1 Introduction: Emotions in Organization Theory

1.1 Emotions in Organization Theory

Emotions are integral to social life, infusing, inspiring and shaping our actions and experiences (Goodwin & Pfaff, 2001; Voronov & Vince, 2012). They are the "glue binding people together," and they generate "commitments to large scale social and cultural structures" (Turner & Stets, 2005: 1). Emotions are deeply connected to social processes at societal, interorganizational, organizational and interpersonal levels. However, in much of organization theory, emotions, if considered at all, have been treated implicitly, or considered secondary to cognitive dynamics. This is problematic, because, as Jasper has suggested: "all the cultural models and concepts in use (e.g. frames, identities, narratives) are mis-specified if they do not include explicit emotional causal mechanisms" (Jasper, 2011: 286). In this Element, we set out to examine the state of research on emotions in organization theory. We do this with the dual objective of illuminating the extant work in this domain and highlighting opportunities for future research.

We argue that because emotions are central to organizational processes and social behavior, they should be seen as central to organization theory. Emotions have structural impacts: they are an important component of the connection between people and their networks (Granovetter, 1973; Mische, 2011; Uzzi, 1997) and social groups (Voronov & Yorks, 2015; Wright, Zammuto & Liesch, 2017). They structure and are structured by the norms, practices, beliefs, values and rules associated with their social groups (Keltner & Haidt, 1999), serving as a means by which people consciously or unconsciously self-regulate their behavior to meet societal norms (Creed et al., 2014).

Emotions also have strategic uses: they contribute to dynamic processes of organizational or institutional change, and they are heavily implicated in efforts to achieve stability, or to protect or promote values (Toubiana & Zietsma, 2017; Vaccaro & Palazzo, 2015; Wright et al., 2017). Emotions can be used strategically to incite or to suppress mobilization of activism (Poletta & Jasper, 2001; Moisander, Hirsto & Fahy, 2016) or to strengthen people's connection to groups (Collins, 2004) or to products and markets (Massa et al., 2017; Weber, Heinze & DeSoucey, 2008). Employers can require employees to express certain emotions at work as well (Hochschild, 1979; Rafaeli & Sutton, 1987), and individuals can use emotional displays to show their competence in a social domain (; Goffman, 1959; Voronov & Weber, 2016).

One can also consider the effects of emotions on people: emotions fuel efforts to resist or engage in organizational change (Huy, Corley & Kraatz, 2014; Vince, 2006) and institutional work (Voronov & Vince, 2012). They affect organizational learning (Gabriel & Griffiths, 2002) and other organizational outcomes such as

risk-taking, teamwork and employee satisfaction (Barsade & O'Neill, 2014; O'Neill & Rothbard, 2017). They enable people with diverse perspectives to work together (Fan & Zietsma, 2017), and they drive groups with diverse perspectives apart (Toubiana & Zietsma, 2017).

Thus, it is apparent that emotions are fully intertwined with social life (Grodal, Nelson & Siino, 2015), having causal effects that can be frequently ignored when researchers consider only cognitive drivers of behavior. Organizational theories that ignore emotions are missing a tremendously rich source of influence on social dynamics. Enriching our theories with a better understanding of emotions and their influences represents an important challenge and opportunity for organization theory researchers.

Yet emotions have not been entirely ignored in organization theory. Some research streams have taken up emotions quite enthusiastically, while others have barely acknowledged them. Though much has been written about emotions in organizations in certain domains, there has not been a systematic review of emotions in organization theory more generally. There is a need for a comprehensive review that goes above and beyond analyzing emotions for one particular area of study and brings together our use and understanding of emotions across the literatures in organization theory. Seeking to fill this gap, this Element highlights the implicit and explicit roles of emotions in different organization theory research streams to provide one of the first broad examinations of emotions in this way.

