FROM THE EDITORS

THE NUTS AND BOLTS OF WRITING A THEORY PAPER:
A PRACTICAL GUIDE TO GETTING STARTED

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“How can I turn my interesting idea into an impactful theory paper?” they clamor. “I know I have a great idea but I don’t know what to do next,” they say discouragingly. These are common sentiments we often hear as an editor and associate editor at AMR. The goal of this editorial is to provide those scholars and you alike with a series of exercises that will progress an idea into a theory paper. A theory paper is a manuscript that seeks to develop new scientific arguments or extend existing arguments about relationships between units observed or approximated in the empirical world based on concepts and logical connections to answer the questions of “how,” “when,” and “why” (Bacharach, 1989). Although these exercises are geared toward scholars wishing to develop a purely theoretical paper, they are equally valuable to those who are developing the theoretical portion of an empirical paper that seeks to test that theory. Further, we hope that this editorial will be used in doctoral seminars and workshops as a guide to help scholars as they contemplate writing theory papers.

Theory papers can be challenging to develop and especially tricky to start because you have so much latitude; you are not bound by data or other empirical constraints. As theory papers need to be bold and make clear, substantive theoretical contributions, attempting to get started can be intimidating and overwhelming, especially early in one’s career. Furthermore, as many scholars do not receive conceptual development as part of their graduate school training, they may not have the knowledge base to make even initial progress (Byron & Thatcher, 2016). Advice on how to tackle the development of a theory paper is scattered and can sometimes be contradictory; some people say “jump in and just write,” others call for extensive outlines and iterations, while others say that one should hold off writing a pure theory paper until much later in one’s career.

The reality is that there are excellent articles and editorials about different elements of theory papers (e.g., Barney, 2018; Cornelissen, 2017; Lange & Pfarrer, 2017; Makadok, Burton, & Barney, 2018; Ragins, 2012). But these articles and editorials can be difficult to translate into practice if writing theory papers is a new experience for you. Further, many of these articles and editorials tend to focus on one element of a theory paper. Our AMR editorial team believes that a holistic experience addressing multiple elements of a theory paper would provide some much-needed guidance to interested scholars.

To create this holistic perspective, we first collected valuable articles and editorials focused on developing different elements of a theory paper. We “operationalized” each article or editorial into a hands-on exercise. For some elements of a paper with no corresponding editorial guidance, we developed exercises based on our own experiences (i.e., Exercises 1, 3, 6, and 7 in the Online Appendix). The paragraphs, figures, and statements that result from this collection of exercises will provide the initial framework upon which you will be able to produce a draft of a theory paper. In fact, these exercises are the foundation for the idea development workshops that the current AMR editorial team is conducting.

The exercises help to clarify, structure, and concretize your ideas—working through them moves you closer to having an initial draft of a theory paper.

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1 The Online Appendix is available at https://www.dropbox.com/s/pi4jkm7kxe1utic/AMR_FTE_Exercises.docx?dl=0
But, they don’t result in a fully formed draft of the paper. After completing the exercises, you will still need to write the paper, yet you will be in a much stronger position to do so because you will have a clearer perspective of what you are trying to achieve and a greater appreciation for the theoretical apparatus at your disposal to construct and convey your ideas. If you think of a final theory paper as a completed puzzle, then the set of exercises we are going to present to you represent the edge pieces. If you start your puzzle by completing all the edge pieces, then you have a clearer vision for what the puzzle will look like, and you will have delineated the boundaries of the final puzzle. Having done this, you are well positioned to make meaningful progress.

