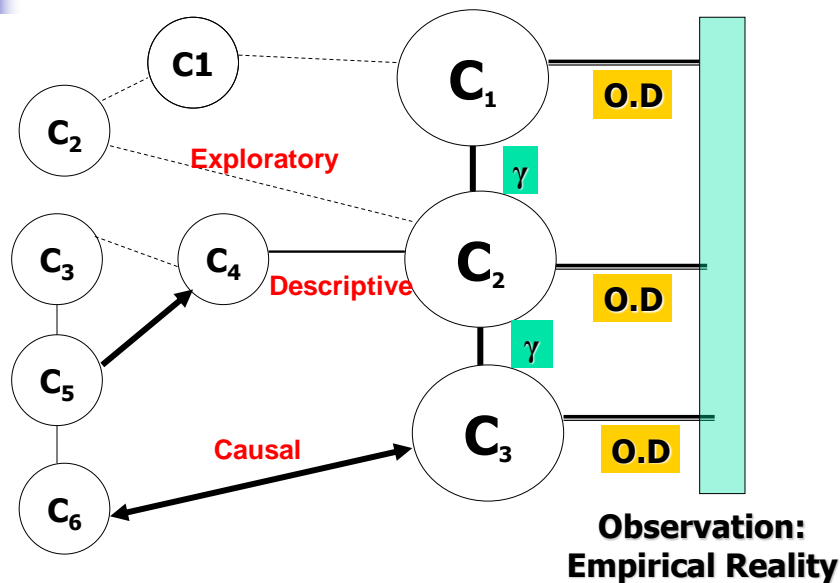


Review: THEORY

- A set of interrelated constructs (concepts), (operational) definitions, and propositions that presents a systematic view of phenomena by specifying relations among variables, with the purpose of explaining, predicting, and controlling the phenomena.

Review: Causation Levels of Constitutive constructs





Review:

3-3

邏輯實證主義 (Logical Positivism)

- 邏輯實證主義和邏輯經驗主義 (logical empiricism)，共同形成了新實證主義，也被稱為科學經驗主義，是以確證主義為核心的西方哲學運動。1920年代後期開始，一群哲學觀點相似的哲學家、科學家和數學家等組成維也納學派，發展出邏輯實證主義。
- Logical positivism and logical empiricism, which together formed neo-positivism, was a movement in Western philosophy whose central thesis was verificationism, a theory of knowledge which asserted that only statements verifiable through empirical observation are cognitively meaningful. The movement flourished in the 1920s and 1930s in several European centers. Efforts to convert philosophy to this new "scientific philosophy", shared with empirical sciences' best examples, such as Albert Einstein's general theory of relativity, sought to prevent confusion rooted in unclear language and unverifiable claims.



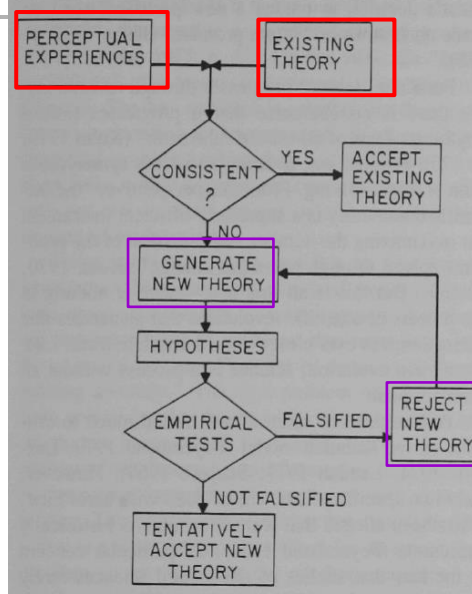
Review:

