QUALITATIVE RESEARCH METHODS IN MANAGEMENT

1. Intended learning outcomes

This course is intended, not just for doctoral students in the Social and Behavioral Science Track, but also for other doctoral students, regardless of substantive area or methodological orientation. Qualitative methods are used in many management fields by a significant minority of researchers. Whatever your methodological affiliation, you can benefit from the ability to read qualitative research critically and evaluate its contribution to your subject area of study.

The objective of the course is to develop your appreciation for qualitative research methods. The course takes a practical approach to this objective: While philosophical assumptions underlie all method choices, the course does not put them in the foreground. Rather, the emphasis is on doing qualitative research -- that is, reading it, evaluating it, learning the skills involved in conducting it, and applying these skills in the design, conduct, and writeup of a small-scale research study of your choice.

2. Methodology and learning activities

The course is organized according to an idealized research life cycle: study design, data collection, data analysis, write-up, and so forth. Each week, we will devote time in class to (1) discussing the "Theory and practice" assigned readings; (2) evaluating critically one qualitative research article published in refereed management journals, assigned as "Example"; and (3) discussing learnings and problems that occur as you conduct your qualitative research project.

More specifically, we will proceed as follows. Please prepare you presentations according to the timings indicated (NOTE: these instructions may change slightly once we know how many people will take the course):

(1) "Theory and practice" readings: students will take turns in leading the discussion of the assigned readings. Plan for a 5-10 min. informal presentation of each reading to be followed by a 15-10 min. discussion of that reading. Focus on the 3 to 5 main messages you want to highlight: there is no need to repeat the paper as everybody will have read it beforehand. We will end with a 15 min. overall discussion of the set of readings.
In addition, all students will submit a weekly report in relation to these readings. Please refer to the “Written assignments” section below.

(2) “Example” readings: students will take turns in leading a critical discussion of the assigned reading. Plan for a 10 min. formal presentation (using overheads) to be followed by a 15 min. discussion of the reading. Please refer also to the “Written assignments” section below.

(3) Project discussions: students will take turns to present their ideas for the course project. Plan for two presentations on separate days. The first presentation (3–5 min. presentation plus 10–8 min. discussion) will focus on the research question that you are interested in. The second presentation will focus on the research design (10 min. presentation plus 10 min. discussion). Please refer also to the “Written assignments” section below.

3. Course Requirements and Performance Evaluation

- Introduction to the readings of the week (30%).
- Contribution to class discussions (30%).
- Evaluation of a qualitative research article (10%).
- Students will design, execute, and write up the results of a small-scale qualitative research study on a topic of their choice (30%).

4. Bibliography

Basic readings:

- See required readings assigned for each week: (1) theory and practice; and (2) examples.
Complementary readings:

- See recommended readings suggested for each week.

5. Competences

General competences:

CG6: Use appropriate tools and techniques for problem solving, correction contrasting and decision validation

Specific competences:

CE1: Understand the concepts of social and human sciences relevant and necessary to carry out research projects of international level in the area of business management.
CE3: Organization, planning and implementation of a research project related to social sciences.
CE5: Ability to understand state-of-the-art research in organization theory published in the top academic journals (Administrative Science Quarterly, Academy of Management Journal, Organization Science, American Journal of Sociology, etc.) and compare and contrast the arguments developed in the papers from a logical and empirical point of view.
CE10: Use the acquired knowledge and skills and apply them to a constantly changing business environment as generated by current societies.
CE17: Ability to critically establish the relevance and significance of the results obtained with respect to the proposed objectives, and prepare conclusions within the framework of current scientific knowledge on the topic in question.
CE18: Develop a scientific / technical report or research work with the objective to inform the scientific community on the contribution of the research conducted, making use of adequate information technology for both acquisition and dissemination of research results.
CE19: Publicly present ideas, procedures or research reports to advise people and organizations.
WRITTEN ASSIGNMENTS

Note: written assignments are to be sent to the Professor’s Assistant by e-mail on the due time (see below). Please do not send the reports to the Professor directly.

Weekly report— Understanding the theory and practice of Qualitative/Case Research
Due before each class meeting.

Prepare a written report (500-600 words) on your main learning points from the week's readings.

Assignment 1— Evaluating an Example of Qualitative/Case Research
Due on the day when you lead the discussion of an Example reading.

Prepare a written report (1,200-1,500 words) evaluating the example of qualitative/case study that you have been assigned. The Example has been selected because it connects particularly well to the topic of the day. Thus, you may want to pay special attention to the method issues we will discuss on that day, in addition to those discussed previously.