1.1.1 A Sociological Approach to Emotions

This Element focuses on a sociological approach to emotions, which we believe is appropriate for studies in organization theory (for a history of sociological approaches to emotions, see Bericat, 2016; Stets & Turner, 2014; Turner & Stets, 2005;). A sociological approach to emotions is sensitive to the idea that emotions are experienced bodily by individuals (Bericat, 2016) in interaction with the social world (Collins, 2004, 2001), but understands them to be socially structured by conventions and culture (Gould, 2009), and experienced relationally (Emirbayer, 1997; Mische, 2011). Emotions are often collectively produced in interactions (Collins, 2004), socially contagious (Barsade, 2002) and easily amplified (Hallet, 2003). We experience and express emotions and interpret other's emotions based on the norms and cultural practices associated with our social contexts and interactions, with the understanding that emotions such as anger or love will be experienced and expressed differently in different contexts and between different people (Illouz, Gilon & Shachak, 2014). We experience fear, anger, hope, happiness or even sexual desire in alignment with our habitus (Bourdieu, 2000; Friedland, 2018), our social groups, our gender (see Figure 1), race, class etc. Even whether or not people engaging in sexual acts experience

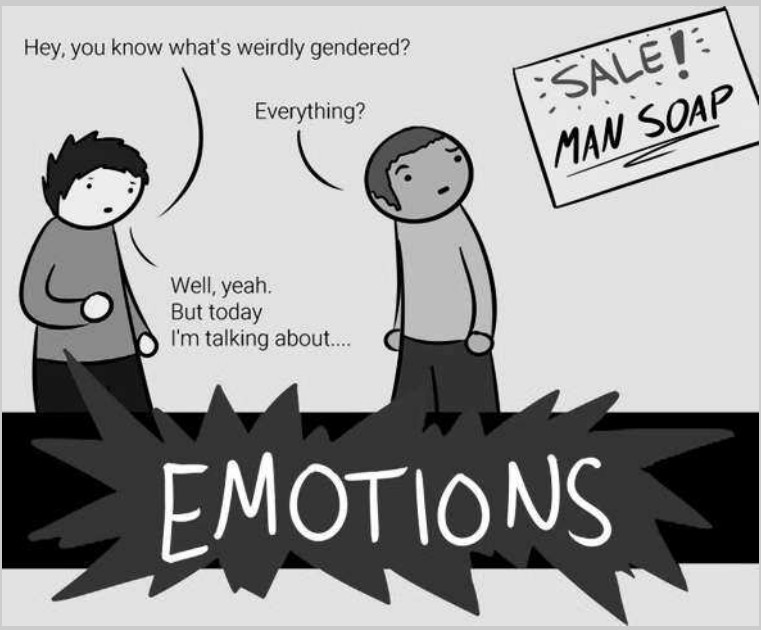

Figure 1 Hugs, Robot. "Emotions." Cartoon. *Robot Hugs.* July 21, 2015. www.robot-hugs.com/emotions/

Gender and emotions: Men and women are expected to display emotions differently based on culturally defined gender roles. These cultural norms can have negative effects on both men and women, as this article and comic strips suggest: www.upworthy.com/a-short-comic-strip-explains-how-our-double-standard-about-feelings-hurts-men-too?c=ufb5.

Women in particular are socialized against displaying anger, or displaying it in only very restrained ways: www.nytimes.com/2018/01/17/magazine/i-used-to-insist-i-didnt-get-angry-not-anymore.html?emc=edit_th_180121&nl=todaysheadlines&nlid=80012837, as actress Uma Thurman displays in this video: https://youtu.be/Rs4gK8DuuWY.

Beyond the regulation of one's own emotions, another article discusses President Donald Trump's "work wives." Author Jill Filipovic argues that: "Assumptions that women will monitor and manage men's emotions span industries and political persuasions. It's not that subtly sexist men refuse wholesale to hire women; it's that they often hire a small number of us, with the unspoken but swiftly understood expectation that we will be the uncompensated 'chief feelings officer.' Then they often lose respect for us because we play this very role." www.nytimes.com/2018/01/20/opinion/donald-trump-and-his-work-wives.html?emc=edit_th_180121&nl=todaysheadlines&nlid=80012837

orgasm is related to their religious and ideological beliefs and affiliation (Friedland et al., 2014). Thus, we focus on emotions as intersubjective, collective and relational – conditioned by one's place in the social world and one's relationship with others, especially the groups to which one belongs.

