

Literature Review Expectations of *Project Management Journal*[®]

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We continue our series of editorials to provide authors with guidance for future submissions to *Project Management Journal*[®] (PMJ). Previous editorials from 2018 and 2019 considered establishing a theoretical contribution, reporting on a qualitative study, and reporting on a quantitative study. We next turn our attention to the criticality of the literature review, which serves to establish a foundation of current knowledge on particular phenomena or theories on which your paper builds. Many early rejections result from a poor review, which is perceived as a lack of understanding of the current literature. We further recognize that the literature review is unique in that it not only serves a foundational purpose in every paper but also serves as a potential research methodology. Many of these “literature review” papers are desk rejected as they are merely descriptive, void of any insight into the field. We will address each purpose in isolation, with an understanding that for the sake of brevity, we will not reiterate duplicate information that applies to each purpose.

Joining the Scholarly Dialogue

Critical to every study is establishing a position in the current academic dialogue. Authors must ground their case in the introduction by integrating what is known about the topic and identifying what we do not know. The expectations for a study might require development beyond current understanding for a line of inquiry, integration of separate discourses in prior studies, or even introduction of a novel perspective that may conflict or coexist with current thought. Regardless of the end intent, one must convince readers that the chosen phenomenon or theory needs further study or development to fill incomplete knowledge, expand limited perspectives, or adjust erroneous trajectories. Early charting of fundamental and subsequent work justifies the research; sets the theoretical framework; and leads to the development of novel research questions that, when answered, add to our understanding of managing projects, programs, and portfolios.

Achieving a targeted discussion of the literature is not a trivial endeavor. Describing past research in a list or a seemingly random pattern to identify a gap in prior studies is not sufficient.

First, one must identify those prior studies, most fundamental by extensive searching and reading. Searching requires tracing streams of literature back to originating sources; locating

more recent works that cite foundational papers; and probing databases with keywords, synonyms, and antonyms. Critically examine the content of identified papers in terms of relevance to your study, then refine and repeat. When searching, the nascent result may be that of a growing tree, as shown in Figure 1. The trunk is a collection of fundamental papers on the phenomenon or theory. The large branches represent major perspectives that guide separate streams in the literature. The smaller branches are significant studies that alter context or extend theory. Placing the fruit of your study onto that tree requires growing a new branch—a major branch if the study is a wholly new theoretical perspective or contradictory to current thought, a lesser branch for an extension to established theory. The distance in reaching your study from the surrounding branches represents the gap in knowledge that you aim to close.

It may seem discouraging that only a small fraction of the literature you locate and read is required to build your case and develop your research questions. However, the literature you identify is critical throughout the remainder of the paper as well. Most presentations slip into a deeper discussion of the background immediately after the introduction. Here, one must engage prior research to build a logical argument for any hypotheses or set the direction for exploration and explaining why your study is an essential contribution beyond prior works. Your logic is the prime driver but must be informed by earlier studies. The methodology is likewise informed and justified by prior studies, for example, in choosing appropriate samples, measures, and controls. Lastly, the discussion requires the entrenchment of your ideas into the ongoing dialogue of scholars in the field. Return to the focus in the introduction of pursuing a development beyond current understanding, integrating separate discourses, or introducing a novel perspective. “Critical here is a bridge between a study’s findings and the broader literature. It is only the connection to a broader understanding that the theoretical ‘value added’ of a given study can

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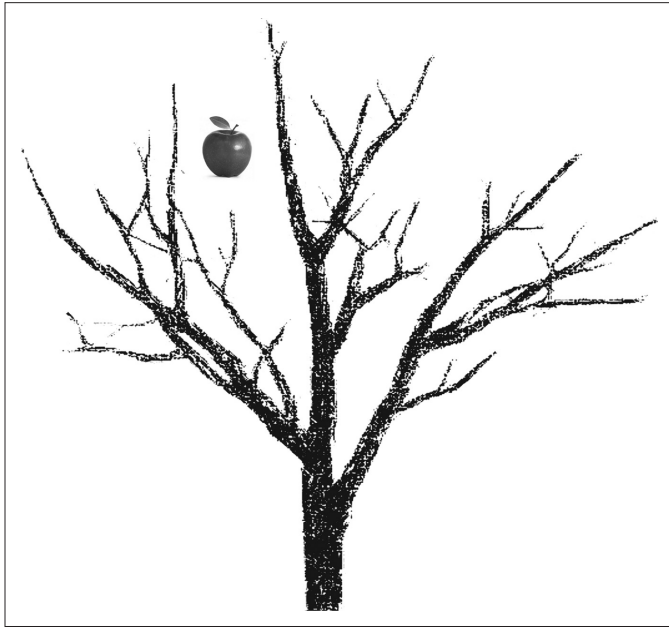


Figure 1. Positioning the fruit of your research in the literature tree.

be interpreted and, indeed, appreciated” (Geletkanycz & Tepper, 2012, p. 257).

The Literature Review as a Methodology

If a single paper has the force of evidence to inform readers about a phenomenon or theory, consider the evidential strength of the collective body of work on the topic. Indeed, a literature review may reside at the top of the hierarchy of evidence. However, as in any research project, the general purpose and research questions of the study will determine the choice of a literature review as a method, after which one must plan the type of review and analysis.

