

Dialogue, Debate, and Discussion

Management Scholars' Learning from History: Direct vs. Indirect Approach

Runtian Jing and Mei Dong

Shanghai Jiao Tong University, China

Study the past in order to define the future.
–Confucius

We appreciate this invitation to comment on the paper on Western perceptions of Chinese culture, to provide an insider perspective. Because of its unique perspective on Chinese historical teachings, the study reminds us about the challenges in learning and applying indigenous knowledge. For example, it compares the lens of war and business in many dimensions, such as a focus on an enemy (war) or on customers (business), a matter of life and death (war) or not (business), one competitor (war) or a number of competitors (business), deception (war) or secrecy (business), or a one-time relationship (war) or a long-term relationship (business). The paper offers us a striking warning about the risk of overdrawing historical analogies in management research.

At the same time, we have serious concerns about its approach to defining and applying cultural knowledge in management research. A Chinese parable called 'Mark the Boat to Find the Sword' goes as follows: While a man from the state of Chu was crossing a river by boat, his sword fell into the water. He quickly carved a mark into the side of the boat where the sword dropped into the river. When the boat stopped moving, he jumped into the water to look for his sword at the place that he had marked. However, the boat had moved while the sword had not, and he was unable to find it. So, looking for the sword in this way does not make any sense.

Likewise, when trying to map cultural philosophies to a business context, we cannot make direct comparisons or applications. Instead, we need to capture the cultural values and logic underlying behavioral patterns and then apply them to the process of theorizing in management research.

THREE APPROACHES TO ACQUIRING CULTURAL KNOWLEDGE

Knowledge about a culture can be acquired using three different approaches.

1. 'What-knowledge' about behavioral patterns

In cultural studies, researchers examine and compare behavioral patterns among people in different cultural contexts. This kind of research aims to achieve 'what-knowledge' – that is, relevant knowledge about different countries. However, the value of this knowledge is limited by a lack of comparable knowledge about the context of the research (Tsui, Nifadkar, & Ou, 2007). Deeper understanding is needed to decipher behavioral patterns in that culture.

2. 'Why-knowledge' about cultural values

As the dominant approach in cross-cultural studies, researchers often adopt culture as a set of values or beliefs about what ought to be. In order to attain 'why-knowledge', they regard culture as normative anchor to explain why certain behaviors are more appropriate in a particular context. The problem with this approach is that most studies treat each dimension of cultural values as independent, in opposition to the common understanding of culture as a pattern of interrelated values (Tsui et al., 2007). Thus, a configuration approach is needed that integrates individual concepts and values into a coherent set, what we call cultural logic.

3. 'How-knowledge' about cultural logic

Cultural logic can be understood as a cognitive frame for integrating individual cultural concepts and values into a coherent system of thought (Drazin, Glynn, & Kazanjian, 2004). Because it is socially constructed, cultural logic can subliminally enable people to make sense of interpersonal dynamics and to implement their beliefs and values in consistent actions (Augoustinos & Innes, 1990). When people in a local community interact frequently about cultural experiences, their cultural logic becomes more tightly organized. Indigenous cultural logic may reveal different coherence of thinking to its foreigners. After it is decoded, it can make people reflect on their preconceptions and inspire them to view the world differently (Chen & Miller, 2011; Li, 2016). Thus, as Jullien (2003) comments, 'China as philosophical tool', the cultural logic in Chinese historical teachings has the potential to help researchers overcome unconscious limitations in the existing theoretical paradigms.

HISTORICAL CONTEXTUALIZATION FOR SUN ZI'S MILITARY THEORIES

We believe that the first approach can give practitioners relevant knowledge, but overdrawing this kind of knowledge across different contexts leads to a misuse of

history. Theoretically, to understand a behavior in an unfamiliar context, we have to discern its cultural meaning. Accurate perception relies not only on what we see but also on what we/they think, because even similar behavior can imply different feelings or thinking in different contexts. Thus, as the author stated, 'the technical detail [of military strategies] is lost when transposed to business' (Clydesdale, 2017); learning behavioral patterns directly cannot achieve a borrowing of knowledge across contexts. To do so, we need to learn the embedded cultural values and logic through a process of deep contextualization (Tsui et al., 2007), in a systematic borrowing approach (Whetten, 2009). These kinds of knowledge are referred to in the article as 'a high level of skill' or 'art'.

Next, we examine the deep context of Sun Zi's military theories to understand their contribution to 'why-knowledge' and 'how-knowledge'.

An 'Indirect' Approach to War

Sun Zi was a Chinese military strategist in the sixth century BCE. At that time (called the Spring and Autumn Period, ca. 771–476 BCE), China was embroiled in long-drawn-out wars involving over 140 vassal states across the empire,^[1] and each war cost many thousands of lives. Reacting to this situation, Sun Zi developed an 'indirect' approach to war, which 'reflects a horror of war and a deep-felt yearning for peace' (Koller, 2007: 244). In his book *The Art of War*, Sun Zi claimed that the best way to achieve peace is through a swift victory or, better yet, by defeating an enemy before war is even begun. As he writes, 'to fight and conquer in all your battles is not supreme excellence; supreme excellence consists in breaking the enemy's resistance without fighting' (Sun Zi, 1971: 77).^[2] Such an 'indirect' approach differs from the traditional 'direct' approach in Eastern and Western warcraft (Hart, 1967). For example, in his book, *On War*, Carl von Clausewitz (2007) emphasizes that victory on the battlefield can be achieved only through a decisive battle of annihilation and destruction of the opposing forces at any cost.

