

IBUS – 6329 MARKETING THEORY
FALL 2022

Instructor:	Dr. Fernando R. Jiménez
Meetings:	Monday 9:00 AM to 11:50am, Room COBA 307.
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Office hours:	By appointment

Course Description

The purpose of this course is to introduce doctoral students to academic scholarship and theory building. Students will learn how to develop and apply theory to explain and predict business phenomena in marketing and management.

Course Objectives

1. Understand the structure and purpose of scholarly articles.
2. Develop the ability to advance the field of marketing and management through theoretical development.
3. Develop the ability to elaborate theoretically driven hypotheses.
4. Develop the ability of thoughtful evaluation and critical analysis of research in marketing and management.

Required Readings

- (1) Ken Smith and Michael Hitt (2005), *Great Minds in Management: The Process of Theory Development*. Oxford, U.K.: Oxford University Press.
- (2) Shelby D. Hunt (2010). *Marketing Theory*. M.E. Sharpe, Inc.
- (3) Wall Street Journal. For free access go to WSJ.com/ActivateUTEP.

Recommended Readings

- (1) Shelby D. Hunt (2003), *Controversy in Marketing Theory*. Armonk, NY: M.E. Sharpe.
- (2) Van de Ven, Andrew H. (2010). *Engaged Scholarship: A Guide for Organizational and Social Research*. Oxford.
- (3) Anne Sigismund Huff (2009), *Designing Research for Publication*. Los Angeles: Sage.

Course Requirements

Homework	20%
Class participation	10%
Midterm paper	20%
Final paper	30%
Final exam	20%
Total	100%

Homework

Reading summaries. Students will read newspaper articles, book chapters, and academic articles throughout the course. Students will summarize each reading assignment in one page following the format below. Front and back printouts are two pages. Summaries that exceed the one-page limit will not be accepted. Students must submit their summaries in print at the beginning of the session. Add a cover page and page numbers. Summaries should follow the style of the Journal of Marketing. Late submissions will not be graded.

Format for Newspaper articles

- (1) Citation (Journal of Marketing style)
- (2) Description of the business issue
- (3) Propose a research question
- (4) Propose a hypothesis for the research question
- (5) Provide a list of 3 academic papers on this topic. Search top journals first.

Format for book chapters and conceptual articles

- (1) Citation (Journal of Marketing style)
- (2) What is the main point that the author wants to communicate?
- (3) Create bullet points for the key points of the reading. Briefly explain.
- (4) How is the article related to other topics in this course?

Format for empirical papers

- (1) Citation (Journal of Marketing style)
- (2) Description of the business problem
- (3) Research question
- (4) Theory and hypotheses
- (5) Data collection (i.e., type of study design, sample frame and size)
- (6) Data analysis (i.e., statistical procedures)
- (7) Major findings
- (8) Practical recommendations

Class participation

Students are expected to actively participate in the discussion each week. To accomplish this, students must be ready, willing, and able to discuss readings. Successful participation requires diligent preparation. It takes more than a quick reading of an article or book chapter to be prepared to discuss it. Throughout the semester, students will also be asked to conduct class presentations.

Midterm paper

Over the course of the semester each student is required to develop a scholarly research project culminating in a research model and hypotheses based on one or more theoretical perspectives.

This is to be a “new-to-the-world” project based on your own efforts. The midterm paper should include the following sections:

1. Cover page
2. Background. In this section explain in detail the problem being investigated. What is it? Why is it important? Who is impacted by this problem?
3. Research question. What is the research question? What is the dependent variable?
4. Annotated bibliography. A brief summary of the annotated bibliography. Tables are useful here. What are the main research questions? What are the leading articles in the area? What are the main theories, data collection methods, statistics used? What are the main findings? Students must submit a Dropbox folder with all the articles found. Label the articles as follows:
Year, Firstauthor lastname, title hint. E.g., 2022 Jimenez et al Value.pdf
5. Theory. A description of the top theories used in the area to explain and predict the problem of interest. In this section, students should provide a brief summary of each theory (at least 3). What are the origins of the theory? Main authors? What does the theory explain? What does the theory predict? Why are these theories appropriate in the context of investigation?