Below, we describe and explain these exercises so that you can utilize them to make progress in translating your ideas into the different elements of a theory paper. In the Online Appendix to this editorial, we provide worksheets that can be used to support and help facilitate working through these exercises. There are three caveats that we would like you to keep in mind as you work through the exercises. First, there is no right or wrong order in which to complete them; we have presented them in an order that makes sense to us, but you may complete them in any order that makes sense to you. Across the editorial team, we find that different team members like to utilize them and present them in a different sequence. Second, you may realize that the information that you generated in a prior exercise is vague or becomes inaccurate or obsolete as your theory development evolves. This is great news! It means that you are making progress, and you should seize the opportunity to go back and re-do or revise an exercise as you clarify your thinking. There is no limit on the number of times you can revise or fully re-do an exercise. Third, some of the exercises have overlaps and some of the information that you capture may feel redundant with respect to what you captured in other exercises. This is intentional. It creates an opportunity for you to assess the clarity of your ideas and to ensure consistency in your articulation of those ideas as you carry them through in developing your manuscript.

In this editorial, we describe seven separate exercises, and each centers on a different aspect of the theory-paper development process. These exercises—and the structure, focus, and clarity they engender for your ideas—constitute the basic “nuts and bolts” that hold a theory paper together. We hope they will serve you well as you create the framework for translating your ideas into a theory paper.

**EXERCISE 1: PATHS TO MAKING A THEORETICAL CONTRIBUTION**

The purpose of this exercise is to help you determine the type of theoretical contribution you would like to make with the paper that you are developing, and to allow you to identify other, high-impact exemplar articles that have achieved a similar purpose. Such exemplar articles can serve as inspiration and a source of insight throughout the theory development process. We have provided a couple of exemplar articles in our discussion but we encourage you to read AMR more widely to find exemplars that may be most beneficial to you.

There are four primary paths to making a theoretical contribution in AMR. The first is the development of new theory, which necessitates the generation of a novel theoretical idea, one that has not previously been presented in the literature (examples are McMullen & Shepherd, 2006, and Ashforth & Mael, 1989). The second path is challenging or enhancing existing theory. Taking this path requires building off a previously developed theory and substantially advancing it with new ideas and extensions, or, alternatively, challenging some of its fundamental concepts and assumptions and offering plausible theoretical alternatives (an exemplar is Mitchell, Agle, & Wood, 1997). The third path entails synthesizing divergent ideas or literatures into fresh theory. This path calls for stretching across previously disparate theoretical domains and integrating ideas from these different domains to generate new theoretical insights (see Suchman, 1995, for a good exemplar). The final path is putting forth ideas and approaches for improving the process of theory development in management and organizational studies. Engaging in this line of thinking may entail outlining ways to generate novel and impactful theoretical insights in empirical studies, or it may specify new approaches to constructing and conveying conceptual insights (exemplars include Eisenhardt, 1989, and Furnari, Crilly, Misangyi, Greckhamer, Fiss, & Aguilera, 2021).

**Step 1**

Consider your idea and the direction you wish to go. Do you intend to generate new theory, challenge or enhance existing theory, synthesize divergent literatures into fresh theory, or put forth an approach for improving the process of theory development? Think through this choice carefully, justify your decision to yourself, and then write out the justification, as writing can clarify your thinking (Ragins, 2012).
Step 2

Once you have determined the primary path that you intend to adopt to make a theoretical contribution, it is useful to search for exemplar articles that have pursued a similar path.

An exemplar is a document already in the literature that accomplishes the kind of task that you are trying to accomplish in an effective way. (Huff, 1999: 55)

In her excellent book Writing for Scholarly Publication, Anne Huff (1999) has described how exemplar articles can be used to speed up one’s understanding of key conventions in a journal or scholarly domain; they serve as a guide to help structure and solve problems in writing, while also providing a springboard for innovating beyond structures used by others. We recommend that you identify at least two impactful exemplar articles. They don’t need to address the same subject or build off the same theory as your paper in development; in fact, as Huff (1999: 55) noted, “it is often helpful to look for examples of similar work outside of your domain of interest.” You are merely interested in the template or blueprint of how your chosen path is presented.

