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The Backstory of “Digital Agility Theory”

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1 Introduction

In this backstory¹ editorial, we reflect on our journey in getting our theory of digital agility (Salmela et al., 2022) published in the *Journal of the Association for Information Systems* (JAIS) from its starting point as a literature review. We extract some of the lessons learned from the challenges we faced during the process with the hope that they may be useful for others facing similar challenges. Table 1 below provides a summary.

2 Challenges and Lessons Learned

2.1 Challenge 1: The Problematizing Challenge

A persistent challenge throughout our paper’s development was the question: *Is there a need for what we are doing?* This question occurred time and time again. It informed the different turns we took before making the breakthrough in what became our digital agility theory publication.

The paper’s journey began as a systematic literature review of IS agility (Tapanainen et al. 2008). Several years later, we embarked on updating the review, which was published in the proceedings of the European Conference on Information Systems (ECIS) (Salmela et

al., 2015). These two early papers were founded on the idea that the agility concept was becoming difficult to grasp, as it had evolved into something that meant different things to different scholars. Nonetheless, commonalities could be seen across these different perspectives, but these had not yet been captured or organized in the literature. This observation pointed to a need for a refreshed literature review. This need was challenged, however, when we submitted the revised review article to a journal in 2018.

The emergence of more recent literature reviews during the development of our paper led to the conclusion that we were “too late to market.” The publication of the Tallon et al. (2019) review was pivotal in our decision to drop the idea of a systematic review and reorient our paper’s purpose. We expressed this in our response to the review team:

While engaging with the suggestion to update the literature ... we discovered that other comprehensive literature reviews were published while the paper was in ... the first round ... With this discovery, we realized that there would simply have been too much similarity (e.g., to the Tallon et al. 2019 paper especially), if we embarked on ... creating yet another updated systematic literature search.

¹ This editorial is the second in a series of backstory editorials published in JAIS. For the first backstory, see Leidner et al. (2023).

Table 1. Summary of Challenges and Lessons Learned

Challenge	Response	Lessons Learned
<i>Submission and acceptance to ECIME and then ECIS</i>		
1. The problematizing challenge	We embarked on a literature review because we identified the need for a synthesis of IS agility knowledge. While sufficient for conference papers, advancing to journals required higher theoretical contributions that led us to identify the need for a theory paper on agility for the digital era.	<i>Identifying a need or problem in a body of literature that would not get outdated can serve as a guiding compass through several iterations. In our case, the need for a unifying theory of agility remained relevant despite several other pivots.</i>
<i>Submissions to MISQ and then to JAIS</i>		
2. The not novel/interesting enough challenge	By building on the JAIS review teams’ recommendations, we experimented with different ideas. Eventually, we settled on a shift from a literature review to theorizing about agility in the digital era, which became key to arriving at novel and interesting insights.	<i>A shift from simply reviewing the past to experimenting with contemporary and emerging ideas/literature can be useful for injecting novelty and interestingness into a paper.</i>
<i>First round of JAIS revision + submission of a second version</i>		
3. The “seventh gear” challenge	While the shift to a future-oriented (digital era) theory was seen as an improvement, reviewers questioned our abstraction and articulation of our ideas. Thus, we embarked on different forms of abstraction and had to do so repeatedly.	<i>The stamina and resilience to abstract repeatedly, even after feeling like one has given all, requires assessing the “seventh gear”—to keep going when the review team keeps pushing for more.</i>
4. The obsolescence challenge	Theorizing from a rapidly growing literature required us to decide between striving to keep up with the literature and drawing a stop line on which the theory would be built. Given the emergence of new agility literature reviews, we opted for the latter.	<i>Pivoting to a pure theory building paper is one way to stop having to keep up with the literature in a rapidly developing topic area.</i>
<i>Second round of revision + submission of a third version</i>		
5. The classification challenge	We experimented with different classifications (involving regrouping, relabelling, etc.) of the literature. It emerged that simpler classifications resonated better with the review team.	<i>Simplicity is an effective (though painstaking) means of classifying and communicating a synthesis of the relevant literature.</i>
<i>Third round of revision + submission of a fourth version</i>		
6. The theory-building challenge	At least three theory-building apparatuses played significant roles in our theory development process – leveraging: <ul style="list-style-type: none"> 1. visualizations and propositions as organizing lenses 2. “adjacent” observations and literature as sensitizing devices 3. “external” feedback as catalysts. 	
	a) Organizing components of the theory	<i>Leveraging visualization and propositions as organizing lenses can serve as a crucial theory-building apparatus for illuminating inconsistencies and clarifying relationships between constructs.</i>
	b) Developing the theory’s sensitivity and relevance	<i>Leveraging “adjacent” observations and “adjacent” literature streams can be an important theory building apparatus for increasing the sensitivity and relevance of the emerging theory.</i>
	c) Assessing whether the emerging theory resonates with others	<i>Leveraging external feedback (especially from the editorial and review panel) provides opportunities that can be instrumental in shaping the eventual theory.</i>