A sociological approach to emotions stands in contrast to approaches to emotion that dominate in psychology and organizational behavior. While definitional disputes continue (Gooty, Gavin & Ashkanasy, 2009), most researchers in more psychological traditions largely agree that emotions are intrapersonal "reaction[s] to a stimulus" with "a range of possible consequences" (Frijda, 1988; Elfenbein, 2007: 317). Such work emphasizes "feeling states and physiological changes" (Elfenbein, 2007: 315) elicited by stimuli, devoid of context and culture (Fineman, 2004; Haidt, 2012), though recognition within psychology and organizational behavior is growing that the emotional registration process is deeply contextualized (Ashforth & Kreiner, 2014; Brescoll & Uhlmann, 2008; Gooty et al., 2009). However, despite the importance of this work, Voronov (2014: 172) warns, emotions as conceptualized in a traditional psychological approach can present ontological problems for a sociology of emotions, since "both emotions and people – or individuals – are reified and extracted from their social context," and laboratory experiments are thought to be able to "reveal basic properties of emotions that would, theoretically, still hold regardless of the specific real world properties of these stimuli." Such psychological approaches are incompatible with sociological ontologies of emotions, which see them as relationally produced and culturally constituted. Accordingly, in this Element, we adopt a more sociological approach to emotions, while acknowledging that differing perspectives on emotions are prevalent in organizational behavior and in some of the work we cite.

1.1.2 The Emergence of Emotions in Organization Theory

As Gabriel and Griffiths write (2002: 2014): "Far from being emotional deserts, organizations are full of emotion and passion." From the beginning, emotions have been an implicit part of organization theory. Weber's value rationality incorporates "the actor's specific affects and feeling states" (Weber, 1978: 25), and his notion of charismatic authority relies on genuine emotional support. Heralding the beginning of the human relations movement, Mary Parker Follett focuses on the relationship between workers and managers and the "law of the situation," foreshadowing later work on organizational culture (Follett, 1927). Barnard (1938) built on these ideas to discuss the creation of a persuasive moral code for workers, inspiring "morale" to secure workers' "willing" cooperation. Gouldner (1954) shows how the informal organization, involving kinship-like

connections and good sentiments between management and workers, was an important part of the functioning of a mine, and significant strife resulted when a replacement manager relied only on the formal organization. Selznick (1957: 17) argues that institutionalization occurs when structures, organizations and activities become "infused" with affect and "value beyond the technical requirements at hand." Despite these emotional underpinnings, few organization theories explicitly focused on emotions as central to their theorizing. Particularly as cognitive approaches in organization theory began to challenge hyperrational approaches (e.g., DiMaggio & Powell, 1983; March & Simon, 1958; Meyer & Rowan, 1977), emotions remained out of focus.

By the late 1970s, Hochschild's research on the sociology of emotions (1979, 1983), introducing the concepts of feeling rules, feeling display rules and emotional labor, sparked a flurry of organizational behavior research into the role that emotions play in organizational settings (see, e.g., Rafaeli and Sutton, 1987, 1989; Sutton & Rafaeli, 1988). Building on this foundation, a healthy literature has burgeoned around emotions and organizations at the individual level (see Elfenbein, 2007; Grandey, 2008; Gooty et al., 2009; Ashkanasy & Dorris, 2017, for literature reviews). Concepts such as emotional intelligence (e.g., Mayer & Salovey, 1997; Joseph & Newman, 2010; Dong, Seo & Bartol, 2014; see Fineman, 2004, and Matthews, Zeidner & Roberts, 2002, for critiques), emotional contagion (e.g., Kelly & Barsade, 2001; Barsade, 2002; Hareli & Rafaeli, 2008), group emotions (e.g., Menges & Kilduff, 2015) and the role of emotion in leadership (e.g., Bono et al., 2007; Toegel, Kilduff & Anand, 2013) have emerged. However, as we are focused on organization theory and a more sociological view of emotions, we consider these various strands of organizational behavior literature out of scope and do not delve into them in this Element.