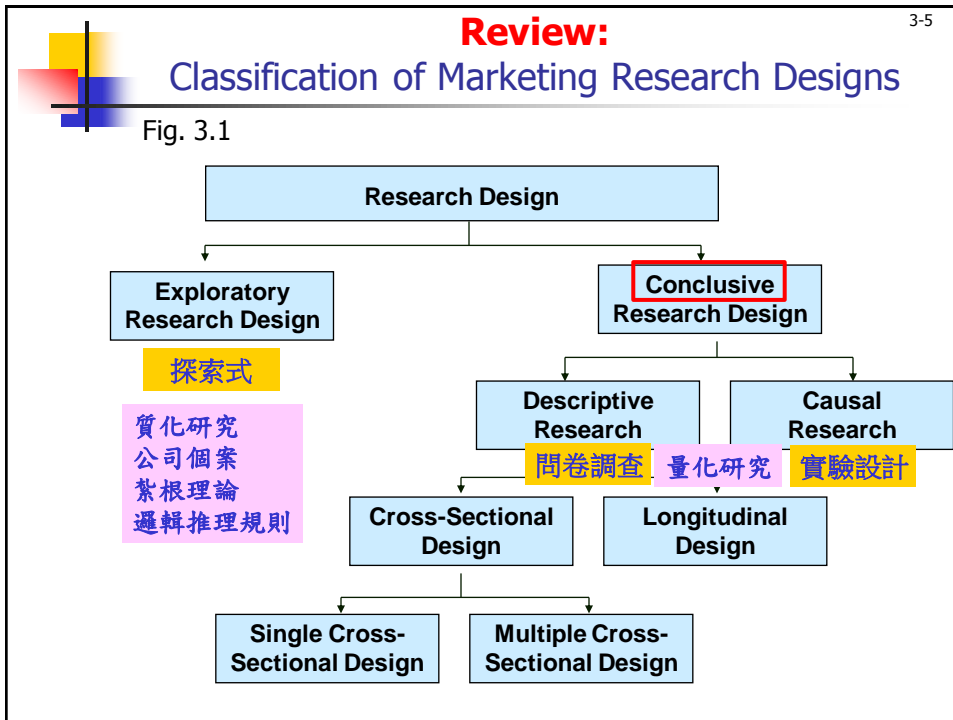
Paul F. Anderson

Marketing, Scientific Progress, and Scientific Method

Journal of Marketing, Fall 1983


FIGURE 2
The Falsificationist Model of Scientific Method





3-6

Review:
Q. Why researcher needs to understand philosophy?



WIKIPEDIA
The Free Encyclopedia

- 哲學（英語：philosophy）是研究普遍的、根本的問題的學科，包括存在、知識、價值、理智、心靈、語言等領域。哲學與其他學科的不同是其批判的方式、通常是系統化的方法，並以理性論證為基礎。在日常用語中，其也可被引申為個人或團體的最基本信仰、概念或態度。
- Philosophy (from Greek φιλοσοφία, philosophia, literally "love of wisdom") is the study of general and fundamental problems concerning matters such as existence, knowledge, values, reason, mind, and language



認識論(Epistemology)

- 知識論是探討知識的本質、起源和範圍的一個哲學分支。柏拉圖將知識定義為被證實的真實的信念 – 想要被定義為知識，它必須是被證實的，並且必須被我們相信是真的。這個定義暗示我們不能因為「相信一件事並且那件事是真實的」便說我們知道/了解這件事。
- Epistemology studies the nature of knowledge, justification, and the rationality of belief. Much debate centers on four areas: (1) the philosophical analysis of the nature of knowledge and how it relates to such concepts as truth, belief, and justification, (2) various problems of skepticism, (3) the sources and scope of knowledge and justified belief, and (4) the criteria for knowledge and justification. It addresses such questions as: "What makes justified beliefs justified?", "What does it mean to say that we know something?", and fundamentally "How do we know that we really know?".[6]



解釋 (Explanation)

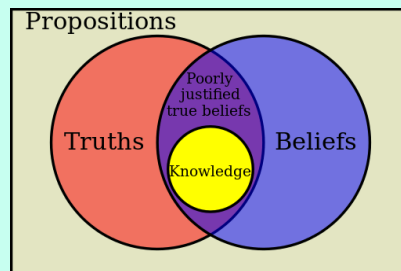
- 解釋 (explanation)，是對事物的現象、過程、狀態、道理等進行描述，以說明其含義、原因、理由等。這樣的描述可能是建立在一定**推理規則**（如邏輯推理、科學分析）、法律基礎之上的。解釋也是發現新知識、探索研究對象各個方面之間的關係的方法。
- An explanation is a set of statements usually constructed to describe a set of facts which clarifies the causes, context, and consequences of those facts. This description of the facts et cetera may establish propositional logic, rules or laws, and may clarify the existing rules and/or laws in relation to any objects, or phenomena examined. The components of an explanation can be implicit, and interwoven with one another.

