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How Can Explanations Be Used to Foster Organizational Justice?

D. Ramona Bobocel
University of Waterloo

Agnes Zdaniuk
University of Waterloo

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Since the early 1980s, justice researchers have been interested in the role that explanations play in the perception of workplace fairness. Our primary goal in the present chapter is to provide an overview of where research on explanations in the organizational context has been, and where it is going. To do so, we develop a framework to organize the past research, and we review the pertinent findings. We begin by presenting a brief historical overview of research that identifies the major ways that actors account for their own or others' actions. We then address five issues: the effects of explanations on recipient reactions; factors that influence the efficacy of explanations; potential drawbacks to using explanations; when it is most important to explain; and factors that influence how people explain. Along the way, we address seven emerging themes that set the agenda for future research.

Imagine an employee who receives a performance rating that falls short of what he or she expected. Without a convincing reason for this discrepancy, the employee may be apt to perceive the situation as unfair. In general, employees want to understand organizational decisions or events that affect them and their coworkers, in particular when those events are unanticipated or undesired. In fact, there are strong normative expectations among employees, as well as other constituents, such as customers and the general public, for organizational leaders to explain controversial actions (e.g., Bies, 1987).

For the past two decades, justice researchers have been keenly interested in the role that explanations play in the perception of workplace fairness. Initial interest in explanations was stimulated by a then emerging body of research on procedural justice, which demonstrated that people are generally more accepting of decision *outcomes* to the extent that they perceive decision-making *procedures* as fair (e.g., Leventhal, 1980; Thibaut & Walker, 1975). Explanations were conceptualized as one element in the interpersonal enactment of decision-making procedures (Bies, 1987; Bies & Moag, 1986; Lind & Tyler, 1988; Tyler & Bies, 1990). Given that employees often have little direct knowledge of the procedures by which organizational decisions are made, researchers suggested that explanations offered by leaders may be the central—if not sometimes the sole—basis on which employees decide whether a situation is fair or unfair (Bies & Moag, 1986; Tyler & Bies, 1990).¹

¹Following the work of Bies and Moag (1986), some researchers conceptualize explanations as a determinant of interactional justice perceptions; following Lind and Tyler's work (1988; also see Tyler & Lind, 1992; Tyler & Blader, 2000),

(continued)

After two decades of study, what has research revealed about the role of explanations in the perception of fairness? In this chapter, we address this question by reviewing past research on explanations as it pertains to the study of organizational justice. Figure 16.1 provides an organizing framework. As illustrated at the top, explaining comprises at least two interrelated processes: account giving (boxes 1, 4, and 6) and account receiving (boxes 2, 3, 4, and 5). As shown in box 1, actors use a variety of explanations, typically following unfavorable or unanticipated events. Ultimately, explanations influence how receivers respond to the event (box 3). The nature of the response—that is, whether it is positive or negative—is influenced by the receiver's evaluation of the explanation and intentions of the account giver along a number of dimensions (box 2). As indicated in box 4, many factors influence the efficacy of explanations. We have categorized these factors as characteristics of the message, the actor, the receiver, and the situation, with the situation including the social context. Explanations have a greater potential to shape receiver responses in certain conditions (box 5). Finally, as shown in box 6, researchers have recently moved upstream in the account-giving process to uncover factors that influence how managers explain their own or others' actions. Again, we have classified these factors as characteristics of the message, the actor, the receiver, and the situation.

In the following sections, we elaborate on each of the components in Fig. 16.1. We first set the stage by presenting a brief historical overview of research in psychology and sociology that identifies the major ways that actors account for their own or others' actions (box 1). The remainder of the chapter is organized around five questions revealed by our review as characterizing much of the research enterprise to date:

- What are the effects of explanations on recipient reactions? (boxes 2 and 3)
- What factors influence the efficacy of explanations? (box 4)
- Are there potential drawbacks to using remedial explanations? (box 3)
- When is it most important to explain? (box 5)
- What factors influence how people explain? (box 6)

Given its breadth, by necessity our review is not exhaustive. Our goal is to provide a clear overview of where research on explanations in the

¹(continued) others conceptualize explanations as a determinant of procedural justice perceptions. Following Greenberg (1993a), still others view explanations as a determinant of informational justice perceptions. The validity of the various conceptualizations is discussed elsewhere in this volume, so, for simplicity, we do not distinguish among them in the present review (see Bobocel & Holmvall, 2001, for a critique of the distinction between the concepts of procedural and interactional justice).

organizational context has been, and where it is going. In conducting our review, seven themes emerged, themes that set the agenda for future research. These are summarized in Table 16.1.

A HISTORICAL OVERVIEW: HOW DO PEOPLE ACCOUNT FOR THEIR OWN OR OTHERS' ACTIONS?

Psychologists and sociologists have long recognized that people attempt to account for questionable actions in a variety of ways, and that the accounts offered can have profound implications for interpersonal relations. In a now classic paper, sociologists Scott and Lyman (1968) defined an account as a "statement made by a social actor to explain unanticipated or untoward behavior—whether that behavior is his own or that of others" (p. 46).² Scott and Lyman argued that accounts are a crucial element of interpersonal relations because they prevent

