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| Instructor: | Dr. Fernando R. Jiménez |
| Class Time: | Wednesdays 8:00 – 10:50 |
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Course Description

The purpose of this course is to introduce Ph.D. students to academic scholarship, philosophy of science, and marketing thought. This course covers the basics of theory development and validation for business school Ph.D. students. Along the way, we discuss issues in the philosophy of science. The course is also designed to provide familiarity with the major journals in the discipline and the nature of scholarly articles. The course also covers a critical examination of historical concepts and theories in marketing and management.

Course Objectives

The primary objective of this course is to become familiar with the domain of marketing, its theoretical development, and gain an in-depth understanding of the fundamental theoretical and empirical elements founding the field of marketing. Within this domain, specific key objectives include:

1. Gaining an appreciation for the nature and purpose of a Ph.D. program in marketing.
2. Gaining a respect for the breadth of the field of marketing.
3. Becoming familiar with the major journals in the discipline.
4. Understanding the nature and purpose of scholarly articles.
5. Developing an appreciation for the historical development of marketing thought.
6. Gaining an understanding and appreciation of how our personal world views and various philosophies of science are related and influence our approach to conceptualizing and conducting research in marketing.
7. Developing the ability to advance the field of marketing through theoretical development.
8. Developing the ability of thoughtful evaluation and critical analysis of research in marketing.

Recommended Readings

- (1) Shelby D. Hunt (2010). *Marketing Theory*. M.E. Sharpe, Inc.
- (2) Shelby D. Hunt (2003), *Controversy in Marketing Theory*. Armonk, NY: M.E. Sharpe.
- (3) Van de Ven, Andrew H. (2010). *Engaged Scholarship: A Guide for Organizational and Social Research*. Oxford.
- (4) Ken Smith and Michael Hitt (2005), *Great Minds in Management: The Process of Theory Development*. Oxford, U.K.: Oxford University Press.
- (5) Anne Sigismund Huff (2009), *Designing Research for Publication*. Los Angeles: Sage.

Seminar Structure

The seminar is structured to consist of four key elements: (1) introduction to marketing scholarship, (3) foundations of philosophy of science, (4) foundations of marketing and marketing thought, (5) understanding and developing theoretical contributions; and (6) becoming familiar with theoretical streams of research in marketing. To facilitate the integration of these elements, they will be intermixed throughout the semester.

In terms of the daily structure, the seminar will be discussion based, where the students take the lead role in a discovery-oriented approach to learning. To facilitate discussion, students are expected to have carefully read each assigned reading and actively engage in discussion during each weekly meeting. Students are expected to read each article carefully, think about the major issues involved, consider the relationships among the articles, and think of ways to extend the research/topic.

Course Requirements

Grading

These components will determine your seminar grade.

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|-----------------------|-----|
| Class participation | 30% |
| Reading Summaries | 10% |
| Research Idea | 10% |
| Literature Review | 10% |
| Theory and hypotheses | 10% |
| Research paper | 30% |

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. Each student will be assigned one or more sessions to lead the discussion. This typically involves preparing discussion questions in advance to guide student preparation for the session as well as actually leading the discussion during the class period.

Reading Summaries

Students will be assigned to read book chapters, conceptual papers, as well as empirical papers throughout the course. Each student is expected to summarize each article in ONE front page. Front and back summaries will not be graded. Each summary should contain: (1) Citation (JM style), (2) location of authors (e.g., North America, Europe, Asia), (3) primary theory base underlying conceptual development, (4) hypotheses, (5) number of empirical studies reported in article, (6) primary methods used for data analysis (e.g., experiment, survey, qualitative interviews, modeling of secondary data), (7) number of data sources per study (e.g., a study based solely on data collected via a single survey from a single group of respondents has one data source; a study that matched responses from one group of respondents with objective data or data collected from another respondent would have two data sources), (8) statistical technique used, and (9) major findings. Students must turn in a hard copy of their own work at the beginning of each session.

