



Management History: Issues and Ideas for Teaching and Research

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This review examines the study of management history and discusses its role in management education. Management history provides a theoretical baseline, a historical perspective, and a framework for building and integrating knowledge. After examining issues in teaching and research, future needs and directions for management history are indicated.

The Study of Management History

The practice of management is quite ancient and may be found in any civilization where people work together to achieve a common goal. As old as managerial practice is, however, the formal study of management is relatively recent. Early managers learned on the job and by the examples provided them by others. Modern managers and students of management have an opportunity to learn about the subject in a different way: that is, by studying the body of knowledge that has taken many years to develop. The study of management history provides examples of theory and practice, illustrates different approaches to management, and identifies the great thinkers who have been prominent in refining the practice and theory of management. Through the study of the evolution of management thought, modern managers and students of management can be better equipped to face a changing world. History distills for us the lessons of the past and allows us to progress from where we have been to where we need to go.

Writings in Management History

The writing of management history began some years after the subject was established in academia. L.P. Alford's articles (1922, 1932) were progress reports on industrial management for the American Society of Mechanical Engineers (ASME). Alford focused on evolving developments in work methods, wage plans, productivity, employee relations, and numerous other subject areas. After Alford's death in 1942, the ASME used subject area specialists for two more de-

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cedes (“Ten Years’ Progress”: 1943, 1953) before abandoning its *Transactions*. George Filipetti (1946, 1953) reflected the broadening trends in management following World War II by examining the impact of scientific management on managerial practice, discussing Mary Follett, briefly touching on the Hawthorne research, and extending management history to include international developments. Filipetti set the standard for other management historians in terms of a broad view of the field, the examination of theory and practice, and the interdisciplinary flavor.

John Mee’s doctoral dissertation (1959) had breadth and insight, but was never published. Excerpts appeared in book form (Mee, 1963), but scholars have never fully appreciated Mee’s unpublished contribution. Joseph Litterer’s doctoral dissertation had a better fate in publication (1961, 1963) and showed how management history could limit its focus to connect developments. By tracing systematic management, Litterer pulled historians toward seeking better linkages between past and subsequent events.

Claude George (1968, 1972) picked up the Filipetti tradition and added material on ancient management and quantitative developments. George’s work filled a long standing gap in the history of management literature. Daniel Wren (1972, 1979, 1987) extended the Filipetti/George tradition by including economic, social, and political facets of culture that influenced the development of management thought. Other modern histories have been more limited; Pollard (1974, 1978) wrote well in describing selected individuals and their ideas but fell short of other integrated historical works. Collections of “classics” abound and provide brief excursions into the contributions of selected pioneers (for example, Bluedorn, Brass, Ferry, Carter, & Keon, 1986; Boone & Bowen, 1980; Del Mar & Collons, 1976; Merrill, 1960).

Filipetti (1946, 1953) examined the spread of scientific management abroad, touching off an interest in international management developments. Brian Corbishley’s doctoral dissertation (1969) and John Child’s examination of developments in Great Britain (1969) continued this inquiry into management history in different countries. More recently, Wren’s book has been translated into Japanese, a French rendition of developments before 1900 has been prepared by André Gingras (1980), and from Italy has come Martelli’s (1979) more sweeping coverage of the period 1770-1970. These developments in the United States and abroad echo Bedeian’s conclusion of “an awareness and appreciation of past accomplishments in the field of management” (1976, p. 96):

Approaches to Management History

From this overview of earlier writings of management history it is apparent that there are a number of approaches to the subject. Trent (1972) identified various ways of treating historical subjects as the stages, schools, institutional, biographical, and evolutionary approaches. In studying stages, the historian carves out an era or time period to be examined. For example, the scientific management period could be used as a chronological artifact for historical analysis and discussion.

A second approach, the schools of thought, was popularized by Harold Koontz (1961). In sorting out the “management theory jungle,” Koontz identified six

categories of management thought as the management process, empirical, human behavior, social system, decision theory, and mathematical schools. When Koontz revisited the theory thicket (1980), he found that the number of schools had increased to eleven, but he held forth the promise of a convergence in the future.

The institutional approach focuses on events as they apply to an organization, such as a business firm, or a group of institutions, such as in researching organizational life cycles. By probing over longer periods of time and finding commonalities among institutions, one can generalize about the sequencing of events that determine or influence certain behaviors, such as the impact of mass production and mass distribution on the growth of a management hierarchy.