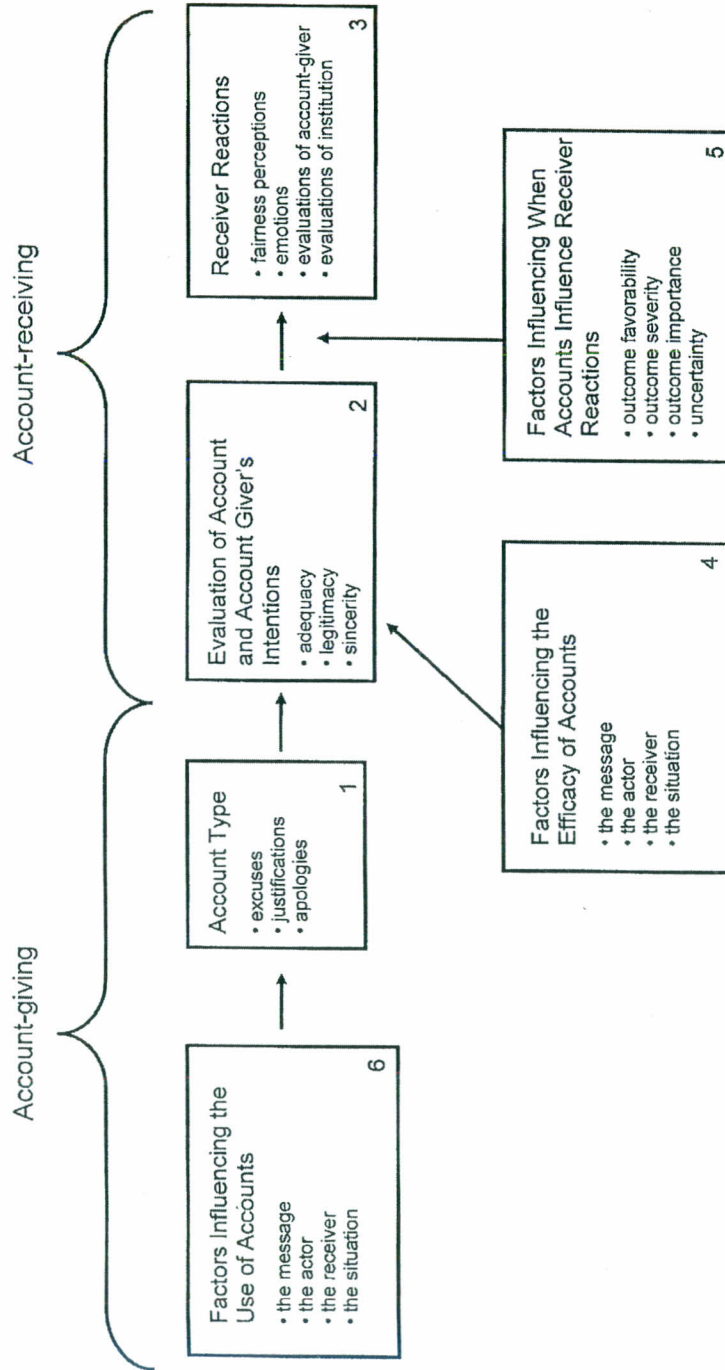


FIG. 16.1. A framework for the study of explanations.

TABLE 16.1
Summary of Seven Themes for Future Research

1. Explore the effects of apologies in the organizational context more systematically, and conduct more research into the relative effects of different forms of explanations.
2. Conduct process-oriented research to discover the psychological mechanisms through which explanations exert their effects.
3. Continue research into characteristics of the receiver and the social context that influence how people construe explanations. Investigate the possible interactive effects of various factors that influence the efficacy of explanations.
4. Investigate more systematically the potential downsides of excuses, and when negative effects are likely to occur. Also, examine how managers can offset the potentially negative side effects of "good" explanations on receiver self-evaluations.
5. Examine the moderating role of person variables that might influence receivers' proclivity to ask why.
6. Continue to identify factors that influence how managers explain their own or others' actions.
7. Examine both the potential benefits and the potential downsides of account-giving for the actor in terms of his or her emotions, private evaluations of the self, and task performance.

²Although Scott and Lyman (1968) distinguished between accounts and explanations (reserving the former for statements pertaining to untoward action or events), this distinction has not been upheld consistently in the contemporary psychological literature. Therefore, we use the terms synonymously in the present review.

conflict from arising by “verbally bridging the gap between action and expectation” (p. 46).

In the decades that followed Scott and Lyman’s (1968) article, researchers identified several types of accounts that actors use to remove themselves from social predicaments—referred to by Schlenker (1985) as remedial accounts—and specified the many forms that the different types can take. A comprehensive review of this literature is beyond the scope of the chapter (for excellent reviews, see Cody & McLaughlin, 1990; Schlenker, 1980, 1985; Schönbach, 1990; Scott & Lyman, 1968; Tedeschi & Reiss, 1981). In two seminal review papers, Bies (1987) and Greenberg (1990) highlighted the potential relevance of theory and research on social accounts for the study of organizational justice.

Most of the research in social and organizational psychology has focused on the study of three forms of social accounts: excuses, justifications, and, to a lesser extent, apologies. As is discussed later, however, many organizational studies have not distinguished the type of explanation. Although theorists have defined these categories in slightly different ways, impression management researchers have traditionally distinguished them along two dimensions: whether the actor admits that the event or its consequences are negative, and whether the actor accepts personal responsibility for the event or its consequences (e.g., Schlenker, 1980).

An excuse, which Bies (1987) labeled a causal account, is an explanation in which the actor admits that the event is negative but denies personal responsibility for it. According to Schlenker, an effective excuse is one that convinces the audience that the negative event is not the fault of the actor or, to the extent that the actor is at fault, that it is due to less central aspects of the self, such as forgetfulness rather than incompetence (e.g., Schlenker, Pontari, & Christopher, 2001). Excuses can take many forms, including attempts to convince the audience that the event or its consequences were unforeseeable, and references to extenuating circumstances that influenced the actor’s behavior or its consequences.

In contrast to excuses, a justification is an explanation in which the actor admits personal responsibility for the action, but minimizes or denies its severity as perceived by the audience (Scott & Lyman, 1968). Bies (1987) highlighted two forms of justification: In one form, which Bies labeled an ideological account, the actor attempts to reframe the event or its consequences by appealing to superordinate values and goals, or by relabeling the action in positive value-laden terms. In another form, which Bies labeled a referential account, the actor attempts to reduce the severity of the event or its consequences by providing a more favorable standard by which to evaluate the situation.

In contrast to excuses and justifications, an apology (or concession) is a statement in which the actor accepts personal responsibility for the event or its consequences and makes no attempt to reduce the negativity as perceived by the audience. Through an apology, the account giver is hoping to convince the victim that his or her actions were an isolated event, and not representative of what he or she is like as a person (Schlenker, 1980). According to Bies (1987), actors provide apologies, or what he labeled penitential accounts, in an attempt to express regret and seek forgiveness from victims of wrongdoing.

As noted earlier, several other account forms have been proposed. For example, actors may use denials (or refusals) rather than excuses as a means of minimizing personal responsibility (Schlenker, 1980). Denials are more extreme than excuses in that the actor attempts to completely dissociate himself or herself from the alleged event by showing that the actor had nothing to do with it or by denying that it occurred.

