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FROM THE EDITORS

OPENING UP AMJ's RESEARCH METHODS REPERTOIRE

The mission statement of *Academy of Management Journal (AMJ*) indicates that all empirical methods are welcome, including, but not limited to, qualitative, quantitative, field, laboratory, meta-analytic, and mixed methods. Over the years, it is clear that the journal has expanded the range of methodologies and types of data that have appeared in published papers – both in terms of qualitative (Bansal & Corley, 2011; Bansal, Smith, & Vaara, 2018) as well as quantitative research (George, Osinga, Lavie, & Scott, 2016). And yet, we believe that there are opportunities to further open up the journal's methods repertoire, both to new methodologies, and to existing methodologies that may sometimes have been missing from the journal's pages, even though they can support scholars in making strong empirical and theoretical contributions to the management field. This editorial essay aims to call attention to some of these opportunities. In doing so, we build on the transformational agenda laid out by Editor-in-Chief Marc Gruber for the 23rd editorial team (Gruber, 2023).

At the same time, this is an opportunity to introduce readers to three of the five new methods experts who have joined the 23rd editorial team specifically to support editors, reviewers and authors to engage with methods that might perhaps be less familiar to all readers and reviewers of the journal – Emma Bell, Paul Bliese and Curtis LeBaron. Their involvement is intended to ensure that *AMJ* is able to fairly assess research that draws on a wide range of methodologies, and that the journal continues to publish the best, most insightful and most impactful work in the management field. Their participation is also intended to signal to prospective authors that the journal is open and welcoming towards manifold types of methods, data and analytical approaches.

To write this editorial, each of our methods experts has selected approaches to doing research that they suggest deserves more attention. They pinpoint what kind of insights these methods might enable, offer examples, point to resources that may be valuable in implementing these approaches, and indicate some of the criteria to be considered in evaluating research that draws on them. In a recent "From the Editors" essay, the editorial team already addressed particular methodologies that draw on artificial intelligence and machine learning methods (von Krogh, Roberson, & Gruber, 2023).

The opportunities we illustrate here – *visual methods*, *microethnography*, *incorporating time into quantitative analyses*, *multilevel theorizing*, and *researching forward* – constitute a selected sampling of possibilities. The overall message is that methodological innovation and experimentation is encouraged at *AMJ,* and that if you as an author submit a study that draws on a method or approach that is less well-established at the journal, we will do our best to live up to our mission statement, drawing on reviewers and experts who are qualified to judge it on its merits.

Beyond words and numbers: Visual methods

The growing use of visual methods over the past decade illustrates the creative evolution of methods used in our field, driven by the visual turn which advocates a move beyond the traditional focus of qualitative researchers on language (talk and text), and towards the study of visible, material features of organization (Bell & Davison, 2013; Meyer, Höllerer, Jancsary, & Van Leeuwen, 2013). This growth is also a response to the ubiquity of images in organizational life, including digital images, as well as the greater ease of collecting visual data (e.g., through smartphones). While much visual research in management studies is currently qualitative, the availability of large volumes of pre-existing digital visual data also paves the way for greater use of quantitative visual analysis in journals like *AMJ*.

A key tenet of qualitative research is a commitment to taking the role of the other in order to see the world from the perspective of those studied, rather than from an assumed objectivist standpoint (Mead, 1967). However, methods that rely on language, such as interviews, tend to elevate individual perceptions and accounts of experience in a way which encourages an overly rationalistic view of human behavior (Atkinson & Silverman, 1997). Such accounts also tend to be developed post hoc, rather than in the moment. Visual methods can provide an important means of addressing this limitation by gaining access to, and generating data about, embodied lived experience. For example, De Rond, Holeman and Howard-Grenville's (2019) study of rowing the Amazon River uses video footage of the voyage, combined with linguistic data (fieldnotes and interviews), to explore the body's role in sensemaking. Their use of images provides a "permanent and detailed record of what happened" (De Rond et al., 2019: 1966) as events unfolded during the research which is used to recall "what it actually 'felt like' for the fieldworker" (De Rond et al., 2019: 1962).