解釋 (Explanation)

- 在邏輯中，推理規則是構造有效推論的方案。這些方案建立在一組前提的公式和結論的斷言之間的語法關係，又稱三段論法(syllogism)，是由兩個包含共通的命題去推斷推出另一個新的命題，即大前提，小前提和結論。以波特的「競爭優勢」(Porter, 1985: 10)為例：
 - “The fundamental basis of above-average performance in the long run is sustainable competitive advantage. Though a firm can have a myriad of strengths and weaknesses vis-à-vis its competitors, there are two basic types (sources) of competitive advantage a firm can possess: low cost or differentiation. The significance of any strength or weakness a firm possesses is ultimately a function of its impact on relative cost or differentiation.”
- 「競爭優勢」的邏輯推理，可用三段論的演繹推理拆解如下：
 - 大前提：「持續的競爭優勢」造就企業「高於行業水準的績效表現」
 - 小前提：「差異化戰略」能創造和保持競爭優勢
 - 結論：「差異化戰略」能造就企業「高於行業水準的績效表現」

句子演算 (Propositional Logic)

- 在邏輯和數學裡，命題演算（或稱句子演算）是一個形式系統，有著可以由以邏輯運算符結合原子命題來構成代表「命題」的公式，以及允許某些公式建構成「定理」的一套形式「證明規則」。
- Propositional logic, also called, statement logic, sentential logic, propositional calculus, sentential calculus, or sometimes zeroth-order logic. It deals with propositions (which can be true or false) and argument flow.





句子演算 (Propositional Logic)

A Generic Concept of Marketing

PHILIP KOTLER

• ABOUT THE AUTHOR.

Philip Kotler is A. Montgomery Ward Professor of Marketing at the Graduate School of Management, Northwestern University, Evanston, Illinois.

Journal of Marketing, Vol. 36 (April, 1972), pp. 46-54.

Axiom 1. *Marketing involves two or more social units, each consisting of one or more human actors.*

Corollary 1.1. The social units may be individuals, groups, organizations, communities, or nations.

Axiom 2. *At least one of the social units is seeking a specific response from one or more other units concerning some social object.*

Corollary 2.1. The social unit seeking the response is called the *marketer*, and the social unit whose response is sought is called the *market*.

Axiom 3. *The market's response probability is not fixed.*

Corollary 3.1. The probability that the market will produce the desired response is called the *market's response probability*.

Corollary 3.2. The market's response probability is greater than zero; that is, the market is capable of producing the desired response.

Axiom 4. *Marketing is the attempt to produce the desired response by creating and offering values to the market.*



句子演算 (Propositional Logic)

Strategic Management Journal

Strat. Mgmt. J., 36: 758–775 (2015)

Published online EarlyView 18 April 2014 in Wiley Online Library (wileyonlinelibrary.com) DOI: 10.1002/smj.2245

Received 20 July 2012; Final revision received 17 November 2013

RECONCEPTUALIZING COMPETITIVE DYNAMICS: A MULTIDIMENSIONAL FRAMEWORK

MING-JER CHEN^{1*} and DANNY MILLER^{2,3}

¹ Darden Graduate School of Business, University of Virginia, Charlottesville, Virginia, U.S.A.

Proposition 1b: Firms whose owners and top managers adopt a long-term perspective and promote inclusive, cohesive, and nurturing cultures are more likely to be more willing to engage in relational as opposed to rivalrous competition. Many such firms are closely held by individuals or families.

² Darden Graduate School of Business, University of Virginia, Charlottesville, Virginia, U.S.A.



Thesis Proposals

- 蔡瓊儀－行動通信產業電信營運商與設備商 競合關係之探討
- 陳書豪－以「組織犯錯」、「資源構型」及「組織雙手同能」探究企業「競爭優勢」形成之組織作為
- 王怡惠－密集母職下的關係行銷
- 蘇凌瑩－金融科技創新的生存之道-以區塊鏈技術與比特幣生態系統為例
- 林大淵－在位者的競爭策略—以金融科技(Fintech)為例
- 李玟諭－三元知識論下金融科技對金融決策之影響
- 呂達人－以三元世界觀點探討快速流通消費品的品牌動態競爭
- 陳豫楹－以品牌價值象限探討消費者與企業之品牌認知落差

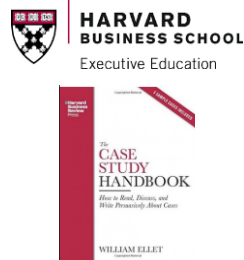
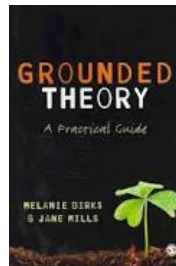


Realism

- Realism 實在論:為希臘哲學家亞里士多德所提出的創見，主要是否定其師柏拉圖提出的真知只存在於觀念世界的說法，主張知識可經由感官經驗而得自於現象世界。知識的由來是與環境的互動而得到。
- whatever we believe now is only an approximation of reality and that every new observation brings us closer to understanding reality.
- our reality is ontologically independent of our conceptual schemes, perceptions, linguistic practices, beliefs, etc. Realism may be spoken of with respect to other minds, the past, the future, universals, mathematical entities (such as natural numbers), moral categories, the material world, and thought. Realism can also be promoted in an unqualified sense, in which case it asserts the mind-independent existence of a visible world, as opposed to skepticism and solipsism 唯我論.