The challenge we faced was to change our thinking regarding the paper's rationale. The fundamental need for a unified theory of agility was not outdated, but the use of literature reviews as a vehicle for that need was. Arriving at this "core" need guided the paper through several iterations and revisions until it was eventually published in JAIS (Salmela et al., 2022). While many concerns were raised throughout the review cycles, the editors agreed there was a cogent need for the paper, albeit one that would not be expressed via a revised literature review. Based on this experience, a key lesson learned is that identifying a cogent need for the theory stemmed from—but was not to take the form of—our review of the literature. Nevertheless, the review remained a valuable guiding compass throughout the paper's (many) iterations.

2.2 Challenge 2: The Not Novel / Interesting Enough Challenge

Although we had identified the need for a unifying agility theory, we faced our next challenge: *How do we develop interesting and novel theoretical contributions based on a literature review?* This challenge remained with us as we developed the conference paper into a journal submission. Our approach was to propose a grand, single theory that could encapsulate organizational and IS development agility. We first submitted the paper to *MIS Quarterly* (MISQ) ... and received a swift, but kind rejection! Our theory was apparently boring: our claim of theoretical contributions was not sufficiently interesting.

This focused our minds, and we turned to JAIS. We clearly needed to reflect on how to develop a compelling theoretical case for publication. While not claiming to have a resoundingly clear answer, the turning point that altered the course of our paper's development came from the astute comments provided by the JAIS reviewers. They encouraged us to not only focus on reviewing the past (as literature reviews are wont to do) but to focus our theorizing on contemporary events and the future. However, getting this right required several iterations, and we undoubtedly benefited from the supportive reviews that helped shape the emerging theory. This shift in focus would become the catalyst for pivoting the eventual theory to focus on the digital era and to translate our efforts from a literature review to a theory building exercise.

2.3 Challenge 3: The "Seventh Gear" Challenge

We quickly learned that while writing a literature review that synthesizes literature for a conference is one thing, building a theory for publication in a leading journal is quite another, requiring a great deal of abstraction—

repeatedly. Making a theoretical contribution from a literature review requires abstracting *beyond* the literature (Rivard, 2014). Abstraction involves observations from literatures that lie outside the confines of a systematic literature review. This notion of abstraction is reflected in what Weick (1989) terms disciplined imagination. However, we learned that doing this just once was hardly enough to get the eventual digital agility theory through the rounds of review: repeated abstractions were necessary.

To borrow the gear metaphor from Leidner and Tona (2021), we conceive of the process of revising the digital agility theory paper as a search for an extra invisible gear (what we term the "seventh gear") that is not immediately apparent. Our experience suggests that each round requires going up a gear: When we thought we had exhausted all our gears and had put together the best theorizing we could, the review team came back asking for more. Each round required us to search for and activate the invisible seventh gear. Each round resulted in new abstractions that hitherto had not been apparent, only becoming visible as we reengaged with the content. We were fortunate to have a senior editor who gave us coordinates to find our seventh gear, round after round.

In abstracting our thoughts, readings, observations, and ideas into the theory, we employed different techniques and approaches in each round. For the ECIS submission, we focused on synthesizing the extant literature. For the rejected MISQ version, we abstracted mostly from the agility literature review to propose a grand theory of IS agility. During the course of the JAIS reviews, our abstraction shifted from being solely derived from the agility literature to encompassing our emerging observations (e.g., related empirical insights) and non-agility literature. The eventual theory is the last of many iterations, ranging from abstractions based on eras, agility levers, and the digital context, among others. Many of these abstractions did not make it into the final paper but were important building blocks that enabled us to arrive at the final theory. Simply put, we would not have been able to attain what we did had we not gone through these cycles of abstraction.