The visual turn in management studies is driven by a commitment to collecting data in organizational contexts that research participants ordinarily inhabit. The rise of digital communication platforms including social media means that online spaces, and their visual affordances, have become increasingly important in the everyday lives of managers and other social actors in organizations. Heizmann and Liu's (2022) study of women entrepreneurs' identity performances on Instagram illustrates how this kind of visual data may be analysed. It uses discourse analysis to interpret photographic images alongside verbal descriptions provided in online posts. Such examples highlight the importance of visual meaning making in understanding management topics like identity and leadership.

Visual methods that focus on physical objects, including their properties and the effects they have on people, offer another important means of moving beyond words. Object interviewing involves participants and researchers touching, handling and engaging physically with objects, using this as the basis for a verbal exchange (Woodward, 2019). This makes it possible to better understand relations between human bodies, and the material organizational worlds they inhabit as a series of encounters, as in Bell and Vacchani's (2020) study of craft work. Related to this is the method of photo-elicitation which uses photographs, taken either by participants or sourced by researchers, as a basis for interview or focus group discussion (Warren, 2005). The potential of both of these methods stems from the capacity of objects and photographs to enable events, experiences and emotions to be recalled in a manner that is more vivid than is enabled by words alone. Moreover, by involving research subjects in the creation of meaning, researchers are able to overcome a key challenge of working with visual data which stems from the polyvocality of images that enable multiple readings (Banks, 2018).

The use of visual methods also opens up possibilities for studying sensitive organizational phenomena. An example is provided by Jarvis, Goodrick and Hudson's (2019) study of animal rights organizations, which uses visual methods in combination with linguistic data gathering techniques. Through analysis of video and photographs depicting graphic acts of animal abuse, this example highlights the pre-discursive power of images, which are often more immediate and emotionally affecting than words. This type of visual analysis also draws attention to the role of image producers, such as photographers and news media editors, in framing how images are interpreted by spectators (Klein & Amis, 2021).

Yet in using visual images, it is important to avoid visual data either being relegated to the status of illustration or ontologically privileged as a reflection of reality. Key to this is skilled interpretation, through analyses that weave together words, images (and perhaps numerical data) in ways which accord them equivalent status as interlinked sources of knowledge. Research outputs thereby become multimodal (Kress & Van Leeuwen, 1996). To reach beyond illustration, several papers in *AMJ* take a semiotic approach to visual analysis (Jarvis et al., 2019; Klein & Amis, 2021). By considering the relationship between the signifier (the visual representation) and the signified (what it represents), semiotics provides a theoretical framework for interpreting images and their effects on viewers by connecting the visual to broader structures of culturally constructed meaning (Barthes, 1981). While semiotics draws attention to collective processes of making meaning from images, analysis may also be grounded in the meanings of an image to individual participants. Visual analysis can also consider the role of image-producers in composing and framing visual texts and privileging particular ways of seeing (Rose, 2007).

Each of these analytical approaches treat visuals as a source of socially constructed meaning; images, like language, are seen as a medium for constructing the social world through its representation. However, there is also scope for more quantitative analyses of visual materials in *AMJ*. Quantitative content analysis can be used to describe and systematically analyze large corpuses of digital images, including photographs, which may be collected from news media or social media platforms (Parry, 2020). Coding visual data according to its denotative meanings (e.g., objects, people, subjects or places represented) allows the researcher to perform statistical analyses to examine changes in visual representation over time or to trace the circulation of images within particular networks or communities. Despite its considerable potential, qualitative and quantitative visual analysis remains relatively rare in *AMJ*. Greater use of visual methods can thus be used to expand *what* we know as well as *how* we know it by providing researchers with an opportunity to see things differently.

Capturing meaning-making in situ: Microethnography

Though so far appearing quite rarely in *AMJ,* microethnography (sometimes called video ethnography) emerged as a social science research method in the 1970s, when video technology became reliable and accessible. This section thus builds, in some ways, on the discussion of visual methods above, but extends it to focus on methods to study meaning-making in motion and in situ. Specifically, microethnographic studies engage with "big" organizational issues through a detailed examination of seemingly "small" activities and practices (Streeck, Goodwin, & LeBaron, 2011). While most social scientists are in pursuit of natural law or cause-and-effect relationships that may help to predict future behavior, microethnography is in search of meaning and meaning-making. Geertz (1973: 5) famously said: "Man [sic] is an animal suspended in webs of significance he himself has spun." Researchers thus attempt to explicate how people interactively create and sustain the meanings that they inhabit.