In the psychological study of interpersonal relations, researchers have distinguished the four preceding account types—apologies/concessions, excuses, justifications, and denials/refusals—along a continuum in terms of their potential to mitigate or aggravate (respectively) interpersonal conflict following a transgression (e.g., McLaughlin, Cody, & O’Hair, 1983). Mitigating accounts attempt to reduce the tension and conflict created by the event or action by acknowledging the victim’s interpretation of it and expressing regret; in contrast, aggravating accounts tend to increase the tension created by the event or action and escalate conflict by challenging the victim’s interpretation of the event or their right to question it (e.g., Gonzales, Manning, & Haugen, 1992; Gonzales, Pederson, Manning, & Wetter, 1990). Accordingly, apologies are considered the most mitigating account, followed by excuses. Justifications, then denials are considered the most aggravating accounts. The mitigating–aggravating continuum provides one promising means by which to distinguish among the major account types, and recently justice researchers have begun to explore its implications for the study of accounts in organizations (e.g., Folger & Skarlicki, 2001; Tata, 1998).

With this background on the major ways in which people account for their own or others’ actions, we now address our five central questions in turn.

WHAT IS THE EFFECT OF EXPLANATIONS ON FAIRNESS PERCEPTIONS?

In the mid 1980s, Bies and his colleagues published a series of articles that focused on the role of explanations in the study of organizational justice (Bies, 1987; Bies & Moag, 1986; Bies & Shapiro, 1987, 1988; Bies,

Shapiro, & Cummings, 1988). In an initial set of empirical studies, Bies and Shapiro (1987) asked MBA students to evaluate several cases describing a manager's questionable conduct. Half of the participants were provided with an excuse for the manager's conduct; the other half received no such information. Participants perceived the manager as more fair and endorsed him to a greater extent when they received the excuse as compared to when they did not. In a follow-up study, the researchers asked MBA students to recount a time when a request was denied by their boss and to respond to various questions with the event in mind. Again, participants perceived their boss as more fair, and reported less anger and resentment, when they rated their bosses' explanation for the refusal as more adequate. In prior laboratory research, Folger and his colleagues also examined the role of excuses and justifications in mitigating perceived injustice. In a series of classic experiments designed to test referent cognitions theory (e.g., Folger & Martin, 1986; Folger, Rosenfield, & Robinson, 1983), the researchers found that the provision of a credible explanation assuaged participants' anger and resentment following a negative outcome, when they could mentally simulate having received a better outcome had the experimenter used different procedures.

Since the 1980s, there have been numerous investigations into the effect of managerial explanations on receiver reactions. In reviewing this literature, we made five general observations. First, the dominant trend has been to focus on explanations as a potential mechanism by which leaders might enhance perceived fairness and minimize interpersonal conflict in organizations. Second, two types of "receiver" have been examined: In the majority of studies, the receiver comprises people who are personally affected by the event being explained, such as in the case of layoff victims or survivors (e.g., Brockner, DeWitt, Grover, & Reed, 1990; Brockner et al., 1994). In other studies, the receiver comprises third-party observers, who are not directly affected by the event being explained, such as in the case of members of the general public who read about a layoff at a company with which they have no direct association (e.g., Bobocel & Debeyer, 1996; Skarlicki, Ellard, & Kelln, 1998).

Third, much of the experimental research has examined the effects of providing an explanation—typically operationalized as an excuse or a justification—relative to a control condition in which no explanation is provided (e.g., Bies & Shapiro, 1986; Folger & Martin, 1986). Recently, researchers have begun experimental work that compares the relative effectiveness of different types of explanations (e.g., Conlon & Murray, 1996; Shapiro, 1991), a trend that promises to enrich the literature substantially. In field-based correlational research, investigators typically do not measure employees' perceptions of account types, but rather

their perceptions that the event in question was adequately explained (e.g., Wanberg, Bunce, & Gavin, 1999) (for some exceptions, see Konovsky & Folger, 1991; Mellor, 1992).

Fourth, researchers have examined explanations for a wide range of actions or workplace events. Many studies have focused on explanations for a specific decision, such as a selection or layoff decision, or a pay cut (e.g., Brockner et al., 1990; Gilliland, 1994; Greenberg, 1990; Ployhart, Ryan, & Bennett, 1999). Other studies have examined explanations for a superior's questionable conduct, such as denying a subordinate's request for resources, or taking credit for a subordinate's ideas (e.g., Bies & Shapiro, 1987; Bobocel, Agar, Meyer, & Irving, 1998; Davidson & Friedman, 1998; Tata, 2000). Still other studies have examined explanations in the context of protracted organizational change initiatives and the introduction of new organizational policies, such as drug testing (e.g., Conlon & Ross, 1997; Daly, 1995; Greenberg, 1994; Konovsky & Cropanzano, 1991; Rousseau & Tijoriwala, 1999; Schweiger & DeNisi, 1991).

Finally, although many studies have examined effects, few have investigated the psychological processes underlying the effects. Given that explanations have been conceptualized as one element of fair process, researchers typically draw on existing theories of procedural justice to make predictions about, or to interpret, the effects of explanations. Credible explanations have been said to be valued by employees for at least two reasons: the respect that they convey from authorities, and the information that they provide about why and how decisions are made (Bies & Moag, 1986; Greenberg, 1993a; Lind & Tyler, 1988; Tyler & Bies, 1990; Tyler & Lind, 1992). Several specific justice theories have been applied successfully to the study of explanations. As discussed elsewhere in this volume, the effects are often interpreted within the framework of Folger's referent cognitions theory (Folger, 1986, 1993), recently revised and relabeled fairness theory (Folger & Cropanzano, 2001; for two recent illustrations, see Gilliland et al. 2001, and Shaw, Wild, & Colquitt, 2003).

Although there are exceptions, the majority of studies since the 1980s have corroborated the early findings. In general, when controversial, unexpected, or negative events are perceived to be adequately and sincerely explained by organizational authorities, recipients react more favorably toward the event, the account giver, and the institution in which the event occurs than when such events are not explained or are perceived as being inadequately explained. In a recent meta-analytic review of 54 independent samples, Shaw et al. (2003) examined the relation between explanations—operationalized as excuses, justifications, or unspecified type—and four categories of response: justice judgments (e.g., procedural and distributive justice), cooperative responses (e.g.,

task motivation, performance, and organizational citizenship behaviors), retaliation responses (e.g., theft, complaints, anger, blame, and stress), and withdrawal responses (e.g., turnover, absenteeism, intentions to engage in future business with the organization). The researchers found significant relations between explanations and justice judgments as well as the other response variables, such that both justifications and excuses were associated with more positive responses. Shaw et al. also reasoned, from fairness theory (Folger & Cropanzano, 2001), that excuses would be more effective in alleviating negative responses than would justifications. As predicted, the relations between explanations and positive responses were significantly stronger for excuses than for justifications.