2.4 Challenge 4: The Obsolescence Challenge

Our aim after the ECIS conference in 2015 was to progress beyond synthesizing the literature toward the development of a new theory (cf. Challenge 2). In line with systematic literature review recommendations (e.g., Webster & Watson, 2002), we had methodologically gathered papers concerning IS agility with typical techniques such as, *inter alia*, inclusion and exclusion criteria and keyword permutations. We spent considerable time figuring out how to go beyond the ECIS paper to develop what we believed to be a meaningful theoretical contribution, as expected by a

leading journal (cf. Rivard, 2014). However, it was not until 2018 (three years later) that we submitted the paper to MISQ. Therein lay our next dilemma.

While we were working on leveraging the literature review to advance a theoretical contribution, more and more papers were published that had not been captured by our review. We were confronted with the issue of whether to reembark on the exercise of updating the (never-ending stream of) literature or proceed with the theoretical insights we had already formed. We realized we could easily become stuck in a loop of ever-moving targets. How were we ever to move on? Our fears were confirmed when the MISQ SE notified us following an initial screening:

First, it is not clear to me why you haven't updated the literature beyond the 2014 review. It is now 2018, and if the paper is ultimately accepted, it will be even later when the paper is published ... I am happy to overlook these issues now but there is a chance that we might have to revisit them later.

We held our breath. Weeks later, the dreaded rejection came, albeit with an option to resubmit. The SE noted:

Rather than consume your time with a large and uncertain revision, I think it would be safer for you ... to send the paper to another journal. ... A different option would be to undertake a heavy revision and submit a new version to MISQ in the future (i.e., as a new paper). This would amount to a reject-resubmit decision.

While we considered that we had produced interesting theoretical insights, the ultimate Achilles heel was the “outdatedness” of our review paper.

Convinced that we had a theoretical insight that was worth publishing, we submitted the paper to JAIS after attending to most of the other helpful MISQ feedback—except, that is, for the point about systematically updating our review. We did, however, engage with the emerging literature without claiming that these articles were part of our systematic review. We now worked quickly in order to have the paper submitted in less than six months. Fortunately, we had a review panel that recognized the paper’s potential—despite comments reiterating the outdatedness issue. As aptly summarized by the JAIS SE:

... you need to bring the literature up to date. There is no reason to ignore 2014 to 2018. I realize that with a literature review, one must stop somewhere with the reading of articles and begin to write. But it looks a bit as though you began writing in 2015 and are only just now submitting in 2019. That is a bit long of a lapse. Please include 2014-2018 in a revision.

This notwithstanding, the SE decided to give us another chance. A chance for which we were—and are—deeply grateful, especially given one reviewer’s sharp rejection recommendation!

A key observation arising is that literature reviews are faced with a dilemma: while bracketed by time, they are nonetheless expected to capture recent advances. Attempting to update the literature to capture such advances would keep the theorizing in flux. The SE articulated this point succinctly: “one must stop somewhere with the reading of articles and begin to write.” This was our tipping point, leading to repositioning our literature review to a theory building exercise. A key lesson learned from navigating this challenge is that, while arduous, pivoting to a theory building exercise is one way to draw “a line in the sand.”

2.5 Challenge 5: The Classification Challenge

During the course of developing the paper over the 15 years since preparing the first conference paper, a consistent feature was our repeated efforts to synthesize the corpus of literature into categories that we considered meaningful anchors for our theorizing. Table 2 overviews the synthesis of the agility literature over several years of classifying and reclassifying the literature.

During the process of synthesizing, we had occasions where we “zoomed in” and others where we “zoomed out” with regard to the level of abstraction. At one point, we broke the literature down into its microconstituents, but eventually we ended with a simple macroclassification. It appeared that the synthesis we had come up with in earlier iterations had led to avoidable questions and critique from the reviewers. This led us to a much-simplified classification. The iterations through different classification schemes reveal the malleability of the synthesizing process.

The simplified synthesis enabled us to make sense of the contours and assumptions that characterize different viewpoints expressed in the literature. Reviewer 1 made the point:

I think the repositioning resolved many of the issues ... identified in the previous round, such as the omission of more recent publications, the ad-hoc conceptualization of different research streams, and the integration of research from reference disciplines ... I really like how the revised manuscript now structures the development of agility research along a time-line and illustrates the branches of this research stream.