Step 3

Having identified exemplar articles that have pursued a similar path to the one you wish to pursue, carefully study each of them and make notes on their key elements, lessons, insights, and conventions. Examine each article from a big picture structuring and flow perspective and then consider it on a micro level, in terms of transitions, word usage, and utilization of figures and tables. We use exemplars to support our own writing and theory development processes, we insist that our doctoral students do so, and we encourage you to do the same.

Different articles may be exemplars in distinct ways. For example, you may like the theoretical development approach in one article and the organization of the discussion section in another article. As you work through the exemplars you have identified, make notes of the elements that you like about each of them. Isolating the helpful elements from each exemplar article will allow you to craft a paper that uses effective styles in your own unique way.

EXERCISE 2: THEORY-BUILDING APPARATUS

This exercise is designed to help you identify and pin down the main components of your theoretical contribution. The exercise draws on key insights from an article entitled “A Practical Guide for Making Theory Contributions in Strategic Management” by Makadok et al. (2018). Although they wrote the article with strategic management scholars in mind, the core ideas apply to all management theory contributions. They noted that most theory contributions “extend, clarify, or apply received theories in new and interesting ways,” and they then go on to “offer a guide on how to make these kinds of contributions to theory” (Makadok et al., 2018: 1530).

To effectively complete the following exercise, it is important to first read the Makadok et al. (2018) article, and then to keep a copy of it handy as you work through the prompts below. The prompts nudge you to decompose your proposed theory into its component parts, such that you can properly specify and understand these component parts before writing them up in a draft paper.

Makadok and colleagues (2018: 1530) emphasized that making a theoretical contribution “usually begins with a research question, which can come from the phenomenon of interest, variations/limitations of existing theory, or intellectual creativity.” Then, to address this question, the theorist should specify and utilize the six levers that constitute elements of a theory: (1) the mode of theorizing, (2) the level of analysis, (3) an understanding of the underlying phenomenon, (4) causal mechanisms, (5) constructs and variables, and (6) boundary conditions. These six levers then combine to generate “a set of outcomes in the form of explanations, predictions, or prescriptions.”

To apply these ideas to your own theory development process, we recommend that, after reading the Makadok et al. (2018) article, you aim to complete the following eight statements:

1. The research question I seek to address is …
2. The primary modes of theorizing I will adopt are … (how)
3. The primary level of analysis for my theorizing is … (who)
4. The phenomenon that I am interested in is … (where)
5. The primary causal mechanisms underlying relationships in my theorizing are … (why)
6. The core constructs or variables in my theorizing are … (what)
7. The boundary conditions of my proposed theory are … (when)
8. The output of my theorizing will be … (explanations, predictions, prescriptions)
In addition to the information provided in the original article, there are a few things to keep in mind as you work through this exercise. First, you might not be able to answer all these statements immediately. You may need to do some reading, engage in careful thinking, and possibly enlist coauthors and other scholars to figure out the answers to these questions. Second, the answers to these statements may change as you complete the other exercises. Remember, writing down a response does not lock you into that response as your theory development process advances. Developing theory is a dynamic, consultative, and iterative process, and hence it is expected that some of these answers will change over time. Finally, some of these statements may not be relevant to you. For example, if you do not present a causal model, then you may not need to present causal mechanisms. Or, if your article is putting forth ideas and approaches for improving the process of theory development in management and organizational studies, then it will not be necessary to describe your core constructs. However, for many theory papers, most of these levers will apply, and you should tackle them even if they are difficult to specify.

EXERCISE 3: THEORETICAL BACKGROUND AND FOUNDATION

This exercise is designed to focus your attention on the key literatures that are foundational to your theorizing. All theorizing builds off concepts, theories, and ideas that already exist in the literature; it is important to know the literatures that are central to what you intend to do so that you not only build on the literatures but you engage with the research.

