

Theory Building Through Hermeneutic Documentary Inquiry in Management Research

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Abstract: Management research increasingly addresses complex forms of organisational value, yet conceptual frameworks often remain fragmented across economic, social, environmental, governance and strategic traditions. This paper examines how hermeneutic documentary inquiry can be used as a rigorous theory-building strategy for constructing an integrative management framework from dispersed secondary sources. The study is derived from a doctoral research project that designed the RMS Model, translated as Multidimensional Sustainable Wealth (MSW) Model, but the purpose of this paper is methodological rather than confirmatory. It asks how conceptually rich documents can be selected, interpreted, reduced and synthesised to produce a coherent conceptual architecture without claiming empirical validation. The research followed a predominantly qualitative and exploratory design grounded in a hermeneutic-interpretive stance. The method was theoretical research operationalised through documentary inquiry, purposive theoretical sampling, iterative comparison, qualitative simplification and categorisation. A limited longitudinal review of economic, social and environmental indicators contextualised the problem, while the core analytical work focused on management models, ESG-related tools and associated theoretical contributions. The process generated an integrative framework organised around five dimensions of multidimensional sustainable wealth, ten subcategories and associated emergent themes. The MSW Model is presented as a theory-building output that systematises dispersed conceptual insights into a structured framework for future research, not as evidence of organisational effectiveness. The paper contributes to research methodology in three ways. First, it positions documentary inquiry as more than a literature review technique by showing its potential for conceptual construction. Second, it clarifies how hermeneutic interpretation can guide the movement from heterogeneous documents to theoretically ordered categories. Third, it distinguishes explicitly between conceptual model design, derivative practical instruments and subsequent empirical validation. This distinction helps prevent overclaiming in conceptual research and defines an agenda for future case-based, comparative and psychometric studies. The paper is relevant to scholars interested in theory development, conceptual framework design and qualitative methodology in business and management research.

Keywords: Theory Development, Hermeneutic Inquiry, Documentary Inquiry, Conceptual Framework Design, MSW Model

1. Introduction

Management research increasingly deals with organisational phenomena that are complex, multidimensional and difficult to explain through single-purpose frameworks. Firms are expected to achieve economic performance, productivity and competitive continuity, but they are also required to respond to social inequality, ecological deterioration, governance demands, human development concerns and long-term stakeholder expectations. This creates a scientific problem for business and management research: many frameworks are useful for analysing specific dimensions of organisational performance, yet they remain fragmented when the aim is to conceptualise value creation as a broader, multidimensional and sustainable phenomenon. The problem is therefore not only practical, but also theoretical and methodological.

This paper addresses that problem from a methodology-oriented perspective. It is derived from a doctoral study that designed the MSW Model, a management framework intended to conceptualise multidimensional sustainable wealth in organisations (Vega-Baez, 2025). However, this article does not aim to validate the MSW Model empirically, nor to present it mainly as a normative management proposal. Instead, it examines the methodological route through which such a model was constructed. The central concern is how hermeneutic documentary inquiry can support theory building when researchers work with heterogeneous secondary sources, including management models, ESG-related tools and associated theoretical contributions.

Three research gaps guide the article. The first concerns the methodological status of documentary inquiry in management research. Although documentary sources are often used to contextualise empirical studies or support literature reviews, their role as primary material for conceptual construction remains less developed. The second gap relates to literature-based theory development. Recent scholarship has shown that reviews can advance theory when they move beyond descriptive summary and become scientific inquiry, integrative synthesis and conceptual contribution (Post, Sarala and Gatrell, 2020; Fan et al, 2022; Kunisch et al, 2023). Yet

conceptual papers may still remain too descriptive or too broad. The third gap concerns the boundary between conceptual design and empirical validation. Conceptual frameworks may be theoretically grounded without being empirically tested, and this distinction must be explicit.

The article asks: How can hermeneutic documentary inquiry support theory building in business and management research through the construction of an integrative management framework? To answer this question, the paper pursues four objectives. First, it explains the methodological rationale for using hermeneutic documentary inquiry as a theory-building strategy. Second, it describes how purposive theoretical sampling, iterative comparison, qualitative simplification and categorisation were used to move from secondary sources to conceptual categories. Third, it presents the MSW Model as the conceptual output of this process. Fourth, it clarifies the limits of the contribution by distinguishing the framework from empirical validation and identifying future research paths.