Table 2. An Example of Different Classifications of Agility Literature during the Making of Digital Agility Theory

First classification (2007)	Second classification (2014)	...	Final classification (2022)
Agility in IT management and leadership	Strategic IS management	~	Organizational agility
Agility in IT organization structures	Design of the IS organization		
Agility in IT infrastructure	IT applications for business agility		
	Design of the IT infrastructure		
Agility in the IT workforce	Skills and competences of IS professionals		IS development agility
Agility in IS development processes	Methods used in IS development		
	Software development and programming		

Through the synthesizing process, we realized that the existing agility literature seemed to cast IS agility in two broad branches, both of which miss the realities of the digital era. This became the pillar of our subsequent theory, as it enabled us to theorize at a much higher level of abstraction. Our experience suggests that a theory building exercise can leverage an explicit or implicit (systematic or narrative) literature review in making sense of the subject matter. An implication is that there is value in simplifying the resultant classification since the synthesis grounds the subsequent theorizing. The simplified version allowed us to communicate a complex and large body of literature in a more easily accessible way for the reader. A key lesson arising is that simplicity is an effective—albeit tedious—means of classifying and communicating a synthesis of the literature.

2.6 Challenge 6: The Theory-Building Challenge

There are three major lessons learned in navigating this challenge. We outline these as:

1. Leveraging visualization and propositions as organizing lenses
2. Leveraging adjacent literature and observations as sensitizing devices
3. Leveraging “external” feedback as catalysts.

2.6.1 Leveraging Visualization and Propositions as Organizing Lenses

Since we pivoted the paper towards theory development, it dawned on us that the task ahead was not about reporting prior conversations in the agility

literature and making theoretical contributions on this basis. Rather, the task was that of *building a theory*. We found that *visualizing* our ideas was a valuable mechanism for outlining our thoughts during the theory’s development. Visualization in the form of figures, charts, sketches, diagrams, and tables proved instrumental in this process. Additionally, crafting *propositions* proved useful in structuring our thinking, discussions, and eventual theorizing. We used these to arrange our thoughts as we sought relationships and associations between key concepts and emergent literature classifications. We believe visualizations and propositions moved to center stage in the revision process because of the shift in orientation. Theory papers are not necessarily founded on empirical data or a comprehensive review primarily. Hence, the plausibility and acceptability of the visualizations and propositions become critical.

The JAIS SE had a keen eye on our figures and visualizations, making pointed comments and suggestions in each iteration—for example, by sketching out inconsistencies and making us realize that alternative interpretations could arise. This attention to visualization alerted us to the importance of ensuring that our figures captured our ideas as impeccably and simply as possible. As highlighted by prior guidance on theory building (Cornelissen, 2018; Leidner & Tona, 2021; Whetten, 1989), our experience amply demonstrated the point that the value of figures cannot be understated in theory building. Visualization helped to highlight inconsistencies in our thinking and helped us structure our arguments. Visualizations challenged our thinking and made us rethink ideas that had initially seemed reasonably established in our discussion.

For the JAIS version, we documented about 50 variants of visualizations in a single PowerPoint file (not counting the conference and MISQ visualizations and tables, or the numerous sketches on whiteboards and paper, or in email exchanges), most of which did not feature in the final paper but were nonetheless valuable in shaping our thinking. We meticulously laid down our theorizing in the form of visual narratives that showed the state of the literature and progressed gradually to highlight missing aspects and problematic assumptions in the prior literature.

Similarly, our theory building benefited from *propositions*. We also took inspiration from papers on theory building (Cornellisen, 2018; Gregor, 2006; Weick, 1989; Whetten, 1989) and benefited from the recommendations of SEs and reviewers that encouraged us to refine and sharpen our propositions. Thus, a lesson regarding theory building is that, where possible, visual representation and theoretical proposition statements can illuminate areas of inconsistencies and present a frame for clarifying relationships between the theory’s constructs.

2.6.2 Leveraging Adjacent Literature and Observations as Sensitizing Devices

Sensitizing with adjacent observations: The pivot from literature review to theory building was based on a shift to theorizing agility in the digital era as distinct from the way it had been characterized in earlier industrial and internet eras. We were sensitized to this reorientation by our observations arising from our varied engagement with digital transformation, even though the digital context seemed tangential to our initial focus. We were already working on several digital transformation projects (e.g., Baiyere et al., 2018, 2020; Wessel et al., 2021; Zimmer et al., 2020, 2023) and our pivot was received favorably by the JAIS review team because of how we situated the agility literature within a contemporary digital context. This resonated with the editorial team (especially the SE and Reviewer 1), who pointed to it as the way forward, further motivating us in justifying and strengthening this reorientation. We realized that the literature review had boxed us into a narrow perspective, and engaging with the digital context (empirical and practical observations) gave our theorizing a higher degree of freedom, leading to further inspiration.