Research Idea

Over the course of the semester each student is required to develop a scholarly research project culminating in a research model and hypotheses (no data) based on one or more theoretical perspectives. This is to be a “new-to-the-world” project based on your own efforts, although I will provide feedback and input along the way. The first step in this process is to write a short idea paper that provides background about the phenomenon to be investigated. The focus of this paper is to understand, what is the phenomenon of interest (i.e., context, real life example)? What is the dependent variable? How is the DV defined? Why is the DV important to business? Why is the DV in the domain of marketing? This paper is to be no longer than six pages long (12 pt. Times New Roman, 1-inch margins, double-spaced) plus references and appendix. The idea must be formally presented in class, in a typical national conference format (15 minutes, power point). Although you will receive a grade on the initial idea paper that is submitted, this process is not complete until we agree on a reasonable direction for the project. This may require multiple iterations on the idea paper until we reach that point.

Literature Review

From the idea paper, each student must conduct a literature review discussing what is known about the DV. The paper must include: definition, measurement, antecedents, consequences, moderators, mediators, and a section discussing several theories explaining the DV. 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 (in-text citations, tables, references, etc.).

Theory - Hypotheses

From the literature review, each student must select a theoretical approach explaining the DV. The theory-hypotheses paper should briefly describe the chosen theory, that is, its constructs and their relationships. The paper should include a section called “Theoretical background” that briefly describes the origins and evolution of the theory (boundaries, moderators, mediators, etc.). The student must demonstrate that she/he is an expert on the theory, that she/he knows its application to business situations, and its boundaries. The paper should conclude by identifying a research gap (e.g., a missing moderator, a missing mediator) and propose testable hypotheses. This paper is to be no longer than eight typed pages (12 pt. Times New Roman, 1-inch margins, double-spaced) plus references and appendix. The paper must be formally presented in class, in a typical national conference format (15 minutes, power point).

Research Paper

At the end of the semester, each student will turn in a manuscript, in journal format (i.e., JM, JMR, JCR or MKS), of the quality to be a credible submission to a national conference. This manuscript will be the fully-developed version of previous assignments, and will include an introduction (for positioning the project), a thorough literature review, a theory section, and a section discussing hypothesis development. Although students are not required to detail the

methods to be used to collect data, I expect students to take operational considerations into account to develop models and/or hypotheses (i.e., there is little point in developing a model that ultimately cannot be operationalized). Most conferences (and some journals) have a 20-page limit for paper submissions (inclusive of everything); we will adopt that standard. All papers must abide the formatting style of JM (in-text 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 within a year following the conclusion of the course.

The paper must be formally presented in class, in a typical national conference format (15 minutes, power point).

Special Note

The research process is a dynamic one, as such new articles appropriate to the topics to be covered may be incorporated into the reading list as they become available. If so, appropriate restructuring of our regular discussion schedule will take place. Lastly, circumstances may require me to modify this syllabus during the semester. Announcements pertaining to changes will be made 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 |
|-----------------|---|
| Week 1 01/17 | <p data-bbox="380 338 886 371">Introduction to Marketing Academia</p> <p data-bbox="380 413 878 447"><u>What does it take to become a scholar?</u></p> <p data-bbox="380 489 1344 558">Rotfeld, Herbert Jack (2011), “Researchers, Scholars, and Ivan,” <i>Journal of Consumer Affairs</i>, Summer, 358-364.</p> <p data-bbox="380 632 922 665"><u>What are the objectives of Ph.D. students?</u></p> <p data-bbox="380 707 1419 810">Lusch, Robert F. (1982), “Creating a Successful Career: Guidelines and Suggestions for Doctorates in Marketing,” <i>Journal of Marketing Education</i>, 4(1), 2-6.</p> <p data-bbox="380 852 1393 955">Close, Angeline G. et al (2011), “Establishing Human Brands: Determinants of Placement Success for First Faculty Positions in Marketing,” <i>Journal of the Academy of Marketing Science</i>, 39 (6), 922-941.</p> <p data-bbox="380 1037 867 1071"><u>What is tenure and promotion (T&P)?</u></p> <p data-bbox="380 1113 1373 1215">Parasuraman, A. (2003) “Reflections on Contributing to a Discipline Through Research and Writing,” <i>Journal of the Academy of Marketing Science</i>, 31 (3), 314-318.</p> <p data-bbox="380 1257 1385 1327">Seggie and Griffith (2009), “What Does It Take to Get Promoted in Marketing Academia? <i>Journal of Marketing</i>, 73 (January), 122-132.</p> <p data-bbox="380 1369 1422 1472">Zamudio, César, Yu Wang, and Ernan Haruvy (2013), “Human brands and mutual choices: an investigation of the marketing assistant professor job market,” <i>Journal of the Academy of Marketing Science</i>, 41 (June), 722-736.</p> |

Week 2
01/24

Planning your career and the research process

How to plan your career?