Today's Agenda

- A. Concept, construct, variable, theory and propositions
- B. Research Design II (Research Methodology) – chapters 5, 6



Chapter Five

Exploratory Research Design: Qualitative Research



3-17

Qualitative vs. Quantitative Research

Table 5.1

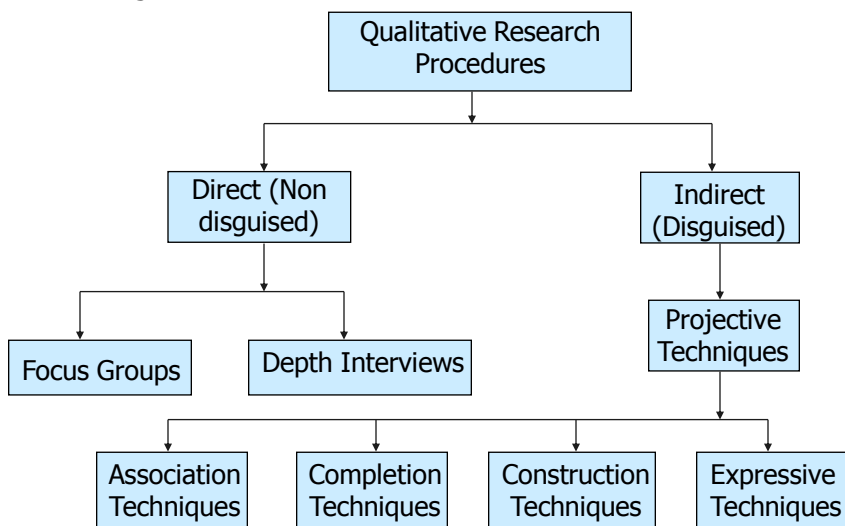
	Qualitative Research	Quantitative Research
Objective	To gain a qualitative understanding of the underlying reasons and motivations	To quantify the data and generalize the results from the sample to the population of interest
Sample	Small number of non-representative cases	Large number of representative cases
Data Collection	Unstructured	Structured
Data Analysis	Non-statistical	Statistical
Outcome	Develop an initial understanding	Recommend a final course of action



3-18

A Classification of Qualitative Research Procedures

Fig. 5.2





Advantages of Focus Groups (p. 146)

1. Synergism
2. Snowballing
3. Stimulation
4. Security
5. Spontaneity
6. Serendipity
7. Specialization
8. Scientific scrutiny
9. Structure
10. Speed



Disadvantages of Focus Groups

1. Misuse
2. Misjudge
3. Moderation
4. Messy
5. Misrepresentation





Depth Interview Techniques: **Laddering**

In **laddering**, the line of questioning proceeds from product characteristics to user characteristics. This technique allows the researcher to tap into the consumer's network of meanings.

Wide body aircrafts (product characteristic)



I can get more work done



I accomplish more

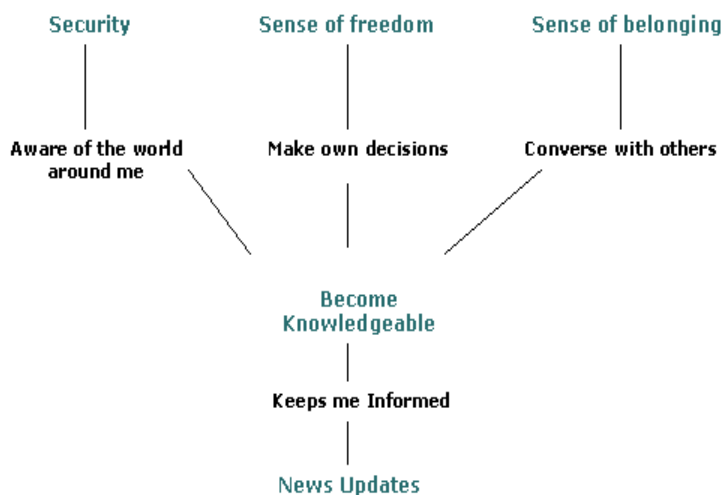


I feel good about myself (user characteristic)

Advertising theme: You will feel good about yourself when flying our airline. "You're The Boss."



