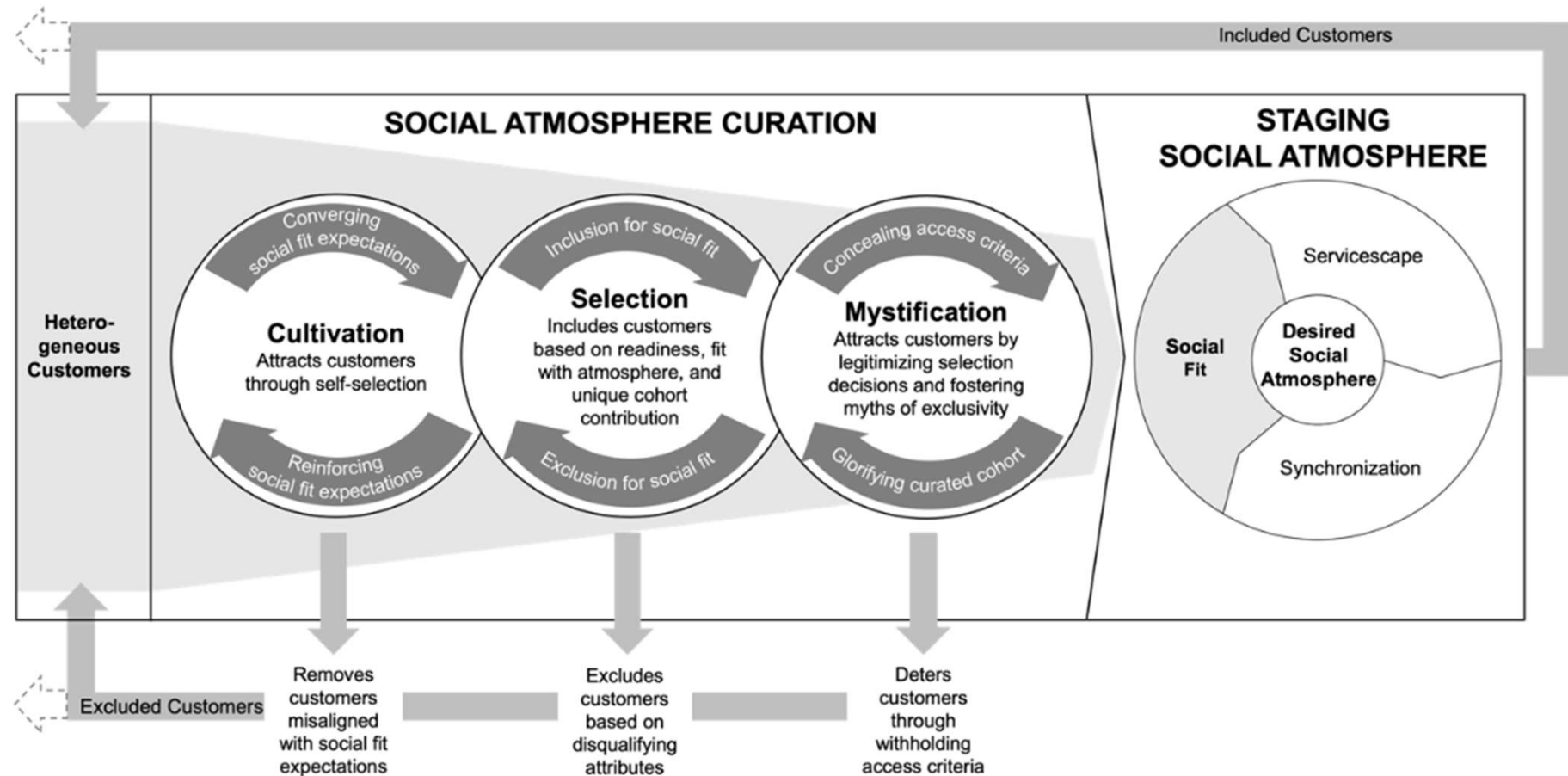


Generic model of a process theory

Strategies for Data Analysis and Sensemaking in Process Theorizing

- Narrative strategy: Constructing a detailed story from the raw data
- Quantification strategy: Systematically listing and coding qualitative incidents from process data according to predetermined characteristics, gradually reducing the complex mass of information to a set of quantitative time series that can be analyzed using statistical methods
- Alternate templates strategy: Proposing several alternative interpretations of the same events based on different but internally coherent sets of a priori theoretical premises
- Grounded theory strategy: Systematic comparing small units of data (incidents) and gradual constructing of a system of "categories" that describe the phenomena being observed
- Visual mapping strategy: Manipulating words (e.g., narrative strategies or grounded theory), numbers (quantification), or matrix and graphical forms
- Temporal bracketing strategy: Structuring the description of events
- Synthetic strategy: Taking the process as a whole as a unit of analysis and attempting to construct global measures from the detailed event data to describe it

Process Model of Social Atmosphere Curation



Danatzis et al. 2025, p. 693

Theorizing Styles: Refigurational Theorizing

Refigurational Theorizing

- “Theorizing about theorizing”
- Critically interrogating the assumptions, categories, and belief systems through which research phenomena are constructed and explained in explanatory theorizing.
- Revealing the limiting, divisive, or oppressive effects of existing conceptualizations and theories in order to open possibilities for alternative ways of explanatory theorising.