Follow Journal of Marketing guidelines. The paper and the PPT must be submitted by email prior to the session. A printout of the paper and a PPT outline (3 slides per page) must be submitted at the beginning of the session. The paper will be formally presented in person, following a typical national conference format (15 minutes, power point).

Final paper

The final paper is a continuation of the midterm paper. The paper should follow the structure of an empirical paper in the Journal of Marketing, including introduction, theory, hypotheses, method, analysis, and conclusion. No data is required. However, the student must propose a method and analysis consistent with common practices in the topic.

The student must turn in a manuscript, in journal format. Most conferences (and some journals) have a 20-page limit for paper submissions (all-inclusive); we will adopt that standard. All papers must abide the formatting of the Journal of Marketing (citations, tables, references, etc.).

The minimum expected outcome from this process is a paper that is appropriate for submission to a national academic conference. The more important outcome, however, is the foundation of a research project that can be submitted to an academic journal that contributes to theory and practice. The paper must be formally presented in class following a typical national conference format (15 minutes, power point). Submission guidelines are similar to the midterm (email, printouts, etc.).

By the time of writing the final paper, students should be familiar with academic articles on the topic. I recommend students to identify the structure of such articles and follow it. The final paper should include:

1. Cover page
2. Introduction (what is the managerial problem, what is the research question?)
3. Literature Review (what do we know about the problem, why current research is insufficient?)

4. Theoretical Background (what theory can explain the problem and predict the solution?)
5. Hypotheses (what would the theory predict?)
6. Research design. Propose the method to test the hypotheses. Data collection, sample (size, frame), type of study design (experiment, survey, secondary data, etc.).
7. Findings. What do you expect to find? Graph the expected results.
8. Contribution to Theory and Practice. Based on your expected findings, what contribution would you make to theory? What practical recommendations would you provide to managers?

Final Exam

The final exam will be in a comprehensive-exam format. More information will be provided in class.

Academic Honesty

Academic dishonesty is not condoned nor tolerated at UTEP or in this class. Such dishonesty, when evidenced, will be reported to the Student Judicial Affairs Office at UTEP. Read UTEP's website for more information about sanctions. Academic dishonesty is behavior in which a deliberately fraudulent misrepresentation is employed in an attempt to gain undeserved intellectual credit, either for oneself or for another. It includes, but is not necessarily limited to, the following types of cases: **Plagiarism** - The representation of someone else's ideas as if they are one's own. **Unauthorized Collaboration on Out-of-Class Projects** - The representation of work as solely one's own when in fact it is the result of a joint effort; **Cheating on Exams** - The covert gathering of information from other students, the use of unauthorized notes, unauthorized aids, etc.; and **Knowing Cooperation with Another Person in an Academically Dishonest Undertaking** - Failure by a student to prevent misuse of his/her work by others.

Accommodations for Students with Disabilities

If you have a disability and need classroom accommodations, please contact The Center for Accommodations and Support Services (CASS) at 747-5148, or by email to cass@utep.edu, or visit their office located in UTEP Union East, Room 106. For additional information, please visit the CASS website at www.sa.utep.edu/cass.

Tentative Schedule and Reading List

Date Topics/Readings

Session 1 Introduction

8/22

Readings:

1. Lusch, Robert F. (1982), "Creating a Successful Career: Guidelines and Suggestions for Doctorates in Marketing," *Journal of Marketing Education*, 4(1), 2-6.
2. Parasuraman, A. (2003) "Reflections on Contributing to a Discipline Through Research and Writing," *Journal of the Academy of Marketing Science*, 31 (3), 314-318.
3. Seggie and Griffith (2009), "What Does It Take to Get Promoted in Marketing Academia?" *Journal of Marketing*, 73 (January), 122-132.
4. Close, Angeline G. et al (2011), "Establishing Human Brands: Determinants of Placement Success for First Faculty Positions in Marketing," *Journal of the Academy of Marketing Science*, 39 (6), 922-941
5. Submit your academic CV. For the format, check one from a doctoral student that is looking for a job in your field, or contact friends or senior doctoral students. Be prepared to talk about yourself. Background, experience, motivation for PhD in your field, why UTEP? what type of job do you want after you get a PhD?