As a guideline, the following are aspects you may wish to consider in your evaluation (you need not consider them all, or you may want to add others):

- the purpose of the research study;
- the research design;
- the kinds and quality of evidence presented;
- the way in which evidence is presented (i.e., verbal, tabular);
- the quality of data analysis;
- the role of theory in the study/report;
- the organization of the written report, with special attention to the introduction and the opening paragraph;
- the persuasiveness of the written report.
Assignment 2—Conducting Qualitative/Case Research

Design, conduct, and write-up a small-scale qualitative or case study. I recommend that your study directly addresses a research issue in your research paper, your dissertation proposal, or a project on which you have recently worked. Even if your larger research project employs survey, experimental or formal methods, you can benefit from conducting a small-scale qualitative pilot study or case study. You may wish to reformulate your research questions somewhat to get most out of a qualitative/case study.

In this assignment, you may use any one technique or combination of techniques: interviews, observations, analysis of documents, etc. This is an opportunity to be creative with relatively low risk.

Part 1, Research Question—Write the introduction to an article motivating the research question (approx. 500–700 words) and be ready to present it in class. Distribute this document to your classmates and to the Professor at least 24 hours prior to the class.

Part 2, Research Design—Prepare a presentation of the research question and methods (please refer to section 3 above on "Methodology and learning activities").

Part 3, Final Report—Due on June 8th (4,500–5,000 words).
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<td>1 (April 3rd)</td>
<td>IntroductionThis week, we consider what qualitative methods are and the reasons for using them</td>
<td>Readings</td>
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**Theory and practice:**


**Example:**


**Recommended readings**

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| 2 (April 10th) | Different purposes, different styles | **Readings**

Glaser and Strauss (1967) proposed a typology of research approaches employing qualitative methods with two categories: theory generation and theory testing. We examine various methods in the context of this typology.

**Theory and practice:**

**Example:**

**Recommended readings**
- M&H, chapter 1: "Introduction"
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<td>3 (April 17th)</td>
<td>Study design</td>
<td><strong>Readings</strong></td>
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**Theory and practice:**
- Yin, chapter 1: "Introduction"
- Yin, chapter 2: "Designing case studies."

**Example:**

**Recommended readings**
- *MéTH, chapter 2: "Focusing and bounding the collection of data: The substantive start."
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| 4 (April 24th) | **Data collection**<br>In this session, we consider the theoretical and practical issues in method "triangulation", with particular emphasis on alternative data sources | **Readings**<br>**Theory and practice:**<br>- Yin, chapter 3: "Preparing to collect case study evidence."
- Yin, chapter 4: "Collecting case study evidence"
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<td><strong>6 (May 8th-11th)</strong></td>
<td>Data analysis: Atlas.ti program &lt;br&gt;This week we will become familiar with the Atlas.ti program, one of the most commonly used software packages for data analysis. Further instructions will be provided as we go along.</td>
<td><strong>Example:</strong>&lt;br&gt;• García-Alvarez, E. and J. López-Sintas. 2001. &quot;A taxonomy of founders based on values: The root of family business heterogeneity,&quot; <em>Family Business Review</em>, XIV(3): 209-230.&lt;br&gt;Note: while we will not discuss this example in class, it serves to illustrate the use of Atlas.ti. You should read it prior to the class meeting.&lt;br&gt;<strong>Recommended readings</strong>&lt;br&gt;• Weitzman, E. A. 2000. &quot;Software and qualitative research,&quot; in Denzin, N. K. and Y. S. Lincoln (Eds.) <em>Handbook of Qualitative Research</em>. Thousand Oaks, CA: Sage Publications, pp. 803–820.</td>
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<td>7 (May 15th)</td>
<td><strong>Data analysis: Within case analysis.</strong></td>
<td><strong>Readings</strong></td>
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<td><strong>Theory and practice:</strong></td>
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<td>• Yin, chapter 5: &quot;Analyzing case study evidence&quot;</td>
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<td><strong>Example:</strong></td>
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<td><strong>Recommended readings</strong></td>
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<td>• M&amp;H, chapter 5: &quot;Within-case displays: Exploring and describing&quot;</td>
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<td>• M&amp;H, chapter 6: &quot;Within-case displays: Explaining and predicting&quot;</td>
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<tr>
<td>8</td>
<td>(May 22nd)</td>
<td>Data analysis: across case analysis</td>
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**Readings**

**Theory and practice:**
- M&H, chapter 10: "Making good sense: Drawing and verifying conclusions."

**Example:**

**Recommended readings**

- M&H, chapter 7: "Cross-case displays: Exploring and describing"
- M&H, chapter 8: "Cross-case displays: Ordering and explaining"
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<td>9 (May 29th)</td>
<td>Reaching closure</td>
<td><strong>Readings</strong></td>
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**Theory and practice:**

**Example:**

**Recommended readings**
- M&H, chapter 9: "Matrix displays: Some rules of thumb"
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<tr>
<td>10</td>
<td>Writing and publishing qualitative research</td>
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**Readings**

**Theory and practice:**
- "M&H, chapter 12: "Producing reports"

**Example:**

**Recommended readings**