

An examination of the *theoretical framework usage (TFU)* in the Agile Literature Review Approach (ALRA)

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Abstract

Theoretical framework usage (TFU), i.e., theoretical frameworks level-0, level-1a, level-1b and level-1c (the theoretical framework set) construction and application, plays a crucial role in the agile literature review approach (ALRA). In view of the fast development of ideas on the TFU, via reflection on practice experience, an updated briefing on them to the ALRA users, notably the MBA students doing applied business research projects with the ALRA, is timely. To do so, this article examines the steps, the advices, the rationale and the learning issues of the TFU. This discussion on the TFU should be of use to both the ALRA users as well as those who are interested in the field of applied business research chiefly at the post-graduate level.

Key words: agile application, applied business research, dissertation project work, MBA students, managerial intellectual learning (MIL), the agile literature review approach (ALRA), the theoretical framework set, theoretical framework usage (TFU).

INTRODUCTION

Over the last two years, the writer has been working on an original academic research subject called the agile literature review approach (ALRA). At the outset, being a subject teacher

on applied business research for MBA students in Hong Kong, this writer's research aim was to develop a suitable literature review approach for the MBA students; they are typically busy, often new to research projects, as well as study under much time pressure. Out of this academic research, the writer has published a number of articles on the ALRA subject, e.g., Ho (2018a; 2018b). Besides, a Facebook group called "The agile literature review approach group" was created for sharing practice and conceptual ideas on ALRA. From the beginning of the research, this writer recommends that the ALRA be relying on using systemic diagrams in an evolutionary prototyping mode to (i) capture management concerns of the client organization to be studied [*agile application 1*] and (ii) develop an overall task agenda in diagram form to guide the literature review for the applied business research projects [*agile application 2*]. Diagramming practice for **agile application 1**, called *management-concerns diagramming*, has recently been reported in Ho (2018c). This article examines the diagramming technique for **agile application 2**. This can be called *theoretical framework usage* (TFU) in the ALRA as the diagrams are known as the *theoretical framework set* in the ALRA. The next section briefs the readers on the original ALRA thinking on the TFU. It is then followed by a more detailed elaboration on the TFU's underlying thinking, practice and learning issues.

The original thinking on the *theoretical framework usage* (TFU) in the agile literature review approach (ALRA)

In its original conception, the agile literature review approach (ALRA) comprises four phases (Ho, 2018a):

Phase 1 is ideas search

Phase 2 is ideas collection

Phase 3 is ideas categorization

Phase 4 is ideas systemic diagramming

These four phases can be described as literature search (Phases 1 and 2), followed by literature review (Phases 3 and 4). An important emergent outcome via some kind of coding exercise¹ on reviewing the relevant academic literature is the formulation of a systemic theoretical framework (i.e., an ideas systemic diagram) in ALRA Phase 4. The formulation of such a theoretical framework needs to heed "the ALRA user's own voice... for explaining and evaluating a management concern of the ALRA user" (Ho, 2018a). This recommendation to be management-concerns-responsive has now been more fully addressed via the management-concerns diagramming of Ho (2018c). This diagramming, as **agile application 1**, precedes the four ALRA phases (**agile application 2**). As to the steps to construct the ideas systemic diagram (the original ALRA Phase 4) (Ho, 2018a), a more encompassing tactic has now been developed by the writer on top of the original ALRA's four phases as **agile application 2**. There is now a set of four diagrams, not one diagram anymore. Nevertheless, the original ALRA 4-phase approach is not to be written off. These points will become clear in the subsequent discussion in this article. The more encompassing steps and companion notions are being discussed from time to time in the form of blog notes on *the Agile Literature Review Approach group* (Facebook). Here, they are put together and elaborated on in the next two sections.