Session 2 The Domain of Marketing and Management

8/29

Readings:

1. Find out which textbook is being used for the intro to Marketing or Management course at UTEP. From that textbook, read Chapter 1 and define marketing or management. Discuss what kind of managerial issues the discipline entails.

If you don't have access to a textbook, find another textbook at the library or find a definition in the AMA (American Marketing Association) or AOM (Academy of Management) website.

In addition, look up the program for the latest AMA or AOM conference. What tracks were there? How are the subfields organized?

2. Choose one WSJ article that discusses an issue pertaining to marketing or management. Summarize the article and highlight its relevance to practitioners.

3. Identify (and summarize) a current article in Harvard Business Review or Sloan Management Review about the same topic in #2 above.
4. Identify (and summarize) a current empirical article in an “A” academic journal about the same topic.
5. Identify (and summarize) a current empirical article in a “B” academic journal about the same topic.
6. In one page, compare and contrast the articles (WSJ vs. HBR vs. B journal vs. A journal). How are they similar, how are they different?
7. From this week’s WSJ, identify 3 current problems that managers are facing in marketing or management. One problem can be the same used for the assignment above. Be ready to answer: why are the problems relevant for managers? What are the potential solutions?

Session 3 **Typology of Academic Contributions**
9/12

Readings:

1. Brinberg and Hirschman (1986), “Multiple Orientations for the Conduct of Marketing Research: An Analysis of the Academic / Practitioner Distinction,” *Journal of Marketing*, 50 (October), 161-173.
2. Calder and Tybout (1987), “What Consumer Research Is,” *Journal of Consumer Research*, 14 (1), 136-140.
3. Wells, William D. (1993), “Discovery-oriented Consumer Research,” *Journal of Consumer Research*, 19 (1), 489-504.
4. Parasuraman, A. (2003) “Reflections on Contributing to a Discipline Through Research and Writing,” *Journal of the Academy of Marketing Science*, 31 (3), 314-318.
5. Ladik and Stewart (2008), “The Contribution Continuum,” *Journal of the Academy of Marketing Science*, 36, 157 – 165.
6. In one page, compare and contrast the articles.
7. From this week’s WSJ, identify 3 current problems that business decision-makers are facing in marketing or management. Tell us, why are the problems relevant for managers? Potential solutions?

Session 4
9/19

Finding a Research Question

1. Shugan, Steven M. (2003), "Editorial: Defining Interesting Research Problems," *Marketing Science*, 22(1), 1-15.
2. Barley, Stephen R. (2006), "When I Write My Masterpiece: Thoughts on What Makes a Paper Interesting," *Academy of Management Journal*, 49 (1), 16 – 20.
3. Bolton, Ruth, Stephen W. Brown, Frederick E. Webster, Jr., Jan-Benedict E.M. Steenkamp, William L. Wilkie, Jagdish N. Sheth, Rajendra S. Sisodia, Roger A. Kerin, Deborah J. MacInnis, Leigh McAlister, Jagmohan S. Raju, Ronald J. Bauerly, Don T. Johnson, Mandeep Singh and Richard Staelin (2005) "Marketing Renaissance: Opportunities and Imperatives for Improving Marketing Thought, Practice, and Infrastructure," *Journal of Marketing*, 69(4), 1-25.
4. Janiszewski, Chris (2009), "The Consumer Experience," Association for Consumer Research Presidential Address.
5. Kohli, Ajay K. and Haenlein Michael (2020), "Factors Affecting the Study of Important Marketing Issues: Implications and Recommendations," *International Journal of Research in Marketing*.
6. Zeithmal et al. (2020), "A Theories-in-Use Approach to Building Marketing Theory," *Journal of Marketing*, 84 (1), 32-51.
7. Oviatt, Benjamin M. and Miller Warren D. (1989), "Irrelevance, Intransigence, and Business Professors," *The Academy of Management Executive*, 3 (4), 304-312.
8. Compare and contrast the articles. What are the recommendations to find a research topic?
9. From this week's WSJ, identify 2 current problems that business decision-makers are facing in marketing or management. Tell us, what research questions can be derived from those problems? That is, what would managers like to know the answer to?

