



TONY LUONG

Humans and Technology

**The man who changed  
disruption—and saw  
his own theories get  
disrupted**

# What I learned from Clayton Christensen, the author of *The Innovator's Dilemma*.

by Christian Sandström

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I met Clayton Christensen only once. It was 2012, and thousands of business scholars were gathering in downtown Boston for the Academy of Management, the industry's biggest conference of the year. People from all around the world presented papers, networked, applied for jobs. Keynotes were delivered in gigantic lecture halls packed with hundreds of curious PhD students, aspiring postdocs, and tenured professors.

Not everything felt like a rock concert, though. Two years earlier, I'd defended my doctoral thesis on Christensen's theory of disruption, and I was keen to present some of my arguments to anyone who would listen. Our paper was assigned to a small seminar room. There were hundreds of such backwater sessions, and usually only the coauthors and a few acquaintances from last night's cocktail party showed up.

A few minutes before the session started, Christensen entered the room. I was stunned. Why would someone of his status even bother to find our paper in this haystack of academic research? But he listened carefully, and his presence was calm and focused. After our presentation, Christensen made a couple of remarks—most of them reflective and self-critical—and acknowledged some of our arguments.

This man was clearly not in the game to gain prestige or try to push an agenda. He came across as humble, thoughtful, and curious in a way that left me astonished and impressed.

## **Data driven**

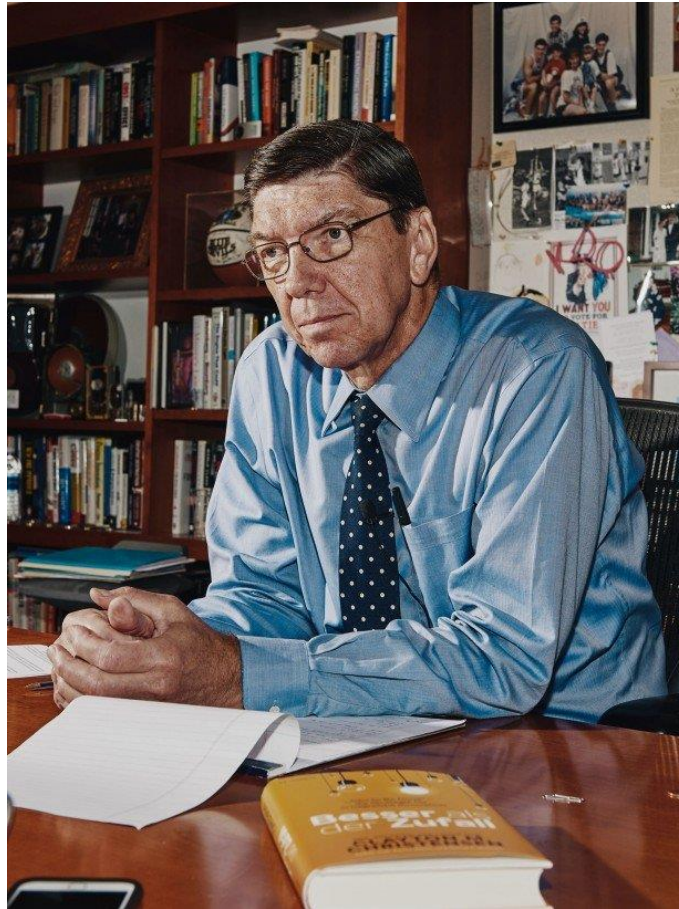
When I heard that Clayton Christensen had died—aged 67, from complications caused by the leukemia he had been fighting for some time—I thought about my experience in Boston back in 2012. After all, if we are going to discuss his legacy, that first and only impression seems as a good point to start as any.

Christensen's own doctoral dissertation, defended at Harvard Business School in 1992, concerned the disk drive industry from the early 1970s up until the 1990s. He investigated every technological change during this era and tried to relate these shifts to changes in industrial leadership. The data told an interesting—and initially confusing—story.

Previous research had tried to answer the question of why organizations found success so difficult to keep going over long periods, but it mostly looked at a company's internal capabilities. If a business built on what it was good at, went the received wisdom, then it could defend itself against new, smaller entrants unless they came up with some entirely novel approach.

Christensen's data suggested otherwise. It wasn't the emergence of radically new technology that helped David outsmart Goliath. Rather, it was the emergence of a new generation of smaller disk drives that created insurmountable problems for established players. Why?