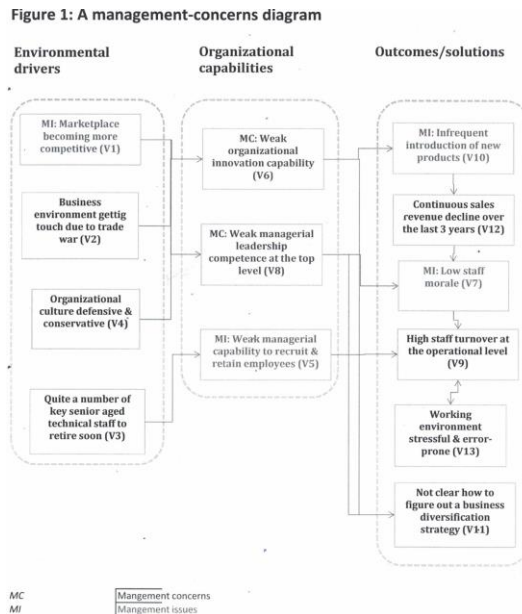
The practice of the *theoretical framework usage* (TFU)

In the ALRA, the researcher, as the ALRA user, responds to a set of legitimate management issues (MIs) and management concerns (MCs), as depicted in a carefully considered² management-concerns diagram (Ho, 2018c). An example of a

¹ This ALRA coding (i.e., categorizing and connecting literature review tasks and academic concepts in the relevant academic literature) resembles open coding (categorizing data) and axial coding (connecting data categories) in Grounded Theory (Strauss and Corbin, 1990: chapters 5 and 7).

² The quality of the management-concerns diagram, to a large extent, depends on the quality of exploratory investigation as conducted by the researcher during the research project orientation phase (RPOP) (Ho, 2018c).

management-concerns diagram is provided in Figure 1 (Ho, 2018c).



Regarding this management-concerns diagram (Figure 1), there are four management issues (MIs) and two management concerns (MCs), specifically:

MI1: Marketplace becoming more competitive

MI2: Infrequent introduction of new products

MI3: Weak managerial capability to recruit and retain employees

MI4: Low staff morale

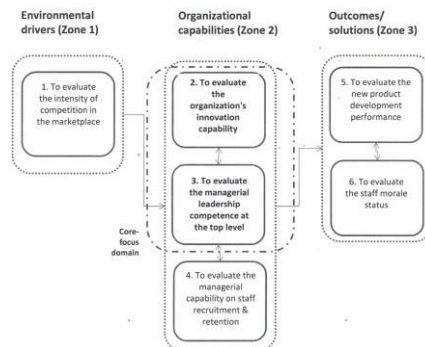
MC1: Weak organizational capability

MC2: Weak managerial leadership competence at the top level

They are connected and located into three zones, namely, the "environmental drivers" zone, the "organizational capabilities" zone and, finally, the "outcomes/solutions" zone. Based on Ho (2018c), *management issues (MIs)* are "business issues that the management team is worried or excited about, while not

strongly feeling that they need to be seriously addressed in near future" while *management concerns (MCs)* are "business issues that the management team is worried or excited about, as well as strongly feels that they need to be seriously addressed in near future". These MIs and MCs, together with the other contextual variables³ (e.g., variables 2, 3, 4, 9, 11, 12 and 13) make up a picture of a problem-situation that involves a set of related MIs and MCs. When comprehended with the broader problem-context, the underlying attribute of soft complexity on the set of related MIs and MCs (as depicted in this management-concerns diagram) is revealed, albeit somewhat hazily, to its readers also⁴. This discussion so far is all about **agile application 1**. What is more important for our discussion purpose is that the ALRA researcher, based on the management-concerns diagram (re: Figure 1), can now have a clearer sense of direction to intellectually respond to the MIs/MCs set in the expressed form of a theoretical framework level-0. This is now a topic in **agile application 2**. The framework is shown as Figure 2 (Ho, 2018c) as follows:

Figure 2: A theoretical framework (level-0) based on the management-concerns diagram of Figure 1



³ These other contextual variables are not incorporated into the ALRA theoretical frameworks, because they are outside the research and literature review scope of the dissertation project. This research scoping decision is for the researcher to make.