Depth Interview Techniques: **Laddering**



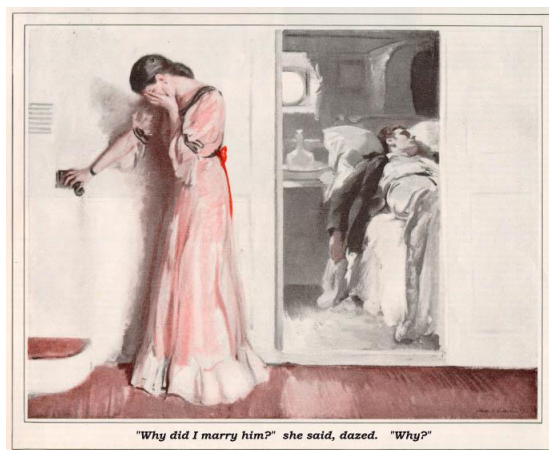


Definition of Projective Techniques

- An unstructured, indirect form of questioning that encourages respondents to project their underlying motivations, beliefs, attitudes or feelings regarding the issues of concern.
- In projective techniques, respondents are asked to interpret the behavior of others.
- In interpreting the behavior of others, respondents indirectly project their own motivations, beliefs, attitudes, or feelings into the situation.



Projective Techniques





Advantages of Projective Techniques

- They may elicit responses that subjects would be unwilling or unable to give if they knew the purpose of the study.
- Helpful when the issues to be addressed are personal, sensitive, or subject to strong social norms.
- Helpful when underlying motivations, beliefs, and attitudes are operating at a subconscious level.



Rorschach inkblot test



Situation/Context Design
情境設計



Disadvantages of Projective Techniques

- Suffer from many of the disadvantages of unstructured direct techniques, but to a greater extent.
- Require highly trained interviewers.
- Skilled interpreters are also required to analyze the responses.
- There is a serious risk of interpretation bias.
- They tend to be expensive.
- May require respondents to engage in unusual behavior.



Guidelines for Using Projective Techniques

- Projective techniques should be used because the required information cannot be accurately obtained by direct methods.
- Projective techniques should be used for exploratory research to gain initial insights and understanding.
- Given their complexity, projective techniques should not be used naively.



Comparison of Focus Groups, Depth Interviews, and Projective Techniques (p. 157)

3-29

Table 5.3

Criteria	Focus Groups	Depth Interviews	Projective Techniques
1. Degree of Structure	Relatively high	Relatively medium	Relatively low
2. Probing of individual respondents	Low	High	Medium
3. Moderator bias	Relatively medium	Relatively high	Low to high
4. Interpretation bias	Relatively low	Relatively medium	Relatively high
5. Uncovering subconscious information	Low	Medium to high	High
6. Discovering innovative information	High	Medium	Low
7. Obtaining sensitive information	Low	Medium	High
8. Involve unusual behavior or questioning	No	To a limited extent	Yes
9. Overall usefulness	Highly useful	Useful	Somewhat useful



Chapter Six

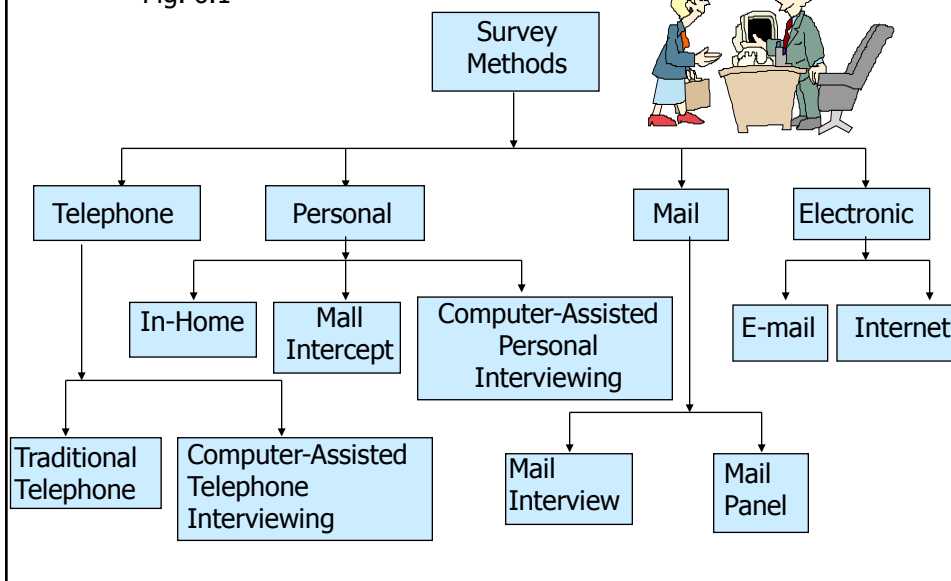
Descriptive Research Design: Survey and Observation