Our review revealed that apologies have been relatively understudied in the organizational context compared to excuses and justifications (and apologies were not included in the Shaw et al. meta-analysis). Moreover, the results to date are mixed. For example, in an early series of experiments, Wood and Mitchell (1981) examined the effect of subordinates' use of apologies, following a poor performance, on the appraisals of nursing supervisors. In one study, the researchers found that supervisors were less punitive following subordinates' apologies, but this effect was not replicated in a second study. Clearer support for the role of apologies comes from two studies by Baron (1990). In an initial laboratory study, participants were provided with criticism followed by several interventions. Baron found that an apology was successful in mitigating the negative feelings (e.g., perceived injustice) produced by the destructive criticism. In a second field survey, Baron found that employees (both those in management and those in nonmanagement positions) reported that apologies would be an effective means to counter the negative effects of being severely criticized by another member of the organization. Recently, several researchers have examined the relative effectiveness of apologies compared to other types of explanations. In an investigation of company responses to customer complaints, Conlon and Murray (1996) found that explanations that assumed responsibility for a problem (e.g., apologies and justifications) led to more favorable reactions than did explanations that denied responsibility (e.g., excuses or avoiding the issue). However, in at least two other studies, researchers found that an apology was less effective than a justification in reducing perceived injustice (e.g., Conlon & Ross, 1997; Tata, 2000).

In summary, the results of the Shaw et al. (2003) meta-analysis are consistent with the idea that excuses and justifications can enhance perceived fairness, as well as minimizing other conflict-inducing responses. Further, their research revealed that excuses are particularly effective. From basic research in social psychology (e.g., Ohbuchi,

Kameda, & Agaries, 1989; Weiner, Graham, Peter, & Zmuidinas, 1991) and several organizational studies, there is good reason to think that apologies can also have beneficial effects. Given the mixed evidence on apologies to date, one direction for future research will be to explore their effects in the organizational context more systematically. Research into the relative effects of different forms of explanations promises to illuminate the process of account receiving considerably by elucidating when and for whom particular types of explanations are more effective. It will also be important to conduct more process-oriented research to determine the psychological mechanisms through which explanations exert their effects. At present, the effects of explanations can be accounted for by several theories (e.g., fairness theory, attribution theory, group-value theory, fairness heuristic theory); thus, research on process is necessary to adjudicate the various theoretical perspectives.

A Caveat: The Effect of Explanations on Fairness Perceptions Is Indirect

In light of the evidence just described, most researchers agree that explanations have the *potential* to enhance perceived fairness and assuage other negative reactions, but that they do not necessarily always do so. Almost as soon as justice researchers began the systematic study of managerial explanations, it was clear that the mere provision of an account is itself not sufficient. Consistent with early sociological work on the honoring of social accounts (e.g., Blumstein et al., 1974), the data suggested that for explanations to have beneficial effects they must meet certain requirements. For example, in their initial investigations, Bies and his colleagues demonstrated that managerial accounts were effective only when they were perceived as adequate and sincere (see Bies & Shapiro, 1987, 1988; Bies et al., 1988). The roles of perceived adequacy and sincerity have been replicated in numerous studies over the years (e.g., Bobocel & Farrell, 1996; Greenberg, 1990; Shapiro, 1991). Relatedly, researchers have demonstrated that employees' beliefs about the legitimacy of an organization's account shape their reactions to it (e.g., Manscour-Cole & Scott, 1998; Mellor, 1992).

On the basis of such findings, there is now consensus that managerial explanations do not influence fairness perceptions and other recipient responses directly. Therefore, concepts such as account adequacy and communicator sincerity have been accorded status as mediators. Although the precise nature of the intervening variables needs to be more fully explicated, there is general agreement with the fundamental idea that recipients' responses to an explanation are indirectly determined

by their evaluation of the validity of the explanation and by their assessment of the account givers' intentions (e.g., Sitkin & Bies, 1993).³

The early findings pertaining to account adequacy and sincerity were theoretically significant in that they clearly indicated that employees are not passive recipients of explanations, but rather play an active role in their interpretation and, ultimately, in the efficacy of explanations as a conflict-minimizing mechanism. On this basis, from the beginning, justice researchers cautioned organizational leaders against interpreting the evidence demonstrating beneficial effects of accounts to suggest that any explanation will do and—more importantly—not to believe that deceptions can be covered merely by providing an account (e.g., Bies, 1987; Bies et al., 1988; Greenberg 1990; Shapiro, 1991; Sitkin & Bies, 1993; Tyler & Bies, 1990).

WHAT FACTORS CONTRIBUTE TO THE EFFICACY OF EXPLANATIONS?

With early findings indicating that explanations themselves are not always effective, justice researchers soon turned to the systematic investigation of factors that influence their efficacy. Efficacy is operationalized in different ways: Some researchers have examined factors that enhance perceived account adequacy or communicator sincerity (e.g., Shapiro, Buttner, & Barry, 1994); others have examined factors that lead to more favorable responses downstream, such as greater perceived fairness and organizational commitment (e.g., Greenberg, 1994).

Characteristics of the Message and the Actor

To date, much of the research has examined characteristics of the message and characteristics of the account-giver that influence efficacy. In a series of experiments conducted in both laboratory and field settings, Greenberg (1990, 1993b, 1994) demonstrated that explanations are more effective (a) when they contain detailed and thorough information as to why and how the decision was reached as compared to when they are less thorough, and (b) when the communicator displays greater rather than less social sensitivity and concern for the recipient. Moreover, Greenberg (1993b, 1994)

³It is worth noting that people's perceptions of account adequacy and sender sincerity will likely be somewhat related in natural settings. Factors that induce one to perceive an account as adequate—such as cogent and thorough information—are likely to enhance perceptions of the message sender as sincere and truthful. Similarly, factors that contribute to perceived sincerity—such as verbal expressions of remorse and nonverbal cues such as tone and eye contact—may be processed heuristically (e.g., Bobocel, McCline, & Folger, 1997; Shapiro, Buttner, & Barry, 1994) and taken as an indication of explanation adequacy. In support of this idea, researchers have found ratings of adequacy and sincerity to be highly related in correlational research (e.g., Shapiro et al., 1994, study 1).

found that these factors combine additively, such that explanations are most effective when they contain detailed information and the communicator is interpersonally sensitive. In related research, Shapiro and her colleagues (1994) examined the roles of communicator sensitivity and specificity of the message content. Similar to Greenberg, Shapiro et al. found that both explanation features contributed to judgments of explanation adequacy. It is interesting to note that expressions of remorse, as in an apology, are often included as part of the operationalization of communicator social sensitivity (e.g., Greenberg, 1994), consistent with the notion that apologies may have beneficial effects.