One of the empirical cases we were working on (Baiyere et al., 2020) provided an internal justification that our theorizing made sense. This study, which started out as an agility project, provided us with a useful segue into the realm of “the digital” because we saw how the digital transformation context of the case organization was challenging basic tenets and assumptions of agility. As we continued to develop our theory, we constantly

reflected on our emerging theorizing with this case as well as other observations from other empirical and practical contexts. These became useful vehicles we could draw upon in providing examples and justifications for the arguments central to our paper.

Sensitizing with adjacent literature streams: We did not solely gain theoretical sensitivity from observations; we benefited from expanding our literature base beyond agility. While our starting point was to base our theorization on the agility literature, the pivot to theory building meant that we had the liberty to go beyond these boundaries. One such foray was to engage with ongoing conversations in the “digital” literature (e.g., Baskerville, 2020; Karimi & Walter, 2015; Svahn et al., 2017; Utesheva et al., 2016; Wessel et al., 2021).

In addition, we were introduced to other literature streams by the reviewers. For example, Reviewer 2 suggested the management literature on flexibility:

A review of the management literature on flexibility in teams will show ... how individuals and teams improve their ability to perform activities in the presence of uncertainty (e.g., Burke et al. 2006, 2006; LePine 2003; Salas et al. 2007).

Reviewer 1 led us to engage with the crowdsourcing literature:

...the gig economy, online labor markets, open source software communities, etc. all afford new ways of creating agility that may not have been examined from the lens of agility ... I expected to see levers specific to the digital era, not just a repetition of what ... has already identified. After all, the goal of the authors was to develop new theory.

In summary, another lesson on theory building is that sensitizing the theory building process with adjacent observations (empirical, practical, or contextual) and literatures can improve the relevance of the theory and provide theoretical/practical anchors/examples to justify the argumentation.

2.6.3 Leveraging “External” Feedback as Catalysts

Papers often enter the review process as “rough stones” but emerge as “polished jewels” that sparkle. Unfortunately, in most cases, the role of reviewers in helping to create this “sparkle” remains unknown and little acknowledged. The reality is that theory construction most often benefits from many external inputs. For example, there were occasions when we realized that our theory building that we had considered as breakthrough ideas were often beset with inconsistencies or flaws as new information came to

light. On many of these occasions, we found that the insights needed to resolve the issues were embedded in reviewer feedback, which often required revisiting.

In our case, we owe a lot to the guidance of the editorial review team that handled our paper in such a supportive manner. In helping to shape our paper, the following comment from the MISQ AE—back in 2018—eventually became central to the published JAIS version:

Given that most organizations now operate on the cloud and with agile programming methods provided by vendors like Amazon, many of the arguments put forward are completely outdated—not to mention IoT and robotic process automation, none of which [you have] covered.

Another defining comment that ultimately shaped the paper’s trajectory was from the JAIS SE:

*I also think ... that you will need later in the paper to develop a definition of digital agility. I do think you need to rework the introduction ... to motivate the need for theory on agility in the digital era. **I would suggest you think about labeling your construct digital agility.** After you discuss the different eras of agility research, you might consider ... extracting the assumptions about agility and then making a case for which assumptions still hold in the digital era and which do not. This then*

will lead into the new definition of digital agility. You talk about how the digital era is different, but this has to go one step further—why do these differences make a difference for agility? That’s where the assumptions come in—if the assumptions from the past work on agility no longer hold [or partly so] then you have the justification for a new construct—digital agility.

While we had previously tried to develop the theory around agility in the digital era, we had not conceived of labeling it “digital agility.” The SE’s comment helped us to develop the eventual theory in many ways: it gave us the elegant label with which the theory is now known, and it provided us with a clear worksheet to follow in problematizing and exposing a gap in the literature and justifying the need for, and value of, the theory.

As noted, considerable helpful advice exists on theory building (e.g., Gregory & Henfridsson, 2021; Leidner & Tona, 2021; Rivard, 2014). In our reading of such advice, however, authors are typically cast as the intellectual engine. This does not do justice to the reality of publishing theory papers in our leading journals. Instead, our experience focuses attention on the critical input arising from external feedback. Such feedback is a vital input that shapes the process and outcome of the theorizing effort. Another lesson on theory building is thus: *External feedback (especially from the editorial and review panel)* provided us with guidance that ultimately shaped, challenged, and reoriented the trajectory of the theory building—without which a different outcome would most likely have ensued.