In-class exercises:

- Prepare your CV
- Application Packet
- Execution Timeline
- Professional Organizations (e.g., DocSIG)
- What are the resources available to you at UTEP?

What are the job opportunities for Ph.D. graduates?

Look at the Who Went Where survey 2016, and write down five take-away points.

Getting to know academic articles

Research question

Relevance

Contribution

Theory

Hypotheses

Method

Implications

Additional assignments

- Bring a CV from a well-known marketing scholar.
- Look at the scholar's career path. In one page, answer: what made her/him successful?
- Bring a "job application packet" from a Ph.D. student that is currently in the job market.
- Identify the top three marketing journals and bring an empirical article from each one.
- Understanding the job market. Watch:
<https://cc.readytalk.com/cc/playback/Playback.do?id=27t8g2>
- Read <https://www.ama.org/career/AcademicCareers/Pages/AMA-Transitions-Guide-Navigating-the-Progression-from-Doctoral-Student-to-Marketing-Profesor.aspx>

Week 3
01/31

The nature and scope of marketing

What is the domain of marketing (DVs)?

Bartels, Robert (1965), "Development of Marketing Thought: A Brief History," in *Science in Marketing*, George Schwartz (editor), New York, John Wiley and Sons, 47-69.

Hunt (2010), Chapter 1, "Introduction"

Hunt (2010), Chapter 2, "On the Marketing Discipline"

Kotler, Philip (1972), "A Generic Concept of Marketing," *Journal of Marketing*, 36(2), 46-54.

Bagozzi, Richard P. (1975), "Marketing as Exchange," *Journal of Marketing*, 39(4), 32-39.

Janiszewski, Chris (2009), "The Consumer Experience: Presidential Address," *Association for Consumer Research*.

Webster, F. E. and Lusch, R. F. (2013), "Elevating Marketing: Marketing is Dead! Love Live Marketing! *Journal of the Academy of Marketing Science*, 41 (4), 389-399.

What are the major fields of marketing (DVs)?

Baumgartner, Hans and Rik Pieters (2003), "The Structural Influence of Marketing Journals: A Citation Analysis of the Discipline and Its Subareas Over Time," *Journal of Marketing*, 67(2), 123-139.

Additional Assignments for this week

On their websites, read the scope of three major marketing journals. Bring a list of the most common dependent variables they investigate (domain, scope).

Check major journals at : <http://www.ams-web.org/displaycommon.cfm?an=1&subarticlenbr=10>

And search for impact factor in InCites Journal Citation Reports:

<https://jcr.incites.thomsonreuters.com/JCRJournalHomeAction.action?SID=B2-P6VHBFBpibLU0MeUM1Upgs11kjmauM0a-18x2dc3Posby7Y4IeA24DqhpckAx3Dx3DIoRaabHex2FUsgj7g9PkQsZQx3Dx3D-iyiHxxh55B2RtQWBj2LEuawx3Dx3D-IiOubBm4x2FSwJjjKtx2F71AaQx3Dx3D&SrcApp=IC2LS&Init=Yes>

Bring the list of research priorities published by the Marketing Science Institute (MSI).

Ask three different professors in your department:

- What are the main dependent variables in your research?
- Why are those variables important?
- What are the three top journals in your area?
- What are the main academic conferences in your area?
- What are the main fields in your discipline?

Supplemental Reading

Tellis, Gerard J., Rajesh K. Chandy and David S. Ackerman (1999), "In Search of Diversity: The Record of Major Marketing Journals," *Journal of Marketing Research*, 36(1), 120-131.

Mittal, Vikas, Lawrence Feick and Feisal Murshed (2007), "Publish and Prosper: The Financial Impact of Publishing by Marketing Faculty," *Marketing Science*, 27 (3), 430-442.