Biography, as another approach, is also used widely to portray an individual and her or his contributions to management thought. Examples would be Wolf's (1974) study of Chester Barnard, Worthy's (1984) examination of Robert E. Wood of Sears, Roebuck and Company, and Wren's (1987) study of Whiting Williams. In biography, the historian examines an individual's contributions to management thought in the context of their times.

A fifth approach, the history of ideas or concepts, may be combined with biography, or it may stand alone. Writing dissertations or building a theoretical base for a research project are examples of where one ferrets out previous work on a given idea or concept. Published historical reviews of specific concepts provide an opportunity to summarize, compare, and/or indicate future research needs.

The evolutionary approach to the study of management history describes the unfolding of management thinking along a continuum of time. This approach seeks connections between stages or eras, and uses biography, ideas, and institutions to tell the story. In this sense it is general history, providing a framework for further study and a background which traces evolving ideas.

Each approach to management history has its strengths and limitations and the historian must choose the approach that meets best the resource material available and the goals to be accomplished. Outstanding executives or scholars may be studied by using the biographical/idea approach, whereas searches for emerging practices would focus on research into concepts, always being careful of changing terminology, or on stages in the development of management thought. In brief, these approaches to the study of management history must be tailored to the needs of the scholar/practitioner.

Teaching and Research Issues

Management History and Management Education

In providing a rationale for the role of management (or any other) history in the curricula of our schools, we have relied frequently on the idea that those who forget the past will repeat its errors. This justification for the study of history always seems to carry some negative or punitive connotation. For example, Solzhenitsyn quotes a Russian proverb: "Don't dig up the past! Dwell on the past and you'll lose an eye...[but] Forget the past and you'll lose both eyes" (1974, p. x). Solzhenitsyn's allegory may be apt, but it does not emphasize the positive. Forgetting or never knowing the past will not necessarily cause us grievous harm; in

fact, we may prosper despite our ignorance. If we expect history to repeat itself, we are also in danger. According to McCraw (1986, p. 83), Mark Twain once said that "history doesn't repeat itself but sometimes it rhymes." This rhyming of events indicates a pattern which is not always the same but often a variation on a theme. So we may see a manager wrestling with the problem of motivating a modern worker and know that this is not the same event as one of 200 years ago, but that the problem of motivation still exists as it has always existed.

The rationale for the study of history is found in the things it can do for us: (a) establish a theoretical baseline for recognizing change; (b) aid in framing questions for research and practice; and (c) provide a framework for building and integrating knowledge. Managing today is different from that of last year, the last decade, or whatever date we choose. But *how* different? How do we know the difference if we have no prior knowledge? As Bluedorn et al. (1986) framed the question in a preface to a review of some classics: "Do we genuinely know more about management today than was known 100 years ago? And if we do know more, how much more?" (p. 442). The answer provided by Bluedorn and his associates would not surprise a management historian but might shock others:

"Most of the content [of the six classics] that was examined is surprisingly valid; very little can be considered 'disproved' by work that has followed it. Despite the quality of these writers' ideas, a disappointing amount has been forgotten, ignored, and misinterpreted over the generations. It is fair to conclude that management has experienced genuine growth since the pioneers established a foundation, but it has not grown nearly as much as they had hoped it would or we would like to believe it has" (Bluedorn et al., 1986, p. 442).

Have we made so little progress because we have ignored the past and spent our time coining new terminology and reinventing the wheel? Leontiades (1982) and Bower (1982), for example, decry the confusion created in the business policy literature by creating new definitions for terms. Part of our theory thicket is a product of this practice of inventing new words for old ideas and losing any sense of continuity and theory building through time. We need to teach and study history to establish an intellectual baseline for the future.

A second use of management history is in framing the right questions to ask in teaching, researching, and/or practicing. No reputable scholar should ever begin a work without examining what has been done previously; no perceptive consultant should ever begin an assignment without inquiring into the historical basis of the problem at hand; no executive should ever embark upon an acquisition or merger without a thorough investigation of the historical development of the firm it intends to approach; and no student who hopes to complete a thesis or dissertation should ever omit a review of the literature. Recent interest in a corporation's "culture" is an illustration of how the historical development of a firm's traditions and shared values and beliefs is necessary to understanding how the firm functions. Planning, employee training and development, marketing, public relations, and other corporate activities are all influenced by a firm's history (Smith & Steadman, 1981). A firm's history is embodied in its institutional

memory, which helps employees understand the past as it relates to the present and extends to the future (El Sawy, Gomes, & Gonzales, 1986).