The article contributes to business and management research methodology in three ways. It positions documentary inquiry as a structured mechanism for conceptual construction, demonstrates how hermeneutic interpretation can guide the movement from heterogeneous documents to theoretically ordered categories, and provides an example of how a conceptual management framework can be presented responsibly as a theory-building output without overstating its empirical status.

2. Literature Review

2.1 Review Research and Theory Building

The first gap identified in this paper concerns the methodological role of documentary and literature-based inquiry in theory development. A growing body of methodological literature argues that review-based research should not be treated as secondary or merely preparatory. Instead, it can serve as a route to theoretical insight when conducted with rigour, transparency and generative intent (Fan et al, 2022; Kunisch et al, 2023). Post, Sarala and Gatrell (2020) argue that review articles can advance theory when they identify conceptual tensions, reframe constructs, or reveal previously unconnected relationships. Patriotta (2020) adds that impactful reviews require a clear intellectual purpose rather than broad aggregation.

This shift matters for business and management research. Integrative reviews allow researchers to connect bodies of literature that have evolved in parallel but not necessarily in conversation (Cronin and George, 2023). Breslin and Gatrell (2023) describe this process as a continuum between “mining” and “prospecting”, where theory-building reviews may excavate latent insights within an established domain or create new conceptual territory by combining separated strands. Alegre, Callahan and Iszatt-White (2023) emphasise that conceptual contributions require authors to move from description to explanation, from mapping to synthesis.

For this paper, these arguments are central because the purpose is not to provide a descriptive review of management models or ESG-related tools. The objective is to show how dispersed conceptual sources can be interpreted and reorganised into a new framework.

2.2 Documentary inquiry and hermeneutic interpretation

The second gap concerns the use of documentary inquiry as a primary route to conceptual construction. Rouleau (2024) argues that documents should not be treated merely as background or contextual evidence. They can serve as central research material when interrogated interpretively and comparatively. This is important for research that seeks to reconstruct conceptual patterns over time, across traditions and through multiple genres of managerial discourse.

A hermeneutic stance reinforces this possibility. Rather than assuming that texts contain fixed meanings awaiting extraction, hermeneutic inquiry treats interpretation as a reflexive movement between parts and wholes, between individual documents and the broader phenomenon they illuminate. The researcher does not simply collect evidence; the researcher interprets, compares and recontextualises it. This raises the importance of reflexivity and positional awareness (Pearse, Snowball and Drummond, 2025). Developments in reflexive thematic analysis also stress that interpretive coding and categorisation are iterative acts of sensemaking that can support conceptual emergence when handled transparently (McManus, Basini and O’Driscoll, 2025).

For the present study, documentary inquiry is not used to produce a conventional systematic review. It is used as a hermeneutic and theory-oriented process in which documents are selected, interpreted, compared, reduced, categorised and synthesised to generate a conceptual framework.

2.2 Conceptual Frameworks and Responsible Theoretical Contribution

The third gap concerns the boundary between conceptual framework design and empirical validation. Conceptual frameworks organise complex phenomena and offer researchers a structure for further investigation. However, they require methodological caution. A framework may be theoretically grounded and coherent without yet being empirically validated. Recent guidance on literature reviews and conceptual contributions stresses the need to clarify what kind of contribution is being made and what evidence supports it (Kraus et al, 2022; Kraus, Bouncken and Yela Aránega, 2024; Delery and Shi, 2026).

This distinction is relevant in the case of integrative management frameworks. The broader issue addressed by the underlying doctoral research is that dominant management models have often privileged economic performance, efficiency, or competitive positioning while under-integrating social, environmental, governance and longer-horizon concerns (Vega-Baez, 2025). Later sustainability and ESG-oriented tools have broadened the agenda, yet often operate as evaluative overlays rather than as comprehensive models of management purpose and design.

This creates an opportunity for theory development. If the literature contains partial but valuable insights distributed across management models, governance approaches, sustainability discussions and ESG-related tools, then an integrative framework may emerge from their structured comparison. The challenge is methodological: how to identify relevant sources, compare heterogeneous contributions, synthesise them into a conceptually ordered model and avoid presenting conceptual construction as empirical validation.