In conceptually related work on message content, researchers have suggested recently that multiple explanations may be more effective than a single explanation. For example, in an investigation of company responses to customer complaints, Conlon and Murray (1996) found that the combination of an apology and a justification was more effective in mitigating customer complaints than was either account alone (see also Gilliland et al., 2001). In still other work in this vein, researchers have found that explanations for selection decisions are more influential when they contain personalized information compared with when they do not (Gilliland, 1994; Ployhart & Ryan, 1997; Ployhart et al., 1999).⁴

Recently, Manscour-Cole and Scott (1998) found that the source of the message may be influential. In a longitudinal field study, the researchers found that layoff survivors' perceptions of the fairness of a restructuring and layoff process were greater for those who indicated that they had first heard of the layoff in discussions with their direct managers as opposed to other sources, including the official company announcement. The researchers found that this was especially true for those employees who had, 15 months earlier, indicated that they had a high-quality relationship with their direct supervisor. There are several plausible interpretations of this effect, one being that employees who first heard the news from their direct manager perceived greater information or more sensitive treatment.

In addition to message content and communicator characteristics, some research has examined the communication medium, namely, whether the explanation is delivered orally versus in writing. Drawing on research in the area of nonverbal communication, Shapiro and her colleagues (1994, study 2) hypothesized that, compared to explanations delivered in writing, those delivered orally might raise perceptions of the account giver's sincerity due to subtle cues that accompany oral de-

⁴It is noteworthy that Ployhart et al. (1999) found that personalized information exacerbates both positive and negative effects of explanations. Possible negative effects are discussed in the next section.

livery. Shapiro et al. also suggested that verbal and nonverbal cues might serve as a heuristic in judgments of account reasonableness. As expected, the researchers found that the explanation features under investigation had a more pronounced influence on ratings of account adequacy when the explanation was delivered orally rather than in writing.

Does the timing of the message influence its effectiveness? Several theorists have suggested that timely feedback is one standard or criterion by which people evaluate fairness, suggesting that explanations should not be severely delayed vis-à-vis the event in question (Aram & Salipante, 1981; Bies & Moag, 1986; Folger & Bies, 1989; Greenberg, Bies, & Eskew, 1991; Tyler & Bies, 1990). There is some evidence to support this idea. In a field study of the editorial review process, Gilliland and Beckstein (1996) found that authors' distributive justice perceptions were positively correlated with both an objective measure of the time (number of days) it took editors to render their editorial decision and a measure of perceived timeliness. Similarly, Conlon and Murray (1996) found that customers were more satisfied with the explanation that they had received from a company in response to their letter of complaint, and had greater intentions to conduct future business with the company, when they were more satisfied with the speed of the company's reply. Unlike Gilliland and Beckstein (1996), however, an objective measure of the speed of the company's reply failed to influence recipients' reactions (see Shapiro et al., 1994, study 2, for a similar null effect). Thus, there is some support for the idea that timeliness may influence the effectiveness of explanations, but more definitive research is needed, given the inconsistent findings across objective and subjective indices.

Characteristics of the Receiver and the Social Context

As noted earlier, research into factors that enhance the efficacy of explanations is fundamentally motivated by theorists' early discovery that the provision of an explanation is itself not sufficient; instead, recipients' evaluations or interpretations of the explanation are crucial. Although the recipient was clearly recognized as having a key role in the process of account receiving, much of the empirical research to date has focused on identifying characteristics of the message (e.g., content, medium, source, timing) and characteristics of the account giver (e.g., sincerity, social sensitivity, relationship to recipient) that contribute to account efficacy. In recent years, research has begun to consider the role of the receiver more explicitly. Importantly, this work also acknowledges the role of social and contextual factors, such as the nature of the past relationship between the recipient and the account giver, as well as

the reactions of coworkers. Research on the roles of the receiver and the social context is particularly promising because it encourages the conceptualization of explaining as a reciprocal process rather than as a unidirectional event. Such a conceptualization is consistent with theorizing in the broader psychological and sociological literatures (e.g., Schönbach, 1990). As a consequence of this conceptualization, justice researchers are grappling increasingly with complex questions pertaining to the efficacy of managerial explanations.

A study by Rousseau and Tijoriwala (1999) highlights the role of the receiver in the study of managerial accounts. The authors conducted a field survey in a hospital implementing empowerment among nurses and examined factors that influenced nurses' interpretations of the social account offered by management. They found that trust in management, the nature of the psychological contract, and beliefs of coworkers influenced the degree to which nurses believed management's account of the change, as well as the alternative reasons that nurses generated for the change. The account was more readily accepted and successful in motivating employee participation for those who had a high-quality relationship with the organization, and for those whose coworkers accepted the account offered by management. Among other things, these findings highlight the important role of relational and social factors that can impinge on recipients' construals of explanations, in particular in the context of explaining a complex organizational change that occurs over a protracted period of time.

In other research highlighting the role of recipient, some researchers (e.g., Bobocel, McCline, & Folger, 1997; Frey & Cobb, 1999) have suggested that reactions may be influenced by receivers' cognitive processing strategy. As discussed by Bobocel et al., psychological research has delineated a continuum of processing strategies by which people make judgments (for reviews, see Chaiken & Trope, 1999; Petty & Cacioppo, 1986; Shiffrin & Schneider, 1977; Wegner & Bargh, 1998). At the *controlled* or *systematic* end, people engage in mindful, deliberate, and effortful processing. At the *automatic* or *heuristic* end, judgments are more mindless, less deliberate, and less effortful. When processing a communication more systematically, judgments are said to result from attending to, elaborating on, rehearsing, and integrating information contained in the message. In contrast, when processing a communication more heuristically, judgments are likely to be influenced by the quick application of well-learned decision rules or schemas, such as "in general, the experts are right," and "if others agree, the explanation is likely to be true." Drawing on this broad dual-process distinction, Bobocel et al. hypothesized that the features that contribute to an account's efficacy may be moderated by processing strategy. For example, as people move toward the systematic end of the processing contin-

uum—depending on their motivation and ability to process an account more or less deliberately—they may be relatively more influenced by the quality of arguments. In contrast, as people move toward the heuristic end of the processing continuum—either because they are unable to process more systematically or they are not sufficiently motivated to do so—they may be relatively more influenced by cues in the situation. Such cues can pertain to the message itself (e.g., number of arguments), the communicator (e.g., expertise, sensitivity), or the context (e.g., audience response). Future empirical research is necessary to test the viability of this model.