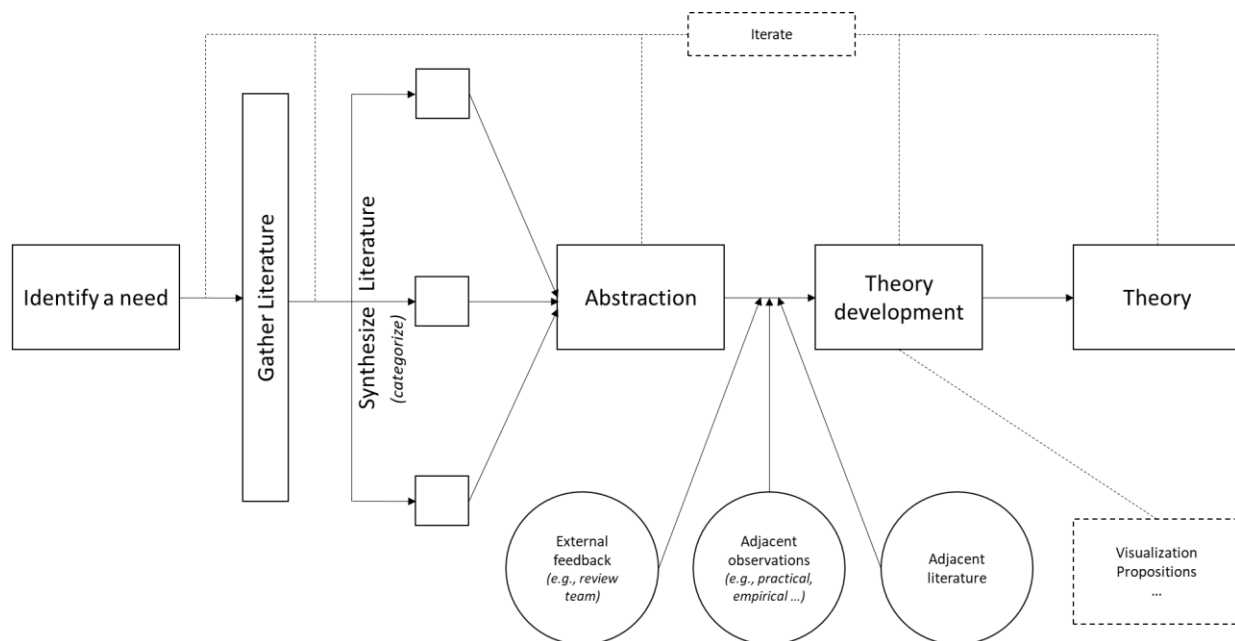


Figure 1. Framework of Lessons Learned in Developing Digital Agility Theory: From Literature Review to Theory Building

3 Concluding Thoughts

On iterations: Our experience has reinforced an already well-known lesson—theory building is not a linear process. One of the features of theory building that became manifest in our journey is the continuous need to reiterate within and across various steps of the process. Someone once remarked that the renowned management theorist Karl Weick gave speeches that could be typed out verbatim and printed as a book without any need for editing. Very few of us are this gifted. For most scholars, the process of theory building requires multiple iterations to stabilize the theory in the face of the manifold directions and possibilities that present themselves.

In our case, we had to revisit our literature(s), modify our synthesis, and embark on many abstractions before the theory finally emerged. As a team, we were pleased with our submission following each round of revision. We genuinely felt that each submission was much improved and worthy of serious consideration. The reviewers enabled us to see more clearly through our blinkered lenses.

Figure 1 provides an overview of the process we went through. We present this visual representation to tie together the key lessons learned along the way in the hope that it may prove valuable for other scholars

facing similar situations—particularly those facing the challenge of pivoting from a literature review to a theory building paper.

In closing: Without perseverance, imagination, and a review panel that was interested in helping refine our ideas rather than simply rejecting them, our years of reviewing the literature might have been a waste of time. Fortunately, in the end, our time was well spent, and the knowledge built up over the long life of this project made it possible to conjure up something we could not have imagined at the outset. Herein lies perhaps the most important lesson from our publication journey: *To embark on building theory from a literature review, one needs to be agile!*

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