A Classification of Survey Methods


Fig. 6.1



Some Decisions Related to the Mail Interview Package

Table 6.1

Outgoing Envelope			
Outgoing envelope: size, color, return address			
Postage		Method of addressing	
Cover Letter			
Sponsorship		Type of appeal	Postscript
Personalization		Signature	
Questionnaire			
Length	Size	Layout	Format
Content	Reproduction	Color	Respondent anonymity
Return Envelope			
Type of envelope		Postage	
Incentives			
Monetary versus non-monetary		Prepaid versus promised amount	







Sample Mailing Lists

List Title	Number on List	Price
Advertising agencies	3892	\$45/M
Banks, branches	11089	\$85/M
Boat owners	4289601	\$50/M
Chambers of Commerce	6559	\$45/M
Personal computer owners	2218672	Inquire
Families	76000000	Inquire
Hardware wholesalers	7378	\$45/M
Magazines, consumers	4119	\$45/M
Photographic, portrait	33742	\$45/M
Sales executives	190002	\$55/M
Wives of professional men	1663614	\$60/M
YMCA's	1036	\$85



* Price shown is per 1000 names (/M), except where noted.



Criteria for Evaluating Survey Methods

Flexibility of Data Collection

- The flexibility of data collection is determined primarily by the extent to which the respondent can interact with the interviewer and the survey questionnaire.

Diversity of Questions

- The diversity of questions that can be asked in a survey depends upon the degree of interaction the respondent has with the interviewer and the questionnaire, as well as the ability to actually see the questions.

Use of Physical Stimuli

- The ability to use physical stimuli such as the product, a product prototype, commercials, or promotional displays during the interview.



Criteria for Evaluating Survey Methods

Sample Control

- Sample control is the ability of the survey mode to reach the units specified in the sample effectively and efficiently.

Control of the Data Collection Environment

- The degree of control a researcher has over the environment in which the respondent answers the questionnaire.

Control of Field Force

- The ability to control the interviewers and supervisors involved in data collection.

Quantity of Data

- The ability to collect large amounts of data.



Criteria for Evaluating Survey Methods

Response Rate

- Survey response rate is broadly defined as the percentage of the total attempted interviews that are completed.

Perceived Anonymity

- Perceived anonymity refers to the respondents' perceptions that their identities will not be discerned by the interviewer or the researcher.

Social Desirability/Sensitive Information

- Social desirability is the tendency of the respondents to give answers that are socially acceptable, whether or not they are true.



Criteria for Evaluating Survey Methods

Potential for Interviewer Bias

- The extent of the interviewer's role determines the potential for bias.

Speed

- The total time taken for administering the survey to the entire sample.

Cost

- The total cost of administering the survey and collecting the data.



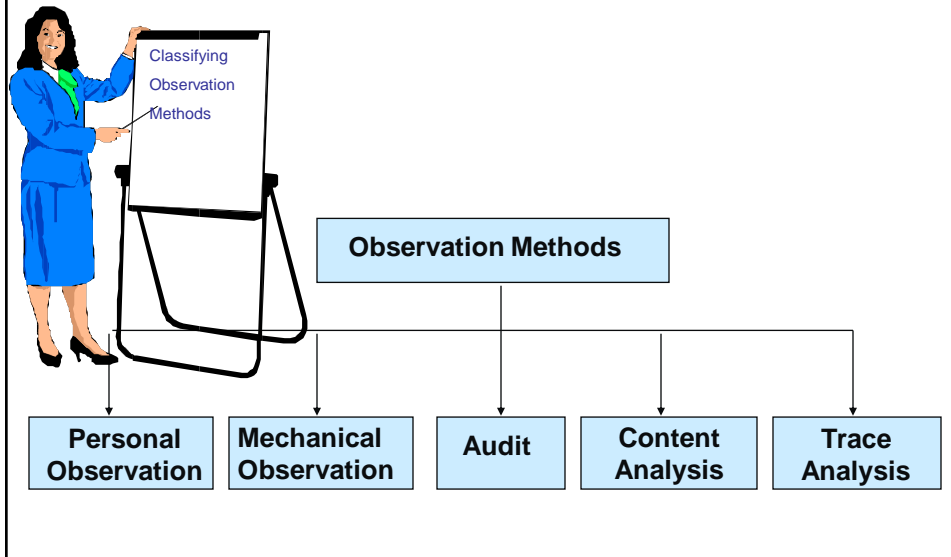
A Comparative Evaluation of Survey Methods

Table 6.2 (P. 179)