⁴ The soft complexity of the broader problem-context facing a client organization can be more clearly exposed with the rich-picture building exercise (RPBE) in the soft systems methodology (Ho, 2015). The RPBE is not always taught in an MBA programme, however. So it is most likely not done in the MBA applied business research projects. Instead, a brief SWOT analysis is carried out to comprehend the problem-situation.

Briefly, the theoretical framework level-0 expresses in a diagrammatic form the researcher's intellectual response to a set of identified management issues and concerns in a management-concerns diagram (Figure 1). In this regard, the theoretical framework components (representing certain literature review tasks)⁵ can be associated to the corresponding MI/MC items in the management-concerns diagram (re: Figure 1). This is made plain in Table 1.

Table 1: MI and MC items and their corresponding theoretical framework components

MI and MC items (re: Figure 1)	Corresponding theoretical framework components (re: Figure 2)
<i>Variable 1 (MI):</i> marketplace becoming more competitive	<i>Component 1:</i> to evaluate the intensity of competition in the marketplace
<i>Variable 5 (MI):</i> weak managerial capability to recruit and retain employees	<i>Component 4:</i> to evaluate the managerial capability on staff recruitment & retention
<i>Variable 7 (MI):</i> low staff morale	<i>Component 6:</i> to evaluate the staff morale status
<i>Variable 10 (MI):</i> infrequent introduction of new products	<i>Component 5:</i> to evaluate the new product development performance
<i>Variable 6 (MC):</i> weak organizational innovation capability	Component 2 (core-focus domain one): to evaluate the organization's innovation capability
<i>Variable 8 (MC):</i> weak managerial leadership competence at the top level	<i>Component 3</i> (core-focus domain one): to evaluate the managerial leadership competence at the top level

Referring to Table 1, we can say that: (i) the theoretical framework level-0 represents the researcher's preferred intellectual response to the set of management issues and concerns identified in the applied business research project and (ii) the theoretical framework level-0 (re: Figure 2) is largely derived from the management-concerns diagram (Figure 1). Furthermore, the theoretical framework level-0 constitutes an agenda for the researcher to conduct a set of related literature

⁵ A theoretical framework level-0 is made up of a number of theoretical framework components whose labels are essentially high-level research task statements, such as "to evaluate the organization's innovation capability" and "to evaluate the managerial leadership competence at the top level". These components are connected together to make up a systemic theoretical framework.

review tasks to meet the high-level research tasks' need for academic ideas. These literature review tasks respond to the high-level research tasks (i.e., component labels) on the theoretical framework components in Figure 2⁶. The component labels are deliberately expressed with academic jargon, e.g., "intensity of competition" and innovation capability" to serve the purpose of being an agenda on the management-concerns-focused literature review tasks. That is, the theoretical framework components are high-level research tasks in need of literature review efforts. Specifically, the six high-level research tasks (re: Figure 2) are:

High-level research task 1: [Component 1] to evaluate the intensity of competition in the marketplace

High-level research task 2: [Component 2 (core-focus domain one)⁷] to evaluate the organization's innovation capability

High-level research task 3: [Component 3 (core-focus domain one)] to evaluate the managerial leadership competence at the top level

High-level research task 4: [Component 4] to evaluate the managerial capability on staff recruitment & retention

High-level research task 5: [Component 5] to evaluate the new product development performance

High-level research task 6: [Component 6] to evaluate the staff morale status

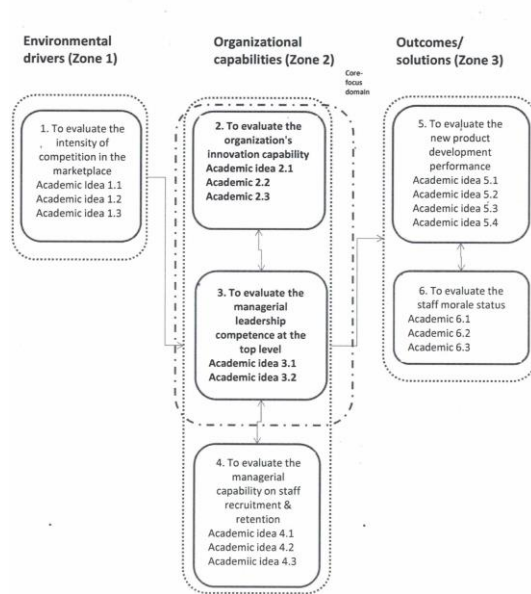
These six high-level research tasks are formulated by adopting specific academic topics and jargon, so that the researcher can