Session 5
9/26

Finding a Research Question

1. GMIM (2005), Chapter 1, "The Process of Developing Management Theory," Hitt and Smith
2. GMIM (2005), Chapter 12, "On the Origins of Expectancy Theory," Vroom

3. GMIM (2005), Chapter 14, “Where Does Inequality Come From? The Personal and Intellectual Roots of Resource-Based Theory,” Barney
4. GMIM (2005), Chapter 23, “Transaction Cost Economics: The Process of Theory Development,” Williamson
5. Find and summarize an empirical article that employs each theory in marketing or management.
6. From this week’s WSJ, identify 3 current problems that business decision-makers are facing in marketing or management. Tell us, what research questions can be derived from those problems? That is, what would managers like to know the answer to?

Session 6 Research Question - Presentation

10/3

From the WSJ articles you have read so far, choose a research question. In class, students will present their choice. In a PPT, answer the following:

- a) What is the managerial problem? Provide background. For example: Why is it a problem? What decision can managers make with the results of the research? Why is the decision relevant? Provide details and examples of companies affected by the problem.
- b) What is the research question?
- c) In the research question, what is the independent variable and what is the dependent variable?
- d) What would your hypothesis be to answer the research question?
- e) How would you test your hypothesis? What data would you need? How can you collect and analyze the data?

Session 7 Annotated Bibliography

10/10

Prepare an annotated bibliography. That is, find as many articles as possible in A level journals about the topic and write a one page summary for each article.

Submit the summary of the 5 most recent empirical articles. Organize the summaries in one Word document in chronological order. Create an Excel table summarizing the articles (using summary headings).

Create a Dropbox folder and add all the articles you find. See the description for the “Midterm assignment” for details. Share the folder with your instructor and your classmates. Include the annotated bibliography and excel file in the same folder.

Students will present (PPT) their initial annotated bibliography in class.

Specifically, the presentation should answer the following questions:

- a) What are the main research questions in the articles?
- b) What are the theories used to develop hypotheses?
- c) What type of data and research method is used to test the hypotheses?
- d) What type of statistics and software are used to analyze the data?
- e) What has the research found? How are the findings useful to managers?
- f) How many articles have you found? Which journals?

Session 8
10/17

MIDTERM PRESENTATION

Session 9
10/24

Theoretical contributions

1. Daft, R. L. (1995). Why I recommended that your manuscript be rejected and what you can do about it. In L. L. Cummings & P. J. Frost (Eds.), *Publishing in the organizational sciences* (2nd ed., pp. 193-209). Thousand Oaks, CA: Sage

Theory:

- Tell a story. Theory is related to why question? Why did you choose these variables?

2. Varadarajan (1996), "From the Editor: Reflections on Research and Publishing," *Journal of Marketing*, 60 (4), 1-6.

3. Summers (2001), "Guidelines for Conducting Research and Publishing in Marketing" *Journal of the Academy of Marketing Science*, 29 (4), 405-415.

Define constructs.

4. Stewart, David (2002), "Getting Published: Reflections of an Old Editor." *Journal of Marketing*, 66 (4), 1 – 6.

Creativity. Necessary step. Theory – relevance

5. Kumar, V. (2016), "My Reflections on Publishing in Journal of Marketing," *Journal of Marketing*, 80 (January), 1-6.

Implications. Managerial application.

6. After reading the articles, answer the following questions: What is a theoretical contribution? What is the structure (parts) of academic papers that make a theoretical contribution?

7. Imagine you are submitting your paper to a top conference in your field (AMA, AOM). If possible, try to go to the website and follow the process. Choose a track for the paper. What tracks are there, which one would you choose? Why?

8. Imagine you are submitting your paper to a top journal in your field. Go to the website, register, and start the submission process. What key words would you choose? What field for the paper? Based on this paper, what field of expertise would you classify for yourself (when registering)?