Microethnography is a convergence of competences from various disciplines. From the field of sociology comes conversation analysis (Sacks, 1992/1966), which enables researchers to examine the details of people's talk-in-interaction (i.e., who says what, when, and how). Conversation analysts transcribe their audio recordings—or at least the portions of conversation that will be a focus of their attention and argument. Fortunately, video recordings almost always include an audio track, which can be parsed and analyzed separately as needed. From the field of psychology comes context analysis (Scheflen, 1973), which highlights the embodied maneuvers of people (i.e., the relative location, orientation, and posture of their bodies, when they are still and in motion). From the discipline of anthropology comes methods of observation, especially participant observation (Spradley, 2016/1980), which enables researchers to participate—directly or vicariously—in the meaning-making activities of research subjects. Anthropologists are also notorious for collecting and examining material artifacts, which are a residue of past acts of meaning. This helps researchers to become familiar with their target groups so that they can readily recognize, appreciate, and explain moments of meaning-making in the wild.

Baked into microethnographic methods are fundamental assumptions about people (ontological) and their knowledge work (epistemological) within organizations. Because video is the mainstay of microethnography, researchers must make a host of cinematic decisions before and during data collection. Where should the camera be located? Where should it be pointed? When should it be turned on or off? Answers to such seemingly simple questions constitute theoretical assertions about the nature of people and their ways of knowing (LeBaron & Christianson, 2022). For the purposes of microethnography, most researchers insist on capturing "naturally occurring" interaction—i.e., interaction that would have occurred whether or not the camera was present. Microethnographers thus avoid recordings from television or theater, because scripted conversation and choreographed movement are fictional and potentially misleading. "Naturally occurring" is a contested notion, however. For example, Bavelas (1995) argues that her video recordings of laboratory interaction show what people "naturally" do in a laboratory setting.

Video data and analyses can be combined with other research methods such as interviews, surveys, narrative analysis, and so forth, as long as researchers are consistent with their underlying assumptions (e.g., see LeBaron, Christianson, Garrett, & Ilan, 2016). Video and visual methods (see above) also have a strong kinship as both involve a study of images that may reference people and things (Streeck et al., 2011). Yet video enables a stronger focus on movement, gesture, and sequence in interactions. Although researchers may avoid explicit claims about the generalizability of site-specific findings, microethnographers assume that practices and patterns of behavior in one place may have relevance in other places.

Video-based research generally, and microethnography more specifically, are becoming more popular within the field of management and organization studies (Christianson, 2018). In a recent of example, LeBaron and colleagues (2016) collected and analyzed more than 250 video recordings of Intensive Care Unit (ICU) physician handoffs at shift change. As an organizational routine, handoffs may be highly consequential if communication errors become medical errors. The challenge for physicians is that each handoff needs to be sufficiently the same so that participants can recognize that a handoff is underway; but also sufficiently different so the patient's unique medical situation can be flexibly treated. Through the location, orientation and posture of their bodies during the handoff, physicians make each other a sustained object of attention. Specifically, the two participants maneuver their bodies until they are sitting directly across the table from each other. The study shows that physicians used the sequential features of the handoff routine – i.e., expected moves and the sequence of those moves – to tailor individual performances of the routine in order to address the needs of specific patients.

The temporal nature of video recordings (i.e., they unfold through time and space) makes them especially useful in studies of human behavior and interaction. Sequence matters when meaning is afoot. People make their interaction and circumstance meaningful, partly through their temporal organization of people and things. For example, in a microethnographic study of strategic planning, Gylfe et al. (2016) identified patterns of "bridging" among participants: hand gestures and body movements performed in relation to whiteboards and computer screens constituted a form of embodied cognition. That is, people's ideas and understandings were located not only in the participants' heads, but also in the social and material surround, which becomes meaningful through the participants' interaction with each other and material objects within reach. Meaning unfolds through time and space. Meaning is public, not private.

There are many situations, like those described above, where the detailed understanding of how meaning is made in micro-level interaction could offer novel and distinctive insights about management and organizing that are not easily obtainable from less fine-grained methods. Other examples include the study of performance appraisal sessions (Sorsa, Pälli, & Mikkola, 2014), and leadership dynamics in interaction (Holm & Fairhurst, 2018).