⁶ In a nutshell, the theoretical framework component tasks are high-level research tasks (e.g., to evaluate....) in need of specific literature review endeavors (e.g., to identify useful academic ideas to perform the research tasks in a theory-driven way). That is why theoretical framework level-0 can also be treated as an agenda to do literature review for a set of high-level theory-driven research tasks.

⁷ *Core-focus domain ones* simply means that they are the main research tasks while the *non-core-focus domain ones* cover the minor research tasks in the applied business research project. The decision on *core-focus domain scoping* is for the researcher to make based on his/her intellectual interest and knowledge on the management issues and concerns (MIs and MCs).

make use of them as key words to do the relevant literature search and review. After performing all the literature review on these research tasks, the researcher is in a position to populate the theoretical framework level-0 components with some useful academic ideas to bring forth the theoretical framework level-1a as follows (re: Figure 3):

Figure 3: A theoretical framework (level-1a)



Theoretical framework level-1a provides at a glance the collection of academic ideas (i.e., academic concept definitions, analytical academic concepts/ theories, and ideas on information gaps/ debatable points on academic topic, etc.) as associated to specific high-level research tasks (represented by the theoretical framework components). With it, the researcher and his/ her dissertation project supervisors, are now able to speedily weigh up the quality of the researcher's literature review outcome in terms of the relevance of the academic ideas for performing the theoretical framework component tasks (e.g., "to evaluate the organization's innovation capability" [re: component 2 of Figure 2]) and the level of complexity of the

academic ideas chosen to be used⁸. [Subsequently, there is the required undertaking to conduct literature review⁹ on these academic ideas for all the high-level research tasks (i.e., on the six theoretical framework components). In this case the original ALRA phases 3 and 4 exercise can be quite relevant for this undertaking at the high-level research task level. On the level of complexity of analytical academic ideas, the following table, Table 2 is useful for some clarification.

Table 2: Level of complexity of analytical academic ideas

Complexity level	Examples of analytical academic ideas
<i>Level 4</i>	Dynamic capability model of Teece, Pisano and Shuen (Teece, n.d.)
<i>Level 3</i>	Porter and Lawler model of motivation (Yourarticlelibrary.com, n.d.)
<i>Level 2</i>	Maslow's hierarchy of needs (McLeod, 2018)
<i>Level 1</i>	Quality culture is positively related to leadership (Arumugam <i>et al.</i> , 2011)

With reference to Table 2, an analytical academic idea at a higher level (e.g., complexity level 4) is more sophisticated than that at a lower level (e.g., complexity level 1). It comprises a larger set of related complex ideas with a more complex methodological structure. The exercise on complexity level assessment on analytical academic ideas is, however, impressionistic in nature. The foremost consideration for our discussion purpose is this: if the theoretical framework (level-1a) is all populated with complexity level 1 analytical academic ideas, the quality of the literature review output would be considered as conceptually unsophisticated. This too implies that the overall literature review quality is primitive. This

⁸ A proper evaluation of the literature review quality can only be carried out by studying carefully the dissertation chapter on literature review written by the research student.

