


# Role Theory Perspectives: Past, Present, and Future Applications of Role Theories in Management Research

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*Role theories examine how individual behavior is shaped by prevailing social roles and provide insights into how behavior is perceived by others in light of such roles. Current movements for police reform as well as the landmark decision by the U.S. Supreme Court concerning the employment rights of LGBTQIA individuals have brought conversations concerning roles and their potential impact to the forefront of public discourse. Academic perspectives in management research have aided in building knowledge concerning how roles impact individuals and organizations in a variety of research domains, including entrepreneurship, human resource management, organizational behavior, and strategic management. While the utilization of role theory has gained tremendous momentum over the past two decades, its central tenets are often blurred given that several related but unique perspectives surrounding roles exist in the literature. We trace the origins and development of specific role theories by defining central constructs to bring clarity to the conceptual ambiguities between various role theories and key concepts. Next, we provide an integrative review of empirical role research in management journals over the past 20 years. Here, we identify the five most prominent research themes in the*

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*management literature: roles and identity, work–nonwork interface, biases and stereotypes, career life cycles, and ethics and other-oriented behavior. Finally, we provide an agenda for future research that highlights missed opportunities in management research that draws from the key themes identified in our review.*

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Few topics hold the propensity to tap the conscience of individuals as the study of roles and role influences. A role represents a core set of behavioral expectations tied to a social group or category that defines appropriate and permitted forms of behavior for group members (Biddle, 1986; Koseoglu, Liu, & Shalley, 2017). Gender roles (e.g., woman or man; Badura, Grijalva, Newman, Yan, & Jeon, 2018), career roles (e.g., sales, education, financial services; Livingston, 2014), and status roles (e.g., supervisor or subordinate; Matta, Scott, Koopman, & Conlon, 2015) are all examples of roles that impose behavioral expectations on an individual viewed as a part of these social groups. To understand how roles shape the lives of individuals, sociologists and social psychologists developed role theories that explain how individual behavior is influenced by roles and how individual behavior is judged by others in light of prevailing roles (Biddle & Thomas, 1966; Eagly, 1987; Eagly & Karau, 2002; Stets & Burke, 2000).

Role theory operates under the key assumption that individuals have various roles that they play in daily life (Biddle, 1986). These roles affect how the individual behaves and sees themselves and how the individual's behavior is perceived by others. As such, individual behavior can be understood and predicted if one knows the roles occupied and the corresponding behavioral expectations tied to that role. Early role theorists used these assumptions to better understand how role expectations may lead to prejudiced beliefs among adolescents who opposed the racial integration of schools (Bank, Biddle, Keats, & Keats, 1977) and to examine differences in how educators interact with students based on a student's socioeconomic status and the teacher's age, experience, and ethnicity (Beezer, 1974). The key tenets of role theory have been used to develop extensive theory concerning specific roles, how individuals relate to roles, and perspectives such as social role theory, role congruity theory, and role identity theory.

Role theories provide indispensable perspectives in management, with work spanning major disciplines, such as organizational behavior (OB), human resource (HR) management, entrepreneurship, and strategic management. A review of this burgeoning literature is needed for two primary reasons. First, while role theories have similar origins, ties to specific theories and related concepts have become blurred in the literature. For instance, our review suggests that the concepts of role salience (readiness to act out a focal identity) and role centrality (relative importance placed upon a focal identity) are often used interchangeably even though they are conceptually distinct and should be treated as such (Greer & Egan, 2012; Stryker & Serpe, 1994). Likewise, the role theory literature includes a variety of interrelated concepts where clarifying distinctions can be useful. For example, role conflict (where one role conflicts with another role) and role enrichment (where one role enhances the experience in

another role) may appear to be two ends of a continuum. However, these concepts are theoretically distinct with distinct measures, where conflict focuses on the strain from incompatible role demands (e.g., Carlson, Kacmar, & Williams, 2000; Siu et al., 2010) and enrichment examines how engagement in one role better the experience in another (Carlson, Kacmar, Wayne, & Grzywacz, 2006). This review helps to bring clarity to prominent role-related concepts and boundaries of each theory.

Second, role theory work adopts two schools of thought with untapped potential. In the structural-functional perspective, roles are viewed as “rules” that govern a larger social system or society that impose behavioral expectations on role occupants, who generally cannot change or escape the purview of such rules (Vandenberghe, Bentein, & Panaccio, 2017). This perspective provides a valuable tool to understand how expectations tied to broadly held social roles, such as gender or race, influence important outcomes for individuals. Our review suggests that the management literature adopting a structural-functional perspective overwhelmingly examines how traditional gender roles shape outcomes for those in functional roles, such as leader, board member, or entrepreneur (e.g., Lee & Huang, 2018; Oliver, Krause, Busenbark, & Kalm, 2018; Rosette, Mueller, & Lebel, 2015). However, virtually all management disciplines give considerably less attention to other important social roles, such those tied to race, age, sexual orientation, and nonbinary gender roles. Our review highlights the need to expand structural-functional role research beyond the purview of traditional gender roles.

The symbolic-interactionist perspective places emphasis on how individuals interpret their in-role and extra-role experiences and treats roles as flexible and negotiated (Ashforth, 2000; Sluss, Van Dick, & Thompson, 2011). Scholars adopting this perspective frequently examine individuals’ relationships to work roles and the intersection among work and nonwork roles. This perspective appears prevalent in the OB and HR literatures but quite infrequently in others—particularly, strategy and entrepreneurship. For example, the transition from the role of employee to entrepreneur is a pivotal process, and entrepreneurs must frequently transition between roles as a business grows. However, the concept of role transitions—moving from one role to another or changing the orientation toward a currently held role (Ashforth, 2000)—found in the symbolic-interactionist perspective appears only rarely in the entrepreneurship literature (e.g., Mathias & Williams, 2018) and treats the transition from employee to entrepreneur as a business-minded transition (Hoang & Gimeno, 2010). Such research ignores how other role dynamics, such as those related to family, influence this transition. Thus, some management disciplines would benefit from adopting a symbolic-interactionist perspective.

Our integrative review of role theory research provides three contributions. First, we describe role theories’ main concepts, define key constructs, and delineate predictive relationships by tracing the origins and development of specific role theories. Here, we clarify conceptual ambiguities in role theories and role concepts to allow scholars to best select the theoretical lens suited for their research. Second, we review empirical research that has leveraged role theory perspectives in management journals over the past 20 years (2000–2020), focusing on the five most prominent themes identified in our review. To do so, we use role-related terms, such as “role congruity,” “role identity theory,” and “role salience,” to identify relevant papers in management journals that leverage role theory perspectives (see the Current Trends in Research on Role Theories section for full search criteria). By

integrating research across disciplines into key themes, we provide a platform for scholars to learn from other management domains that may spark insights in their own research. Third, we draw from these key themes to provide an agenda for future research that highlights missed opportunities in management research.

## **Fundamentals of Role Theories**

Actors in the theater often play a defined role derived from a script dictating the qualities of the character they portray. Using the theater metaphor, sociologists and social psychologists observed that social life could frequently be distilled into observable roles “played” by individuals that carry predictable, context-specific behaviors tied to that role (Biddle & Thomas, 1966; Merton, 1957). Understanding these roles is useful to explain why individuals are expected to behave in certain ways and how such expectations shape their own behavior or judgments of others’ behavior (Biddle, 1986). Role theories emerged from these observations as powerful theoretical perspectives to explain and predict human behavior. Broadly, these theories work by identifying an observable role (e.g., woman, doctor, or child). Observation of this role communicates expected qualities tied to that role (Dierdorff, Rubin, & Bachrach, 2012). An individual’s characteristics, actions, or behaviors are often then judged in light of the qualities associated with that role—by both themselves and others.

Role theory work has typically adopted a structural-functional or a symbolic-interactionist perspective (see online Appendix A for a comparison of assumptions). The structural-functional approach to roles (Merton, 1957; Parsons, 1951) is rooted in the macro-oriented structural-functional perspective in sociology that views society as structured according to set of interconnected rules and laws that bring order to society. Here, roles “represent the building blocks of social systems that engender behavioral expectations that transcend role occupants” (Vandenberghe et al., 2017: 2092). It is assumed that roles and corresponding expectations are part of a broader social fabric, tend to be relatively fixed, and guide the behavior of, and response to, certain groups. Role expectations are generally uniformly imposed, irrespective of individual differences. In contrast, the symbolic-interactionist perspective adopts a micro-oriented approach to studying the subjective meanings that humans impose on objects, behaviors, and events (Stryker, 2001). The symbolic-interactionist perspective is concerned with how individuals interpret their in-role and extra-role experience (Sluss et al., 2011) and with relationships among roles. Roles are assumed to be flexible and negotiated as well as come in sets (e.g., teacher–student, leader–follower). Here, roles may be made or unmade through social interaction. This approach is typified by the role identity literature that places a much greater focus on the individual’s relationship with a role. The figure in online Appendix B summarizes both perspectives’ approach to roles, specific role theories rooted in each tradition, primary applications in management research, and key outcomes addressed by each approach.

### *Key Concepts*

We briefly review the primary concepts (summarized in online Appendix C) used in the role literature and provide insights regarding how each as used in management research.

