

# Methods of Musement

## Cultivating Serious Play in Research on Business and Organization

Wadhvani, R. Daniel; Sørensen, Anders Ravn

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# Methods of Musement: Cultivating Serious Play in Research on Business and Organization

R. Daniel Wadhvani  
Anders R. Sørensen

*...man only plays when he is in the fullest sense of the word a human being, and he is only fully a human being when he plays.*  
F. Schiller, "Letters on the Aesthetical Education of Man" (1793, 15<sup>th</sup> letter, para 9)

**Abstract:** We explicate the value and practices of "serious play" in historical and organizational research. In particular, we draw on the philosophy of Charles Peirce to consider why and how playful methods are effective for abductive inference. Introducing the papers in this special issue, we highlight four playful practices: (a) creating and categorizing new sources, (b) seeing anew, (c) sensing connections, and (d) entertaining new representations. We discuss how each of these practices contribute to the generation of new hypotheses. Finally, we conclude by highlighting research and methodological practices with the aim of cultivating a more playful future.

**Keywords:** abduction, play, methods, creativity, management and organizational history.

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In discussing research methods, social scientists typically single out rigor as the principal virtue of a program of study. Methodological rigor entails justifying the believability of one's claims to a community of researchers (Mantere and Ketokivi 2013, Harley and Cornelissen 2022). It involves such actions as explaining the logic of one's argument, making one's observations and data transparent, ensuring the consistency and replicability of one's analysis or interpretation, and rendering claims testable against evidence. In short, rigor involves specifying the deductive and inductive logic of one's research.

Yet, the valorization of rigor often crowds out other methodological virtues (Pillai et al. 2021), in particular the value of creativity in the process of inquiry. By methodological creativity we mean the introduction of novel conjectures, interpretations, and hypotheses that fundamentally drive forward a field of inquiry. The methods by which new conjectures and hypotheses are created are arguably as important to the health and progress of a field as the methods by which they are legitimized. While rigor may be crucial in justifying research claims, it cannot substitute for – and may even undermine – creativity in the context of discovering new claims. Yet, by comparison, little has been written on the practices by which scholars or communities can act creatively to derive novel inferences (Locke et al. 2004).

In this article and in the lineup of papers that constitute this special issue, we explore the value of “serious play” for the research process. In particular, we draw on pragmatist philosopher Charles Saunders Peirce's (1998, p. 434) discussion of play (or “musement”) as introducing the values and activities involved in methodological creativity. We highlight its application to contemporary research by exploring the value of playful practices in research and dissemination of business and organizational history. A logician and scientist by profession, Peirce argued that deductive and inductive reasoning is essential to scientific methods for the “fixation of belief” (Peirce 1877) within a research community. However, he also posited that new interpretations and the evolution of knowledge within a community take place as inquirers notice surprising phenomena and venture new plausible conjectures for their existence. He called this distinct form of inference “abduction.” Play, Peirce (1908) posited, was crucial to abduction because it freed an inquirer to observe in new ways, make new connections, and entertain new explanations.

Cultivating methods of “serious play,” we contend, is particularly important to the fields of business and organizational history at this moment in time. Over the last decade, much effort has been devoted to justifying historical methods in management and organization research (Jones and Khanna 2006, Bucheli and Wadhvani 2014, Rowlinson et al. 2014, Vaara and Lamberg 2016, Barros et al. 2019, Durepos and Van Lent 2019, Durepos et al. 2021, Decker et al. 2023). These initiatives have been principally focused on establishing the rigor of historical research in the context of an interdisciplinary social scientific field by categorizing, explicating,

and labeling a set of standard historical methodologies for management and organization studies. They have successfully generated growing recognition of the value and acceptability of historical methods in management research (Maclean et al. 2016, Argyres et al. 2020, Wadhvani et al. 2020, Decker 2022). Our motivation is to cultivate an equally lively engagement with playfulness.

Our argument is developed in three major sections. First, we explicate Peirce's construct of play, focusing on its role in inquiry, the methods it involves, and how it drives the evolution of knowledge in a community. We highlight notable differences with the approaches to abductive reasoning being used in management and organizational research and elaborate on why playfulness strengthens abductive inquiry. Second, we use the papers in this special issue to demonstrate how play generates promising research insights. We highlight the role of play in (a) creating and categorizing new sources, (b) seeing anew, (c) sensing connections, and (d) entertaining new representations. Third, and finally, we make suggestions for how to make play more central to scholarly practice.