Instead, we are concerned with organizations, organizing and more macro levels of analysis. While the lines are not always easily drawn, we attempt to remain firmly rooted in theories traditionally considered as comprising the canon of organization theory.

1.1.3 Organization of This Element

Organization theory includes a range of literatures at various levels of analysis, and demarcations between organization theory and related disciplines such as organizational behavior, sociology and strategy are not always clear. Our approach to identifying key organization theory topics or theoretical perspectives involves examining the topics submission list for the 2016 and 2017

Academy of Management Conference in the Organization and Management Theory (OMT) Division, and surveying recent organization theory doctoral course syllabi. We then review each of these theoretical perspectives to identify literature related to emotions within each topic. In this Element, we classify each theoretical perspective according to the extent of its consideration of emotions. Literatures where there is *substantial* work on emotions include institutional theory, social movement theory, identity theory, organizational culture, power and control and organizational learning, routines and change. Literatures featuring more *limited* work on emotions include sensemaking, practice theory, networks and entrepreneurship. Literatures in which emotions are nearly *absent* from theorizing include the topics of organizational economics (agency theory and transaction cost economics), economic sociology and embeddedness, organizational ecology, categories and resource dependence theory.

Within each reviewed theoretical area, we adopt a common approach. In a rich and comprehensive review of the emotional work in institutional theory, Lok et al. (2017) develop a categorization scheme regarding the role of emotions in the studies they reviewed. They identify three different perspectives in studying emotions: *structuralist, people-centered* and *strategic*, and further segment them into change and reproduction. While the change and reproduction aspects are particularly germane to institutional theory and not as broadly applicable, we feel the *structuralist, people-centered* and *strategic* perspectives they articulate have broader application – they transcend institutional theory to apply to all of organization theory. We thus borrow and adapt this categorization scheme to review the literature in each theoretical stream and generate future research directions.

Structuralist perspectives are those that consider how emotions are constituted in (and constitutive of) social structures – that is, how they are "integral to their purposive, animating force" (Lok et al., 2017: 33). For example, emotions such as faith and hope are a significant component of religious institutions (Gutierrez et al., 2010), while caring is embedded in the professional norms of medical professionals (Wright et al., 2017), and organizations can have particular emotional cultures, with significant organizational effects (Barsade & O'Neill, 2014; O'Neill & Rothbard, 2015). ***People-centered perspectives*** focus on people's emotional responses and reactions to organizations and organizing dynamics (Petriglieri, Ashford & Wrzesniewski, in press). For example, such approaches focus on the anxiety or resistance employees experience when faced with an organizational change program (Smollan & Sayers, 2009), the positive emotions that come from identification with an organization (Dukerich, Golden &

Shortell, 2002), or the collective outrage groups experience when their expectations are violated (Toubiana & Zietsma, 2017). Finally, ***strategic perspectives*** focus on the use of emotions as "resources or tools" (Lok et al., 2017: 38) to affect others, for example, in using affective work to persuade them (Tracey, 2016), or in using smiling and other aspects of emotional labor to deliver customer service (Hochschild, 1979).

Within each review of a theory, we briefly outline the theory, review recent literature that deals with emotions within that theoretical perspective, then assess it based on its focus on structuralist, people-centered and strategic perspectives. Importantly, we find that many of the research streams take two of these perspectives, such as strategic use of emotions to effect people-centered responses, or people-centered responses arising from emotions constituted in structures, but not the third. We then reflect on what was absent in the literature, both based on our categorization scheme and, more broadly, to identify directions for future research.