⁹ The literature review involves reviewing academic idea definitions, points of debate on academic ideas, and analytical theories and approaches associated to the academic ideas. To review ideas is to describe, compare, evaluate, and adopt specific application decision on them. It is not merely about producing some descriptive teaching notes on academic ideas.

assessment viewpoint reflects a major learning attitude commitment of the ALRA, which is to "develop a complicated intellectual response to the chosen set of management issues and concerns for the researcher's dissertation project"¹⁰ (Ho, 2018d). Such learning attitude commitment is a way to anchor the ALRA onto critical systems thinking (Ho, 2018a), and critical systems thinking promotes creative holism (Jackson, 2003) in applied business research. In addition, there are five additional advices on the theoretical framework level-1a construction exercise:

Advice 1 [*the idea concreteness advice*]: academic ideas chosen need to be concrete. For example, let us consider the theoretical framework component of "to evaluate the innovation capability of a company" (re: component 2 in Figure 3). Instead of opting for the academic idea of "innovation management" for this component [which is too broad], the researcher could more usefully adopt the academic idea of "the seven dimensions of innovation capability" (Ukko, *et al.*, 2016), which is more concrete (i.e., specifically applicable).

Advice 2 [*the lead model advice*]: there could be a lead model as one of the academic idea which is utilized to synthesize all the other academic ideas (i.e., subsuming ideas) for a theoretical framework component. For instance, we could consider the theoretical framework component of "to evaluate the intensity of competition in the marketplace of ABC Ltd"; in this case, the lead model could be Porter's Five Forces model (cgma.org, 2013), while the academic idea of hypercompetition (Rifkin, n.d.), among others, plays a minor subsuming role for this theoretical framework component study.

Advice 3 [*the balanced portfolio of ideas advice*]: the chosen set of academic ideas by the researcher for a particular research task should, taken as a whole, offer a balanced, complementary

¹⁰ There is a companion ALRA learning attitude commitment which is: "developing a complicated understanding of the problem-situation and the chosen set of management concerns [for the dissertation project] facing the client system as embedded in its problem-situation" (Ho, 2018a).

and relevant portfolio of notions, to enable a holistic conduct of such a research task.

Advice 4 [*the core-focus domain advice*]¹¹: for those theoretical framework components that are within the scope of core-focus domain, e.g., components 2 and 3 in Figure 2, they should have a larger number of (say, 6 academic ideas) as well as more complex academic ideas than that of the other theoretical framework components (e.g., 2 to 3 academic ideas).

Advice 5 [*the literature review skill competency advice*]: the process of searching and reviewing academic ideas per theoretical framework component (i.e., an individual level-0 research task treated as an literature review task) needs to be performed with reasonable literature review skills as taught in research methods textbooks, e.g., Saunders *et al.*, (2016: chapter 3) and Bryman and Bell (2007: chapter 4). What's more, this literature review exercise at the research task level can employ the four ALPA steps of ideas search, ideas collection, ideas categorization and ideas systemic diagramming, as propounded in Ho (2018a). With that in mind, skilful efforts of review and synthesis of academic ideas per individual literature review task are crucial, especially for those theoretical framework components within the theoretical framework core-focus domain (re: Figures 2 and 3).

Altogether, there are five additional literature review advices as related to theoretical framework level-1a, namely, the idea concreteness advice, the lead model advice, the balanced portfolio of ideas advice, the core-focus domain advice and, lastly, the literature review skill competency advice. Much learning is required to respond well to these five advices.

¹¹ Indeed, the research tasks (i.e., the theoretical framework component labels) in the core-focus domain of a theoretical framework can be roughly considered as the main research objectives of the dissertation project.