### **Serious Play**

Peirce (1998, p. 436) called play an "agreeable occupation of mind" that entailed "a lively exercise of one's powers" in which there are "no rules, except the very law of liberty." By itself, this description provides us little insight into the nature of play or its value in research. To understand play and its importance from a Peircian perspective, we (a) place it within the broader context of scholarly inquiry, (b) identify some of the kinds of activities it involves and (c) conclude by describing its role in a community of researchers.

#### *(a) Play in the Context of Inquiry*

Peirce (1908) was a logician and a scientist who wrote extensively on the nature of inquiry and the development of a pragmatic theory of knowledge. A "well-conducted and complete inquiry," Peirce (1998: 440) explained, certainly included both deductive and inductive logic. Deduction begins "with examination of the hypothesis, and a muster of all sorts of conditional experiential consequences which would follow from its truth" and induction involved "ascertaining how far those consequents accord with Experience (Peirce, 1998: 441-442)." But Peirce (1998: 443) insisted, neither deductive nor inductive reasoning could explain where new ideas, interpretations, or hypotheses come from. "Observe that neither Deduction nor Induction contributes the smallest positive item to the final conclusion of the inquiry," he wrote. "They render the indefinite definite; Deduction Explicates; Induction evaluates: that is all."

New hypotheses and interpretations, Peirce argued, arose through yet another mode of inference that came before both deduction and induction in the process of inquiry. This type of inference involved noticing surprising phenomena and deriving antecedents that could plausibly explain the consequence. Abduction, the name Peirce gave to it, was a form of inference in which:

The surprising fact, C, is observed.  
But if A were true, C would be a matter of course.  
Hence, there is reason to suspect that A is true.

In short, he summarized, abduction involved “reasoning from consequent to antecedent. (Peirce, 1998: 441)”

Inspired in part by Peirce, management and organization researchers have increasingly embraced abductive reasoning as an essential complement to deduction and induction, including launching a new journal – *Academy of Management Discoveries* – devoted to the publications that take an abductive approach (Bamberger 2018). They have also sought to articulate abduction as a method to render it “more systematic.” Sætre and Ven (2021, p. 686), for instance, suggest that abduction involves “four steps that may recur to make sense of complex phenomena: observe anomaly, confirm anomaly, develop hunches, and evaluate hunches.”

Peirce (1998, p. 437), however, argued that abductive inference could not be effectively pursued by “a method of such moderate fertility as logical analysis.” Nor did he turn to such methodological values as doubt or reflexivity – research practices that limit the process of inference to cognition and the human mind. Instead, he argued, abductive inference was best exercised through the human capacity to play. Unlike logic, play is not instrumental; it is open ended, exploratory, and involved engagement in sensation and action in ways not limited to cognition or the reflective mind. Peirce described play as open ended in that it could take a number of different directions: (a) aesthetic contemplation, (b) imagining some unactualized possibility, and (c) speculating about the cause of a surprising phenomenon. Peirce called the “pure play” of this last variety “musement,” and argued for its importance as a method of abduction.

Musement involved the “lively exercise of one’s powers” to tap into and combine aspects of human experience in ways that were not limited by scientific rationality:

It begins passively enough with drinking in the impression of some nook in one of the three Universes. But impression soon passes into attentive observation,

observation into musing, musing into lively give-and-take of communion between self and self (Peirce 1908, p. 6).

Peirce's description reflects the influence of Friedrich Schiller, the German philosopher who described the "play drive" as capable of overcoming the separation of "form drive" (the human tendency to create mental/theoretical abstractions that "wants the real to be necessary and eternal") from "sense drive" (the "physical existence of man" as sensory and embodied experience in time). Because playfulness "gives rise to freedom," Schiller theorized, it was capable of creatively bridging our experiences of "form" and "sense" and discovering ways they might "work in concert."