Time is on our Side… It's just not in our (quantitative) models

Qualitative researchers, and particularly those concerned with increasing understanding of organizational processes, have long argued for the importance of taking into account time and temporality in management studies (Langley, Smallman, Tsoukas, & Van de Ven, 2013). We argue here that quantitative researchers could enhance their treatment of time as well. Indeed, data collected in micro- and macro-oriented research often contains measures collected over time (i.e., a person or firm). Rarely, however, do ideas about trajectories or change over time play a central role in theory development and model testing. The idea is best conveyed with a simple example using data that Schepker made available in the multilevel library in R (Bliese, 2022). This panel data set stems from 196 firms and spans a range of five years (2007 to 2011). The data contain a return on asset (ROA) outcome and several interesting predictors such as the average age of board members and the percentage of female directors (see full details in Schepker & Bliese, 2023).

A typical fixed-effect econometric model (or equivalent – see Bliese, Schepker, Essman, & Ployhart, 2020; Certo, Withers, & Semadeni, 2017) might ask how within-firm changes in the average age of board members are related to within-firm ROA. If we remove all firm-level heterogeneity by adding firm fixed-effects and we remove all heterogeneity associated with years with year fixed-effects (T-1 dummy codes), we can obtain a good answer to how within-firm changes in the average age of board members are related to within-firm ROA. In this analysis, time is something that ends up being controlled for. We do not want an aberrant year where something like a pandemic disproportionately affected the number of older board members while also seriously impacting ROA. If that had happened across all firms, our within-firm estimates would be biased by that odd year, so we control for time.

But what if our question was somewhat different and asked, "Do firms that have younger board members over the five years of our data *grow faster over time* in term of ROA than firms with older board members?". Now our question is directly about time – it focuses on the growth trajectories over the five years for each firm and tries to identify firm-level predictors of different trajectories. We can test this "growth model" by treating time as a vector (1 DF) instead of as fixed-effect and using the firm-level average of board member age as a between-firm predictor in a cross-level interaction. The cross-level interaction can be estimated in a typical firm fixed-effect model or in a mixed-effect model with random intercepts and/or slopes for the firm.

In the example data, firms with older board members over the five years showed significantly less growth over time than those with younger board members. Of course, there are lots of reasons why we might observe this result and it might not really be due to the average age of the board (that pesky endogeneity problem), but this suggests that it could be valuable to conduct studies that engage in theorizing about trajectories over time. By taking a trajectory-based view, we might better test and understand changes in phenomena between firms in new ways.

This example is from macro panel data, but the same ideas apply to longitudinal data collected in micro settings. For instance, micro researchers might conduct an experience sampling study and ask how an individual's nightly sleep quality is related to their emotional exhaustion the following day. In micro research, some variant of a mixed-effect model (rather than person fixed-effects) would typically be used to control for person-level heterogeneity, and some inconsistencies may be observable in how and whether time is controlled (see Bliese et al., 2020). Despite these differences in analytic approaches, such micro studies tend to focus on predicting within person change. In contrast, the trajectory view of these same data would shift the focus to the pattern of responses over time by examining whether employee emotion exhaustion increases over a work week (as a growth trajectory) and whether an individual's average sleep during the week helps ameliorate their exhaustion trajectory. Again, this alternative framing requires no new data – it is just a different and complementary take on the existing data that could potentially enrich understanding.

Studies of trajectories are more common in *AMJ* when centered around some event. For instance, Stewart, Astrove, Reeves, Crawford and Solimeo (2017) examined trajectory changes involving a team-based empowerment initiative for high versus low status providers (see also Hale Jr, Ployhart, & Shepherd, 2016 for a study of turnover). Studying trajectories to understand dynamic change in response to events is valuable, but even in cases where no pre-event data exist, researchers can still develop and test theories about trajectory changes without needing to collect any additional data. We suggest looking for opportunities where outcomes of interest are expected to gradually change over time (grow or decline) and to test models that explain why some entities (firms, individuals, teams) have more positive trajectories than other entities. Doing so can give us a new and more dynamic perspective on questions we are already asking and may also provide novel ways to theoretically conceptualize research. For example, a challenging concept such as "resilience" may be studied by specifying a specific trajectory pattern for an entity over time within a growth model framework (see Flynn, Bliese, Korsgaard, & Cannon, 2021).