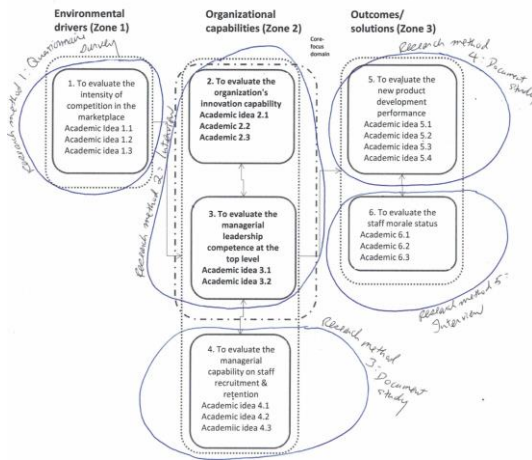
On completing the construction of the theoretical framework level-1a (literature review tasks with academic ideas)¹², the researcher can now direct his/her attention to devising *research tasks* that make use of the academic ideas shown in the theoretical framework level-1a. As a demonstration, with reference to the theoretical framework component of "To evaluate the managerial leadership competence at the senior level of ABC Ltd" (re: Figure 3), the researcher might adopt the academic idea of "managerial roles" (Kumar, 2015) in his/her theoretical framework level-1a. Next, the researcher might come up with the *low-level research task*¹³, using the academic idea of "managerial roles", expressed as follows: "To learn the staff's perceptions on the company's managers' effectiveness in performing various *managerial roles* [optional: by unstructured interview and questionnaire survey with the company's staff]" (Ho, 2018e). After doing so with all the academic ideas in the theoretical framework level-1a, the researcher now generates the theoretical framework level-1b (a set of literature review tasks with their respective research tasks). Since the theoretical framework level-1b consists of quite a number of lengthy sentences on *low-level research tasks*, it is acceptable to adopt a table form, instead of a diagram one, for easier presentation of this theoretical framework (Ho, 20181f).

The last theoretical framework in the theoretical framework set to produce is theoretical framework level-1c. This is essentially theoretical framework level-1a, with an overlay of research methods on it (Ho, 2018g). Figure 4 offers an example on theoretical framework level-1c.

¹² In consonance with the agile spirit, the theoretical framework could be and should be adjusted and refined in the research process as more project learning is gained over time; scraping the framework and start over again with a new theoretical framework is another matter and should be avoided.

¹³ A level-1b *low-level research task*, belonging to a specific theoretical framework component, is a focused activity that requires 1-2 specific research methods and a academic idea to perform.

Figure 4: A theoretical framework (level-c)



Referring to this theoretical framework level-1c (re: Figure 4), five research methods have been mapped onto the theoretical framework level-1a: research method 1 is questionnaire survey; research method 2 is research interview; research method 3 is document study; research method 4 is document and, finally, research method 5 is research interview. Simply put, theoretical framework level-1c is theoretical framework (level-1a + research methods mapping). By performing the research methods mapping onto the theoretical framework, the researcher vividly puts across the research game plan by indicating how the chosen research methods are related to the academic ideas (re: Figure 3: theoretical framework level-1a) and the *low-level research tasks*, belonging to specific theoretical framework components (i.e., the *high-level research tasks*) employed.

In a nutshell, the steps of theoretical framework usage can be understood as a series of diagramming exercises in the agile spirit to produce theoretical frameworks level-0, level-1a, level-1b and, finally, level-1c (i.e., *the theoretical framework set*). Using this *set of theoretical frameworks* to introduce to novice applied business researchers, such as many of the part-time MBA students, the literature review (re: theoretical

frameworks level-0, level-1a, and level-1b) and research design requirements (re: theoretical framework level-1c) is quite effective, from the writer's teaching experience. At the same time, students are also able to gauge early on the daunting and engaging intellectual learning required in order to study and perform well in their applied business research projects. The underlying thinking on the usage of theoretical framework is to be explained in the next section.

The underlying thinking of the *theoretical framework usage* (TFU)

Using diagramming in the form of theoretical framework construction offers the researchers an engaging, easily comprehensible, evolutionary-prototyping and management-concerns-focused path to conduct literature review. ALRA research tasks exist at two levels: the high-level ones are at level-0 and the low-level ones appear at level-1b, grouped by the high-level ones. Furthermore, the TFU is doubly systemic: it is systemic at the overall theoretical framework with its components [the high-level research tasks] and also at the theoretical framework component level with academic ideas/level-1b low-level research tasks. The scoping judgment of the theoretical framework set, i.e., what theoretical framework components and academic ideas to cover on the whole and in the core-focus domain, needs to be critically reflected on from time to time in the spirits of critical systems thinking (Jackson, 2003: chapter 15), agility and managerial intellectual learning (re: *Managerial intellectual learning* Facebook page). With its systemic guiding features and agile orientation, the theoretical framework usage in the ALRA, as **agile application 2**, is very valuable to novice researchers, especially part-time MBA students, doing applied business research projects that can then be problem-driven, well justified, yet challenging. Typically, these projects involve single-case study research on an organization (called the client organization in this context).