Ideas from too many literatures can lead to confusion, complexity, and unclear theorizing, whereas ideas from a single literature realm tend to result in incremental theorizing. We have found that there tends to be a sweet spot between two and four literatures. Identifying prior work within each of the literature domains will serve your theorizing and pinpoint the relevant aspects of that work for your theorizing. This exercise essentially comprises three steps, as follows:

Step 1

Identify the two, maybe three, possibly four literatures that are foundational to your theorizing. Specify each of these literatures.

Step 2

For each literature that you identify, list three to five critical references. These references could be seminal papers, review papers, or papers that you will target during your theory development section.

Step 3

For each literature that you identify, describe the key insights that will serve as input for your theorizing. Specify what it is from each literature that you will use to develop your theory.

When doing this exercise, it is important to keep in mind that the insights generated should reflect how the literature helps you in reinforcing, elaborating, or developing your theoretical perspective. The insights should not just be regurgitated information contained in the abstract or discussion section of a foundational paper! The insights that you list should be specific and valuable to what you ultimately wish to say; they should reflect how you plan to integrate the literature into the contribution that you will make. Your voice should be heard.

In carrying out this exercise, it is highly unlikely that no previous literature exists around your topic of interest. While a few naïve scholars may initially assume this to be the case, with some conscientious searching, it is almost always possible to uncover prior work that can serve as a foundation for your topic of interest. Furthermore, don’t hesitate to build on literatures outside of typical management and organizational study domains. Literatures that inform your theory could come from other disciplines, and, many times, some of the most intriguing theoretical contributions integrate concepts from other domains. For example, Keeler and Cortina’s (2020) paper, which won the AMR Best Article Award, incorporated key ideas from music literature as foundational to its theorizing. The underlying goal of this exercise is for you to determine which conversation you want to enter and to identify the set of literatures that gives you access to that conversation.

EXERCISE 4: THEORY DEVELOPMENT

This exercise is designed to clarify the nature and form of your theoretical contribution. It allows you to develop and specify a big picture perspective of what you intend to write about in your theory paper. Although the previous exercises have given you some insight into how you are bounding your contribution, and what apparatus you might use to do so,
this exercise requires precision in communicating your theory development process.

The exercise builds off the ideas put forth by Cornelissen (2017), who described three common styles of theorizing that are often used in a theory manuscript: propositional style, narrative style, and typological style. To identify your intended style as well as the nature and form of your theoretical contribution, you should first read Cornelissen’s (2017) editorial and then carry out the following steps:

Step 1
Identify your primary style of theorizing and discuss the rationale for your choice.

Step 2
Draw a visual that represents the essence of your theory at this point in the theory development process. This could be a figure or a table that reflects your key ideas. For a proposition-based figure, clearly label the constructs and their relationships. Having a separate sheet of definitions that correspond to your constructs is helpful. For a narrative style, your visual will likely be in the form of a process flow diagram. A typology is more likely to be captured and reflected in a table or perhaps a figure with clearly labeled axes and categories.

Step 3
Share your visual (figure and/or table) with others, such as with a colleague or a mentor. We recognize that this is a scary proposition, but it is one of the most important things you can do to improve your theorizing. Ask this colleague or mentor for their interpretation of your visual without your input. If their interpretation is inconsistent with your idea, explain your thinking, and then ask them how the visual could be clarified. By merely talking through your ideas with others, you are likely to substantially advance your thinking and learn how to better communicate your idea.

Although we have referenced several ways to visually portray your ideas (e.g., figures or tables), you may come up with alternative approaches. If this is the case, it is even more important that you ask for feedback, as new approaches may be less intuitive to readers.

Exercise 5A

Exercise 5A is based on the Lange and Pfarrer (2017) editorial entitled “Sense and Structure: The Core Building Blocks of an AMR Article.” We suggest that you read the editorial and then carry out the exercise as follows:

Step 1 Write out three or four bullet points in response to each of the following statements:
- common ground—“From prior research, we know that…”
- complication—“Yet, a complication comes about because…”
- concern—“This complication is of concern because…”
- course of action—“The course of action to address this concern entails…”
- contribution—“This paper contributes to the literature by…”

Step 2 Use the bullet points you created in Step 1 to draft a paragraph in response to each of the statements in Step 1. According to Lange and Pfarrer (2017), these paragraphs constitute the five key elements of a paper’s introduction.