Bauerly, Ronald J. and Don T. Johnson (2005), "An Evaluation of Journals Used in Doctoral Marketing Programs," *Journal of the Academy of Marketing Science*, 33(3), 313-329. (Table 6 presents the distribution of articles citations per journal)

Week 4
02/7

What is an academic contribution?

Calder and Tybout (1987), "What Consumer Research Is," *Journal of Consumer Research*, 14 (1), 136-140.

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

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

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

Shugan, Steven M. (2003), "Editorial: Defining Interesting Research Problems," *Marketing Science*, 22(1), 1-15.

Brown and Dant (2008), "On What Makes a Contribution to the Retailing Literature," Editorial / *Journal of Retailing*. 131-135.

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

Supplemental Readings

Wells, William D. (1993), "Discovery-oriented Consumer Research," *Journal of Consumer Research*, 19(1), 489-504.

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.

Stremersch, Stefan, Isabel Verniers and Peter C. Verhoef (2007), "The Quest for Citations: Drivers of Article Impact," *Journal of Marketing*, 71(4), 171-193

Shugan, Steven M. (2007), "The Editor's Secrets," *Marketing Science*, 26(5), 589-595.

Colquitt and Zapata-Phelan (2007), "Trends in Theory Building and Theory Testing," *Academy of Management Journal*, 50 (6), 1281-1303.

Week 5
02/14

What is (not) a theoretical contribution?

Calder and Tybout (1987), "What Consumer Research Is," *Journal of Consumer Research*, 14 (1), 136-140. (again)

Whetten, David A. (1989), "What Constitutes a Theoretical Contribution?" *Academy of Management Review*, 14 (4), 490-495.

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.

Yadav, Manjit S. (2010), "The Decline of Conceptual Articles and Implications for Knowledge Development," *Journal of Marketing*, 74 (1), 1-19.

Klein and Zedeck (2004), "Theory in Applied Psychology: Lessons (Re)Learned," *Journal of Applied Psychology*, 89 (6), 931-933.

Campbell (1990), "The role of theory in industrial and organizational psychology," read 64-68.

Van de Ven and Johnson (2006), "Knowledge for Theory and Practice," *Academy of Management Review*, 31 (4), 802-821.

Van de Ven, Andrew H. (1989), "Nothing Is Quite So Practical as a Good Theory," *Academy of Management Review*, 14 (4), 486-489.

MacInnis, Deborah J. (2011), "A Framework for Conceptual Contributions in Marketing," *Journal of Marketing*, 75 (July), 136-154.

Supplemental Readings

Peterson (2005), "Ruminations on Theory and Research Scholarship in Marketing," *Journal of Public Policy and Marketing*, 24 (1), 127-130.

Goodson, F. E., & Morgan, G. A. (1976). Evaluation of theory. In M. H. Marx & F. Goodson (Eds.), *Theories in contemporary psychology* (pp. 286–299). New York: Macmillan.

Week 6
02/21

Research Idea Due / Presentation

What is the dependent variable (definition, examples)?
Who cares? Why is the dependent variable important?
How is this marketing?
Which marketing journal(s) publish research in this domain?
Which marketing academic conferences are adequate for this investigation?

Explanation and prediction

Whetten, David A. (1989), "What Constitutes a Theoretical Contribution?"
Academy of Management Review, 14 (4), 490-495.

Sutton, Robert I. and Barry M. Staw (1995), "What Theory Is Not,"
Administrative Science Quarterly, 40(3), 371-384.

Whetten, Felin, and King (2009), "The Practice of Theory Borrowing in
Organizational Studies: Current Issues and Future Directions," *Journal of
Management*, 35, 537-563.

Week 7
02/28

What is a good explanation? - part 1

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

Week 8
03/07

What is good explanation? – part 2

Hunt (2010), Chapter 6, "Scientific Laws: Issues and Aspects"
Hunt (2010), Chapter 7, "The Morphology of Theory"
Hunt (2010), Chapter 8, "Theory: Issues and Aspects"

Week 9
03/21

From curiosity to academic research

GMIM (2005), Chapter 1, "The Process of Developing Management Theory,"
Hitt and Smith
GMIM (2005), Chapter 12, "On the Origins of Expectancy Theory," Vroom
GMIM (2005), Chapter 14, "Where Does Inequality Come From? The Personal
and Intellectual Roots of Resource-Based Theory," Barney
GMIM (2005), Chapter 23, "Transaction Cost Economics: The Process of Theory
Development," Williamson

Assignment: Do a summary of an empirical article that utilizes one of these theories (expectancy, RB theory and TCE). Bring the summarized article to class, too.