Likewise, for Peirce, abductive inference involved a capacity for identifying surprising phenomena and entertaining new explanations that involved human capacities that extended well beyond carefully observing anomalies in one's environment. Rather, it involved creating openness to impressions in one of the above cited three "universes" of human experience: the realm of "mere Ideas, those airy nothings to which the mind of poet, pure mathematician, or another might give local habitation and a name within that mind;" the realm of "the Brute Actuality of things and facts," singular events to which humans can observe and point; and, the symbolic realm that entailed the "active power to establish connections between different objects, especially between objects in different [realms] (Peirce 1998, p. 435)." In characterizing "play" as the "lively exercise of one's powers," Peirce was thus arguing that the development of new hypotheses and interpretations arose most effectively not by focusing on what the rational mind was or was not capable of, but rather in the power to tap into the fuller range of human capacities to experience –attending not only to external observable phenomena, but also to the internal world of one's ideas and impressions and the symbolic world through which these were connected by rules, habits and representations. In short, playfulness and not rigorous logic or reflexivity must be understood as origins of human inquiry.

#### (b) The Methods of Play

Like other theorists of play, Peirce characterized play as a non-instrumental activity (Cooke 2018). By its nature, it did not involve a prescribed set of sequential procedures that could achieve a given end with some reliability. Rather, play was open ended. But the non-instrumentality of play did not mean play could not be intentional or planned, nor that the methods involved were inexplicable. Rather, it meant that unlike with deduction or induction, the methods it entailed were not procedural or standardized. Explicating Peirce's treatment of play, philosopher Elizabeth Cooke (2018, p. para 7) highlights that "we can indirectly control the purposeless and free play of musement insofar as we control when, how, and how deeply we

engage in this practice.” Indeed, Peirce himself went on to specify some of the kinds of practices of playfulness that generate new hypotheses and interpretations.

*Making Time and Room for Play.* Peirce anticipates Johan Huizinga (1960) in arguing that “the one ordinance of Play” is “the law of liberty.” Like the Dutch sociologist Huizinga, Peirce posited that play has distinct times and places, and operates separately from the rules that govern other life situations. But Peirce’s discussion of play, unlike Huizinga’s broader treatment of play as part of human nature and sociability, was in the specific context of inquiry (i.e. research). In this context, making room for the freedom of play meant rejecting the constraints of deduction and induction generally and rule-bound and procedural methodological conventions in particular. “I can testify that the last half century, at least, has never lacked tribes of Sir Oracles, colporting brocards to bar off one or another roadway of inquiry; and a Rabelais would be needed to bring out all the fun that has been packed in their airs of infallibility.” Peirce (1998, p. 437) singled out for ridicule the positivism of August Comte, who he described as “long the chief of such a band.”

*Noticing.* Central to Peirce’s notion of musement is noticing “surprising phenomenon” (Peirce 1998, pp. 108, 440). Noticing in this sense required not just careful observation but also an inner attentiveness and opening up to the possibility of surprise. Thus, Peirce (1998, p. 437) explained, musement required one to be “awake to what is about or within you.” Peirce’s language here reflects his rejection of dualism and skepticism Cooke (2018) and emphasized that surprising phenomena were found across all the three realms of human experience, not just in the second realm of “bute actuality of Things and Facts” (Peirce 1998, p. 435) but also in the experiences of pure ideas and symbolic world of habits and rules. Cooke (2018, pp. paras 34-35) points out that musement in this sense involved observation “in a more childlike and playful state,” allowing one to “look at common and everyday things and see them as strange and marvelous.” Noticing hence asks “that we open ourselves up not only to strange things, but also to wondrous things, and wondrous things that are familiar but under-appreciated or previously unnoticed.” To allow for deep noticing Peirce (1998, p. 438) warned against the tendency to drift to abstractions too quickly, suggesting “that the Muser be not too impatient to analyse these, lest some significant ingredient be lost in the process; but that he begin by pondering them from every point of view, until he seems to read some truth beneath the phenomena” These passages highlight Peirce’s contention that observing surprising phenomena has at least as much to do with how we observe as it does with the phenomea itself. Surprising phenomena are active impressions of the playful mind.