Criteria	Phone/ CATI	In-Home Interviews	Mall- Intercept Interviews	CAPI	Mail Surveys	Mail Panels	E-Mail	Internet
Flexibility of data collection	Moderate to high	High	High	Moderate to high	Low	Low	Low	Moderate to high
Diversity of questions	Low	High	High	High	Moderate	Moderate	Moderate	Moderate to high
Use of physical stimuli	Low	Moderate to high	High	High	Moderate	Moderate	Low	Moderate
Sample control	Moderate to high	Potentially high	Moderate	Moderate	Low	Moderate to high	Low	Low to moderate
Control of data collection environment	Moderate	Moderate to high	High	High	Low	Low	Low	Low
Control of field force	Moderate	Low	Moderate	Moderate	High	High	High	High
Quantity of data	Low	High	Moderate	Moderate	Moderate	High	Moderate	Moderate
Response rate	Moderate	High	High	High	Low	Moderate	Low	Very Low
Perceived anonymity of the respondent	Moderate	Low	Low	Low	High	High	Moderate	High
Social desirability	Moderate	High	High	Moderate to High	Low	Low	Moderate	Low
Obtaining sensitive information	High	Low	Low	Low to moderate	High	Moderate to High	Moderate	High
Potential for interviewer bias	Moderate	High	High	Low	None	None	None	None
Speed	High	Moderate	Moderate to high	Moderate to high	Low	Low to moderate	High	Very high
Cost	Moderate	High	Moderate to high	Moderate to high	Low	Low to moderate	Low	Low

A Classification of Observation Methods

Fig. 6.3



Observation Methods: Mechanical Observation

Do not require respondents' direct participation.

- the AC Nielsen audimeter
- turnstiles that record the number of people entering or leaving a building.
- On-site cameras (still, motion picture, or video)
- Optical scanners in supermarkets

Do require respondent involvement.

- eye-tracking monitors
- pupilometers
- psychogalvanometers
- voice pitch analyzers
- devices measuring response latency



Harvard MBA Course Modules

3-41

Business & Government Relations

- Economic Policy and Performance
- Institutional Foundations of Capitalism
- Globalization and Governance

Entrepreneurship

- Updated! Entrepreneurial Finance
- Updated! Identifying and Evaluating Opportunities
- Updated! Managing and Harvesting Growth
- Updated! Managing the Early-Stage Venture

Finance

- Capital Structure
- Company Valuation
- Corporate Restructuring
- Mergers and Acquisitions
- Net Present Value and Capital Budgeting
- Real Options
- Risk Management
- Risk, Return, and Cost of Capital

Human Resource Management

- Compensation
- Employee Training and Development
- Performance Evaluation
- Recruiting, Hiring, and Promoting

Marketing

- Branding and Brand Management
- Designing and Managing Channels
- Market Research
- B2B Marketing
- Segmentation, Market Selection, and Product Positioning
- Pricing

Organizational Behavior

- Interpersonal Relationships
- Leading Change
- Leading Teams
- Organizational Culture
- Organizational Structure

Sales Management

- Selling and Buying Processes
- Managing a Sales Force

Strategy

- Competitive Advantage
- Competitive Dynamics
- Corporate Strategy
- Industry Analysis



HBS' Premier Case Selection

3-42

哈佛經典個案

Marketing

- ▶ Apple 2015
- ▶ Aqualisa Quartz
- ▶ BMW films
- ▶ Dove Evolution
- ▶ elBulli: taste of innovation
- ▶ Harrah's Entertainment
- ▶ HTC 2012
- ▶ Inside Intel Inside
- ▶ Lady Gaga
- ▶ Samsung Electronics

Operation

Management

- ▶ Flextronics International, Ltd.
- ▶ GE talent machine
- ▶ IDEO Product Development
- ▶ Microsoft AdCenter
- ▶ SK-II Globalization
- ▶ Southwest Airlines
- ▶ Toyota Motor Manufacturing
- ▶ Zara: Fast Fashion
- ▶ Zipcar



How to Analyze a Case

- **People**
- **Context**
- **Strategy**
- **Decision or Deal**
- **Takeaways**



Paul Marshall



43



Key Components in case writing

(Case Analysis vs. B P or M D)