Week 10
03/28

Literature review Due / Presentations

What do we know about the DV?
What are the theoretical lenses explaining the DV?
Major antecedents, consequences, moderators, mediators?

Finding a research gap / unexplained variance

Huff (2009), Chapter 1, "Finding the Right Conversation"
Huff (2009), Chapter 2, "Criteria for Contribution"
Huff (2009), Chapter 3, "Theoretic Explanation"

Assignment: Identify three recent articles from JM in your topic of interest. Analyze how the introductions were written. What is the pattern?

Week 11
04/04

Theory Development

What are the components of a nomological network?

Peter, Paul J. (1981), "Construct Validity: A Review of Basic Issues and Marketing Practices," *Journal of Marketing Research*, 18 (2), 133-145.

Mowen, J.C. and Voss, K.E. (2008), "On Building Better Construct Measures: Implications of a General Hierarchical Model," *Psychology and Marketing*, 25, 6, 485-505.

Dubin, Robert (1969), "Theory Building," Chapters 1 – 2. p. 1 - 49.

What is the process of theory building?

Weick, Karl E. (1989), "Theory Construction as Disciplined Imagination," *The Academy of Management Review*, 14 (4), 516-531.

MacKenzie and House (1978), "Paradigm Development in the Social Sciences," *The Academy of Management Review*, 3 (1), 7-23.

Assignment: Find and summarize a recent article from JM that tests a theoretical model. Bring the summary and the article to class.

Supplemental reading:

Teas and Palan (1997), "The Realms of Scientific Meaning Framework for Constructing Theoretically Meaningful Nominal Definitions of Marketing Concepts," *The Journal of Marketing*, 61 (April), 52-67.

Cronbach, Lee J. and Paul E. Meehl (1955), "Construct Validity in Psychological Tests," *Psychological Bulletin*, 52 (4), 281- 302.

Alba, Joseph (2012), "In Defense of Bumbling," *JCR*, 6 (April), 961-967.

Week 12
04/11

Tips for Publishing Academic Articles

Barley, Stephen R. (2006), "When I Write My Masterpiece: Thoughts on What Makes a Paper Interesting," *Academy of Management Journal*, 49 (1), 16 – 20.

Ladik and Stewart (2008), "The Contribution Continuum," *Journal of the Academy of Marketing Science*, 36, 157 – 165.

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

Theory - Hypothesis

Assignment: Find and summarize a recent article from JM and identify the hypotheses. Bring the summary and the article to class. Pay attention on how the theory leads to the hypotheses.

Week 13
04/18

Theory and hypotheses paper due / presentation due

Week 14
04/25

Approaches to knowledge creation / Foundations of Philosophy of Science

Hunt (2003), Chapter 1, "Introduction"

Hunt (2003), Chapter 2.

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

Guba and Lincoln (2005), "Paradigmatic Controversies, Contradictions, and Emerging Confluences."

Assignment: Research what is TCR? CCT?

Supplemental Reading:

Alba, Joseph (2012), "In Defense of Bumbling," *JCR*, 6 (April), 961-967.

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

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

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

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

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

Week 15
05/02 **Towards a General Theory of Marketing**

Alderson, Wroe and Reavis Cox (1948), "Towards a Theory of Marketing," *Journal of Marketing*, 13(2), 137-152.

Bagozzi, Richard P. (1975), "Marketing as Exchange," *Journal of Marketing*, 39(4), 32-39.

Vargo, Stephen L. and Robert Lusch (2004), "Evolving to a New Dominant Logic for Marketing," *Journal of Marketing*, 68 (1), 1-17.

Hunt, Shelby (2010), Part 4 Toward a General Theory of Marketing.

Week 16
05/9 **FINAL PAPER PRESENTATIONS AND SEMINAR PAPERS DUE**