*Role.* The most fundamental concept of role theories is the role. Roles can be defined broadly as a set of behavioral expectations placed on individuals based on their position in a social structure (Biddle, 1986; Rizzo, House, & Lirtzman, 1970; Tubre & Collins, 2000). A role is typically a noun referring to a position (woman, manager) with behavioral expectations describing role characteristics. The behavioral expectations of the role are naturally applied to that role and serve as social standards, or norms, to evaluate the appropriateness of behavior, often resulting in the future conditioning of such behavior (Rizzo et al., 1970). Roles may also influence an individual's self-concept and help shape an individual's identity (Chreim, Williams, & Hinings, 2007). For instance, the female gender role, represented by femininity and family role salience, may explain why women show stronger preferences than men for socioemotional career satisfiers, such as supportive coworkers and working for a company that puts people first (Eddleston, Veiga, & Powell, 2006). The salience of roles may be elevated or lessened due to contextual factors, such as periodic/temporal concerns related to clock hours, physical context (office, home), or activity (participating in a wedding or watching a football game). Finally, while roles are generally viewed as positional, and the bulk of role research in management examines positional roles, it is important to recognize the presence of "social-type" roles. These are defined as a bundle of associated behaviors that reflect society's values (Biddle, 1979). Examples of such roles are "hero," "vigilante," and "fool." We found only one example of management work examining social type roles. Specifically, DeCelles and Aquino (2020) develop a theory of workplace vigilantes who monitor for and punish deviance without the formal authority to do so.

*Role consensus.* Role consensus reflects shared agreement concerning the behavioral expectations tied to a role (Biddle, 1979). Terminology such as "role expectations," "prescriptive norms," and "social norms" are frequently used as synonyms. These terms generally refer to broadly *shared* expectations concerning behaviors that are desirable, proper, or expected of a person in a particular role and behaviors people in that role would ideally portray. This concept is critical to the structural-functional view: For a role to have broad influence to sway behavior, expectations must first be shared by a group of people (organizational members, society). A substantial body of literature has used this concept to examine how conformity to broadly held role expectations tied to social roles, particularly, gender, intersects with expectations tied to functional roles (e.g., leader, entrepreneur) to influence outcomes. For instance, broadly held gender role expectations reduce the ability of female entrepreneurs to raise money in light of the masculine connotation ascribed to entrepreneurs (Kanze, Huang, Conley, & Higgins, 2018), make delegating tasks more difficult for female managers (Akinola, Martin, & Phillips, 2018), and shape perceptions of leadership effectiveness such that women who advance to top leadership roles may be perceived as having exceptional abilities (Rosette & Tost, 2010).

*Role conformity.* Role conformity is concerned with how closely one adheres to role expectations (Biddle, 1979). Rooted in the structural functionalist perspective, this concept is important because whether an individual appears congruent with broadly held role expectations is a critical driver of how others perceive and act toward that individual. Those who appear not to conform often receive sanctions or are otherwise penalized, while those who do conform are rewarded or at least not penalized. Role conformity is related to role consensus as conformity is often judged in light of consensus role expectations. Thus, research on conformity also often examines how prevailing role expectations tied to certain social groups (e.g.,

those related to gender or race) shape outcomes when group members occupy a functional role (e.g., leader, entrepreneur). For instance, leadership roles are often viewed as White and male, creating a “double jeopardy” for Black women in the workplace because they appear inconsistent with leader role expectations on two fronts (e.g., Berdahl & Moore, 2006; Rosette, Koval, Ma, & Livingston, 2016). As another example, cultures that require strong conformity with gender roles often experience lower rates of entrepreneurship, generally considered a “masculine” endeavor (Shinnar, Giacomini, & Janssen, 2012). Examining conformity with widely held role expectations highlights how discrepancies between traditional gender roles and functional roles with a masculine connotation, such as entrepreneur, leader, or CEO, may influence outcomes (often adversely) for women. More recently, management literature has begun to incorporate additional social roles (e.g., race, LGBTQ). For example, Anglin and colleagues (in press) show that women of color may attract more crowd-funding when fundraising for a social (as opposed to commercial) venture because their status as a women and person of color is dually congruent with the role of social entrepreneur.

*Role identity.* Role identity is rooted in the symbolic interactionist perspective (Stryker & Serpe, 1994) and refers to the meaning prescribed to a role by oneself (Burke & Tully, 1977). Thus, while a role is attached to a structural position, role identity determines how an individual interprets that role and corresponding expectations (Sluss et al., 2011; Sluss & Ashforth, 2007). Information and meaning attached to roles are stored as cognitive schema and provide an internal framework for interpretation of role expectations. Further, while roles are often viewed as structural, thus relatively fixed, microprocesses at the individual level allow for the social construction and negotiation of behavioral expectations and create a more dynamic view of roles. As Sluss and colleagues (2011: 507) suggest, “the role of manager may possess more or less institutionalized behavioral expectations such as allocating resources, providing rewards, giving performance feedback but the nuances, content, and focus of these behaviors are still negotiated by those occupying the role (e.g., manager) as well as the counter-role (e.g., subordinate, senior manager, peer manager).” The concept of role identity has been pivotal in furthering a micro-oriented, individual-level understanding of the influence of roles and developing an understanding of how individuals respond to the demands placed on them when facing multiple sets of role expectations. For example, individuals with stronger home role salience (actively prioritizing one’s home life over one’s work life) have a greater need to detach from work when returning home, and doing so enhances their cognitive liveliness once returning home (Sanz-Vergel, Demerouti, Bakker, & Moreno-Jiménez, 2011). Another takeaway from this literature involves understanding how situational factors influence the development of role identities that then shape individual actions. For example, perceived higher coworker creativity expectations, increased self-views of creative behavior, and greater exposure to U.S. culture may lead to a stronger creative role identity among Taiwanese employees (Farmer, Tierney, & Kung-McIntyre, 2003).

*Role salience and role centrality.* Role salience and role centrality are rooted in the symbolic interactionist perspective and often treated as synonyms (Carr, Boyar, & Gregory, 2008) to refer to the importance people give to roles central to their life and identity (Carlson & Kacmar, 2000; Greer & Egan, 2012). The original conceptualization of these constructs suggests they are related and complementary but distinct (Greer & Egan, 2012; Murnieks, Mosakowski, & Cardon, 2014). Stryker and Serpe (1994: 19) note that role centrality

refers more to “what a person regards as desirable or preferred from his or her own point of view,” while salience is “defined as a readiness to act out an identity as a consequence of the identity’s properties as a cognitive structure or schema” (Stryker & Serpe, 1994: 18). Thus, centrality assumes a level of self-awareness, while salience does not. Further, Stryker and Serpe (1994) suggest studies should consider both concepts as each may uniquely contribute to behavior. A notable example in the management literature is Murnieks et al. (2014), who show that centrality of the entrepreneur role is positively related to entrepreneurial passion, while controlling for entrepreneurial identity salience, which did not predict entrepreneurial passion. In reviewing the literature, we noticed considerable conceptual ambiguity in the use of these constructs with a lack of clarity regarding which concept was actually being used as well as studies treating the two concepts as one in the same. We urge management scholars researching these topics to take care to conceptually and empirically distinguish the two concepts. More generally, a key insight from the literature is that greater levels of salience and/or centrality influence when and why individuals choose to engage in role related tasks. Greater levels of centrality or salience in work-related roles may increase motivational characteristics, such as passion, aspirations, or commitment for a given job or career (e.g., Seibert, Nielsen, & Kraimer, 2020; Tripathi, Zhu, Jacob, Frese, & Gielnik, 2020). However, when the salience or centrality of nonwork roles, notably, family-related roles, is stronger, this may lead to role conflict at the work–family interface and disengagement from work roles (e.g., Carr et al., 2008; Michel, Kotrba, Mitchelson, Clark, & Baltes, 2011).

*Role conflict and role ambiguity.* Role conflict and role ambiguity are two related concepts with a prominent place in the role theory literature. Role conflict occurs when individuals have multiple roles and the behavioral expectations of one role are incompatible or inconsistent with those of another (Anicich & Hirsch, 2017; Biddle, 1986; Ebbers & Wijnberg, 2017). The conceptualization of roles related to these terms lies in the structural-functional tradition; however, these concepts arose from Turner’s (1962) criticism that previous conceptualizations had been too ridged and role work should recognize an individual’s personal reaction to their given roles. Role conflict is often used in research examining competing demands in functional roles. For example, middle managers experience role conflict because they are often confronted with differing performance expectations from superiors and from subordinates (Anicich & Hirsch, 2017; Floyd & Lane, 2000). Another common role conflict arises from conflicting work and personal expectations. For example, Bolino and Turnley (2005) find that individual initiative may increase work–family conflict as individuals are more likely to go beyond the call of duty at work—an effect that is stronger for female than male employees. Role ambiguity occurs when individuals are not clear about role boundaries and exists on a continuum with role clarity (Ebbers & Wijnberg, 2017; Rizzo et al., 1970; Tubre & Collins, 2000). Role ambiguity is typically applied to individuals in a particular functional role (e.g., manager, employee) where role expectations regarding are unclear and is frequently used in studies of satisfaction, absenteeism, and job performance (Tubre & Collins, 2000). This concept differs from role consensus because it relates to an individual’s understanding of their own functional role, not widely held beliefs that exist as part of a social structure. Indeed, role ambiguity often occurs when day-to-day job roles are not well defined. For example, employees may display more organizational citizenship behaviors (OCB) to enhance their self-image when their specific job role is not clearly defined because of ambiguity in how to get ahead otherwise (Yun, Takeuchi, & Liu, 2007). Role

conflict and role ambiguity are often intertwined as role ambiguity can increase the chances of role conflict due to the uncertainty between how individuals believe they should behave and actual behavioral expectations from others (Ebbers & Wijnberg, 2017). Both role conflict and role ambiguity have been shown to result in tension between employees, higher turnover, individual anxiety, and lower employee performance (Michel et al., 2011).