Multilevel theory needs to emerge

In organizational research, relationships among variables often differ in magnitude across levels. For instance, Foulk, Lanaj, Tu, Erez and Archambeau (2018) used an experimental experience sampling study to examine how "Perceived incivility is negatively related to leader daily need fulfillment" (hypothesis 8, p. 667). The three-week long study exogenously manipulated a within-individual experimental condition, and found that the more a leader perceived incivility among their followers on a given day, the lower their assessment of needs fulfillment for that day. The authors used a mixed-effect model and group-mean centered daily perceived incivility to obtain unbiased estimates of within-effects. The theoretical framing and focus on examining within-person change represent an exemplary example of deductive research.

While the study was focused on understanding within-person relationships, Foulk and colleagues' results also provide insights about between-person effects. In the study, individuals differed in average levels of perceived incivility and in average levels of daily need fulfillment and the correlation table identified a between-person effect that was much stronger than the within-person effect. Specifically, Table 1 in the paper shows that the within-person correlation between incivility and fulfillment was -.09. At the between-person level, in contrast, the relationship was -.48. The latter value is approximately five times larger than the within effect. This difference in relationship strength across levels represents an incremental or emergent effect reflecting the notion that a relationship has "emerged" at the between-level which is "incrementally" different from the within-level effect (Bryk & Raudenbush, 1992; Hofmann & Gavin, 1998).

What the Foulk et al. example illustrates is that any study based on data with a nested structure (e.g., macro panel data, longitudinal data, multilevel group data) can produce unexpected differences where within effects differ significantly from between effects. In macro panel data, for instance, we might find a weak relationship when looking at how within-firm changes in the proportion of females on the board is related to within-firm ROA. In contrast, with the same data we might find a strong between-firm relationship when examining the average proportion of females on the board and average ROA across the panel years. If we agree that our journals should encourage themes of “following human curiosity” and “broadening impact”, we should also provide opportunities for researchers to inductively explore the implications of emergent effects in extensions to the main analysis (Shaw, 2017).

Statistical tests of emergent or incremental effects are well-established based on sources such as Bryk and Raudenbush (1992). Statistical models can formally test whether a within-effect significantly differs from a between-effect and can be expanded to include relevant control variables to help draw sound inferences. That is, the statistical models go beyond just trying to draw inferences from correlations that appear different (see Bliese et al., 2020). Unfortunately, using established models to test incremental effects tends to be under-utilized in both micro and macro research. If we are open to routinely exploring such effects and reporting them transparently in extensions to the main analysis, we can begin to build a foundation for understanding why and when effects differ within and between levels in ways that enhance practice and lead to richer multilevel theories. In turn, these emergent insights could be used to motivate a sequential study that theorizes and further examines the unexpected finding (Tihanyi & DeCelles, 2021).[1]

Beyond explaining the past: Researching forward

It is interesting to note that management scholars, like many other social scientists, but unlike scholars in other professional fields such as engineering and medicine, appear to be more interested in studying and theorizing about happenings in the past than in helping to find solutions

[1] We encourage scholars to submit studies that primarily theorize from or explore their quantitative data to *AMJ*’s sister journal *Academy of Management Discoveries* (AMD) (Rockman et al., 2021).

for the future. In recent years, there have been many calls in the journal to make management research more relevant to social issues, whether expressed as “grand challenges” (George, Howard-Grenville, Joshi, & Tihanyi, 2016), or as “joining societal conversations” (Tihanyi, Howard-Grenville, & DeCelles, 2022). There have also been long-standing concerns in editorials dating back decades about making management research more relevant and impactful in general (Hambrick, 1994; Rynes, Bartunek, & Daft, 2001). Yet despite this, the conventional focus is nevertheless still on understanding and theorizing about the past.

Research published in *AMJ* has undoubtedly helped to develop knowledge and theories that might have potential implications for future action. However, researchers generally present themselves as detached from the phenomena being studied, and almost never engaged in forward-looking efforts to consider action in the future – a stance that practitioners cannot avoid as Weick (1999) points out. Weick argues, moreover, that, “Theorists who are able to narrow the gap between understanding and living, or between the present-to-hand stance of the spectator [i.e., the typical researcher] and the ready-to-hand stance of the agent [i.e., the practitioner], are more likely to generate work that is judged to be moving” (Weick, 1999: 135). This begs the question of how management scholars methodologically might engage more fully with the living forward stance of practitioners – and indeed of themselves, as we can always and only live forward?