1.1.4 Looking across the Theoretical Perspectives

In the final Section of this Element, we look across the theoretical perspectives to consider the role of emotions in organization theory as a whole. We connect emotions in theorizing with the ontological assumptions of the various theories to discuss theoretically appropriate directions for future research on emotions within and across literatures. We also discuss methodological challenges to studying emotions using a sociological view and consider some of the more innovative approaches we noted in our literature review to capture emotions empirically.

Our final arguments reiterate the importance of emotion for social theorizing and the importance of such theorizing to help us understand the world around us. Emotions have substantial influence in society: politically, organizationally, economically – indeed in every facet of life. The late emergence of emotion work in much organizational theorizing has impoverished our view of the world, we argue, and thus increased attention to emotions is critical to building a relevant and rigorous discipline.

2 Theories Featuring Substantial Work on Emotions: Institutional Theory, Social Movement Theory, Identity, Organizational Learning and Change, and Organizational Culture, Power and Control

2.1 Institutional Theory

Until very recently, emotions were absent in most neo-institutionalist studies. While multiple editions of Scott's (2014) classic book paved the way for an explicit theorizing about the role of emotions in institutions by suggesting that

emotions may operate as a fourth pillar (Scott, 2001) or across the standard institutional regulative, normative and cognitive "pillars" (Scott, 2014), it was the increased interest in the micro-foundations of institutions that truly saw institutional theory shed its long-standing cognitive focus (for a review, see Lok et al., 2017, and Zietsma & Toubiana, 2018). Specifically, the institutional work and inhabited institutions perspectives triggered the recent flurry of research at the intersection of emotions and institutions. In the following sections, we discuss the use of emotions in institutional theory from strategic, people-centered and structuralist perspectives.

2.1.1 Strategic Use of Emotions by Actors to Maintain or Alter Institutions

Given the increased interest among institutional scholars in how people (or individuals) impact institutions, scholars have most frequently approached emotions from a strategic perspective. This work has shown how emotions can spark people to either maintain or try to transform institutional arrangements by constructing personally meaningful narratives (Creed, DeJordy & Lok, 2010; Gutierrez et al., 2010), and by using highly emotive, dramatic language to challenge established practices in field-configuring events (Schüssler, Rüling & Wittneben, 2014; Zietsma & Lawrence, 2010).

Further, recognizing the importance of emotive, value-based identity claims in legitimating accounts, Suddaby and Greenwood (2005: 56) explicitly argue that "[m]ost value-based rhetoric openly appeals, directly or indirectly, to emotion." However, their study does not explicitly factor in the strategic use of emotions by actors beyond the employment of value-based rhetoric. Other discursive studies have similarly highlighted the role of emotions (Brown, Ainsworth & Grant, 2012; Harmon, Green & Goodnight, 2015). In their study of an intermediary organization in rural Bangladesh, BRAC, Mair, Martí and Ventresca (2012: 839) describe how workers engaged in strategic action that involved making an emotional connection to produce institutional change:

> When POs visit households, they are usually offered . . . chairs or stools to sit. However, as a matter of strategy, POs instead of sitting on [a] stool/chair, sit on the ground. This makes the people embarrassed, but happy! They are embarrassed because they are not used to seeing an educated outsider sitting on the ground with them. But they are happy because the PO sits with them in an informal way as a nearer one which creates a fellow feeling among them and the gap becomes narrower.