*Role accumulation and role enrichment.* Role accumulation refers to obtaining and occupying multiple roles at once (Sieber, 1974). An individual may occupy the roles of woman, mother, racial minority, and CEO simultaneously. While stemming from structural-functional conceptualization of a role, this concept underscores the importance of examining individual reactions to roles and challenges the idea that accumulating more roles always leads to strain and conflict (Sieber, 1974). Departing from the concept of role conflict, where multiple role demands increase strain or tension, role accumulation considers benefits that may accrue from occupying multiple roles. For instance, role accumulation in women managers can lead to greater life satisfaction, self-esteem, and self-acceptance (Ruderman, Ohlott, Panzer, & King, 2002). A closely related concept is role enrichment. Role enrichment explains how experience in one role may improve the quality of experience in another (Greenhaus & Powell, 2006), with work investigating how performance in a work role (e.g., leader, entrepreneur) may be enhanced by occupying other nonwork or work roles. For instance, skills learned from motherhood (planning, multitasking) may enable women to succeed in the role of entrepreneur more readily as these skills can be applied when launching a new venture (Powell & Eddleston, 2013). A key takeaway from this literature is that the work–family interface, often viewed as source of role conflict, can be a source of role enrichment under the right conditions. Organizations that seek to build a workforce with high self-efficacy as well as provide employee support, prioritize communication, and allow for autonomy can create environments to foster enrichment between work and family roles (Parker, 1998; Wayne, Casper, Matthews, & Allen, 2013; Westring & Ryan, 2010).

While role conflict and enrichment may appear to be opposite ends of a continuum, they are generally treated as different concepts with distinct measures. For instance, Westring and Ryan (2010) examine how core self-evaluations influence school–family conflict and school–family enrichment using distinct scales. Siu et al. (2010) suggest that work–family enrichment and work–role conflict have different roots, that is, the former is driven more by role demands, whereas the latter is generated from personal experiences in work and family roles. Thus, a lack of role conflict does not imply role enrichment or vice versa.

*Role transitions.* Role transitions are the psychological, and sometimes physical, changes between or among roles, including the process of disengaging from one role and engaging in another (Ashforth, Kreiner, & Fugate, 2000) and are often linked to temporary or permanent shifts in identity (Ashforth, 2000; Nicholson, 1984). Role transitions can be considered macrotransitions or microtransitions. Macro role transitions refer to changes between sequentially held roles, such as organizational entry or exit, promotion, or change from employee to entrepreneur (Ashforth, 2000). Because macro role transitions embody major change, they may be accompanied by substantial changes in an individual's identity (Ibarra & Barbulescu, 2010). For example, Maurer and London (2018) argue that the identity transition from individual contributor to leader may range from an incremental shift to a radical shift, with organizational processes, such as training, resources, encouragement, and support, facilitating the degree of identity shift. Micro role transitions include movement between simultaneously



held roles (Ashforth, 2000). For instance, over the course of a day, an individual may begin in a parental role, shift to a manager role at work, and return to a parental role in the evening. As an example of research on micro role transitions, Jachimowicz, Cunningham, Staats, Gino, and Menges (2021) suggest commutes can be an opportunity for meaningful role transitions—employees who engage in thinking about the upcoming work role (i.e., role-clarifying prospection) are less likely to be negatively affected by long commutes, and individuals who experience high levels of work–family conflict benefit the most from role-clarifying prospection. While macro role transitions may lead to changes in identity, one’s identity influences how the individual deals with micro role changes. For example, Delanoeije, Verbruggen, and Germeys (2019) show that employees experience less work-to-home conflict but more home-to-work conflict on teleworking days compared with non-teleworking days. However, those who highly value protecting their home from work interruptions experience more work-to-home conflict when teleworking than those who have a lower home protection preference.

## **The Evolution and Advancement of Role Theories**

Role theories began to take hold in the 1950s and can be found in management research beginning in the 1960s. Early work in management provided a foundational understanding of the key concepts described earlier and primarily investigated how formalized, professional roles, such as managerial or leadership roles, were constructed and perceived (e.g., Delbecq, 1964; Elbing, 1970; Jermier & Berkes, 1979). During the late 1980s and into the 2000s, management scholars broadened their horizons to focus on the intersection of roles within and outside the organization. This research is typified by work examining the work–family interface (e.g., Carlson & Kacmar, 2000; Frone, Russell, & Cooper, 1992). Management scholars produced an impressive body of work that sought to understand how pressures at work influenced pressures at home and vice versa. For instance, Duxbury and Higgins (1991) highlight how women experience greater work–family conflict, noting there had not been a redistribution of roles within the family to match increased role responsibilities outside the home, while Netemeyer, Boles, and McMurrian (1996) proposed and validated what came to be widely used measures of work–family and family–work conflict.

### *Advancing Role Theories From a Structural-Functional Perspective*

During the 1980s, social psychology and microsociology provided notable extensions to the structural-functional perspective of role theory that now wields substantial influence. Online Appendix D summarizes these advancements. In the 1980s, Eagly (1987) applied role theory concepts to a contentious debate in psychology concerning behavioral differences between men and women. Social psychologists sought to understand the origins and impact of sex differences by focusing on cultural stereotypes, while evolutionary psychologists focused on biological explanations related to the early survival of humans (Archer, 1996; Eagly, 1997). Likewise, while role theory had recognized sex differences in a variety of behaviors, no definitive explanation for why such differences emerge and persist had been reached, and the malleability of gender roles had been largely ignored (Eagly & Wood,

2011). Against this backdrop, Eagly (1987) proposed the social role theory of sex differences and similarities, frequently called social role theory.

Social role theory contends that sex differences in social behaviors arise from the distribution of men and women into social roles (Eagly & Wood, 2016; Eagly, Wood, & Diekmann, 2000). Consistent with evolutionary psychology, social role theory recognizes that physical differences contribute, but differences in behavior also result from a confluence of economic, technological, ecological, and cultural processes (Eagly & Wood, 1999). The product of these processes is pervasive gender roles and stereotypes that reflect a consensually shared set of expectations concerning typical and appropriate behaviors for men and women. The gender role of men typically includes agentic behaviors (dominance, assertiveness), while the gender role of women typically includes communal ones (nurturing, friendliness). Such roles are pervasive and persistent because gender-appropriate behaviors are socially modeled, learned, and reinforced through society's power and status structures. Thus, women and men internalize gender roles and tend to see the world and behave in ways that conform with these roles. However, although gender roles are persistent, social role theory suggests these roles can and do change over time.

Social role theory has been expanded beyond sex differences. Notably, Koenig and Eagly (2014a) illustrate that core concepts of social role theory apply to a variety of stereotypes. The authors showed that racial, occupational, age, socioeconomic-status, sexuality, and educational differences may all carry stereotypical roles that are a result of historical, social, and economic forces. Like gender roles, these roles carry expectations for appropriate behaviors that influence individual behavior and perceptions of behavior. While management research has predominately leveraged social role theory to examine gender differences (e.g., Kacmar, Bachrach, Harris, & Zivnuska, 2011; Madera, Hebl, & Martin, 2009), researchers have leveraged this perspective to further understanding of other role types. For example, Hoyt, Price, and Poatsy (2013) use social role theory to propose a theory of unethical leadership, while Anglin, Wolfe, Short, McKenny, and Pidduck (2018) use social role theory to understand how the interplay of entrepreneur sex, race, and sexual orientation shapes assessments of entrepreneurs in the crowdfunding context.

The second key extension of role theory is role congruity theory. Building from the core tenets of role and social role theories, Eagly and Karau (2002) extend social role theory by considering congruency between prevailing gender roles and leadership roles and introducing two forms of prejudice against female leaders (Eagly & Karau, 2002). Specifically, when thinking about leaders, perceivers combine leader role expectations with gender role expectations and make judgments based on congruity between the two sets of expectations. Traditional leadership characteristics (self-confident, ambitious, aggressive) appear congruent with the male gender role and incongruent with the female gender role. As such, leadership behavior shown by women violates expectations about how one ought to behave, eliciting negative reactions. This leads to two forms of prejudice: Women's leadership potential is less favorably evaluated than men's because leadership ability is more stereotypical of men, and women's actual leadership behavior is less favorably evaluated than men's because such behavior is perceived as less desirable in women. Role congruity theory has moved beyond examination of leadership and gender roles under the premise that prejudice arises when group stereotypes are incongruent with stereotypes based on social roles (Koenig & Eagly, 2014b). For instance, role congruity theory has proven valuable in understanding

the influence of stereotypes about age (Diekmann & Hirnisey, 2007), race (Barden, Maddux, Petty, & Brewer, 2004), and sexual orientation (Clarke & Arnold, 2018). Still, management research drawing on this theory has remained focused on gender roles. A notable exception is Rosette et al. (2016), who add an intersectionality lens and note that prevailing gender stereotypes for women may be altered once race is considered with gender.