A study by Conlon and Murray (1996) also indirectly highlights the role of the receiver in determining the effectiveness of managerial accounts. Drawing parallels between Best and Andreason's (1977) life cycle of customer complaints and Felstiner, Albel, and Sarat's (1980–1981) model of grievances, Conlon and Murray hypothesized that apologies may be particularly effective in the context of customer complaints. According to Felstiner and colleagues, people are said to progress through three stages in the grievance process: (a) the perception of injury, (b) the attribution of responsibility and blame, and (c) the demand for some remedy, referred to as naming, blaming, and claiming, respectively. Conlon and Murray reasoned that apologies may be more effective than excuses or denials on the theory that, by the time people complain to an organization, they have already determined blameworthiness. As a consequence, people may be more resistant to excuses or denials and more receptive to an apology. Conlon and Murray's results were in line with their reasoning.

Although the researchers did not test the role of recipients' goals directly, we believe that their study has important theoretical implications: The effectiveness of particular types of accounts might be influenced by receivers' goals. When people are first deciding whether to name an event as an injustice, justifications may be more effective than excuses or apologies because justifications aim to reframe an event in more positive terms whereas both excuses and apologies admit that injury has occurred. Once people have decided that an injury has occurred and are next deciding whether to blame the offending party, excuses may be particularly effective because they aim to minimize responsibility. Finally, as argued by Conlon and Murray, once people have decided that an injury has occurred and that an actor or institution is responsible, apologies may be particularly effective. Admittedly, we suspect that people move through the naming, blaming, and claiming stages very rapidly, thereby blurring the distinctions just drawn. Clearly, our ideas will need to be validated in future research. Nevertheless, research that explicitly considers the goals of the recipient promises to shed light on why and when particular types of accounts may be

more or less effective, providing a more complete understanding of the account-receiving process.

Finally, research on third-party observer reactions to explanations has similarly highlighted the role of the receiver. For example, Davidson and Friedman (1998) found what they labeled a "persistent injustice effect," such that an excuse failed to mitigate perceived injustice among Black respondents who observed transgressions toward a hypothetical Black victim. The researchers suggest that the persistent injustice effect results from the combination of the observers' in-group identification and their personal experiences with injustice, factors that combine to produce the motivation and ability to empathize with the victim.

In summary, researchers have devoted a good deal of attention to the study of factors that contribute to the efficacy of explanations. Clearly, explanations are not all equally effective in assuaging negative reactions. Numerous factors have been studied; we classified these broadly as factors pertaining to the message, the actor, the receiver, and the situation, with the situation including the social context. It will be important to continue research into characteristics of the receiver and the social context that influence how people construe explanations. Further, it will be of interest to investigate the possible interactive effects of various factors that influence efficacy.

ARE THERE POTENTIAL DRAWBACKS TO USING REMEDIAL EXPLANATIONS?

As summarized earlier, on balance the evidence to date suggests that managerial explanations can potentially enhance perceived fairness and maintain employee morale. Moreover, the Shaw et al. (2003) meta-analysis showed that excuses may be particularly effective, a finding that is consistent with a large volume of psychological research on excuse making (e.g., Harvey, 1995). In their comprehensive review, Snyder and Higgins (1988) found that, relative to not using excuses, excuse making can have a host of beneficial effects, including intrapsychic benefits for the account giver (e.g., higher self-esteem and adjustment, reduced anxiety and negative affect, and even better task performance), and the recipient (e.g., restored self-esteem, reduced negative affect), as well as for interpersonal relations.

Although the benefits of explanations—in particular, excuses or mitigating accounts—have been emphasized in the justice literature, there has been less theory and research on the potential disadvantages. Several justice theorists have raised the possibility of adverse consequences of managerial accounts (e.g., Shapiro, 1991; Sitkin & Bies, 1993), but only recently are researchers beginning to study the potential risks of account giving systematically. For example, Bobocel and Farrell

(1996, study 1) found that providing an inadequate excuse for a diversity policy raised perceptions of unfairness among observers relative to a control condition in which no explanation was offered. Similarly, Skarlicki, Folger, and Gee (2004) found that providing recipients with a negative outcome accompanied by either a polite message or an apology—but no substantive content—resulted in greater perceptions of unfairness and attributions of manipulative intent relative to when participants received no message at all. Other research suggests that excuse-making may have trade-off effects for the actor's public image. For example, Bobocel et al. (1998) found that participants who imagined themselves as an employee who was denied a request by their manager evaluated their manager as more friendly and likeable as a person—but weaker as a leader—when he shifted responsibility to others compared with when he accepted responsibility or did not provide an account.

In a recent review of psychological literature on excuse making, Schlenker and his colleagues (Schlenker, et al., 2001) drew on their triangle model of responsibility (Schlenker, Britt, Pennington, Murphy, & Doherty, 1994) to elucidate the possible downsides. Schlenker et al. (2001) suggested that because excuses are self-serving explanations of events, they are vulnerable to creating a negative image of the excuse maker; in particular, excuses can undermine perceptions of the excuse maker's character as someone who has integrity, is effectual, and is concerned about the greater good. Thus, excuses have the potential to make the excuse maker appear to be deceitful, ineffectual, and self-absorbed. Schlenker et al. argued that excuses can therefore be harmful to the excuse makers' public identity, private views of the self, interpersonal relations, and possibly even future performance. According to Schlenker et al. (p. 25), the beneficial effects of excuse making likely accrue to the extent that excuses: (a) are credible, (b) maintain the actor's self-engagement in cases of important and recurring tasks, and (c) maintain goodwill and do not give the impression of narcissism. An important direction for future research on managerial explanations will be to investigate more systematically the potential downsides, in particular, of excuses, and when negative effects are likely to occur.

So far, we have been discussing several possible risks of explanations that are deemed by recipients as inadequate or disingenuous. But there is another way in which explanations—which are perceived as adequate and sincere—can have adverse effects. Research into the role of explanations in the employee selection process has revealed that adequate explanations for job rejections can lead to a diminished sense of self-efficacy (e.g., Gilliland, 1994; Ployhart & Ryan, 1997; Ployhart et al., 1999). Presumably, adequately and sincerely explaining the process enhances recipients' perceptions of fairness. In turn, the more fair that recipients perceive the job rejection, the more they are inclined to attribute

it to internal factors, such as their ability or effort, rather than to external factors, such as improper selection procedures. Such internal attributions result in lowered self-evaluations.