3. Research Methodology

The study was designed as a predominantly qualitative and exploratory inquiry grounded in a hermeneutic-interpretive stance. Its principal method was theoretical research, operationalised through documentary inquiry. Theory building did not emerge from interviews, surveys or direct field immersion. It emerged from the interpretive analysis of conceptually rich secondary sources spanning three broad domains: global economic, social and environmental indicators; business management models; and ESG-related tools.

3.1 Methodological Foundations

The methodological position of the study is rooted in hermeneutic interpretation. Hermeneutics is associated with the interpretation of texts and meanings through the movement between parts and wholes. Gadamer (2004) emphasises that understanding is historically situated and develops through a dialogical encounter between interpreter and text. Ricoeur (1976) extends this view by showing how texts generate a surplus of meaning that requires interpretation rather than simple extraction. In this study, documentary sources were therefore not treated as neutral containers of information. They were interpreted as texts expressing assumptions about organisational purpose, value creation, responsibility and sustainability.

The use of documentary inquiry was also informed by qualitative document analysis. Bowen (2009) describes document analysis as a systematic procedure for reviewing and evaluating documents in qualitative research. Here, however, documentary inquiry is not used only to contextualise an empirical study. It is used as the main route for conceptual construction, consistent with recent organisation research on the theoretical potential of documentary sources (Rouleau, 2024).

Source selection followed the logic of theoretical sampling. Glaser and Strauss (1967) introduced theoretical sampling as a process in which data sources are selected for their relevance to emerging concepts rather than for statistical representativeness. Later qualitative research extended this logic through saturation and inductive category development (Strauss and Corbin, 1998; Charmaz, 2014). In this study, theoretical sampling was adapted to documentary inquiry: sources were chosen because they were conceptually information-rich and capable of illuminating emerging categories.

Finally, the analysis was influenced by reflexive qualitative methodology. Alvesson and Sköldberg (2018) argue that qualitative research requires awareness of interpretation, language, theoretical assumptions and the researcher's role in producing meaning. This reflexive stance is important because the MSW Model was not discovered mechanically in documents. It was constructed through iterative comparison, reduction, categorisation and synthesis.

3.2 Research Logic and Source Selection

The research began with a problem-driven orientation. The underlying problem was the gap between the growth of economic wealth and the parallel intensification of social inequality and environmental deterioration. In the doctoral study from which this paper is derived, this problem was contextualised through a limited longitudinal review of global indicators from the Industrial Revolution to the present. This contextual layer did not constitute the main contribution of the research. It served to frame the problem space and justify the need for a management framework capable of addressing wealth in broader and more sustainable terms (Vega-Baez, 2025).

Source selection followed purposive theoretical sampling. Documents were chosen not because they formed a statistically representative corpus, but because they were expected to contribute to the conceptual development of the emerging framework. The sample included foundational and later management models, ESG-oriented tools and supporting conceptual materials related to wealth creation, organisational responsibility and sustainability. Sampling proceeded until theoretical saturation was reached, understood here as the point at which additional documentary sources no longer introduced materially new properties into the emerging categories (Zherdeva, McQuillan and Morales, 2025).

3.3 Analytical Procedure and Quality Criteria

The analytical procedure involved five steps. First, the study delimited the phenomenon of interest: multidimensional wealth in organisational settings. Second, it contextualised the problem through a longitudinal reading of economic, social and environmental indicators. Third, it examined management models and ESG tools comparatively, seeking recurring patterns, omissions, complementarities and latent organising principles. Fourth, it applied qualitative simplification and categorisation. Concepts extracted from documents were compared iteratively, grouped into provisional categories, refined through contrast and reorganised as new patterns emerged. This step is consistent with inductive qualitative approaches that move from empirical or documentary material to higher-order conceptual categories (Gioia, Corley and Hamilton, 2013). Fifth, the categories were synthesised into an integrative framework.

The quality of the study rests on interpretive coherence, transparency of analytical logic, theoretical relevance of sources, conceptual saturation and clarity regarding the limits of the contribution. The study also maintains an explicit boundary regarding validation. A complementary diagnostic instrument, the MSW Instrument, emerged from the framework, but it is treated as a derivative practical artefact rather than as empirical evidence validating the model.