### *Advancing Role Theories From a Symbolic-Interactionist Perspective: Role Identity Theory*

The symbolic-interactionist perspective of role theory developed throughout the 1960s and 1970s (Stryker, 2001; Stryker & Serpe, 1994). This perspective was integrated into the structural-functional perspective because scholars disagreed about basic assumptions supporting the structural-functional perspective, such as an individual's agency within organizations to assign, reject, and identify with one's roles (Stryker, 2001). A key product of this integration is role identity theory, which contends that individuals act based on how they like to see themselves and how they like to be seen by others when operating in particular social positions (McCall & Simmons, 1978). This theory expands role theory to include the processes wherein individual role occupants define themselves within roles and how this influences their interactions with others. As such, role identity theory also expands the definition of a role to include individual goals, values, beliefs, norms, interaction styles, and time horizons that comprise a particular role (Sluss et al., 2011). Thus, roles are not only structural positions occupied by an individual where expectation are imposed at a macro level, but they also shape one's individual identity at a micro level based on the individual's interpretation of their roles. A fundamental feature of role identity theory work in management is examining how and why individuals choose to respond when occupying a myriad of roles. Here, the concepts of role salience, role centrality, and role conflict (among others) have been used to explain such choices. For instance, individuals with a stronger leadership identity are more likely to emerge as leaders because they actively take steps to reach a leadership position, such as engaging in behaviors associated with performance and goal attainment (Kwok, Hanig, Brown, & Shen, 2018).

## **Current Trends in Research on Role Theories**

Our integrative review from the past two decades (2000–2020) of empirical role research ( $n = 234$ ) highlights the emergence of key themes across diverse management disciplines, such as OB, HR, strategic management, and entrepreneurship. To conduct this review, we first searched popular academic journals using the keywords “role congruity,” “role incongruity,” “role theory,” “social role theory,” “role congruity theory,” “role identity theory,” “role salience,” “role centrality,” and “role transitions.” Additionally, we performed a second keyword search for “role(s)” as catchall to ensure we did not miss any potentially relevant articles. We searched the following journals: *Academy of Management Journal*, *Academy of Management Review*, *Administrative Science Quarterly*, *Entrepreneurship Theory and Practice*, *Group and Organization Management*, *Human Relations*, *Human Resource Management*, *Human Resource Management Review*, *International Journal of Management Reviews*, *Journal of Applied Psychology*, *Journal of Business Venturing*,

*Journal of International Business Studies, Journal of Management, Journal of Management Studies, Journal of Organizational Behavior, Leadership Quarterly, Management Science, Organization Science, Organization Studies, Organizational Behavior and Human Decision Processes, Personnel Psychology, Research in Organizational Behavior, Strategic Entrepreneurship Journal, and Strategic Management Journal.*

Our search initially identified 533 articles. During our first pass through the literature, we were able to quickly remove 44 articles as they did not directly relate to role theory research, leaving 489 articles. Next, 159 nonempirical articles (conceptual pieces and editorials) were removed, leaving 330 articles. An additional 43 empirical articles were removed because they were published before 2000. During the coding of empirical articles, an additional 59 articles were removed because they did not use one of the role theory perspectives discussed in the review; rather, these articles used a combination of other various theories to discuss the role

**Table 1**  
**Summary of Key Themes**

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**Roles and Identity ( $n = 23$ ):** The interplay between occupied roles and individual identities, including how roles impact the emergence and the dismantling of an identity as well as how identities influence the formation, maintenance, and transition of roles.

*Roles investigated:* Actor; businessperson; information contributor or seeker; culture; developer; student; alumni; entrepreneur, experience; gender; migrant; newcomer; nurse; faculty; staff; researcher; coworker, supervisor, subordinate, and leader; passion, physician; spouse; parent; employee; sibling; neighbor; child; religion; friend; team member

**Work–Nonwork Interface ( $n = 30$ ):** The intersection of work and nonwork roles, primarily focusing on the work–family interface, to understand how work role expectations, family dynamics, and personal life shape individual, family, and work experiences.

*Roles investigated:* Age; education; entrepreneur; parent, child, and spouse; firm successor; gender; identity (career, family, breadwinner, athlete, student, refugee); full-time and part-time employee; unemployed person; professional; homemaker; caretaker; spouse; supervisor; nonmanager; race; religion; political member; abuse victim

**Bias and Stereotypes ( $n = 114$ ):** How broadly held role expectations, along with corresponding stereotypes, influence key outcomes for social groups (e.g., women, people of color) in work-related roles.

*Roles investigated:* Advocate; contributor; board member; leader; manager; member; follower; recommender; applicant; engineer; entrepreneur; executive; department; inventor; investor; information technology professional; pediatrician, surgeon and nurse; military member; film director; professor; negotiator; parent; predecessor; scientist; student; top management team member; gender; U.S. senator; age; coauthor; culture; education; race; industry; institutional affiliation; spouse; mentor; minority; nationality; physical attractiveness; politician; pregnant woman; protégé; religion; sexual orientation

**Career Life Cycle ( $n = 36$ ):** How roles shape the formal and informal emergence (promotion, transition, succession), maintenance (evaluation, performance, negotiation) and decline (retirement, resignation, dismissal) of individuals' organizational careers.

*Roles investigated:* Administration; age; analyst; captain; executive; employee; parent; child; founder; gender; investor; leader; subordinate; marital status; merchant; negotiator; newcomer; nurse; physical space; physician; religion; retiree; terrorist; immigrant; TMT member

**Ethics and Other-Oriented Behaviors ( $n = 24$ ):** How ethics, morals, and other-oriented behaviors influence individual decision making and impact group and organizational social, functional, and financial performance.

*Roles investigated:* Advocate; age; author; beneficiary; board member; business school; owner and co-owner; founder and cofounder; economic environment; employee; entrepreneur; ethnicity; gender; illicit organizational role; ethics; morality; religion; institutional affiliation; military member; executive; supervisor, peer, and subordinate; employee; unemployed person; chief; intern; volunteer; client; parent; teacher; whistleblower

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phenomenon (e.g., Cogin, Sanders, & Williamson, 2018). Thus, our review includes 234 empirical articles.

To determine key themes, we first engaged in an extensive coding process that we then used to inductively inform our selection of themes. For each empirical article, we coded types of roles (social vs. formal), specific roles (gender, manager, leader), role theory used and/or concept, sample, analytic approach, dependent variables, independent variables, and research design. Coding and manuscripts were reviewed by three authors to determine the five themes, each of which are summarized in Table 1 and in an expanded version of this table in online Appendix E. Online Appendix F provides a table reflective of the coding for each article, and online Appendix G provides a summary of the methods used in role research. From this coding, we observed the emergence of five major themes: Roles and Identity ( $n = 23$ ), Work–Nonwork Interface ( $n = 30$ ), Biases and Stereotypes ( $n = 114$ ), Career Life Cycle ( $n = 36$ ), and Ethics and Other-Oriented Behavior ( $n = 24$ ). Only seven articles did not align into our five themes; thus, roughly 97% of our articles found a home in our emergent themes. We consider the most prominent theme for a given manuscript; however, themes are not mutually exclusive. For example, the Roles and Identity theme generally examines relationships between identities and roles, but the role identity concept is important to the Work–Nonwork Interface as well. The Work–Nonwork Interface is treated as a separate theme because it occupies a prominent place in the literature in its own right. We suggest readers consider the following themes as an integrative examination of role theory research and not separate literature streams. After each major theme was determined, authors looked within each theme to inductively determine the two or three most common subthemes. Table 1 provides a brief summary of these themes.

### *Roles and Identity*

In the spirit of role identity theory, the Roles and Identity theme features research that examines how one's identity influences relationships with work. This theme includes work mostly in the OB and entrepreneurship disciplines. Three subthemes emerged: the construction and maintenance of role identities, how individual identities influence individual work outcomes, and the concept of entrepreneurial identity.

*Identity construction.* Several papers examined the construction and maintenance of role identities, which are influenced by internal and situational factors. For example, Cinque, Nyberg, and Starkey (2020) examine how theater actors maintain their actor role identity despite hardships of sacrifice, responsibility, and self-care. Marchiondo, Myers, and Kopelman (2015) illustrate that, for individuals in a leadership role, leadership identities are constructed and negotiated between leader and team members through team members accepting the claims of a leader. Currie, Finn, and Martin (2010) examine role transitions for nurses within the English National Health System and show that, while organizations may impose policy changes intended to alter professional roles, professional identity concerns and inter- and intraprofessional conflict may constrain the enactment of new roles. Creative role identities emerge from perceived coworker creativity expectations, self-views of creative behaviors, and greater exposure to U.S. culture (Farmer, Yao, & Kung-Mcintyre, 2011). In sum, this literature demonstrates that the construction and maintenance of role identities results from a complex interplay of both individual and situational factors where individuals develop and negotiate role identities within themselves and with others.

*Individual outcomes.* Role identities are also important to shaping individual work outcomes. For example, role identities can enable individuals to cope with challenges and increase performance. Beyer and Hannah (2002) highlight how past experiences influence the relationship between identity and work, and show that newcomers with diverse experiences adjusted better because “(1) they found it easier to enact dimensions of their personal identities that allowed them to function effectively in the new situation, (2) they more easily found a fit between know-how gleaned from that experience and their new jobs, and (3) they could draw on a wider variety of personal tactics that they had previously used to help them adjust” (Beyer & Hannah, 2002: 636). Lang and Lee (2005) show that role identity accumulation in flexible work environments and others’ acceptance of one’s identity have a direct impact on reducing job stress. Centrality to the team mediates the influence of one’s functional role, status, and communication role on individual performance (Ahuja, Galletta, & Carley, 2003). Conflict or strain can arise when identities are challenged. For instance, migrant workers who have moved from rural to urban environments experience greater role strain when they retain their rural identity, and they are more likely to quit their job when there is a lack of supervisory support (Qin, Hom, & Xu, 2019).