*Connecting.* Meditating on the causes of a surprising phenomenon, Peirce posited, required conversation about plausible explanation. “[O]pen conversation with yourself,” he recommended, “for such is all meditation.” By this Peirce (1998, p. 437) did not mean

“conversation in words alone” but also with “diagrams and with experiments.” Peirce here does not mean a controlled experiment designed to test a hypothesis, but rather an experimental disposition designed to explore a variety of explanations. The suggestion to not limit oneself to “words alone” was based in Peirce’s assertion that symbols were available in a wide variety of forms for exploring connections between phenomenon that could generate plausible explanations. “Let the Muser, for example, after well appreciating, in its breadth and depth, the unspeakable variety of each Universe, turn to those phenomena that are of the nature of homogeneities of connectedness in each; and what a spectacle will unroll itself!” he Peirce (1998, p. 438) commented, “the Muser will naturally pass to the consideration of homogeneities and connections between two different Universes, or all three.” Entertaining such “homogeneities and connections” Peirce suggested, was the very nature of developing plausible conjectures. Like Schiller, Peirce posited that much of the value of play was that it allowed human beings the freedom to make connections across realms of experience – our sensory experience, our ideational abstractions, our symbolic representations – that were otherwise separated by the rigor and habit of justification. Play allowed us the freedom to discover connections within and, more importantly, across these boundaries.

### (c) The Social and Evolutionary Character of Play

Thus far we have discussed Peirce’s construct of play as if it is an individual activity. But Peirce believed that play was inherently social by its tendency to create the kinds of connections discussed above. Indeed, he considered the playful discovery of new conjectures as integral to connecting an evolving “community of inquirers” (Gill 2009, p. 6). Indeed, Peirce argued that the growth and evolution of knowledge in a community took place not through Darwinian competition but through an openness and generosity of common spirit that made room for play (Peirce 1893).

Conjecture, as noted above, was based on making connections for Peirce. Connecting across the three universes of ideas, observations, and symbols inherently implied a collective enterprise; after all, the freedom of play inevitably entailed connecting with ideas of others, observing others and their observations, and responding to the habits of thought posited by others. Thus, even when musing by oneself, Peirce suggested, one was musing about and in connection with others, making play inherently a co-creative and contextually embedded process.

Moreover, play made such communities of inquiry and the knowledge they created inherently evolutionary. Play involves conjectures on existing phenomena, including the conjectures and inquires that have come before. It thus inherently builds, driving the evolution



of communities of inquiry. Peirce (1893), in fact, speculated that there is an inherent dynamic of growth to knowledge in the universe(s). And musement would seem to be its primary driver.

### **Playing with the Past**

Historical research provides a particularly useful context in which to consider the value of play for abduction. If one uses Peirce's definition of abduction as "reasoning from consequent to antecedent," the close relationship between abductive inference and historical reasoning becomes clear. Quoting Peirce, Niiniluoto (1999) provides the example: "the fact that Napoleon Bonaparte once lived is not any more 'suspectable of direct observation,' but we believe it because 'its effects (such as the histories, the monuments, etc.) are observed.'" In this sense, historical inquiry has an inherently abductive character (Peirce 1998, p. 108).

To foster play in historical studies of business and organization, the Business History Conference organized a virtual event in the Fall of 2022 focused on creative practices in historical methods. The title of the conference, "Method and Madness: Business Historical Methods in a New Age of Extremes," played off the title of a workshop that one of us had organized in 2011: "Method or Madness: Does Business History Have a Methodology?" Whereas the earlier workshop aimed to identify the methodological justifiability of business history, the recent one sought to "unlock the creativity that historical interpretation allows to see the world anew." The shift in title from "Method or Madness" to "Method and Madness," was designed to reflect this turn toward the creativity of historical inquiry. The conference attracted approximately 200 participants and was comprised of 18 workshops focused on three themes: reinventing sources, reinventing interpretation, reinventing form. Each workshop was organized by two or three convenors, most of whom have not previously worked together. Convenors were instructed to be informal, conversational, and to discuss the topic in a craft-like manner using hands-on examples.

Following the conference, we encouraged convenors to develop short articles that captured and extended the insights from those conversations. These essays, we emphasized, were not designed to be systematic reviews of a literature or method but rather playful explorations that reflected on the practice they had focused on in the workshop. The essays were peer reviewed and the authors were provided guidance that the overall theme of the special issue would be on the value of play in the discovery process of research.