While these studies did not incorporate emotions into their core theorizing, more recent discursive studies have done so. Conceptualizing emotions as discursive constructs, Moisander et al. (2016: 19) investigated "rhetorical strategies of emotion work – eclipsing, diverting and evoking emotions – through which institutional actors may seek to wield power in their attempts to manage resistance and to create support for their institutional projects." These discourses are only influential to the extent to which they resonate with audiences emotionally (Giorgi, 2017; Grodal & Granqvist, 2014; Haack, Pfarrer & Scherer, 2014). Similarly, Tracey's (2016) study of institutional "conversion" illustrates how the strategic use of emotions in rituals connects and commits people to particular institutional projects. Emotions can be not only expressed strategically in institutional work, but also deliberately suppressed. Jarvis, Goodrick and Hudson (forthcoming) show how animal rights activists elicited emotions among audiences by the use of visuals and videos, but suppressed their own emotions in order to shield themselves from being thought of as "irrational" and overly emotional. Emotions also have implications for embeddedness. Ruebottom and Auster (2018) demonstrate the importance of emotionally resonant rituals for disembedding actors from their institutional milieu in order to enable them to become change makers. Fan and Zietsma (2017) show the role of emotions in enabling dual embeddedness: the diverse actors they studied generated social and moral emotions and emotional energy while working together, enabling them to embed themselves in a new shared governance logic while remaining attached to their home logic.

Of course, one of the key roles of emotions in institutional processes is to animate and motivate the various forms of institutional work (Friedland, 2013; Voronov & Vince, 2012). Wright et al. (2017), for example, find that emergency department physicians, fueled by moral emotions, maintained their professional values by undertaking institutional work to advocate for patients. Other studies point to the role of emotions in institutional change. Public expression of emotion helped actors wrestle with a plethora of moral and legal issues in Lawrence's (in press) study of North America's first safe drug injection site. The pride felt by the first women students at the US Naval Academy enabled them to challenge and disrupt the institutionalized role prescriptions that applied to them, despite other's shaming and policing (DeJordy & Barrett, 2014). Martin de Holan, Willi and Fernández (in press) identify emotional resources as key to engaging in the work required to escape poverty. Massa et al. (2017) find that emotional investment, fueled by reverence, elation and awe, motivated institutional evangelism, which prompted practice dissemination. Farney, Kibler and Down (forthcoming)

describe how collective emotions enabled institutional creation work in iterative cycles, serving both a justifying and a motivating function, in post-disaster recovery work in Haiti. Thus, emotions are strategically employed and deployed in institutional projects as resources to help actors shape institutions.

2.1.2 People-Centered Perspective: When Institutional Processes Trigger Emotional Responses

Institutional research has acknowledged implicitly for some time that emotions can be triggered in reaction to perceived threats to the values embedded in institutions (i.e., Lok & de Rond, 2013; Wright et al., 2017; Zilber, 2002). For instance, organizational actions that adhere to one logic may provoke negative emotional reactions from audiences that adhere to another logic (Lok, 2010; Marquis & Lounsbury, 2007). However, some researchers have begun to consider emotions from a people-centered perspective more explicitly, including Weber et al. (2008) in their study of the emergence of a market for grass-fed meat. The study focuses on how motivating frames, based on values, connected with emotional commitment. In the study, they state that: "Pioneering grass-fed producers chose and persisted with grass-based agriculture because they obtained emotional energy from connecting their work to a sense of self and moral values represented in the movement's codes" (Weber et al., 2008: 543). Hallett's (2010) study of institutional change in an elementary school, whereby the ideal of accountability was integrated into material classroom practices, offers a rich account of people's reactions to institutional disruption. In another example of the people-centered role of emotions, Voronov and Yorks (2015) argue that a key premise in institutional research, that institutional change is conditioned upon the presence of institutional contradictions (Seo & Creed, 2002), assumes that the contradictions are recognized by people. Yet such recognition is a highly emotive process and far from automatic (Haack & Sieweke, 2018). Exploring these issues empirically, Giorgi and Palmisano's (2017) study of mystic Catholics brings attention to the intensity of emotions in order to understand how persons' behaviors correspond to institutions. In their study, participants experienced intense emotions of joy, love and awe in their everyday institutional life, and these emotions prompted participants to set aside any tacitly rational calculations and cost-benefit analyses. In their study of a high-performing military medical team in Afghanistan, de Rond and Lok (2016) highlight how the breakdown of institutional arrangements can cause psychological trauma (see Video 1). Alternatively, people who experience events that threaten their continued emotional investment in an institutional order may shift the anchor of that emotional investment (Wijaya & Heugens,