To make a moral judgment, we must place the indirect approach in its political context. Compared with the deception problems in indirect war, the sacrifices and crimes against humanity in direct war are more serious. Therefore, after many debates over past centuries, Sun Zi's indirect approach became more accepted in modern warfare research (Hart, 1967). Meanwhile, even with an understanding of why this 'indirect' approach has been developed, we are still unclear *how* to employ it. This kind of question takes us to the next level of contextualization.

How the 'Indirect' Approach Works

To accompany the 'indirect' approach, Sun Zi developed 36 strategies to minimize the costs of a large-scale direct war. As a core concept, situational momentum, rather than military strength, is emphasized in his illustration. The concept of

momentum (*shi*) is borrowed from Daoism, referring to a kind of perceived situational powers that can align people's actions with desired goals. When momentum is favorable, it can help people to achieve these goals through specific actions; when momentum is unfavorable, it hampers those actions. Sun Zi takes a holistic view of human activity and momentum, calling them ordinary and extraordinary forces, respectively, that can co-determine the results of a battle.

Hence, what Sun Zi contributes was built on Daoism (rather than Confucianism) and further developed by Sun Bin and other military strategists in Chinese history. Daoism developed a complicated methodology to help people comprehend whether momentum is favorable and a coherent logic to manage the development of momentum. In Chinese society, this deep cultural logic created a template for people to learn and implement an indirect approach for dealing with conflict (Strutton & Pelton, 1997), competition (Chen & Miller, 2011), paradox (Li, 2016), change (Peng & Nisbett, 1999), and leadership (Hee & Gurd, 2010) in their daily life.

TWO EXAMPLES OF A SYSTEMATIC BORROWING APPROACH

Both the second and the third approaches can be employed as systematic tools for applying cultural knowledge in management research.

Anchoring an 'Indirect' Approach in the Management Context

In a recent study, Persson and Shrivastava (2016) state that, based on the anthropocentrism in Western society, the field of human resource management has mostly assumed that human beings are separate from their working and living environment, and this is the major cause of the excessive pressures and stresses in human life. Inspired by the philosophies of Daoism and Sun Zi, they propose a holistic view of the relationship between human beings and nature to overcome the direct conflicts underlying that relationship and to achieve sustainable human resources development practices. They use Chinese philosophy as an alternative anchor for expanding the existing research view.

Developing an 'Indirect' Theory in the Management Context

For example, in a case study of reform practices at a bus group company in China, Jing and Van de Ven (2014) develop a theoretical model of organizational change based on the core concept of momentum. According to this model, by intuiting the pattern of situational change, change agents can take advantage of favorable momentum (*yingshi*, 应势) to put change actions into practice. By purposefully harnessing external forces for their own aims, they can create favorable momentum (*zaoshi*, 造势) to create desired change outcomes. In an interview as part of the

study, the company's CEO – that is, the change agent – stated his creed for organizational change as follows: 'To solve a tough problem, sometimes a leader needs to create another one first'. This is an example of the cultural logic of the indirect approach in management.

CONCLUSION

Clydesdale (2017) addresses an important question about how management scholars learn from historical knowledge, and his comments on the misuse of history remind us about the risk of borrowing knowledge from a culture without deep contextualization. Instead of using the direct approach, which he criticizes, we propose that management scholars, instead, take two indirect approaches when systematically borrowing cultural knowledge for use in business research. Considering the misunderstandings that can occur in this line of research, we offer the following suggestions.

1. Recognize the difficulties of indigenous research

Despite its significance, indigenous research is difficult to conduct, because it requires deep and reflexive engagement in culturally specific values and logic to obtain informed consent and establish uniqueness (Van de Ven & Jing, 2012). Without deep contextualization, we can run the risk of interpreting indigenous concepts and values through the lens of our own perspectives and reactions. Such preconceived notions can cause indigenous research to lose legitimacy in the eyes of local communities. For example, among the Maori in New Zealand, indigenous research conducted by foreigners was just another manifestation of colonialism, as Smith (1999: 1) states: 'It galls us that Western researchers and intellectuals can assume to know all that it is possible to know of us, on the basis of their brief encounters with some of us'.

2. Avoid distortion of cultural knowledge by practicing engaged scholarship

Chinese culture is rich in the variety and number of traditional beliefs because of its long history, and, since the economic opening and reform policy was implemented in 1978, many economic and institutional factors have also accounted for the construction of Chinese behavioral patterns. Management scholars sometimes lack expert knowledge of culture or history, but high-quality indigenous research requires deep knowledge of the behavioral context. One way to add this knowledge to management research is to involve insiders, who have rich knowledge of the context, in this research or even work with them as collaborators. Another way is to spend substantial time and effort in talking with and observing local scholars and managers in relevant areas (Van de Ven & Jing, 2012). A great deal of influential

indigenous management research about China has been conducted by scholars who are not native Chinese (e.g., Boisot & Child, 1996; Nee, 1992; Walder, 1992).

In conclusion, to systematically borrow from historical works for use in a business context, researchers have to delve more deeply into the context and pay more attention to the underlying cultural assumptions, values, and logic. Only by doing this can the knowledge and wisdom learned from history inspire insights that can enrich our future research.

NOTES

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- [1] Thus, we cannot agree with the article's proposition that Sun Zi envisioned only one competitor.
 [2] Here, the author's positioning of the goal of war for vanquishing competitors may not be very proper, at least from Sun Zi's point of view.

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