Table 1 provides an overview of the essays in this issue. For this introduction, we clustered them into two broad groups using Peirce's language of noticing and connecting. We also divided each group into two subgroups based on the themes and ideas that emerged

through the review process. Our discussion below draws out the main themes of each of these groups of essays and their implications for the value and practice of playfulness in abductive inference.

Insert table 1 here

#### (a) Creating and Categorizing New Sources for Play

Abductive reasoning is often described as beginning by “observing and confirming an anomaly” (Sætre and Ven 2021). However, such a description glosses over two very human aspects of observing surprising phenomena: the sensory nature of “observation” and the researcher’s capacity for “surprise.” The problem is exacerbated by the two meanings of the word observation: (a) the human action involved in sensing a phenomenon and (b) what is subsequently recorded as the external “fact” or “data” of the phenomenon as is captured, for instance, in the phrase “we have 73 observations.” When researchers are primarily users of data or sources, the distinction between these two meanings can easily collapse into one, with observation and data treated as synonyms. But when scholars are involved in the production and categorization of sources, the inherently sensory aspects of observation and our capacity for surprise become more apparent. Tinning and Lubinski (2022), for example, explicate how the classification of “ego documents” as a type of source created new ways of seeing how a particular type of documents revealed aspects of a “historical self.” The first set of essays examines the play involved in constructing or categorizing new sources as objects of observation and occasions for wonder and surprise.

In the first essay, Kirsch et al. (2023) examine “born digital sources,” such as email. It would be tempting for historians to treat email much the same as letters, a category of sources with which historians are already very familiar. But the email-as-letter assumption would fail to notice the unique material qualities and accompanying practices of born-digital sources that produce new possibilities for interpretation: the “metadata” made available by born-digital sources, the ways in which the embodied practices of communicating through email capture more informal and spontaneous interaction, the massive-but-still-incomplete corpus one encounters, and the practical benefits and challenges of actually making sense of digital files.

Noticing such differences in new sources allows for playful opportunities to turn conventional rigor-oriented methods upside down. Whereas established research practice posits that a trace or remnant of the past is “made” into a source by the research question one poses of it, the opportunity to play with a new kind of source allows Kirsch et al. (2023) the

occasion to wonder aloud about the novel research questions that a new source could allow researchers to address. In other words, constructing new sources and articulating the unique attributes of new categories of sources lends itself to wonder by generating open-ended musing about “what kinds of questions could this source address?”

Kirsch et al. (2023), along with the second essay by Zeng and Tao (2023), also highlight how observability itself has to be constructed. The creation of archives requires the invention of tools of discovery. Historians are generally well aware of the fact that what we might call “tools of observability” such as finding aids and searchable databases shape the discoverability of sources, and some may be aware of the way the obsolescence of older tools of discovery (such as card catalogues) changed the process of discovery. But these two essays on digital technologies draw attention to the researcher’s essential role in inventing and using tools that produce the possibility of observation and surprise. The scale and material format of evidence, such as email and social media, make them extraordinarily difficult to “read” in any conventional sense. Kirsch et al. (2023), in turn, describe the effort to develop an AI-based tool to render a body of emails searchable. Playful noticing, in the Peircian sense, requires not only an awareness that “drinks in” the full range of human experience but also the creation of new tools that creatively expand the experiences we are able to take in.

Zheng and Tao’s (2023) essay on the use of social media sources reflect some of the same themes as Kirsch et al. (2023). The authors point out that social media as a source category allow the researcher to observe “both traditional, macrolevel statistics – date, time, location, text, images, audio and video, etc. – and more individual metrics – likes, dislikes, retweets, follows, shares, and comments.” The “size and scale” as well as the “dynamic (active and drafting)” nature of the source create challenges for making it observable as a source, they note, echoing Kirsch et al. (2023). Doing so, however opens up new questions for scholars, such as the uses and abuses of social media as well as understanding phenomena such as social movements from a point of observation that is very different than that which had previously been possible.