Exercise 5B

Exercise 5B is based on Barney’s (2018) editorial entitled “Positioning a Theory Paper for Publication.” In the editorial, Barney presented a concrete, three-paragraph structure for writing a theory paper introduction. We suggest that you read the editorial, and then carry out the exercise as follows:

Step 1 Write out three or four bullet points in response to each of the following prompts:
Step 2 Use the bullet points you created in Step 1 to draft your three-paragraph introduction.

You may choose to complete one or both of the exercises. Completing both Exercise 5A and Exercise 5B is likely to help you improve the clarity with which you communicate your contribution. The version of the introduction you actually use for your manuscript will be based on your personal preference and the contributions that you are making. It is not necessary that you create only five-paragraph or three-paragraph introductions; however, the purpose of these editorials and these exercises is to help you concentrate on the key elements that are required in an introduction.

EXERCISE 6: DISCUSSION AND CONCLUSION

Due to the abstract and generalizable nature of theoretical contributions, it is crucially important to communicate the relevance and value of your contributions to the broader management and organizational field. We are often asked questions like, “How important is it to spend time on the discussion section?” and “I’ve already said all the important stuff in my theory development section; why do I have to repeat it?” Your paper’s discussion and conclusion sections should not be a repeat of what you have already written or a rehash of the introduction. They should help readers understand how your contributions can push the field in numerous ways. They should excite readers and make them think, “This is so interesting! Now, whenever I think of this literature or phenomenon or issue, I will think about it differently than I have in the past.”

To help you figure out what to include in the discussion section, we have created an exercise that prompts you to capture key elements of this section of your theory paper.

Element 1: Summary

Briefly summarize your theoretical development(s). Write out four to six bullet points that capture the essence of the theoretical ideas put forth in the paper.

Element 2: Theoretical Contributions

Using bullet points, lay out the key theoretical insights you have developed. These should be based on your theory developments, but should describe how they extend, change, or alter current theoretical views. This is the most substantive portion of the discussion section, so take the time to develop and capture the most compelling ideas here. These insights should be “matched” to the contributions listed in your introduction, but, now that the reader has read your manuscript, you can make them more generalizable.

Element 3: Practical Contributions

Using bullet points, list how your theoretical development(s) matter for real life, be this for managers, policy-makers, or social activists, to mention a few. Your insights might link to a key complication, concern, or phenomenon described in your introduction.

Element 4: Opportunities for Future Research

Provide your readers with a roadmap of potential future studies or areas of inquiry. Create a list of what scholars might do with what you have presented. Get them excited to build off your work. The more you are able to provide readers with ideas that build off of your theorizing, the more important your work will become to the conversation.

Element 5: Conclusion

Do not just end your manuscript; provide your readers with a “farewell” conclusion paragraph that punctuates the value of your manuscript. For this element, prepare three bullet points that contain the most important message of your manuscript and a strong ending sentence that will stay with the reader. Some authors use this final sentence as a way to link back to the title or to an example that was widely used in the manuscript. Other authors use it as an opportunity to express excitement about the future research to come out of their theorizing.

Although it is crucial to include these five elements in the discussion section, the first four do not...
have to be in the order presented here. For example, you might discuss Element 4 before Element 3 if your opportunities for future research flow directly from your theoretical contribution section. The challenge here is to ground the discussion section in your theoretical development, such that the discussion section builds off the theoretical ideas that you have put forth and creates excitement about those ideas. When authors discuss issues that are not related to their theoretical contributions, reviewers question their contribution to the literature. And, when authors create a discussion section that is blatantly repetitive, reviewers question their contribution to the literature. When authors discuss issues that are not related to their theoretical contributions, reviewers question their understanding of the literature. And, when authors create a discussion section that is blatantly repetitive, reviewers question their contribution to the literature.