*Entrepreneurial identity.* Entrepreneurship literature has drawn from role identity concepts to better understand how entrepreneur identity influences venture creation processes. For example, when the entrepreneur role is central to one’s identity, entrepreneurial passion increases, prompting entrepreneurial behavior (Murnieks et al., 2014). However, while an entrepreneur’s identity centrality is relatively stable over time, changes to the entrepreneur’s idea and increasing role ambiguity may cause passion to fade (Collewaert, Anseel, Crommelinck, De Beuckelaer, & Vermeire, 2016). Zhan, Uy, and Hong (2020) highlight a “role identity advantage” whereby more experienced entrepreneurs avoid being overly enthralled by a situationally salient role identity (e.g., the businessperson) distracting them from the main goals of developing novel and commercially viable ideas. Mathias and Williams (2018) find that entrepreneurs who view the entrepreneur role identity as someone who can delegate and believe others can act out important roles may be better suited to grow their ventures. Thus, entrepreneurship scholars have been able to leverage the concept of role identities to explain why some people choose to become and persist as entrepreneurs while others do not.

### *Work–Nonwork Interface*

Work in the Work–Nonwork Interface theme centers around role conflict at the work–family interface, role enrichment at the work–family interface, and additional work–nonwork roles. Much of this work either directly or implicitly adopts an identity-based perspective in that it explores how individuals relate to their work and family roles, and it occurs primarily in OB and HR disciplines.

*Conflict.* Because work roles and family roles often present competing demands for time and attention, research has focused on interrole conflict from expectations and pressures tied to work and family roles (e.g., Michel et al., 2011; Li, Bagger, & Cropanzano, 2017; Livingston, 2014). The underlying assumption of work–family and family–work conflict is that the centrality or salience of a work role compared with a family role with regard to one’s identity is a key source of role conflict (Carlson & Kacmar, 2000; Carr et al., 2008). For example, Greenhaus and Powell (2003) illustrate that sources of role pressures matter

—if the pressure from a manager to engage in a work activity is strong (weak) and spousal pressure to engage in a family activity is weak (strong), individuals are more likely to choose the work (family) activity. Involvement in family roles shapes the willingness to expatriate, with the lowest interest among women with partners and/or children and greatest interest exhibited by childless single employees (Tharenou, 2008). Women who occupy higher-status job roles than their husbands may indirectly increase perceptions of marital instability, although this is buffered when husbands provide support for their wives' role (Byrne & Barling, 2017). Finally, the ability to establish and maintain role boundaries among family and work roles may lead to reduced conflict (Powell & Greenhaus, 2010). In sum, conflict at the work–family interface is driven by competing role demands where expectations of one role seem incompatible with expectations in another role (Siu et al., 2010).

*Enrichment.* The past two decades (2000–2020) have seen increasing emphasis on how work and family roles serve as sources of role enrichment (Lapierre et al., 2018). For example, Rothbard (2001) suggests that enrichment between work and family roles is more likely to occur from work to family roles for men but from family to work roles for women. Dumas and Stanko (2017) show that individuals who identify more strongly with family roles may increase transformational leadership behaviors as family identification may strengthen relational and planning skills. Another implication from this literature is that situational factors serve as important drivers of role enrichment. For example, when organizations provide family-supportive supervision (Walsh et al., 2019) and when individuals feel they have supportive and encouraging partners (Petriglieri & Obodaru, 2019), individuals are more likely to experience role enrichment. Female entrepreneurs may benefit from family-to-business enrichment in achieving entrepreneurial success perhaps because female entrepreneurs often lack access to other resources and because the female gender role encourages women to pursue work–family synergies (Powell & Eddleston, 2013). More broadly, work examining role enrichment at the work–family interface reinforces the idea that experiences and skills in one role can elevate performance in other roles and that organizations can take steps to foster such enrichment.

*Other nonwork roles.* Some research focusing on the Work–Nonwork Interface has examined the influence of nonwork roles other than family. For example, Ruderman et al. (2002) suggest that women who play multiple roles in their personal lives (e.g., friend or volunteer) may increase their effectiveness in management roles, as occupying multiple roles can create more opportunities to enrich personal skills and to receive advice and support, and provides psychological benefits. Student athletes who cognitively separate the student role from the athlete role express higher levels of well-being than those who struggle to draw boundaries between these roles (Settles, Sellers, & Damas, 2002). Nardon, Zhang, Szkudlarek, and Gulanowski (2020) explore work role transitions caused by forced migration, finding that professional employment support provided by newcomer support organizations ease such role transitions through helping migrants understand career options, assess career opportunities, and cultivate their professional identity.

### *Biases and Stereotypes*

The largest body of work leveraging roles theories focuses on examining how biases and stereotypes tied to roles influence individual, team, and organizational outcomes. The Biases

and Stereotypes theme overwhelmingly focuses on biases stemming from gender roles, with scattered attention paid to roles tied to race, age, and physical attractiveness. This literature tends to adopt a structural-functional perspective of roles and frequently leverages social role and role congruity theories. Studies typically examine how biases and stereotypes tied to a prominent social role (e.g., gender) shape outcomes for individuals in functional roles (manager, entrepreneur, leader, subordinate). This theme spans management disciplines.

*Gender (in)congruency.* Much of the biases and stereotypes literature examines how the misalignment between gender role expectations and functional role expectations of a leader, entrepreneur, and manager create impediments for women. If the prototypical leader embodies agentic characteristics stereotypical of men, women face prejudice that suppresses leadership emergence and harms perceptions of leadership effectiveness (e.g., Hirschfeld & Thomas, 2011; Paustian-Underdahl, Walker, & Woehr, 2014). For example, S. Johnson, Murphy, Zewdie, and Reichard (2008) examine male and female leader prototypes to show that sensitivity was more strongly associated with female leadership, while masculinity, strength, and tyranny were more strongly associated with male leadership. Female leaders needed to show sensitivity and strength to be perceived as effective, whereas male leaders needed to show only strength. Gupta and colleagues (2018) illustrate that women CEOs are more likely to come under threat by activist investors, likely due to gender role bias. Similarly, the financial resource acquisition literature in entrepreneurship has noted a disadvantage for women raising funds compared with men, often attributed to the idea that the traditional role of an entrepreneur is “masculine” (Alsos & Ljunggren, 2017; Malmström, Johansson, & Wincent, 2017). Leveraging role congruity theory, Edelman, Manolova, Shirokova, and Tsukanova (2016) examine venture signals in bank financing and highlight that quality signals (past track record of performance, business age, and hours devoted to business) were impactful for male entrepreneurs but were weaker or played no role for female entrepreneurs. Yang, Kher, and Newbert (2020) use role congruity theory to examine start-ups applying to social impact accelerators and find that acceptance is more likely when a start-up’s signals are congruent with the stereotypes associated with the lead founder’s gender. Further work has argued that investors are biased against the display of stereotypically feminine characteristics for both men and women alike, suggesting that it is not sex differences that drive funding differences, per se, but the gender-stereotypical behavior of entrepreneurs (Balachandra, Briggs, Eddleston, & Brush, 2019).

*Contingences for gender (in)congruency.* While evidence exists for the negative influence of role incongruity between women’s functional and gender roles, contingencies matter. For example, high mental ability may lead to greater emergence in informal leadership roles for women than for men (Neubert & Taggar, 2004). Lanaj and Hollenbeck (2015) find that women who engage in counter-stereotypical agentic behaviors, notably, task-related (e.g., organizing teamwork) and boundary-spanning behaviors (e.g., interacting with people outside the team to acquire resources), are more likely to emerge as leaders than men. Self-reliant female leaders are evaluated as better leaders than are self-reliant male leaders because self-reliant female leaders are seen as similarly competent but more communal (Schaumborg & Flynn, 2017). Zalata, Ntim, Choudhry, Hassanein, and Elzahar (2019) use social role theory to argue that female directors are able to gain executives’ trust through soft skills (e.g., kindness, trustworthiness, sympathy), which allows firm-specific information to be revealed—enabling women to perform this advisory role better than men. Work in



crowdfunding has shown a departure from traditional venture finance domains by illustrating a “female advantage.” This advantage may be partially attributed to the fact that communal qualities, such as trustworthiness, are highly valued in crowdfunding. For instance, M. Johnson, Stevenson, and Letwin (2018) find that female entrepreneurs are viewed as higher in trustworthiness, which leads to funders’ increased preference for backing female entrepreneurs. In sum, studies examining contingencies related to how gender roles intersect with functional roles suggest that leaders, executives, and entrepreneurs who embody communal, feminine qualities as well as agentic, masculine qualities may be more effective in their functional role.