Refigurational Theorizing

- Forms of theorizing that do not primarily aim to explain “what is” or “what determines.”
- Questioning (business) reality indirectly by critically examining how meanings, assumptions, categories, and normative commitments shape what can be known, believed, and imagined.
- Self-referential, reconsidering, questioning, and critically examining existing assumptions, limitations, and implications.
- Advancing understanding through interpretation, synthesis, critique and re-conceptualizing prevailing perspectives and theories.
- Fostering renewed understandings, exposing the limits and consequences of dominant belief systems, and opening space for alternative ways of theorizing by making visible how (business) realities are constituted through meanings, concepts, and interpretive frames.

Interpretive Forms of Refigurational Theorizing

Approaching explanatory questions of theorizing indirectly by showing how they are “mediated through processes of social construction” (Cornelissen et al. 2021, p. 9).

- Perspectival theorizing
“[t]he (re)conceptualization of a topic fosters renewed understandings and creates opportunities for knowledge development through novel questions or concepts.” (p. 7)
- Meta-theorizing
“[t]he deep reading and synthesis of existing categories of theorizing creates reflexivity and provides pointers to alternative ways of studying and knowing topics.” (p. 7)

Emancipatory Forms of Refigurational Theorizing

“bringing to bear the critical force of well-articulated theoretical utopias (i.e., images of how things could be or should be) upon those belief systems, drawing out how either in the realm of our theorizing or in practice such beliefs lead us astray, divide or undermine people, or otherwise limit what may be possible” (Cornelissen et al. 2021, p. 11).

- Theoretical provocation
Criticizing “default assumptions around a topic and their implications leading to a theory-informed basis for action and change” (p. 7)
- Critical meta-theorizing
Synthesizing and criticizing existing categories of theorizing creating reflexivity and providing “an ardent call for alternative ways of studying and knowing topics” (p. 7)

Example




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Sage Journals

Article



Resource entanglement and indeterminacy: Advancing the service-dominant logic through the philosophy of Karen Barad

Michael Kleinaltenkamp ¹, Moritz J Kleinaltenkamp ², and Ingo O Karpen 

Abstract

Resources are central to value creation processes. Hence, marketing and service research rely heavily on conceptualisations of resources and resource integration for theory building efforts. One of the most widely accepted marketing lenses on resources and resource integration is the service-dominant (S-D) logic. Depicting resources as becoming and contextual, S-D logic argues that their usefulness co-depends on other resources. Some assumptions of S-D logic have been challenged particularly its dichotomous categorisation of operand and operant resources. To inform ongoing S-D logic theorising, our article problematises the multiple and contradictory ontological views upon resources and resource integration present within S-D logic. Moving beyond critique, we propose concrete means for reconciling these contradictions. Seeing a parallel between S-D logic's ontological inconsistencies and past ontological disagreements in the philosophy of science, we draw on the philosophical perspective of Karen Barad to develop a consistent onto-epistemological foundation for conceptualising the becoming nature of resources in S-D logic. The theory adaptation we perform enhances the applicability and explanatory capacity of S-D logic, while also offering a more robust and rigorous foundation for marketing and service research at large and giving managers new means to make sense of co-dependent resource phenomena.

Conclusion

Theorizing...

- ... is grounded in existing knowledge but seeks to advance understanding by offering new interpretations, insights, or connections between concepts
- .. is uncovering “the nonobvious and to render the obvious less so,” encouraging scholars to reexamine how they theorized, and what they theorized about, in order to find “better generalizations” (Weick, 1974, p. 501).
- ... is a practice that involves engaging with data, experience, or abstract reasoning to formulate meaningful insights or propositions.

Theorizing...

- ... can be approached through various ontological and epistemological lenses, and it is not constrained by the need for universal generalization or the ability to make precise predictions,
- ... involves reflection, interpretation, and abstraction. In both qualitative and quantitative research, although the goals, methods, and outcomes differ based on the philosophical underpinnings (ontology and epistemology) guiding the research.

Contributions

- Identifying and delineating the theorizing practices and theorizing styles
- Disentangling the often unclear or hidden ontological and epistemological foundations of marketing research
- Providing a comprehensive framework of the various elements of the theorizing process that is applicable to all sorts of theory development in marketing
- Providing guidance (especially for young researchers) for initiating projects, creating conceptual foundations for studies, designing empirical investigations, selecting suitable methods, and creating suitable knowledge artifacts for presenting research results

Thank you!



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