In the third essay of the group, Black (2023) considers material objects as sources for observation. While material culture scholars have studied material objects for a long time, the use of materiality in historical studies of business and organization is relatively new (Lipartito 2016) and creates the occasion for posing new kinds of questions. Black (2023) clarifies that materiality in the context of history invokes a different kind of observing, one that “typically refers to the objects and environments made and/or alternated by human beings.” Like the previous essays, she emphasizes the way in which adoption of new categories of sources produces new occasions for observability, discovery, and surprise, in this case allowing historians to “get beyond what these cultural relics show and find out what they did.”

These essays also highlight the ways in which imagination, along with sensory experience, is integral to playful observation. All three essays mention the way in which the source they examine should not be considered inert sources of information but rather as technologies that helped create the world they inhabited. Material objects created by businesses as well as email, after all, were designed to change business practices, social relationships, and markets. This comes through most clearly in the case of social media – which is, of course, not only a source of information, but also a product and a business model for the firms that have produced it. Understanding the performativity of such business sources, as we see in the next section, has been central to how historians are playing with the re-conception of more traditional written records.

#### (b) Seeing Anew

New sources and new categories of sources make the sensory and imaginative aspects of observation abundantly clear because they bring new objects into play. In contrast, the second group of essays highlight the generative power of playful observation by considering how historians are seeing traditional textual sources in new ways. Rather than observing traditional sources using realistic premises that treat texts as carriers of information about historical questions or as narratives that need to be deconstructed, these essays draw attention to business sources as technologies designed to *produce* relationships, transactions, and values.

Regulatory reports, for example, are a form of source material that business and organizational historians have long used to examine the evolution of enterprise. But, as Ballor et al. (2023) highlight, such reports were typically not voluntary provisions of information but compulsory forms of disclosure, and hence instruments through which power was asserted and negotiated. Embracing realist assumptions in interpreting and analyzing these sources is tempting, particularly because of the seductive promise of revealing consistent longitudinal information from which to draw conclusions about continuity and change over time. However, understanding them as instruments of power reveals a very different set of business dynamics over how the compulsion to report information reveals the dynamics of power expressed in what was disclosed and what was not, the changing ways information was categorized and framed over time, and processes of cooperation and obfuscation shaping the relationship between those who are governed and those doing the regulating. The authors ask us to consider the wide variety of sources historians depend on that were in fact instruments of compulsion – including private as well as public governance and publicly shared versus privately distributed reports – that have pervaded the modern economy.

As Van (2023) shows, a similar move is taking place in how historians are seeing quantitative records anew. Reconceptualizing account books and accounting techniques as

social technologies, she points out, has been pivotal in reconceptualizing these sources as instruments for not just describing or representing the world but for shaping it. Quantification, in this instrumental sense, was not just as expression of a single, modern rationality, as Weber interpreted it. Rather, quantification and account books were a way of constructing and managing a variety of different kinds of relationships in the business world, including the relationship to time and the future, to power and dependence in work relationships, and to kinship.

### (c) Sensing New Connections

Creating novel historical explanations requires making new connections that can serve as the basis for conjectures about a phenomenon of interest. Peirce emphasized the value of playful thinking in allowing for connections between realms of human experience – internal ideas and impressions, external observations, symbolic social worlds – as a process of developing conjectures. Playfulness, in this sense, involves a freedom of mind to entertain links across the boundaries that traditional skeptical reasoning erects between aspects of human experience (e.g. mind/body, internal/external).

The essays in the third group all raise awareness of human senses in making such playful connections between the inner and outer worlds of subjects and scholars, but they do so in very different ways. Drawing on scholarship on the history of the senses, Hisano and Kube (2023) elaborate on how attention to the sensory experiences of our subjects in business history offers opportunities to trace new kinds of relationships over time. “Since the study of sensory experiences illuminates how individuals connected with each other and in what ways they related to their surroundings, inquiries centered on enterprise can yield additional insights into ideological, political, and social conditions” and how they changed over time,” they (Hisano and Kube 2023) explain. “For business historians, the senses can serve as lenses to examine how enterprise factored in the evolution of human perceptions and interrelations—and, vice versa, how the sensory apparatus shaped the development of business activity.” Hisano and Kube (2023) ponder valuable methodological questions about how the affordances of texts and time may give historians a unique vantage point from which to draw connections about the role of business enterprise in the evolution of sensory experience over time.