Researching forward means becoming involved in studying phenomena in real time, building on our human curiosity about what will happen next and why. It also means working *with* others faced with difficult real time choices, rather than simply *about* them (Shotter, 2006). It suggests a need for ‘engaged scholarship’ (Van de Ven, 2007), implying an openness to methods that have often been under-represented in *Academy of Management Journal,* such as field experiments, action research, and collaborative inquiry. Yet there are a few occasional examples that can serve as inspiration. For example, Lüscher and Lewis (2008) published an action-research based article in AMJ showing how paradoxical thinking might help managers cope with tensions raised by organizational change. Building on an ethnographic study of the 'time famine' among software engineers, Perlow (1999) conducted a collaborative experiment with the engineers to investigate whether creating quiet periods might enable them to complete their work on time. Similarly, Bernstein (2012) added a field experimental component to his ethnographic study of surveillance as an inhibitor of organizational learning.

More recently, Hehenberger, Mair and Metz (2019) publishing in AMJ drew on what they call 'inside-out research' in a fascinating study of how a 'field ideology' for impact investment emerged and took hold. One of the authors was involved as an actor, rather than explicitly as a researcher within the site, and the article interestingly draws attention to *"paths not taken, and possible futures,"* (Hehenberger et al., 2019: 1688) in which the proximity of authors to the events enabled a forward-looking focus, where it was possible not only to explain the past, but to see how things might have been and still could be different. Other relevant examples include Jay's (2013) ethnographic study of an energy alliance, and a field experiment by Slade Shantz, Kistruck, Pacheco, and Webb (2020) on how structural forms influence conflict in cooperatives.

Some might question the legitimacy of methods such as collaborative inquiry, action research and inside-out research because they might seen to violate norms of professional distance that scholars are often expected to maintain with subjects to avoid issues of political alignment, 'contamination' of research findings, and reactivity (Anteby, 2013). These concerns are understandable. Yet, maintaining 'professional distance' at all costs is likely to produce thin and superficial knowledge – we cannot deeply understand the world by separating ourselves from it. Moreover, the stance of 'objective observer' has ethical implications as well if it implies treating those who participate in research merely as instrumental sources of information to serve academic purposes (Bell & Sengupta, 2022). More participative and ‘empowering’ methodologies offer the potential to rebalance such power relationships, and could be particularly desirable in situations where research participants’ voices have traditionally been suppressed.

In other words, overall, there may be inherent tensions for researchers between becoming involved and maintaining professional distance, something that has been labeled the ‘involvement paradox’ (Anteby, 2013; Langley & Klag, 2019). Like other paradoxes however, the ‘involvement paradox’ may be best addressed through acceptance and recognition, rather than by avoidance. Thus, methodologies such as action research, collaborative inquiry and inside-out approaches demand reflexivity and transparency. The journal warmly welcomes these methods, but they do expect authors to be transparent about their relationships with their research sites, and the way in which the findings might be influenced by these relationships.

Conclusion

The overall message of this editorial is that *AMJ* is open to a broad range of social science methodologies, some well-established but so far under-represented in this journal, and others more recent and innovative, often made possible by recent technological advances (see also the editorial by von Krogh et al., 2023). We have offered examples of areas where developments would be welcome, but the overall message we want to convey is one of openness to methodological variety and experimentation more generally.

It is conventionally assumed that a researcher’s choice of methods flows logically from their ontological and epistemological stance regarding the nature of reality and how it can be known. Here we take an alternative position which assumes that methods are performative, helping to constitute reality. From this perspective, what we know cannot be separated from how we come to know it. If we understand the research enterprise in this way, then widening the variety of methods we draw on to develop our scholarship can only enrich the wealth of knowledge and theory generated. Opening up our methods to images, to embodied micro-interactions, to the hidden effects of time, to multilevel distinctions and to the future are some of the ways we can achieve that enrichment. There are no doubt other areas of organizational life that traditional methods currently fail to fully capture, and that more innovative or lesser known methods of data collection and analysis could give us access to. We would like to see these represented in *AMJ*.

Ann Langley

HEC Montréal

Emma Bell

Open University (UK)

Paul Bliese

University of South Carolina

Curtis LeBaron

Brigham Young University

Marc Gruber

Ecole Polytechnique Fédérale de Lausanne (EPFL)

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