Over the coming years, Christensen developed and refined his thoughts on what was happening. Invoking some out-of-favor concepts from the 1960s and 1970s, he highlighted how the demand to serve current, profitable customers in the short-to-medium term seemed to captivate companies. The needs of these customers made it seem irrational to invest in other initiatives, and so, he contended, these firms ended up brittle and vulnerable to being blindsided. He argued that companies were being misled by the very same practices—such as listening to their customers, or designing next-generation products for existing users—that had made them successful in the first place. Firms performed well by adhering to the needs of key actors in the environment, but over time, the environment started to impose a great indirect control over firms, eventually putting them in deep trouble. The theory was beautifully counterintuitive.



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These ideas were clarified into a coherent framework in his famous 1997 book *The Innovator's Dilemma*, and, as they say, the rest is history. Christensen's ideas spread like a wildfire. They were intriguing and exciting to everyone who came across them, both in academia and in industry.

By the 2000s, Christensen had reached academic stardom. He was an outstanding communicator and author, and his books about disruption had a huge impact: Intel's acclaimed CEO Andy Grove notably said *The Innovator's Dilemma* was the most important book he had read in a decade, and Christensen was celebrated regularly as the world's greatest management thinker. But as the work became more widespread, his original ideas became more diluted. By 2010 or so, "disruptive innovation" meant the same thing "radical" had meant in the 1990s. At conferences and corporate events, among startups and in tech media coverage, "disruption" became omnipresent—at the expense of its original meaning and identity.

On several occasions, Christensen tried to restore the original ideas behind the disruption concept, but ironically, his ideas now faced a form of innovator's dilemma themselves. Their meaning was beyond the control of the mind where they were born.

## **Disruption, diluted**

As “disruption” became progressively more well known, the concept increasingly faced another threat: becoming too powerful. Christensen’s theory of disruption was never the only one that suggested when and why entrants displace incumbents in business—after all, decades had been spent studying how such things took place. But as his work was watered down, many scholars, consultants, and corporations began to focus on only this one framework, disregarding the entire edifice of knowledge that his work was part of.

For sure, the “Christensen effect” mattered when one company pushed another out of the limelight, but there were many other factors that mattered too. And you could produce an interesting analysis if you applied the theories of *The Innovator’s Dilemma* to business—but the conclusions would often be invalid if they did not pay enough attention to the rest of reality. A company’s capabilities, organizational routines, managerial cognition, and network effects were just some of the factors that clearly mattered—and yet, time and again, experts tried to make predictions based solely upon Christensen’s theories. I know I am guilty of several such mistakes.

For those of us who did this, the natural and unfortunate reaction was then to blame Christensen’s work for our failed assessment or inaccurate forecast. But the problem was less the theory of disruptive innovation and more our collective will to attribute more explanatory power to a single theory than is possible.

Christensen’s work was one theory concerning industrial dynamics and technological change. It was never *the* theory. Elevate any idea to that sort of position and you are bound to generate disappointment. Combine it with other concepts and theories and you can find a much greater impact.

So the innovator’s dilemma faced an innovator’s dilemma of its own. It’s not just companies that are dependent on and vulnerable to an environment beyond anyone’s direct control. Ideas are too.

## **Keys to success**

Clayton Christensen was not the first brilliant scholar or charismatic professor to write and speak about technology and innovation, and he will not be the last. So why was he so remarkably successful? What was the true source of competitive advantage that separated him from others?

He inspired a generation of scholars, including me, to think seriously about how businesses are affected by technology; he helped countless companies and provided valuable knowledge to hundreds of thousands of students who read his books and related papers.

My moment with him suggests an answer. His accomplishments were enabled by the same character that cast its light across that tiny, half-empty seminar room in Boston. You can only speak about failure if you are humble and graceful. You can only explain why well-managed firms fail by being thoughtful. And you can only develop truly remarkable concepts by being self-critical, curious, and open-minded.

*Christian Sandström is associate professor of innovation management at Chalmers University of Technology and the Ratio Institute in Sweden.*

[https://www.technologyreview.com/s/615107/the-man-who-changed-how-we-think-about-disruptionand-got-disrupted-himself/?utm\\_source=newsletters&utm\\_medium=email&utm\\_campaign=the\\_download.unpaid.engagement](https://www.technologyreview.com/s/615107/the-man-who-changed-how-we-think-about-disruptionand-got-disrupted-himself/?utm_source=newsletters&utm_medium=email&utm_campaign=the_download.unpaid.engagement)