Martin, Parsons, and Bennett (1995) found a similar pattern in a natural field experiment that examined the influence of workers' membership in an employee involvement (EI) program on their reactions to being laid off. On the grounds that EI programs facilitate open communication between workers and management, including opportunities for management to adequately explain decisions, the researchers predicted that layoff victims who had been members of EI programs would react more favorably toward the layoff process than would nonmembers. Results confirmed their predictions. Additionally—although the overall level of self-blame was low regardless of EI membership—those employees who were members of EI programs placed significantly more blame on themselves for the impending layoff than did nonmembers.

Together, these findings highlight serious potential trade-off effects of "successful" explanations. On the one hand, offering an adequate explanation may yield several benefits for both the account giver and the account receiver, as well as for interpersonal relations. On the other hand, successful explanations may adversely affect receivers' self-evaluations. These findings are of course consistent with other justice research (discussed in detail elsewhere in this volume) that has demonstrated negative effects of perceived procedural fairness on self-evaluations (e.g., Brockner & Wiesenfeld, 1996; Brockner et al., 2003; Van den Bos, Bruins, Wilke, & Dronkert, 1999). Future research is needed to understand how managers can offset the potentially negative side effects of "good" explanations on receiver self-evaluations.

WHEN IS IT MOST IMPORTANT TO EXPLAIN?

As noted earlier, most studies have examined the efficacy of managerial explanations for mitigating negative reactions to unfavorable events. This focus follows directly from early sociological treatments of accounts (e.g., Scott & Lyman, 1968) and from psychological research on attribution processes. Attribution research indicates that people are more motivated to ask "why" questions, and consequently to search for causal information, when the outcome of an event is negative or unexpected, or when people are confronted with events that are stressful, novel, or personally important (Wong & Weiner, 1981). Similarly, fairness theory and its predecessor, referent cognitions theory, predict that explanations ought to have stronger effects when the event or behavior being explained is unfavorable rather than favorable.

Several studies have nevertheless manipulated or measured outcome favorability, as well as outcome severity, to examine the possible

moderating role directly. Although there are some exceptions, several studies support the idea that explanations have stronger effects on a variety of reactions when the event being explained is negative rather than positive (e.g., Daly, 1995; Folger & Martin, 1986; Greenberg, 1993b, 1994). Similarly, the effects of explanations tend to be stronger when the negative event is of greater rather than lesser severity (Brockner et al., 1994; Greenberg, 1994; Schaubroeck, May, & Brown, 1994; Shapiro, 1991; Shapiro et al., 1994, study 2). In their meta-analysis, Shaw et al. (2003) found that outcome favorability/severity indeed significantly moderated the relation between explanations and recipient responses. Explanations had a greater influence on recipient responses when the event being explained was more, rather than less, unfavorable/severe.⁵

Do these findings imply that there is no value in explaining favorable outcomes or less severe negative outcomes? No. Several studies have demonstrated that explanations enhance perceptions of process fairness regardless of the favorability or severity of the decision outcome (e.g., Daly, 1995; Folger & Martin, 1986; Gilliland & Beckstein, 1996; Greenberg, 1994). Furthermore, in the context of selection decisions, research has revealed that explaining the selection process to those who are selected for the job—a positive outcome—can bolster participants' self efficacy (e.g., Gilliland, 1994; Ployhart & Ryan, 1997; Ployhart et al., 1999).

Researchers have examined the moderating role of other variables that, like outcome favorability and outcome severity, presumably increase recipients' motivation to understand why an event occurred. The current evidence suggests that the influence of explanations on recipient responses is stronger when the event being explained is more important (e.g., Brockner et al., 1990), when the event violates one's expectations (e.g., Colquitt & Cherkoff, 2002; Greenberg, 1993b), and in conditions where people are more uncertain about the event being explained (Brockner et al., 1990). From the latter findings, several researchers have suggested that explanations may be crucial in managing organizational change, when it is likely that uncertainty is high (e.g., Cobb & Wooten, 1998; Rousseau & Tijoriwala, 1999). It is worth noting a parallel between this line of thinking and recent research in the broader justice literature testing fairness heuristic theory (e.g., Lind, 2002; Van den Bos, Lind, & Wilke, 2001) and the related uncertainty management model of fairness (Van den Bos & Lind, 2002), which shows that people are more influenced by manipulations of fairness under conditions of greater uncertainty.

In summary, the data are consistent with the idea that explanations have a greater potential to shape receiver reactions in situations in

⁵Shaw et al. (2003) appear to have combined studies that manipulated or measured outcome favorability with those that manipulated or measured outcome severity.

which the receiver is particularly motivated to understand why the event transpired or what its implications are. Past research on moderators has uncovered important situational factors that presumably influence receivers' motivation to understand. Future research should also examine the moderating role of person variables that might influence receivers' proclivity to ask why, regardless of the situation.

WHAT FACTORS INFLUENCE HOW PEOPLE EXPLAIN?

As is evident from the preceding sections, much of the research on managerial explanations has examined their effects, the factors that influence their efficacy, and the factors that moderate their influence. Recently, research has expanded to include consideration of the factors that determine an actor's use of explanations. In short, there has been a shift toward examining explanations as a dependent variable, as well as an independent variable.

Although research in this vein has gained favor recently, its potential value has been recognized for some time (e.g., Greenberg, 1990; Schlenker, 1980; Schönbach, 1990; Sitkin, Sutcliffe, & Reed, 1993). In one study, Greenberg (1990) examined the narrative comments provided by supervisors in their evaluations of subordinates' performance. He found that supervisors' explanations could be classified into four major categories, and that use of the different categories depended on the nature of the evaluation. Explanations focusing on the meritorious aspects of performance were typically used to explain high ratings, apologies typically accompanied low ratings, and average ratings received no explanation. Similarly, Sitkin et al. (1993) conducted a field study in which pharmacists had to decide whether to fill a potentially erroneous prescription, and how much information to share with their client. The researchers found that pharmacists drew selectively on a variety of institutionalized norms to make their potentially questionable action appear more just.

In several recent articles, Folger and his colleagues highlighted the topic of managerial account giving in the context of what they labeled the "Churchill effect" (see Folger & Pugh, 2002; Folger & Skarlicki, 2001). Citing anecdotal evidence, these researchers have suggested that managers are often the least interpersonally sensitive, paradoxically, when employees most need them to be sensitive—when rendering or implementing unfavorable decisions, such as layoffs. Drawing on existing psychological evidence, Folger and his colleagues highlighted several reasons why managers may distance themselves from employees during difficult times, and fail to provide adequate explanations. These reasons include negative emotions, avoidance of blame, and fear of being sued.