Lawrence (1984) distinguishes between historical research (inquiry into past persons and events) and historical perspective (using history as raw material for understanding the present). For example, the historian Alfred Chandler was interested in how business firms grew and changed over time and how their organizational structure was related to their strategy (1962, 1977). He did not intend to develop any theory but to use historical research to inquire into past events. Other scholars have used Chandler's research and extended it beyond its original intent. In contrast, a search for what Lawrence called historical perspective is more apparent in Bracker's (1980) study of the strategic management concept, Van Fleet and Bedeian's (1977) review of the span of management concept, and Greenwood's (1981) study of Management by Objectives as developed by Drucker and Smiddy. The object of historical perspective is to "sharpen one's vision of the present, not the past ... It pushes thinking about alternative explanations for phenomena, helps identify more or less stable concepts, and expands research horizons by suggesting new ways of studying old questions" (Lawrence, 1984, pp. 307, 311). History provides more and better questions, pushing us to the frontier rather than miring us in rediscovering what was already known.

A third benefit of the study of history is that of providing an integrating framework. The management historian Claude George stated his purpose as "to provide a framework for understanding the development of management thought and to unify the broad field of management for scholars and practitioners alike" (1972, p. vii). We live and study in an age that is represented by a diversity of approaches to management. Our students are presented with quantitative, behavioral, functional, and other approaches in their coursework, and this typically leaves them with a fragmented picture of management and assumes that they have the ability to integrate these various ideas for themselves. In many cases, this burden is far too great. A study of evolving management thought can provide the origins of ideas and approaches, trace their development, provide some perspective in terms of the cultural environment, and thus provide a conceptual framework that will enhance the process of integration. A study of the past contributes to a more logical, coherent picture of the present. Without a knowledge of history, individuals have only their own limited experiences as a basis for thought and action. As one scholar commented: "[History] is the universal experience—infinitely longer, wider, and more varied than any individual's experience" (Hart, 1972, p. 15). For the moment, the past is all we know: sometimes it is folly, sometimes it is uplifting. Consisting of part fallacy and part truth, management history is a bundling of past experiences offered for our guidance today and tomorrow.

Research and Management History

Knowing what we know historically is not as easy as it seems. Historical research falls in Daft's category of being nonlinear, "random and messy" (1983, p. 542). What is fact to one generation may be myth to a subsequent one, as revised interpretations follow newly acquired knowledge. A historian faces two major research issues: documentation and interpretation. In documenting sources

he or she must get as close to the original materials as possible. The biographies prepared by Worthy of Robert E. Wood (1984), by Wolf of Chester Barnard (1974), and by Wren of Whiting Williams (1987) were cited earlier as examples of the use of interviews, personal and professional papers, and other archival materials. In contrast would be Christy's (1984) biography of Charles Bedaux, which McFarland (1986) criticized as having no footnotes, providing no way to check references, leaving a confusing chronology, and containing numerous contradictions.

Sometimes a rich source of raw material is not available to the researcher for various reasons. It is not uncommon to find that materials have been destroyed, such as Mary Parker Follett's instructions that her papers were to be burned. Fortunately, Lyndall Urwick was able to recover some that had been overlooked. In some instances the researcher will find that materials have been suppressed, a practice that dates back some centuries as various religious or governmental agencies required permission to publish. Authors and publishers had to acquire an imprimatur from the Roman Catholic Church, for example, to make sure the work contained no heretical statements. Deliberate suppression or destruction of valuable data sources continues even today, making the test of the researcher doubly difficult in trying to ferret out the facts.

The farther the research is removed from the primary or original documents, the greater the need to triangulate one's sources; that is, to cross-check other references to see if verification can be found. In writing the biography of Whiting Williams, for example, I found in his notes that his purpose of disguising himself as a worker was to study the "bad" industrial conditions of 1919. How bad were they? By referring to U.S. government statistics on work stoppages, wages, real wages, and other employment data, I was able to verify that post-World War I conditions for labor were indeed much worse than they had been before the war. My conclusion was that Williams perceived accurately the industrial conditions and this then led to his unique research method for studying what was on the worker's mind (Wren, 1987).

