

ANALYSING THE TEXT

- What is the general purpose of the article?
- What is the gap in the received knowledge that the article addresses?
 - To identify the gap, look for criticisms in the article's introduction. Usually, the article tries to point out gaps, criticize received theories, underline the importance of some (perhaps new, emerging) phenomenon, describe challenges that firms face
- What is the main point or idea of the author?
- What is the author's purpose? Why is the article written (see also gap analysis above)
- Who is the author's intended audience? Who is the author writing for?
- What arguments does the author use to support her or his main point? How do(es) the author(s) develop their ideas? What is the internal logic of the article?
- What is the scope of application of the argument? Where do the ideas apply?
 - E.g., industry context, type of firm, situation faced, problem faced, other
- What assumptions (both explicit and hidden) is the author(s) making? What is the author's view of how the World works? (links to idea development). Does the author(s) draw on, or contribute to, a specific branch of literature? Which?

EVALUATE THE TEXT

- Is the argument logical? Are the ideas concise?
- Is the text well-organized, clear, easy to read?
- Are the author's facts accurate? Are the claims reasonable?
- Have important terms been clearly defined?
- Is there sufficient evidence for the arguments? What is the evidence?
- Do the arguments support the main point and ideas?
- Does the text present and refute opposing points of view?
- Does the text help you understand the subject?
- What questions or observations does this article suggest? That is, what does the article make you think about?
- Are there tangible, normative implications of the argument? Are the normative implications valuable and actionable?
 - ('normative' refers to instructions for practice: this is what you should now do ...')
- What is the overall value of the article? Are there genuine, value-adding new insights?

SUMMARIZE THE ARTICLE

- State the general purpose of the article
- Describe the gap in received literature, intended contribution
- State the article's main point and ideas
- Describe the article's supporting arguments for the main point
- (If feasible, draw a flow-chart that describes the article's idea development – see University of Alberta web page)
- Describe the underlying assumptions of the article, as well as the literature it draws on
- Describe the scope of application: context, industry, situation, problem addressed
- Describe and elaborate the main practitioner implications and normative conclusions of the article:
 - What should managers do differently? What should they do in general?
 - Prepare a list of tangible implications and normative conclusions
- Present your own critique, point out weaknesses, logical fallacies, severe limitations, alternative courses of action
- Conclude with take-home points

For empirical papers, these are the issues to be addressed by a presentation and/or a summary of the article. When you do a synthesis of several articles you build on your summary of each of the articles.

(1) Describe the essential research question. What is at issue here? What is the research question, i.e., the theoretical contribution that the paper sets out to achieve? What is the intended contribution, i.e., where is the gap in the received body of knowledge? How does the paper propose to add to the received understanding of how the World works?

a Research question **MUST** be described in theoretical terms. What is the theoretical causation? What are the underlying assumptions?

b. Address the received gap in the literature. Typically, articles describe where the received theories fail, or where there is a gap in empirical testing and validation of some of the theoretical notions. The gap defines the intended contribution of the paper.

(2) Describe the objectives of the paper. Objectives emanate from the research question. Objectives are measurable, well identified contributions, the achievement of which can be assessed by the reader of the article. Research question defines the broad theoretical issue. Objectives are more specific, tangible, measurable, and they can also incorporate empirical aspects

(3) Describe the theoretical frameworks on which the paper builds. Which stream of literature does this paper contribute to? What are their underlying assumptions? Identify and list the milestone contributions to this stream of literature

*this insightful guideline was presented in 2004 by Professor Erkkö Autio in a Strategy PhD course at HEC Lausanne. I have modified and updated this slightly.

(4) Describe the nature of the empirical sample and related sampling strategy: how does this particular empirical sample help us address the gap in the literature? And, more importantly, how does this empirical sample provide an ideal context for the study of the underlying theoretical issues?

a. Note that the empirical sample, in this case, should provide the context for the study of the underlying theoretical issue. For example, if you are interested in organizational learning and knowledge-intensive phenomena, you probably should focus on high-tech firms, because for these firms learning and knowledge-intensity are highly relevant processes and organizational characteristics

b. It is important for us to understand the logic that dictated the choice of the empirical setting. Remember that the theoretical issue should always precede the sample selection, not vice versa

(5) Describe the theoretical model that is to be validated empirically. If the paper does not present one, it is the responsibility of the student to prepare a boxes-and-arrows model of the paper's theoretical model. Boxes represent core theoretical constructs (e.g., absorptive capacity, organizational slack, etc), whereas arrows represent the specific hypotheses (i.e., WHY there should be a link between box A and B – why does A cause B)

(6) Describe the analysis methods used: case study vs statistical techniques (linear regression, SEM, survival analysis, other) and describe and assess the justification that the paper gave for the choice of the analytical technique

(7) Describe the core constructs of the empirical validation and their operationalization. What was measured, how, and why these specific measures were used?

(8) Describe the core findings from the empirical analysis. Show regression equations. Assess the strength of the empirical findings

(9) Assess the contribution of the paper to the received literature. Discuss the paper's limitations. Discuss the pointers for future research that the paper gives. Assess the overall contribution of the paper

For theoretical papers, the student should focus more in depth on questions 1 – 3, but the theoretical logic should be elaborated in greater detail. So, in addition to questions 1-3 above, you should also discuss:

- (1) Core theoretical assumptions. What is being assumed here? (e.g., agency theory's assumption of opportunism, IO theories' assumption that all resources are perfectly mobile and information is available to everyone; etc)
- (2) Core theoretical constructs. What are the key theoretical constructs employed by the framework?
- (3) The logic of theoretical causation. You should discuss, in greater detail, how the World Works according to this paper. What influences what and why. What follows from that. Why do firms behave the way they do
- (4) Contrast this paper's framework against other received theories in the area. How does the proposed theoretical logic differ from alternative theoretical logics in received literature? Typically, in theory papers, the authors go to some lengths to discuss weaknesses in received dominating theories, in an effort to make the case for a new theoretical logic. So, you should contrast the paper's theoretical logic to received alternative frameworks

For theoretical papers, the student should also do a citation analysis of the paper (using ISI Web of Science cited ref search) and list prominent empirical applications of the theory: in which kinds of questions, what kinds of empirical methods, and so on.