In an initial test of their ideas, Folger and Skarlicki (1998) examined the role of blameworthiness as one determinant of how managers explain decisions. The authors found that MBA students asked to imagine a layoff as due to personal mismanagement (rather than external conditions) indicated that they would spend less time explaining the layoff to their subordinates. Sitkin et al. (1993) reported a similar finding in their study of pharmacists discussed earlier: The more that pharmacists perceived filling a potentially erroneous prescription to threaten their legitimacy, the fewer explanations they offered to their client.

Psychological research in the area of interpersonal relations has examined characteristics of the actor that influence how they explain their actions. For example, drawing on the McLaughlin et al. (1983) mitigation-aggravation continuum of account types, several studies have found that women are more likely than men to proffer mitigating accounts, such as concessions, apologies, or excuses (e.g., Gonzales et al., 1990, 1992; Tata, 1998, 2000). In one series of studies by Gonzales and colleagues (1992), respondents were asked to read various hypothetical predicaments and to imagine themselves as the offending party. They then provided written accounts to the victim explaining what happened. Gonzales et al. found that women gave more complex accounts—comprising more than one type of explanation—than did men, especially more complex concessions, and that women told fewer lies.

In a recent workplace study, Tata (1998) asked nonmanagerial employees to recall a time when they were denied a request by their boss, and to describe any explanations provided by the manager. Tata found that female managers used more concessions and excuses compared to male managers, although there was no gender difference in the number of justifications or refusals. In addition, the gender of the employee (the account receiver) appeared to influence the type of account used by managers. In general, female managers provided more excuses and concessions to female employees than to male employees; male managers, however, provided excuses and concessions relatively equally between male and female employees. Unfortunately, because Tata's results rely solely on employees' recollections of their managers' explanations, they are open to alternative interpretations. For example, they may reflect memory biases resulting from respondents' implicit theories of gender differences in leadership rather than actual leader behavior. Although the results require replication to rule out alternative interpretations, they are consistent with the idea that both the gender of the account giver and the gender of the account receiver may influence how actors explain their actions.

A recent study by Korsgaard, Roberson, and Rymph (1998, study 1) more clearly illustrates the role of the receiver. Korsgaard and her colleagues hypothesized that employees who are more assertive in their

communication style would elicit more considerate behavior and better explanations from their managers. In an experiment conducted to test this idea, Korsgaard et al. had undergraduate students assume the role of an appraiser and deliver performance feedback to another participant (in reality an experimental confederate) who had performed poorly. The confederate's communication style was manipulated such that it was either assertive or unassertive. The results showed that appraisers were more likely to display consideration toward the appraisee, and to provide justifications for their evaluations, when the confederate's communication style during the meeting was assertive rather than unassertive.

In addition to the examination of situational factors, characteristics of the actor, and characteristics of the receiver, cross-cultural researchers have examined whether culture influences an actor's accounting behavior. Much of this research has compared the responses of people from individualistic cultures, such as North America, to those from collectivistic cultures, such as Asia. Generally speaking, within individualistic cultures, personal goals are given priority over goals of the collective, and behaviors are determined by one's attitudes and the perceived costs and benefits associated with performing a particular behavior. By contrast, within collectivistic cultures, group goals are given priority over personal goals, and behaviors are determined by group norms, duties, and obligations (e.g., Singelis, 1994; Triandis, 1996).

Several studies have demonstrated that, compared to people from individualistic cultures, those from collectivistic cultures are more likely to provide mitigating accounts. For example, Itoi, Ohbuchi, and Fukuno (1996) asked American and Japanese students first to read scenarios in which they assumed the role of a harm doer who unintentionally harmed someone and then to indicate the likelihood of using various account types in response to the harm done. They found that collectivists (relative to individualists) preferred more mitigating accounts, such as apologies and excuses, and less aggravating accounts, such as justifications.

In summary, research into the psychology of managerial account giving promises to enrich our understanding of the process considerably. A key direction for future research will be to continue to identify factors that influence how managers explain their own or others' actions. An important outgrowth of research on account giving will be to examine the effects on the actor. As noted earlier, by and large, justice researchers have focused on the empirical study of receiver reactions. There has been no systematic research on the repercussions of account giving for the actor, apart from his or her image in the eyes of the receiver. This is in stark contrast to the study of accounts in the broader psychology litera-

ture, where the emphasis has been on the benefits of account giving for the actor. As highlighted earlier, psychological research has demonstrated that there can be clear intrapsychic benefits of account giving, in particular of excuse making, for the actor. Of course, as also discussed earlier, Schlenker and his colleagues (2001) identified possible detrimental effects of excuse making for the account giver's private identity and future performance. It will be of interest to study both the potential benefits and the potential downsides of account giving for the actor in terms of his or her emotions, private evaluations of the self, and task performance.

CONCLUSION: WHERE HAVE RESEARCHERS BEEN AND WHERE IS THE FIELD GOING?

We began this chapter by asking the broad question: Do explanations influence perceived fairness in the workplace? Our review has revealed that explanations have the potential to enhance perceived fairness and to maintain employee morale during bad times. Yet it also revealed that the influence of explanations is not straightforward. After two decades of investigation, researchers have learned a great deal about managerial explanations. Still there are more questions to be addressed within the broad framework of Fig. 16.1, many of which we raised throughout this review. In particular, seven themes for future research emerged. These are summarized in Table 16.1. As indicated by these themes, research in the coming years must grapple with a number of challenging issues. To achieve a fuller understanding of the role of explanations, investigators will need to better delineate the many processes and factors that determine how both actors and receivers interpret and react to explanations, and why and when they do so. We hope that our explicit identification of themes will be of assistance, although we expect new themes to emerge as well.

In conclusion, it is our belief that explaining often does matter: It can help both parties in an exchange weather difficult times. But the process is complex, and much more remains to be discovered about the intricacies of explaining in the organizational context. Communication is crucial to the success of the organization, and explanation addresses the central question that people always ask—why? We look forward to continuing research on this issue, as investigators delve into the many important and intriguing questions that are as yet unanswered.

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How Can Training Be Used to Foster Organizational Justice?

Daniel P. Skarlicki
University of British Columbia

Gary P. Latham
University of Toronto

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