Inaccuracies and myths arise when the researcher ignores or misinterprets the documentation. Pethia (1983) examined how numerous textbooks treated the work of Frederick Taylor, the relay assembly test room experiments at Hawthorne, the work of Burns and Stalker, and the model of Lawrence and Lorsch, concluding that much of what the texts contained was pseudohistory. There were numerous historical errors in the texts and Pethia noted the "distortion, evidently, begins early" and in at least one case occurred when the "ink was barely dry" (1983, pp. 40, 53).

Myths often persist even after historians have found evidence to refute previous viewpoints. Wrege's serendipitous discovery of the papers of James Gillespie and Hartley C. Wolle concerning the conduct of the pig-iron handling experiments at the Bethlehem Steel Company are a case in point. Wrege and Perroni (1974) were able to show how Taylor's version of "Schmidt" and pig-iron handling became more elaborate with each telling until the tale became almost pure fiction. Wrege and Nelson (1980) have done a great deal to amend the historical facts about Taylor through the use of primary source materials. Despite these efforts, Bluedorn,

Keon, and Carter (1985) studied numerous introductory texts, all published since the work of Wrege and Perroni, and found that all but two (of 25) ignored the revised version of pig-iron handling. Texts are critical in educating prospective managers and the evidence indicates that some of them contain errors in their historical accounts as well as in their treatment of recent research findings. We need to be able to rely upon accurate reporting of studies, historical or otherwise, to develop and communicate a useful body of management theory. Our record so far is less than glowing and offers substantial challenges for the future.

Documentation is crucial but once we feel we have the facts, we encounter the issue of the interpretation of our evidence. Analysis is the heart of historical research but synthesis provides the soul. If we do not understand what we have found in terms of its overall significance, our effort is of doubtful value. In interpretation, the historian must be careful in drawing the conclusions from the evidence. History is not a cold, calculated science with no margin for judgement; there is room to interpret, but we must not make the evidence fit any preconceived notions we have or advocate.

An illustration of this problem of objectivity versus advocacy is the research done at the Hawthorne plant of Western Electric in the 1920s and early 1930s. No single experiment in the history of management thought has received as much attention, both in praise and in criticism. As one looks at the data and early reports, one set of conclusions appear (Greenwood, Bolton, & Greenwood, 1983; Turner, 1933; Wrege, 1961). Later interpretations of what happened at Hawthorne are at variance with the early work, particularly in the writings of Elton Mayo, the alleged guru of the studies. The discrepancy is explained in the findings of Mayo's biographer, Richard Trahair (1984), who found that near the end of the experiments Mayo began to ignore the results and turned to using the Hawthorne research to further his social philosophy. Mayo was not alone in leaping from data to advocacy; Yorks and Whitsett conclude that "many classical studies in the field of organizational behavior...are better characterized by the term *myth* than the term science. They are based on events that were interpreted differently than actual occurrence would seem to merit" (1985, p. 22).

One major theme of American history was based on Charles Beard's (1913) interpretation of the U.S. Constitution as being written by the wealthy to protect their economic interests. Beard was a progressive in the Theodore Roosevelt tradition and was opposed to big business. Beard's economic interpretation of America's Constitution was the conventional wisdom for years. Almost five decades later, McDonald (1958) studied the economic backgrounds and interests of the delegates to the Constitutional convention and found that Beard was in error and had let his personal values overwhelm the evidence at hand. It would seem that the historian must remain perfectly objective and allow no personal feelings to intrude upon his subject. That is not the case, however. Tuchman (1981) states the situation well:

There is no such thing as a neutral or purely objective historian. Without an opinion a historian would be simply a ticking clock, and unreadable besides.... The historian's task is rather to tell what happened within the discipline of the facts. What his imagination is to the poet,

facts are to the historian. His exercise of judgement comes in their selection, his art in their arrangement. His method is narrative. His subject is the story of man's past. His function is to make it known (p. 32).

There is room for interpretation in historical writing and research. The requirement of the historical craft is in telling the story well, and accurately, which is a demanding enough task in itself.