The other two essays engage with technologically assisted analyses and the use of computational methods for overcoming the limitations of our senses in creating and noticing connections. While we often associate computational techniques as rigidly rational methodologies, both these essays emphasize the playful potential of such tools as sensory aids to exploring and interpreting otherwise-undiscoverable connections. Rinaldi et al. (2023) discuss the value of social network analysis to “unveil new connections and spark creative

thinking to play with new research ... [by] represent[ing] 'non visible' structural institutions in society." Rejecting the use of theory-constrained approaches to social network analysis in history, the authors point out how network analysis can be used for "noticing new – and sometimes surprising – connections among firms, financial institutions, economic elites and the state." Pointing to their own work, they demonstrate how the use of social network analysis to identify how unique attributes of business network formation in Argentina and Chile "led us to ask new questions." Likewise, they highlight Pak's use of network analysis of the J.P. Morgan partners to show how "social ties are important [even] when they are absent." The authors conclude the "unexpected contribution of SNA to historical research is the way in which it can allow one to discover questions and issues that might otherwise be invisible."

Making invisible connections visible is also the theme of Villamor et al. (2023) essay on the use of topic modeling in historical interpretation. The authors point out that the overwhelming volume of documents one encounters in contemporary business history, the further expansion of this volume brought about by digitization, and the long spans of time often required for identifying patterned changes in business practices makes conventional ways of reading sources challenging. "Topic modeling is a text analysis technique that uses statistical methods to discover or identify latent patterns or clusters of co-occurrences of words (topics) within a collection of documents (called a corpus)," they explain. Like Rinaldi et al. (2023), Villamor et al. (2023) highlight the value of computation not for justifying an argument but for the process of making discovery and interpretation possible. The key is to use the technique in ways that recognize the "capabilities of an algorithm to complement the skills of the researcher. Algorithms are well suited to (and efficient at) finding patterns among large texts while ignoring the context. In contrast, researchers excel in deeply understanding the context and phenomena they study while often struggling to identify systematic patterns in large text collections." Hence, "while topic modeling is good at providing historians with the pieces of the puzzle – the "dots" – historians are good at "connecting the dots" and "putting the pieces together." In summary, "Visualization plays an important role in such discovery."

#### (d) Entertaining New Representations

Play also comes in when we consider how to represent and disseminate historical representations of the past. Historical theory since the linguistic turn has embraced the orthodoxy that historical knowledge takes the form of narrative, especially written narrative. Within academic history, the valorization of text is especially clear since forms of historical representation that do not take the shape of an article or book are deeply discounted in value, if the "count" at all. There is perhaps no better example of this than juxtaposing the disciplined reading of a paper with the theatrical format of a conference. The essays in Section 4 break

convention by playing with ways to reinvent older historical forms in ways that reveal insights that contemporary practices of writing history obscure.

Staley and Asmussen (2023) begin by pointing out that visualizing history “is an ancient practice, certainly much older than writing.” Emphasizing the ways in which new technologies are producing an explosion of creative uses of historical visualization (outside of academic history), they examine the value and uses of three varieties of historical visualization. Visual models, both physical and digital, aim to present a holistic view of a represented object, allowing us to identify lacuna and raise new questions. Visualizations that make the people of the past present – what the authors call “ghosts” – allow for the “peopling” of the past and affords opportunities to grasp how they interacted with their environment. Lastly, the authors discuss the use and value of “imagetexts” that represent texts but in ways that are subordinate to the meaning conveyed by the image.

Finally, Wilson and Tilba (2023) argue for a “practical turn” in business history. While some may dismiss this notion as inappropriate or inconsistent for an academic discipline, the authors remind us that it was the practical nature of historical studies of business (in opposition to the highly theoretical and decontextual claims of classical economics) that served as a reason for the emergence of business and economic history in the first place. The notion of history-as-practice can also be found in the older historical tradition of *historia magistra vita* – history as life’s teacher. Wilson and Tilba argue that such a practical turn is precisely the value of the kind of contextualized knowledge that business history creates.