4. Findings: From Documentary Inquiry to the MSW Model

4.1 From Fragmented Sources to Conceptual Categories

The documentary analysis revealed that the selected sources contained valuable but fragmented understandings of organisational value creation. Traditional management models contributed insights into efficiency, structure, human relations, strategic adaptation and systems thinking. ESG-related tools contributed broader evaluative concerns regarding environmental, social and governance responsibilities. However, these contributions often remained dispersed across traditions and were not organised as a unified management architecture.

The theory-building process therefore moved from documentary fragmentation to conceptual integration. Through iterative comparison, concepts were interpreted in relation to the central research problem: how organisations may generate wealth in a multidimensional and sustainable way. The analysis did not treat each document as an isolated source. It compared assumptions, emphases and omissions to identify higher-order categories. The resulting categories were constructed through hermeneutic interpretation, qualitative simplification and conceptual synthesis.

4.2 Integrative Matrix of the MSW Model

The MSW Model was organised around five dimensions of multidimensional sustainable wealth, ten subcategories and associated emergent themes (Vega-Baez, 2025). Table 1 presents the model as an integrative matrix. Its purpose is not only to list components, but to show the conceptual role of each dimension and its interaction with the others.

Table 1: Integrative matrix of the MSW Model

Wealth Dimension	Subcategories	Core Conceptual Role	Interaction With Other Dimensions	Methodological Interpretation
Economic Wealth	Basic Processes & Support Processes	Provides operational viability and the material base for organisational action.	Enables the development of human, functional, contextual and transcendent wealth, while depending on them to avoid short-term economic reductionism.	Synthesised from traditions focused on efficiency, productivity, process design and performance.
Human Wealth	Corporate Culture & Corporate Talent	Represents the social and developmental capacity of the organisation.	Strengthens economic performance, functional learning, contextual responsibility and transcendent purpose.	Constructed from human relations, organisational behaviour, leadership and talent development perspectives.
Functional Wealth	Corporate Intelligence & Corporate Strategy	Captures the capacity to interpret information, learn, decide and act deliberately.	Connects resources and human capabilities with strategic direction and coordinated action.	Derived from learning, strategy, knowledge use and adaptive capability approaches.
Contextual Wealth	Corporate Governance & Corporate Ecology	Situates the organisation within institutional, stakeholder and environmental systems.	Provides accountability and legitimacy to the other dimensions by linking performance to governance and ecological responsibility.	Synthesised from governance, stakeholder, sustainability and ESG-related approaches.
Transcendent Wealth	Corporate Philanthropy & Corporate Legacy	Extends organisational value towards contribution, continuity and long-term meaning.	Gives higher-order orientation to economic viability, human development, strategic capability and contextual responsibility.	Constructed from sources concerned with purpose, social contribution and intergenerational continuity.

4.3 Interaction Among the Five Dimensions

The matrix shows that the MSW Model is not a linear sequence of components. It is a relational framework. Economic Wealth provides the operational foundation, but it is not treated as the final purpose of management. Human Wealth gives internal vitality through culture, talent and capability. Functional Wealth transforms resources and capabilities into strategic intelligence and coordinated action. Contextual Wealth embeds the organisation within governance structures, stakeholder expectations and ecological responsibility. Transcendent Wealth connects organisational action with contribution and legacy.

The interaction among the dimensions is circular rather than hierarchical. Economic Wealth supports the development of other dimensions, but its sustainability depends on human commitment, functional intelligence, contextual legitimacy and transcendent purpose. Multidimensional sustainable wealth is not produced by maximising one dimension independently. It emerges from the balanced development and mutual reinforcement of all five dimensions.

4.4 Methodological Meaning of the Findings

The findings are significant not only because they present the MSW Model, but because they illustrate the methodological potential of hermeneutic documentary inquiry. The model emerged through interpretation and reorganisation of dispersed conceptual materials. This supports the argument that documentary inquiry can move beyond descriptive literature review when used to identify latent categories, compare heterogeneous traditions and construct a conceptual architecture.

The findings also clarify the limits of the contribution. The MSW Model is a theory-building output, not a validated empirical model. Its dimensions and subcategories are theoretically grounded and analytically

ordered, but they require future empirical examination. Similarly, the MSW Instrument is a derivative practical artefact; it does not constitute empirical validation of the framework.