Future Needs and Directions

Recent studies (Bluedorn et al., 1985; Pethia, 1983) indicate that the history of management thought that is available in our student's textbooks is often in error. This is due to shortcomings in both teaching and research, and our efforts should be directed toward remedying this ill state of affairs. In the teaching of history, Van Fleet and Wren's (1982) survey of 644 schools found that the respondents felt that more history of management thought should be taught than is currently being taught and to a greater extent at the graduate level. The researchers also found it was "disappointing in that the history which is being taught is not in separate courses and not [taught] by or under the control of professional historians or even those interested in history" (Van Fleet and Wren, 1982, p. 24). This "chapter approach" to history (i.e., a chapter in each textbook) is dangerous, especially since the texts are often in error. Our historical illiteracy perpetuates itself and is gaining in fecundity. We should be teaching more history, preferably in separate courses, and making it a requirement for our doctoral students. Everyone who intends to teach or research any management subject should have a course in or demonstrate their proficiency in the historical development of management thought. This would contribute to smoothing out terminology problems, ideally realign the historical record that is transmitted, provide an intellectual baseline, serve as an integrating framework for our knowledge, and equip the student with another research tool.

In research, we need to attack both the documentation and interpretation issues. Source materials need to be built such as the archival and history of management theory collections of the Academy of Management started at Cornell University under the leadership of Arthur Bedeian, Claude George, Charles Wrege, Ralph Stogdill, and Richard Strassberg. We should be seeking out, publicizing the location, and preserving the various collections of papers and other archival materials, such as the archives of a business firm or other type of organization. A few excellent collections exist, such as the Harry W. Bass Business History Collection at the University of Oklahoma, the Kress Library of Business and Economics in the Baker Library at the Harvard Business School (see Rogers, 1986), the Goldsmith Library at the University of London, and the Hagley Museum and Library in Wilmington, Delaware (see Nash, 1986). These and other collections are but a small portion of what can be done to build sources for improved documentation.

We should also be encouraging autobiographies by people who are influential today. We should be doing more audio and video histories of pioneering individuals, such as the work that Ronald Greenwood and Alfred Bolton have done on finding persons who were the participants in the relay assembly test room at Haw-

thorne and video taping those interviews. We have probably only scraped the surface in the discovery and development of primary source documents. Although we need more primary sources for our spade and shovel work, we must not forget to fit these fragments we find into a whole for the more facile transmission of our body of knowledge. We need the threads, but these must be woven or we will never have useful cloth.

Modern technology has already enhanced our research capabilities. Computer cataloging and database searches broaden and deepen the sources we can tap. At least two major library information networks are linked by computers: the On-line Computer Library Center (OCLC) and the Research Library Information Network (RLIN). Use of these networks can lead to sources that may not be readily available at all libraries. Microfilm and microfiche also expand the possibilities for accessing rare documents: for example, the papers of Thomas A. Edison, the Hawthorne records, the Kress Library, and the Goldsmith Library are available (although at a price) through micro documentation.

The acquisition of language skills would also extend our research capability. As management becomes more internationalized, we should revive the notion of a foreign language as a research tool for our doctoral students. With added languages we could expand our search for documents and enrich our interpretation. Breeze's (1985) excellent work on Henri Fayol and French management was possible because he had the language skills; or we could read Max Weber's *Wirtschaft und Gesellschaft* (1922) in the original and see how he wrote "Herrschaft ('Autorität')" and check this against Weiss's (1982) interpretation.

We should also enhance our ability to triangulate on historical evidence by an awareness of other groups and journals that publish materials that are tangential to management history. There are accounting, business, and marketing historians who have annual meetings and/or publish proceedings or journals; for example, the *Accounting Historian's Journal*, *Business History Review*, *Journal of Economic History*, *Journal of the History of the Behavioral Sciences*, and others. History is interdisciplinary and the long and broad view is supportive of improved research abilities.

In sum, with an understanding of the past, we can read the literature more perceptively because we have a framework for integrating our knowledge, we can expand our research skills because we have a historical perspective for framing research questions, and we can prepare to meet future problems because we have a theoretical baseline for recognizing change. The study of management history can overcome the fragmentation of the body of knowledge, facilitate research, and enable our students to better understand the arena in which they operate. Management history is a means of searching the scanty scent of the past, of putting the body of knowledge into a logical framework, and then of passing on to those who follow the rich heritage that is ours.

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