### **Toward a More Playful Future**

Discussions of research methods, especially in the context of published scholarship, does much to confound the outcome of research with the process of research. Methodological discussions in the context of publication are, by their nature, about justification and not about discovery. Even when methods are described using seemingly open-ended language, the very point of the discussion is to explain the outcome – how one arrived at the findings being presented. At best, they provide relatively little insight into the process of discovery and at times erase discovery from the research process altogether.

Yet, as discussed in this introduction and in the essays that follow, cultivating playful methods of discovery are crucial for creativity, novelty, and progress in any field of inquiry. The need for playfulness is only greater during turbulent historical moments, such as ours, when transformations in technology, media, ideology, and values raise doubts about what we know and why we ought to know it. Cultivating new ways of nurturing openness to wonder and

discovering historical connections that offer conjectures for exploring the origins of today's world is crucial to the future of the field.

Play, therefore, is very serious business. Yet we tend to discount the practices and traditions of play as peripheral to scholarly practice and are often quick to dismiss it as lacking the rigor and gravitas we associate with scholarly virtues. How then might we cultivate a more playful future for research? We conclude by outlining a set of practices that grows out of the BHC conference, the experience of reviewing and publishing the essays in this special issue, and the insights from working on this introduction.

*Establish specific times and places for play.* The Dutch historian Johan Huizinga (1960) wrote "All play moves and has its being within a playground marked off beforehand either materially or ideally, deliberately or as a matter of course." Huizinga was arguably the keenest observer of the social and cultural aspect of play, and highlighted that play needed to be set aside in time and place from the ordinary flow of life. Within the academic world, conferences offer seemingly ideal conditions as playgrounds for intellectual playfulness. Yet, prevailing practices – ritualized presentation styles, tightly packed schedules, and an emphasis on justification over conversation – often work to inhibit serious play at these gatherings. Such practices date to a time when conferences served as occasions for disseminating research but given the relative ease and low cost of dissemination made possible by the web-based communication, the academic conference should be reconceived to focus on play. In particular, in-person gatherings offer opportunities to engage in and learn the craft-like aspects of research, entertain conjectures in more fluid and conversational ways, and build new relationships that could lead to collaborative projects. The BHC conference that led to this special issue aimed to do this by focusing on practice-oriented workshops and emphasizing multiple formats for conversation – oral, chat, shared document. The result was that the conference also created a documentary trail of ideas, hunches, and illustrations that the authors could use in developing their essays.

*Play with Others.* Historians have in-built practices of researching and writing alone. But play benefits from collaboration, a disposition and skill that needs to be cultivated. From Schiller (1967 (1793)) to Bateson (1955), theorists of play have emphasized its sociability. By contrast, management scholars have developed quite extensive ways to collaborate in discovery and research processes (Sætre and Ven 2021). Many of the kinds of discovery discussed above are only possible in teams, especially interdisciplinary teams. The BHC conference and the papers in this special issue encouraged and at times insisted on collaborative production in order to foster dialogue and produce work that involved connecting ideas and experiences of multiple authors. All the workshops were convened by at least two people who had not previously worked together, and almost all of the papers in this special



issue have been co-authored. We believe that many of the ideas developed in the essays would not have been likely to be produced by working alone.

*Create and Use New Tools to Play.* As the essays by Kirsch et al. (2023), Rinaldi et al. (2023), and Villamor et al. (2023) highlight, creating and using new tools to expand our ability to observe historically, is essential to expanding our range of play and to our ability to decipher the traces with which we are left. From finding aids to card catalogs to the Dewey decimal system, tools have always constituted an essential method of discovery in history as in other fields of empirical research. Historians must be aware of the need and appreciate the value of creating the tools with which we observe and experience the past. As Kirsch et al. (2023) highlights, creating new tools and sources can be extremely generative in opening up new questions and conjectures.

*Make Room for Playful Expression.* Writing and the narrative form will certainly continue to be predominate in academic history, but scholars should play with genres and forms that allow opportunities to break free of these forms of historical representation. Short essays, like the ones in this special issue, provide a simple but effective way of musing. Given the transformations taking place in digital media, we also encourage others to take advantage for the increasing ease and declining costs of playing with visualization, podcasting, games, virtual and augmented reality, and simulations as forms through which to explore the representation of past.

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