1. Tensions, problems and issues to be resolved 緊張局勢、問題以及議題。
2. Context and Scenario (1E, 3C, uncertainty) 情境和場景 (1E, 3C, 不確定性)
3. Opportunities/Resources (business model, financial leverage, technology/market changes, product life cycle, management process, cash/revenue flow, consumer loyalty & STP strategy, terminology) 機會/資源 (商業模式, 財務槓桿, 技術/市場變化, 產品生命週期, 管理流程, 現金/收入流, 消費者忠誠度和STP策略, 術語)
4. Personal difficulty (pastures, timing, decision to be made, consequences of different options, ethics) 個人難度與挑戰 (時間、決策, 不同選擇的後果, 道德)
5. Case ending; core take away (個案結束, 心得感想)
6. Appendix: what really happen? What decision has being made? Recommendation for action plan, detail resolution. 附錄: 發生了什麼? 做出什麼決定? 建議行動計劃, 詳細的解決方法。

44



Layout for Case-based Thesis

The Bottom-Up Approach

- Chap. 1 Issue and Background (2~3 pages) 第一章: 議題和背景
- Chap. 2 Industry/company overview (10pages, include industry analysis, market competitors, governance (organizational) structure, financial reports, product lines, etc.) 第二章: 產業分析/公司簡介 (10頁, 包含: 市場競爭者、組織結構、財務報表、產品線)
- Chap. 3 Literature Review (5~8 pages) (第三章: 文獻回顧 5~8頁)
- Chap. 4 Case Analysis (10 pages, need to have a decision maker as the "actor" (protagonist) to discuss the decision tension, issues to be resolved, personal/company difficulty, threats or opportunities, proposed new business model (solution), etc. (第四章: 個案分析(10頁, 需要一個角色扮演決策者, 來討論需要被解決的議題、個人以及公司的困難、公司對威脅及機會提出新的商業模型來解決這些問題)
- Chap. 5 Q&A (2 pages) (第五章: 問題與討論 2頁)
- Chap. 6 Takeaway & Conclusion (3~5 pages) (第六章: 心得分享及結論)
- Appendix. Organizational chart, financial report, etc. (5~10 pages) (附錄: 組織圖、財務報表 5~10頁)

Building Theories from Case Study Research

KATHLEEN M. EISENHARDT
Stanford University

Building theories from case study research

KM Eisenhardt - Academy of management review, 1989 - amr.aom.org

Abstract This paper describes the process of inducting theory using case studies—from specifying the research questions to reaching closure. Some features of the process, such as problem definition and construct validation, are similar to hypothesis-testing research.

☆ 99 被引用 43294 次 相關文章 全部共 54 個版本 Web of Science: 11250 »

[PDF] jstor.org

Full View

Theory building from cases: Opportunities and challenges

KM Eisenhardt, ME Graebner - Academy of management journal, 2007 - amj.aom.org

... Conflicting theories are not enough. ... existence of a phenomenon (Siggelkow, 2007), multiple-case studies typically provide a stronger base for theory building (Yin, 1994 ... numbers are typically small, a few additional cases can significantly affect the quality of the emergent theory. ...

☆ 99 被引用 9044 次 相關文章 全部共 93 個版本 Web of Science: 2954

[PDF] jstor.org

NCTU-LIB提供

Case study and theory in political science

H Eckstein - Case study method, 2000 - books.google.com

... the abstract brief in favour of the case study as a means of building theories seems to ... Case Study and Theory in Political Science I I member of it) and Verstehen (that is ... We may certainly begin with the notion that case studies, like clinical studies, concern 'individuals', personal ...

☆ 99 被引用 2752 次 相關文章 全部共 2 個版本

Five misunderstandings about case-study research

[PDF] arxiv.org

Proposition 命題

- Proposition has a broad use in contemporary philosophy. It is used to refer to some or all of the following: the primary bearers of truth-value, the objects of belief and other "propositional attitudes" (i.e., what is believed, doubted, etc.), the referents of that-clauses, and the meanings of declarative sentences. Propositions are the sharable objects of attitudes and the primary bearers of truth and falsity. This stipulation rules out certain candidates for propositions, including thought- and utterance-tokens which are not sharable, and concrete events or facts, which cannot be false.
- 在現代哲學與邏輯學中，命題是指一個判斷的語義，這個判斷的概念是可以被定義並觀察的現象。命題不是判斷（陳述）本身，而是背後承載的含義、信仰、邏輯、法則、智慧等。當相異判斷具有相同語義的時候，他們表達相同的命題。例如，雪是白的和Snow is white是相異的陳述，但它們表達的命題是相同的。在同一種語言中，兩個相異陳述也可能表達相同命題。例如，「雪是白的」也可以說成冰的小結晶是白的；不過，兩個相異陳述之所以是相同命題，取決於冰的小結晶可視為「雪」的有效定義。無效的命題，包括不可共享的思想和話語標記，以及不能虛假或謬誤的具體事件或事實。