*Stereotypes beyond gender.* Although the intersection of functional and gender roles dominates the bias literature, some studies examine how role expectations tied to other social roles influence individuals in functional roles. Rosette et al. (2016) show that Black, Asian American, and White women were associated with distinct stereotypes in leadership roles. Black women were perceived as dominant but not competent, Asian American women as competent but not dominant, and White women as primarily communal but not viewed as particularly dominant or competent. As a result, Black women were the least likely to suffer agentic penalties, whereas Asian American women were most likely. Rooted in role congruity theory, Rule, Bjornsdottir, Tskhay, and Ambady (2016) find that gay and straight men are perceived as more suited to professions consistent with stereotypical roles of their groups. Specifically, the functional roles of nurses, pediatricians, and English teachers were viewed as more consistent with gay men and engineers, managers, surgeons, and math teachers as more consistent with straight men. Lai and Babcock (2013) show that White female evaluators were less likely to select and promote Asian candidates than White candidates into job positions involving social skills because the evaluators perceived Asian candidates as having lower social skills. Anglin et al. (2018) use social role theory to examine how narcissistic language in crowdfunding pitches influences funding outcomes depending on social roles tied to gender, race, and sexual orientation. They found that LGBTQ entrepreneurs generally yield greater performance when using narcissistic language than heterosexuals; however, entrepreneurs of color were penalized compared with White entrepreneurs using narcissistic rhetoric. While these studies illustrate the potential to use role theories to further knowledge about bias, they represent a small portion of current work, indicating untapped potential in using role theories to understand a variety of role-related bias.

### *Career Life Cycles*

Considerable research is concerned with how social and functional roles shape the emergence, transition, and decline of individuals’ careers. OB and HR research comprises most of the research within this theme. Work here often adopts a structural-functional view of gender roles to investigate career outcomes. Work on role transitions and leadership emergence is also prominent within this theme.

*Gender roles.* Research on career life cycles frequently leverages role theories to understand career differences between men and women. For example, Bowles, Thomason, and Bear (2019) use role congruity theory to explain gender differences in work negotiations, such that expected gender-prescriptive behaviors inhibit women from engaging in

negotiations for higher pay and men from negotiating for more work flexibility. They do so to minimize the potential for social backlash from not behaving in accordance with expected gender-specific behaviors. Moreover, because female managers experience judgments regarding workplace absence due to having children or being the primary caregiver at home, K. Kim, Atwater, Jolly, Kim, and Baik (2020) found that female managers feel pressure to increase workplace visibility by working extended hours to gain promotions as compared with engaging in professional development activities, leading to more stress, less job satisfaction, and higher turnover intentions. In situations where women are able to climb to the top ranks of the organization, Gupta, Mortal, Silveri, Sun, and Turban (2020) found that female CEOs are roughly 45% more likely to be dismissed than male CEOs, suggesting that even when women are promoted to the highest roles of leadership, they still risk being “pushed out” of the organization. In sum, this research suggests that gender roles influence both the ability to advance in one’s career and the consequences experienced when seeking to advance.

*Role transitions.* The concept of role transitions is important to understanding career life cycles. For example, the transition from the role of professional to that of retiree can be daunting and complex (Beehr, 2014). Bordia, Read, and Bordia (2020) use interviews to understand how pre-retirement role identities influence the retirement transition process and the techniques individuals deploy to manage this transition. Career transitions also occur across dissimilar cultural contexts. For example, in the late 1500s and early 1600s, merchants emigrating from the southern Netherlands (a guild system in a protected economic environment) to Amsterdam (open competition and speculative and depersonalized financial investments) were required to make sense of unspoken social norms prescribed to their work role in a foreign environment (Carnabuci & Wezel, 2011). Carnabuci and Wezel (2011) found that these merchants experienced a role transition from “pre-modern merchant” to that of “capitalist entrepreneur” and predicted why some were successful in this role transition while others were not. Aguinis and Vaschetto (2011) examine the demanding role expectations and role conflict researchers face when adopting the functional role of journal editor. However, Aguinis, Gottfredson, Culpepper, Dalton, and De Bruin (2013) found that former editors of top journals continue to be productive scholars and to make meaningful non-research contributions after their role transition. This emphasizes the prescribed social norm of voluntary service within the career role of an academic.

*Leadership emergence.* A final notable topic within this theme involves how leaders informally emerge in the workplace. For example, a social role theory perspective would suggest that women are less likely to emerge as leaders and would not be as influential in swaying collective group decisions. However, Watson and Hoffman (2004) find that when both men and women are given relevant task-related information and encouraged to use it, women emerge as leaders just as frequently as men do; further, women were just as successful influencing group members to support their preferred decision as men. Similarly, Lemoine, Aggarwal, and Steed (2016) use social role theory to show that when male-majority groups have high group extraversion, women within those groups are more likely to emerge as leaders. Studying leadership emergence in all-female groups, Schock, Gruber, Scherndl, and Ortner (2019) find that the most effective female leaders emerge when they blend agentic characteristics of a leader (e.g., appearing strong to others) with communal characteristics of a woman (e.g., displaying sensitivity to followers’ needs). However,

effective female leaders must also display a high level of competence without being judged as “not nice enough” to appear congruent with their gender social role.

### *Ethics and Other-Oriented Behavior*

The Ethics and Other-Oriented Behavior theme captures research that connects roles and role perspectives to ethical behavior in functional roles as well as other-oriented behaviors, such as OCB. This theme includes identity-based perspectives where one’s role identity influences ethical or other-oriented behavior as well as structural-functional perspectives in which perceptions of ethicality or other-oriented behavior are viewed through the lens of roles.

*Unethical behavior and identity.* The concepts of role theory have been used to understand why individuals engage in ethical or unethical behavior. For example, Stuart and Moore (2016: 1963) develop the concept of an illicit role—a role “that specializes in activities forbidden by law, regulatory bodies, or professional societies, in the belief that doing so provides a competitive advantage.” The authors illustrate that teams who lose individuals specializing in such roles (e.g., an “enforcer” on a hockey team) may be more destabilized than when occupants of formal roles leave. Hoyt et al. (2013) find empirical support for a social role theory of unethical leadership, contending that the core expectation of achieving goals, central to the role of leader, results in leaders overvaluing group goals with higher confidence in the moral permissibility of the means by which to achieve goals, which may result in unethical behavior. Graham et al. (2020) examine perceptions of ethicality when engaging in unethical pro-OB, finding that egoistic norms, where maximizing the interests of a narrow set of internal stakeholders is valued, promote unethical behavior, particularly among those whose identity is more strongly tied to the organization. Vincent and Kouchaki (2016) illustrate that individuals with a stronger creative role identity report higher levels of psychological entitlement and engage in more unethical behaviors.

*Perceptions of ethical and other-oriented behavior.* Drawing parallels to prior themes, gender roles influence the engagement in and perception of ethics or other-oriented behavior. It has been argued that women are generally socialized to obey rules and thus less likely to engage in dishonest behaviors and should show greater concern for others (Honig & Bedi, 2012; Wiltermuth, 2011). For example, Thompson and colleagues (2020) leverage social role theory to illustrate that men, more than women, need to feel a sense of obligation in order to engage in OCB and that this obligation can be fostered through perceived organizational support. Kacmar et al. (2011) illustrate that while both men and women seek to repay ethical leadership by engaging in OCB, when the perception of organizational politics is high, men are more likely to do so while women are less likely. Further, women are more likely to engage in deceptive behaviors when serving in an other-advocacy role compared with when they are representing themselves in strategic interactions, while men’s deceptive behaviors show little difference when advocating for others or representing themselves. This may be because women are more sensitive to letting others down (Kouchaki & Kray, 2018). Women receive more backlash when fighting unethical behavior, however, because the female gender is often viewed as having lower power status. For example, Rehg, Miceli, Near, and Van Scotter (2008) show that women are more likely to receive retaliation for whistleblowing, likely because women are viewed as behaving in a manner inconsistent with their

status. In sum, research examining ethics and other-oriented behavior continues to highlight the emphasis placed on gender in role theory research by illustrating how ethical perceptions and reasons for unethical actions are different for women versus men.

## Insights for Future Work

Using the preceding review as a launching point, we now provide suggestions for future research within each theme. We briefly summarize our suggestions in Table 2 and provide an expanded version of this table in online Appendix H.

**Table 2**  
**Future Research Directions**

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### **Roles and Identity**

*Well-being:* (1) What are the relationships between roles and well-being? How do macro role transitions—those that are tied to shifts in identity—enhance or harm one's well-being? (2) How can organizations best foster career role transitions for those with past trauma?

*Identity conflict:* (1) How do societal views concerning a particular job role (e.g., police officer) impact individual work identities? (2) What are the consequences of role conflict when individuals' job roles are at odds with their beliefs about where they fit in society?

*Identity expressions and diversity issues:* (1) How can organizations and managers best embrace gender diversity while avoiding discrimination against gender and sexual minorities in the recruitment and development of employees? (2) Does language used in organizational communications impact how individuals relate to an organization and the perception of an inclusive working environment?

### **Work–Nonwork Interface**

*Nonwork roles:* (1) How does a volunteer role enrich a work role? (2) How and why do gig roles enrich or conflict with full-time work roles? (3) Does role enrichment from gig work depend on alignment among gig work tasks and full-time work tasks? (4) How does one manage the role transition from their full-time job to gig work, and how does the transition process relate to role enrichment or role conflict?

*Work–family conflict in entrepreneurship:* (1) How do the family dynamics of racial minority entrepreneurs relate to role conflict, role enrichment, and the pursuit and success of new ventures? (2) Does the strength of entrepreneurial identity influence how work–family conflict is perceived by the entrepreneur? At what point does an entrepreneurial identity become destructive to the family dynamic?

### **Bias and Stereotypes**

*Race:* (1) How do diversity, equity, and inclusion strategies alleviate or reinforce role expectations that inhibit the development of managers of color? (2) How do role expectations vary *within* racial-minority populations?