Session 10 Theory Development

10/31

1. Dubin, Robert (1969), "Theory Building," Chapters 1 – 2. p. 1 - 49.
2. Whetten, David A. (1989), "What Constitutes a Theoretical Contribution?" *Academy of Management Review*, 14 (4), 490-495.
3. Van de Ven, Andrew H. (1989), "Nothing Is Quite So Practical as a Good Theory," *Academy of Management Review*, 14 (4), 486-489.
4. Van de Ven and Johnson (2006), "Knowledge for Theory and Practice," *Academy of Management Review*, 31 (4), 802-821.
5. Colquitt and Zapata-Phelan (2007), "Trends in Theory Building and Theory Testing," *Academy of Management Journal*, 50 (6), 1281-1303.
6. Sutton, Robert I. and Barry M. Staw (1995), "What Theory Is Not," *Administrative Science Quarterly*, 40(3), 371-384.
7. Whetten, Felin, and King (2009), "The Practice of Theory Borrowing in Organizational Studies: Current Issues and Future Directions," *Journal of Management*, 35, 537-563.
8. Calder, Bobby J. and Alice M. Tybout (2016), "What Makes a Good Theory Practical?" *AMS Review*, 6, 116-124.
9. MacKenzie and House (1978), "Paradigm Development in the Social Sciences," *The Academy of Management Review*, 3 (1), 7-23.
10. Identify the main takeaways for this session.
11. Identify 3 associations, business groups, or organizations that specialize in your research area. What do they do? What type of data do they collect?

Session 11 Theory-based research

11/7

1. Hunt (2010), Chapter 3, "The Morphology of Explanation"
2. Hunt (2010), Chapter 4, "Explanation: Issues and Aspects"
3. Hunt (2010), Chapter 5, "The Morphology of Scientific Laws"

4. Choose one empirical paper in your annotated bibliography (top journal, empirical). Answer the following: What is the managerial issue? What is the research question? What is the theory? What are the hypotheses? Explain the link between the theory and the hypotheses.

Session 12 Theory and hypotheses

11/14

1. Hunt (2010), Chapter 6, “Scientific Laws: Issues and Aspects”
2. Hunt (2010), Chapter 7, “The Morphology of Theory”

Prepare a presentation (PPT) about the following: Choose one empirical paper in your annotated bibliography (top journal, empirical).

What is the managerial issue?

What is the research question?

How did the author organize the literature review?

What is the theory the author chose?

What are the hypotheses?

Explain the link between the theory and the hypotheses

Session 13 Hypothesis Presentation

11/21

Choose a theory for your project and write hypotheses to answer the research question. Prepare a PPT presentation with the following:

1. What is the research problem?
2. What is the research question?
3. Brief summary of current research. Why can't current research answer the question? Gap.
4. What theory can explain the problem and predict a solution?
5. Who wrote the theory? Explain a little bit about the origins of the theory. What did the theory attempt to explain initially? What are its main components?
6. Drawing from the theory, write a hypothesis (or several).

Session 14 Philosophy of Science

11/28

1. Hunt (2003), Chapter 3, “The Development of the Philosophy of Science Discipline: From Classical Realism to Logical Empiricism”

2. Guba and Lincoln (2005), “Paradigmatic Controversies, Contradictions, and Emerging Confluences.”

3. Alba, Joseph (2012), “In Defense of Bumbling,” JCR, 6 (April), 961-967.

4. Ladyman (2002), Chapter 4, “Revolutions and Rationality.” 93- 125.

5. Peter, J. Paul and Jerry C. Olson (1983), “Is Science Marketing?” *Journal of Marketing*, 47(4), 111-125.

6. Hudson and Ozanne (1988), "Alternative Ways of Seeking Knowledge in Consumer Research," *Journal of Consumer Research*, 14 (4), 508-521.

7. Eisenhardt and Graebner (2007), "Theory Building from Cases: Opportunities and Challenges," *Academy of Management Journal*, 50 (1), 25-32.

8. Suddaby, Roy (2006), "What Grounded Theory Is Not," *Academy of Management Journal*, 49 (4), 633-642.

9. What are the main takeaways for this week? What type of research will you be conducting for your project? What is the dominant research paradigm in marketing and management? What alternatives to the "scientific method" are there?

Session 15 **FINAL PRESENTATIONS AND SEMINAR PAPERS DUE**
12/5

Session 16 **FINAL EXAM**
12/12