5. Discussion

5.1 Documentary Inquiry as a Theory-Building Strategy

The first implication of this study is that documentary inquiry can function as a theory-building strategy when guided by an explicit interpretive and conceptual logic. Documents are often used in management research as background sources, contextual evidence or literature review material. However, they can also become the primary basis for conceptual framework design when selected theoretically, interpreted hermeneutically and compared systematically.

This argument extends recent discussions on review research as scientific inquiry (Kunisch et al, 2023) and theory development through literature-based research (Post, Sarala and Gatrell, 2020; Breslin and Gatrell, 2023). The contribution of documentary inquiry does not lie in the accumulation of sources, but in the transformation of dispersed concepts into higher-order categories. In this study, documentary material was used to identify conceptual patterns across management models, ESG-related tools and sustainability-oriented contributions. The framework therefore emerged from interpretation and synthesis rather than from simple description.

5.2 Hermeneutic Interpretation and Conceptual Integration

The second implication concerns the role of hermeneutic interpretation in conceptual integration. The MSW matrix shows that the five dimensions are not isolated components. They interact as a system of organisational wealth generation. This interaction could not have been generated through a purely mechanical coding procedure. It required movement between individual documentary sources and the broader conceptual whole.

The MSW Model is therefore not presented as a neutral extraction from documents, but as a theoretically informed synthesis derived from interpretive engagement with documentary material. This is relevant for management research because complex organisational problems rarely fit neatly into a single theoretical tradition. Integrative theory building benefits from methods capable of comparing, translating and reorganising contributions from multiple streams.

5.3 Conceptual Framework Design and Methodological Caution

The third implication relates to methodological caution. A conceptual framework may be theoretically grounded and analytically coherent without being empirically validated. The MSW Model should be understood as a theory-building output that organises multidimensional sustainable wealth into an integrative architecture. It should not be interpreted as evidence that the model has already been tested in organisations.

The same caution applies to the MSW Instrument. The instrument is a practical derivative of the framework, but it does not validate the model by itself. This distinction is important because conceptual papers sometimes blur the boundary between model design, practical application and empirical confirmation. By separating these stages, the paper contributes to more responsible framework-building in management research.

5.4 Implications for Future Research

The discussion points to a future research agenda. First, the MSW Model can be examined through qualitative case studies in different organisational contexts. Second, comparative research could examine whether the framework behaves differently across industries, firm sizes, ownership structures or institutional environments. Third, the MSW Instrument could be subjected to technical validation, including construct clarity, reliability, dimensional structure and diagnostic usefulness. Finally, future research could use the MSW Model as a sensitising framework rather than as a fixed measurement model, allowing flexible application while preserving its integrative logic.

6. Conclusion

This paper examined hermeneutic documentary inquiry as a theory-building strategy in business and management research. Its central argument is that documentary sources can support conceptual framework

design when they are not used merely as background material or as a descriptive literature base, but as interpretive material for comparison, reduction, categorisation and synthesis.

The study contributes methodologically by making explicit the route from heterogeneous secondary sources to an integrative conceptual architecture. The process shows that theory building through documentary inquiry requires more than collecting relevant texts. It requires a problem-driven orientation, theoretically justified source selection, interpretive comparison, category development and transparency regarding the limits of the resulting framework.

The MSW Model illustrates the outcome of this process. It organises multidimensional sustainable wealth into five interacting dimensions: Economic Wealth, Human Wealth, Functional Wealth, Contextual Wealth and Transcendent Wealth. These dimensions are not presented as empirically validated constructs. They are presented as a conceptual proposal derived from hermeneutic documentary inquiry and intended to guide future research.

The paper also reinforces an important methodological distinction. Conceptual model design, derivative practical instruments and empirical validation should be treated as different stages of knowledge development. Future research should therefore examine the model through case studies, comparative organisational research, sector-specific applications and technical validation of the diagnostic instrument.

Ethics Declaration

Ethical clearance was not required for the research.

AI Declaration

The structural editing of this paper was carried out by the authors. As non-native speakers of English, they used ChatGPT and Grammarly for translation, stylistic editing, and orthotypographic editing. The authors are fully responsible for the content and the final text.

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