*Expanding conceptualization of gender roles:* (1) How do role expectations tied to nonbinary individuals influence micro-oriented outcomes, such as leadership emergence, supervisor support, and organizational commitment? (2) How does usage of preferred gender pronouns in résumés and cover letters lead to differences in hiring based on role expectations tied to specific jobs?

### **Career Life Cycle**

*Virtual work:* (1) How does the transition to virtual work shape the sense-making process for employers and managers when making pay and compensation decisions given that they cannot directly monitor individuals' role performances in a physical office space? (2) How do outcomes tied to roles related to gender and race differ in virtual versus in-person environments?

### **Ethics and Other-Oriented Behaviors**

*Unethical and counterproductive behavior:* (1) Do moral gray zones create an outlet for unethical or counterproductive behavior for individuals experiencing role ambiguity or role conflict? (2) Would social entrepreneurs grant themselves a moral license to engage in unethical behaviors if they felt the behavior would benefit the venture or the population the venture seeks to help?

*Perceptions of ethical behavior:* (1) How is corporate unethical behavior viewed in light of CEO race or diversity of the top management team?

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## *Roles and Identity*

The Roles and Identity theme examined the construction and maintenance of role identities, how identity relates to individual performance, and the concept of entrepreneurial identity. We identified three key areas in which this literature can expand. First, there is opportunity to expand understanding of the relationship among identity, roles, and individual outcomes by examining the relationship between role identities and well-being. Second, research should examine the conflict experienced by individuals when their profession may be perceived negatively, furthering knowledge on how societal views intersect with individual work role identities. Third, more work is needed to examine identity expressions and diversity issues.

*Well-being.* Our review indicates that recent role theory research has begun to examine how roles are tied to individual well-being (e.g., Hmieleski & Sheppard, 2019). Well-being is a critical part of a fulfilling and flourishing life and substantially shapes people's ability to work and maintain positive relationships (Wiklund, Nikolaev, Shir, Foo, & Bradley, 2019). Despite management scholars' increasing interest in the relationships between well-being and work (Guest, 2017), research has yet to fully explore relationships among roles, identity, and well-being. For example, future research could expand understanding of how roles relate to well-being by examining how processes involved with macro role transition—those tied to shifts in identity—enhance or harm one's well-being. For instance, a substantial challenge facing the United States and other Western nations is enabling veterans' transition back into society by reentering the work force. In the United States alone, each year roughly 200,000 individuals experience role transitions from service member to civilian, with over 19 million men and women identifying as veterans (U.S. Department of Veteran Affairs, 2019). Previous research has shown how prior trauma experienced by veterans impedes their transition back into the workforce, arguing that progress toward a new career path is greatest for those who can orient away from trauma and envision a future career (Haynie & Shepherd, 2011). Yet, how organizations may foster career role transitions for those with past trauma, perhaps increasing an individual's well-being, remains sparsely investigated. HR scholars could interview veterans involved in career services programs, such as Workforce Opportunity Services, Workshop for Warriors, or Microsoft Software and Systems Academy, to study how such programs facilitate the transition from service member to a new career, help veterans deal with trauma, and ultimately enhance well-being. The interviews could be used to generate new theory concerning the linkages between trauma, role transitions, and well-being. This research would likely have implications beyond veteran programs, perhaps holding insights for programs that seek to help abuse victims, victims of sex trafficking, and individuals with other traumatic experiences to regain their footing in the workplace.

*Identity conflict.* Work examining identity conflict has typically focused on individual-level conflicts, such as among functional roles or at the work–family interface. Role identity theory has long contended many job roles are associated with societal perceptions that shape identity (McCall & Simmons, 1978), such as that doctors must do no harm, teachers should care for students, or police should act as protectors. A key uninvestigated question surrounding role identities involves how individuals cope when individual identities conflict with broader perceptions associated with their profession. For example, a *Washington Post* article highlighted the duty and burden of being a Black police officer in the United States

and the profound role conflict these officers face when performing their job (Beachum & Shammas, 2020). One officer interviewed in the article noted that she was called “sellout” or “traitor” during racial justice protests although she is “here to protect and serve.” Future work might examine how a sense of duty or conviction helps individuals, such as Black police officers, manage role conflict and be forces for positive change when experiencing role conflict between their job, community, and what they believe to be right. Such studies have the potential to advance understanding of how conflict between structural roles and individual role identities influence specific action.

*Diversity.* A third question surrounding the concept of role identities facing organizations is how to best embrace gender diversity while avoiding discrimination against gender and sexual minorities in the recruitment and development of employees. Recent work by Klysing, Renström, Gustafsson-Sendén, and Lindqvist (2021) illustrates that Equal Employment Opportunity (EEO) statements that emphasize gender diversity signal identity safety to gender-minority applicants and increase organizational attractiveness to these applicants. They found applicants that identified with a gender majority (man or woman) did not exhibit role identity threat or view the organization more negatively. Such work exemplifies the potential of language to facilitate inclusiveness and impact how individuals relate to an organization. Future research could extend this work by using computer-aided text analysis to examine how the language of advertisements, interview questions, onboarding materials, and other corporate communications reduce role identity threat for gender minorities and how such language may facilitate a more inclusive environment. Linkages between the reduction in role identity threat and individual performance, organizational commitment, and OCB could then be explored to further knowledge of how feeling safe to express role identities relates to important work outcomes. For instance, increased psychological safety has been linked increased OCB and extrarole behaviors for people of color in the workplace (Singh, Winkel, & Selvarajan, 2013). Future work may benefit from examining if organizational language can be used to reduce role identity threat for sexual minorities, perhaps through increasing psychological safety, and the potential influence on extrarole behavior.

### *Work–Nonwork Interface*

Research at the work–nonwork interface, primarily found in OB and HR research, focuses heavily on work–family relationships. We see two key opportunities to expand research at this interface. First, opportunity exists to expand research beyond family roles, such as volunteer or gig roles. Second, the entrepreneurship literature appears ripe for further investigation at the work–family interface.

*Nonwork roles.* As organizations and younger generations of workers seek to be more socially conscious, future work might examine how a volunteer role may enrich work roles. A recent study found that 93% of employees who volunteer through their company report being happy with their employer, while 54% report being proud of their company’s contributions to society (Bengtson, 2020). Further, volunteering may increase job meaningfulness, particularly when employees have less meaning in their jobs (Rodell, 2013). While initial work suggests one role can enrich the other, opportunity exists to investigate conditions in which volunteerism may enhance (or not) the work experience. For example, future work might examine companies who incorporate volunteerism as part of their social responsibility

strategy to determine if a volunteer role may enrich individuals in the employee role, thus uncovering new benefits to socially responsible behavior. It also remains unclear whether spillover effects of an individual adopting a volunteer role identity influence coworkers, although it has been theorized that doing so may encourage the spread of volunteerism to coworkers (Gill, 2021). Future work might study the spread of volunteerism in the workplace to examine how individuals who have a stronger volunteer role identity influence volunteer efforts with the organization, and whether coworkers' participation in volunteer efforts increases over time. Such studies could shed light on how individuals with certain role identities may serve as exemplars that motivate collective action.

Despite the rapid emergence of the gig economy, there remains a paucity of research examining the intersection of gig roles with full-time work roles. Research by Sessions, Nahrgang, Vaultont, Williams, and Bartels (2021) indicates engaging in a "side hustle" may create opportunities for role enrichment when workers feel able to shape the work and its context. However, given the diversity of gig work, questions remain. One key question is whether role conflict or enrichment depends on alignment among gig work and full-time work role tasks. Consider teachers who choose to drive for Uber, where the role expectations are distal from their teaching role, and teachers who choose to tutor students, where role tasks are more similar. To assess how alignment between gig and work role tasks facilitates role enrichment or conflict, researchers might benefit from developing a typology of gig work. Future research could also consider questions of role transitions. For example, how does one manage the micro role transition from their full-time job to gig work, and how does the transition process relate to enrichment or conflict? Jachimowicz et al. (2021) contend that commutes create opportunities to actively engage in role transitions and that employees who engage in thinking about the upcoming work role (i.e., role-clarifying prospection) during a commute—while they are making the micro transition to the employee role—are less likely to be negatively affected by long commutes. It is worth investigating whether role-clarifying prospection may also be beneficial for workers as they make the micro role transition from full-time employee to gig worker.

*Work–family in entrepreneurship.* Opportunities exist for entrepreneurship scholars to more deeply probe how family and work relationships intersect to foster the creation and growth of new ventures. For instance, in the past decade (2010–2020), approximately 50% of new ventures in the United States have been launched by entrepreneurs classified as a racial minority (SBC, 2021), but little is known about the underlying dynamics of these ventures. These entrepreneurs typically have less access to resources and face a variety of business and family hurdles (e.g., lower incomes, longer hours, less access to childcare) that may hinder the launch of a new venture. Entrepreneurship scholars have sparingly drawn from theory at the work–family interface to show how role enrichment and family support enable women entrepreneurs (e.g., Powell & Eddleston, 2013). As such, we encourage future research to tap the rich literature examining the work–family interface to better understand relationships among family dynamics, role conflict, role enrichment, and the pursuit and success of new ventures of racial-minority entrepreneurs. For example, entrepreneurship scholars might survey business owners associated with the Black Business Association to examine how affective family-to-business enrichment, instrumental family-to-business enrichment, and family-to-business support relate to entrepreneurial success and compare these results against a sample of White entrepreneurs.