EXERCISE 7: ABSTRACT AND PAPER TITLE DEVELOPMENT

The purpose of this last exercise is to help you articulate what should be in the paper’s abstract and title. This is what everyone will read and is your opportunity to make a stellar first impression on the reader! We’ve placed this exercise last because it is much easier to create an impactful abstract after you have completed all other aspects of the theory paper. The aim of the abstract is to give readers a strong sense of what is in the manuscript, but also leave them wanting to read more.

The paper elements put forth by Lange and Pfarrer (2017) in their “Sense and Structure” editorial serve as a very useful initial structure for a paper abstract. These elements can help you create a first draft of an abstract, after which you can (and should) refine and update it many times so that it draws readers into the article. Using Lange and Pfarrer’s (2017) structure to create the initial draft of your abstract, write a single sentence in response to each of the prompts below, and then string the five sentences together into a single paragraph:

- sentence 1, common ground—“From prior research, we know that…”
- sentence 2, complication—“Yet a complication comes about because…”
- sentence 3, concern—“This complication is of concern because…”
- sentence 4, course of action—“The course of action to address this concern entails…”
- sentence 5, contribution—“This paper contributes to the literature by…”

Following this five-sentence formula is just a starting point; you will need to massage and rework the abstract until it accurately conveys the synopsis of your manuscript. Most authors rework and refine their abstract dozens of times. It is the part of your paper that will be read the most, so it is important that it sounds good and has the appropriate tone. Avoid jargon. Read the abstract aloud to ensure that it flows and makes sense. Ask others who don’t know what your paper is about to read it and provide you with feedback. Are they excited and intrigued after reading your abstract? Does your abstract make them want to read your manuscript? If “yes,” you are on the right track. If “no,” keep revising.

The very last step is to create your title. Titles are a valuable opportunity to catch your reader’s attention. Think about titles that have attracted your attention in the past and consider how you might emulate elements from such titles. Will a reader see your title and be curious enough to read the abstract? Does your title make sense, given your abstract and theory paper? Is it too long? Is it accurate enough that search engines will connect your paper to the types of readers you want to attract? Running your title by others is an important feedback mechanism that lets you know if you have come up with a winning title.

PUTTING THE PIECES TOGETHER AND BUILDING OUT THE MANUSCRIPT

We have presented a series of exercises to help you clarify, structure, and concretize the main idea(s) for your theory paper and its theoretical contribution. This information provides you with the foundation for building out the rest of your AMR manuscript. We hope that the information from these exercises helps you coalesce your ideas into a coherent paper consisting of the following elements: abstract, introduction, theoretical background and foundation section, theory development section, and discussion and conclusion section.

Although some senior scholars encourage young scholars to “just start writing,” others caution against this advice. Donald Lange, in an interview in the AMR Origins series (episode 15) stated, “Once you start writing things down, you start falling in love with your own writing and it becomes hard to change things” (Makadok, 2021). Thus, working through these exercises may prove helpful in gaining clarity about your ideas and potential contributions before you start drafting your paper. Further, completing these exercises will help ensure that there is
consistency across the different sections of your AMR manuscript.

The seven exercises described in this editorial are the underlying “nuts and bolts” of a theory paper. Ultimately, though, how you develop your ideas and write your manuscript is up to you. Take what works from what we have shared and discard what doesn’t work. As you complete the exercises, you are piecing together the edge pieces of your unique puzzle. However, in contrast to a typical puzzle wherein there is only one way that the pieces fit together, your theoretical contribution can be constructed in multiple ways. How that puzzle emerges and the picture it presents is unique to your genius and your contribution. The more you engage in writing theory papers, the easier it becomes, but the exercises shared here provide a launching-off point to get you started. We are excited and anxious to see the creative, unique, and thought-provoking manuscripts that evolve from your engagement in, and integration of, these exercises.

REFERENCES