A literature review as a study might serve multiple purposes. One purpose is descriptive—to identify key resources, summarize major issues, applied theories, or standard methodologies in a field of study. Research questions might be: “what are the recognized antecedents of a behavior?” or “what are the origins of the topic?” On their own, descriptive reviews are of less interest to *PMJ* and run the risk of being desk rejected, because they do not provide new insights. The software available today makes searching and summarizing a simple matter, and many authors are tempted to leave it at this level, which provides insufficient development of new directions.

More advanced purposes aim toward synthesizing a new perspective, providing structure to disparate knowledge, or advancing theory, all of which are welcomed by *PMJ*. Research questions might be: “how is knowledge on the topic structured?” or “how do the concepts of the topic relate to theory and practice?” The contribution of such a study would be to provide insight that informs policy or practice, confirms or extends theory, derives testable propositions, or develops a new

theoretical model or framework. As an example, Müller et al. (2014) consider the governance in the realm of projects, derive an initial framework for organizational enablement, and surface propositions about the relationships among process facilitators, discursive abilities, organizational enablers, governance, and governmentality.

A purpose and research questions serve to guide the type of review. Some researchers recognize up to 14 review types and methodologies (Grant & Booth, 2009). Fortunately, Snyder (2019) proposes a spectrum that ranges from systematic reviews to integrative reviews, with semi-systematic reviews as a happy medium. Systematic reviews aim to synthesize and compare evidence across studies to answer specific research questions (and even hypotheses) that consolidate or confirm practices, policies, or theoretical relationships. A transparent and repeatable search strategy is applied to capture a large body of topical studies that may center on the most rigorous and unbiased. Qualitative articles are analyzed to find common characteristics across samples. Quantitative articles provide cumulative evidence of effect (or lack of effect), with a meta-analysis being the quantitative extreme of a systematic review. The systematic review is prominent in the healthcare and medical literatures, where consolidation of clinical trials is essential to develop sound practice. Tranfield et al. (2003) provide a methodology for management studies derived from the practices followed in healthcare and medical studies.

An integrative, or critical, review will have a variety of research questions but have the purpose of arriving at a theoretical model, framework, or taxonomy. The search process is limited, typically, because a large body of work may exist. A search may often begin with the more foundational works in the field, then logically proceed to other works based upon the critical analysis conducted as literature is added to the study from the general to the particular. The researcher must analyze arguments in the papers to determine their points and reasoning, taking into account the author’s stance and possible bias to analyze the claims made in the paper. As papers are added, the researcher must establish relationships of statements from the multiple authors to determine if they have come to similar or opposite conclusions, and perhaps map the results and reasoning with caution, respecting differences in underlying philosophies and different methodologies. Guidelines for an integrative review are described by Torraco (2005).

In between systematic and integrative reviews is the narrative review, or semi-structured review, described by Baumeister and Leary (1997). The narrative review typically considers a broad range of literature with equally broad research questions and a purpose that focuses on the understanding of complex areas. Analysis techniques often follow those in the integrative review, conducting a thematic or content analysis. The objective is to characterize the state of knowledge of a particular topic from multiple perspectives. The result will be the discovery of specific themes in literature and provide a historical overview. Theoretical models might emerge, but certainly, the results will lay out a future research agenda. An excellent

example of this review type is the product development work of Brown and Eisenhardt (1995). In this work, the authors study innovation research to identify three unique historical streams of study, build a model of each, and suggest potential paths for future research based on relationships and concepts not well defined, or even missing, in the built models. Lastly, in subject areas that are quite diverse, one may combine different approaches. For example, one could scope the field through an integrative or narrative review, then follow with a systematic review using a transparent process and clearly identified inclusion/exclusion criteria to answer specific questions (Curran et al., 2007; Jesson et al., 2012).

Our brief discussion is naturally limited. Before you conduct your literature review, consider your purpose and research questions carefully. Examine the articles in the reference list to help determine the best review methodology and even books on conducting reviews, such as those by Hart (2018) or Jesson et al. (2012). In conducting your search and analysis, remember to include landmark studies in your topic as well as up-to-date material. Do not confuse a review with the search; a search remains simply a list of articles that may be randomly or categorically organized. Be aware of your biases and evaluate the existing studies critically but fairly. Report your results through clearly designed tables and figures that effectively communicate the process you followed and justify your results. Be sure to identify the need for further research based on the logic and structure of your argument and resulting framework. Consider a review paper to be a research project with all of the attending requirements for rigor, relevance, and value.

Finally, consider these hints. Some, especially the less seasoned writers, tend to focus more on the names of the (well-known) authors than on the content of the literature they review. This leads to a writing style, where each sentence starts with a new name, such as “Turner said...,” then “Mintzberg said...,” and then “Flyvbjerg said...” and so on. This structure often leads to a repetition of findings or unrelated findings that do not help in building a cohesive story around a phenomenon. In addition, it is very dull reading. A better style is to investigate the arguments of the different authors for their content and then structure the review by content areas, such as “From an organizational theory perspective the phenomenon is seen as...(see Mintzberg), whereas from a project management perspective the phenomenon presents itself as...(see Turner and Flyvbjerg).” This provides for a focus on the subject and leads almost automatically to a content-based analysis and more structured findings.

This editorial continues our series of guidance for authors by providing some insights into the expectations of editors and

reviewers when it comes to *PMJ* submissions. More topics will follow over time.

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