The transition from employee to entrepreneur role is pivotal. Research has generally treated this transition as business focused, where entrepreneurial identity facilitates the change (e.g., Hoang & Gimeno, 2010). However, for entrepreneurs with families, it is likely that the decision to become an entrepreneur occurs with input and influence from a spouse or other family members. Given that the family may serve as a source of support or resources for entrepreneurs (Edelman et al., 2016) and that family dynamics play a key role in successful career change (Ocampo, Restubog, Liwag, Wang, & Petelczyc, 2018), entrepreneurship research can benefit from developing a better understanding of how family dynamics relate to the transition from employee to entrepreneur. For example, the strength of one's entrepreneurial identity may increase one's entrepreneurial passion (Murnieks et al., 2014); however, recent work has shown that entrepreneurial passion maybe become destructive to a venture when it becomes obsessive (Cardon, Glauser, & Murnieks, 2017). Thus, future research could examine if the strength of one's entrepreneur role identity, through the mechanism of passion, can lead to work–family conflict. If so, at what point does an entrepreneurial identity, which has generally been viewed in a positive light, become destructive to the family dynamic?

### *Biases and Stereotypes*

The role literature focusing on biases and stereotypes overwhelmingly examines traditional gender roles and how such roles influence outcomes for men versus women in functional roles. We believe this creates two opportunities for future research spanning management disciplines: expanding research to biases associated with race and expanding conceptualizations of gender roles.

*Race.* Issues surrounding race continue to evolve as organizations make concerted efforts to be more inclusive. Indeed, the concept of systemic racism—where racism is a fundamental part of society's structure—is consistent with the structural-functional view of roles. As such, research can use the structural-functional view of roles to examine issues of race. For example, due to negative role perceptions, such as lower capability and competence, managers of color may have a more difficult time developing social capital (Keeves & Westphal, 2021). At the same time, diversity, equity, and inclusion (DEI) programs frequently fail to reduce obstacles for managers and employees of color and may even create additional impediments (Kraus, Torrez, & Hollie, 2022). However, the specific influence of these programs on role expectations has generally been overlooked, potentially leaving an important explanatory mechanism for racial bias out of the conversation. For example, such programs may lead people of color to be viewed as occupying a “model minority” or “token minority” role, which then imposes harmful stereotypes (e.g., Garibay & Vincent, 2018; J. Kim, Block, & Yu, 2021). As such, HR scholars might examine how DEI strategies alleviate or reinforce role expectations tied to “model” or “token” minority roles and examine how such strategies further influence the development of social capital, performance reviews, or role conflict among managers of color.

*Expanding conceptualization of gender roles.* Gender roles are generally assessed using a dichotomous measure of gender. We believe opportunities exist beyond the dichotomous emphasis on gender to expand understanding of how biases associated with gender roles shape important outcomes for individuals within organizations. The concepts of gender



identity and gender expression do not conform to traditional binary measures of gender used in management. Likewise, recent work in psychology has begun to provide evidence that the role of “nonbinary” or “transgender” may constitute a gender-based social role. Initial evidence suggests this role includes negatively valenced expectations, such as being confused, mentally ill, weak, or depressed (e.g., Howansky, Wilton, Young, Abrams, & Clapham, 2021; Worthen, 2021). However, additional evidence suggests this role could include expectations of being creative or a nonconformist (Motmans, Nieder, & Bouman, 2020). If true, such role prescriptions may carry important implications in the workplace. As such, we encourage OB and HR scholars to assess how role expectations tied to nonbinary individuals influence a range of micro-oriented outcomes, such as leadership emergence, supervisor support, organizational commitment, and a willingness to hire. For example, HR scholars could use content analysis to examine usage of preferred gender pronoun mentions in resumes, cover letters, or email signatures and examine differences in hiring perceptions and decisions based on role expectations tied to specific jobs.

### *Career Life Cycles*

The Career Life Cycles theme generally focused on differences in men’s and women’s career development, leadership emergence, and professional role transitions. Future research could benefit from examining role concepts in virtual or hybrid work environments (e.g., Delanoeije et al., 2019). Indeed, the COVID-19 pandemic has accelerated the growing trend of virtual and hybrid work environments (Bennett, Campion, Keeler, & Keener, 2021); thus, opportunities exist to use role theories to better understand the consequences of and opportunities in virtual work as well as how employees transition between in-person and remote work.

Virtual work that allows employees to complete job tasks at home raises questions about how individuals are assessed and develop in their functional roles, and the boundaries pertaining to the temporal-spatial orientation of roles. For example, because physical role transitions (working from home) may become normalized as a result of the pandemic, HR scholars might investigate the sense-making process managers experience when making pay and compensation decisions when they cannot directly monitor role performances in the physical office space. Further, although gender, racial, and age-related roles influence a host of evaluations, such roles may be more impactful for in-person work as coworkers are frequently seen; thus roles triggered by outward appearance remain highly salient. It is possible the virtual environment could reduce the salience of such roles, perhaps leveling the playing field for women and people of color in some domains. Such reasoning would be consistent with prior work finding that social cues are less influential in virtual work environments compared with in-person work environments (Serban et al., 2015). As such, OB and HR scholars might revisit prior studies on gender and race to determine how the influence of such roles differs in virtual and in-person environments.

Many roles have periodic and/or spatial boundaries. For example, the manager role is likely most salient during working hours and in the office. However, virtual work may blur such boundaries (Hughes & Silver, 2020). We know little about how individuals redefine their work roles in virtual environments. Future research might adopt a longitudinal, qualitative approach with employees transitioning to a virtual role. Following this transition may

provide substantial insight into how employees recraft work identities. Future research in strategic management might also examine how the organization restructures roles and the resulting impact on firm performance. For instance, recent reports indicate that Google plans to cut pay to suburban employees working remotely relative to employees who work remotely from cities where Google offices are already located. Employees moving further away from the company's offices could potentially face the harshest pay cuts (Kaye, 2021). From a role theory perspective, this move suggests Google is trying to place spatial boundaries on virtual work roles. As such, scholars might examine differences in how employers define the boundaries of virtual work roles and how differences in such boundaries ultimately influence financial performance.

### *Ethics and Other-Oriented Behavior*

The Ethics and Other-Oriented Behavior theme revealed that scholars have used role theory to develop explanations of why individuals choose to engage in unethical behavior as well as to examine perceptions of ethical, unethical, and other-oriented behavior. We believe both lines of inquiry continue to have fruitful opportunities for growth.


*Justifying unethical and counterproductive behavior (CWB).* Opportunities exist to examine how individuals use roles to justify unethical behavior. Unethical behaviors can be linked to morally ambiguous gray zones, where leaders or followers engage in behavior that could harm others but benefit the follower, leader, or organization (Knoll, Lord, Petersen, & Weigelt, 2016). For example, an interviewee might ask for a salary far below the company standard for a position, where a manager could choose between granting the typical salary, the requested salary, or a salary between the two (Knoll et al., 2016). Such zones may result in role ambiguity. At the same time, employees experiencing role conflict may be more likely to engage in CWB (Selvarajan, Singh, Cloninger, & Misra, 2019). A next step for OB scholars could be to juxtapose this work and examine whether moral gray zones create an outlet for unethical or counterproductive behavior for those experiencing role ambiguity or conflict. Further, Klotz and Bolino (2013) present a theory of moral licensing, where people engaging in morally praiseworthy behavior grant themselves license to behave "immorally," but note how identity orientations may lessen engagement in CWB. For example, a salesperson who regularly engages in OCB has obtained a moral license but may not engage in CWB until coming across a disliked task, such as cold-calling a new prospect (Klotz & Bolino, 2013). Entrepreneurship scholars could use the role of social entrepreneur to extend this theory. Social ventures are generally viewed as doing good, with the role of social entrepreneur being seen as someone who is compassionate and concerned for the welfare of others (Anglin, Courtney, & Allison, in press). In light of such praiseworthy behavior, would social entrepreneurs engage in unethical behaviors if they felt the behavior would benefit the venture or the population the venture seeks to help? For example, the social entrepreneur could exaggerate accomplishments to impress donors or key stakeholders with the intention of doing good with added resources. Or would such behavior be prevented by inconsistency with the role identity held by the social entrepreneur?


*Perceptions of (un)ethical and other-oriented behavior.* Although gender roles have been the primary lens for examining perceptions of unethical behavior, future research should embrace a more diverse perspective, given that ethical perceptions are also shaped by race (Marquardt, Brown, & Casper, 2018). Strategy research could examine how corporate unethical behavior or social responsibility is viewed in light of CEO race or top management team diversity. For instance, research has shown that boards may react differently in terms of CEO dismissal depending on previously held beliefs in the face of misconduct (e.g., Connelly, Shi, Walker, & Hersel, 2020; Park, Boeker, & Gomulya, 2020). Given harmful racial stereotypes that often occupy roles associated with people of color (e.g., Black man role), future research might examine if racial-minority CEOs are more likely to be replaced after corporate misconduct.

## Concluding Remarks

Shakespeare's classic notion that "all the world's a stage, and all the men and women merely players" has inspired research on roles at least since Biddle and Thomas's (1966) classic book on role theory. Understanding the roles individuals play is particularly salient today given heightened awareness regarding role perceptions and their potential impact in a variety of settings. Our review of role theories offers extensive avenues for scholarly investigation that can continue to provide insights into how roles impact individuals and organizations.

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