Other than the TFU benefits, there are inevitably disadvantages and challenges for employing the ALRA, with the theoretical framework usage (TFU) playing a crucial role (Ho, 2018h). Particularly, three major learning issues need to be carefully handled by the MBA students using the ALRA:

Learning issue 1 [self-study weakness on the academic literature]: often, the part-time MBA students, as researchers, have difficulties on their own to understand and apply the relevant academic ideas, e.g., management theories, they come across in literature review. However, their dissertation project supervisors are not their personal tutors - they will not teach them these academic ideas. So the students easily stumble in the literature review process if no tutorial help is available to them. To resolve this issue, they may have to employ some personal tutors to teach them the more sophisticated academic ideas so that they are able to carry on with their literature review work.

Learning issue 2 [poor time management]: some research students are used to doing the research project works only when the research project submission deadline is near. It may have something to do with the students' learning mood and learning habit in their study. On the other hand, intellectual learning and research inquiry works cannot be accelerated with unrealistic speed, even with the employment of the ALRA and other fast learning methods, e.g., Kaufman (2013). High time pressure very often prompts the students to submit to the universities poorly written dissertation reports. Moreover, there is very limited intellectual learning from hurriedly doing the applied business research projects on the students' part.

Learning issue 3 [intellectual learning mind-condition barriers]: some research students experience difficulty in conducting the needed intellectual learning in an engaging and inner-driven

way. This might have to do with their learning mindset as well as the many learning disturbances to them from the domestic and workplace sources, e.g., high work stress.

No research methodologies, including the ALRA, can be silver bullets for the research students to address these three learning issues. It is chiefly up to them to reflect on and work out their long-term personal intellectual learning orientation and strategy so as to cope with these learning issues. In this regard, the writer's research work on managerial intellectual learning (MIL) (re: *Managerial intellectual learning* Facebook page) offers some relevant intellectual ideas for students to reflect on this important personal realm of theirs. It has to be recognized that for the most part these learning issues entail long-term personal efforts to cope with. Admittedly, certain environmental influencing factors (re: learning issue 3), among others, are beyond the control of the research students.

CONCLUDING REMARKS

Novice post-graduate researchers, such as many of the part-time MBA students doing applied business research projects, need clearly articulated research guidance. The development of the ALRA, in which the theoretical framework usage holds a pivotal role, is, from this standpoint, a laudable intellectual endeavour in the field of applied business research. Using the theoretical framework set as a condensed output blueprint of the literature review exercise of the research students, the students' research project supervisors can also more quickly grasp the overall thinking and quality of their supervisees' research works, including that of the literature review exercise. To the research project supervisors, the ALRA theoretical framework set (levels-0, 1a, 1b and 1c) serves as a handy dissertation project supervision communication and control tool. They can offer clearer feedback on how to refine these

frameworks, e.g., (Ho, 2018i). If the research students could, at the same time, tackle their more personal learning issues well, they could be more capable to (i) perform satisfactorily in their applied business research projects as well as (ii) gain more intellectual learning.

Lastly, the subject of the ALRA (covering **agile application 2**), including the theoretical framework usage (TFU) topic, is not a small one, given the large amount of notes and articles written on it already. It is thus not feasible to discuss it, and in particular the TFU topic, in much depth in this article. On this matter, interested readers are referred to the Facebook group of *the agile literature review group* for more updated and detailed information on the whole subject of the *agile applied business research* (Ho, 2019), including **agile application 1** and **agile application 2**.

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