

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 your 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:

- Yin, R. K. 2009. Case Study Research: Design And Methods, Thousand Oaks, CA: Sage Publications.
- Miles, M. B. and A. M. Huberman. 1994. Qualitative Data Analysis: An Expanded Sourcebook, Thousand Oaks, CA: Sage Publications. (Referred to as M+H).
- 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).

WEEK	DESCRIPTION	CASE/ACTIVITY
1 (April 3 rd)	<p>Introduction This week, we consider what qualitative methods are and the reasons for using them</p>	<p><u>Readings</u></p> <p><u>Theory and practice:</u></p> <ul style="list-style-type: none"> • Van Maanen, J. 1979. "Reclaiming qualitative methods for organizational research: A preface," <i>Administrative Science Quarterly</i> 24(4): 520-526. • Mintzberg, H. 1979 "An emerging strategy of "direct" research," <i>Administrative Science Quarterly</i> 24(4): 582-589. • Gephart, R. 2004. "Qualitative research and the Academy of Management Journal," <i>Academy of Management Journal</i>, 47(4): 454-462. • Jensen, M. E. et al. 1989. "Clinical papers and their role in the development of financial economics," <i>Journal of Financial Economics</i>, 24(1): 3-6. <p><u>Example:</u></p> <ul style="list-style-type: none"> • Isabella, L. 1990. "Evolving interpretation as a change unfolds: How managers construe key organizational events", <i>Academy of Management Journal</i>, 33: 7-41. <p><u>Recommended readings</u></p> <ul style="list-style-type: none"> • Piore, M. J. 1979. "Qualitative research techniques in Economics," <i>Administrative Science Quarterly</i>, 24(4): 560-569. • Morgan, G. and L. Smircich. 1980. "The case for qualitative research," <i>Academy of Management Review</i>, 5(4): 491-500. • Cunliffe, A. L. 2011. "Crafting qualitative research: Morgan and Smircich 30 years on," <i>Organizational Research Methods</i>, 14(4): 647-673. • Langle, A, C. Smallman, H. Tsoukas and A. Van de Ven 2013. "Process studies of change in organization and management: Unveiling temporality, activity, and flow", <i>Academy of Management Journal</i>, 56(1): 1-13 • Molina-Azorin, J. F., D. D. Bergh, K. G. Corley, and D. J. Ketchen. 2017. "Mixed methods in the organizational sciences," <i>Organizational Research Methods</i>, 20(2): 179-192.

WEEK	DESCRIPTION	CASE/ACTIVITY
2 (April 10 th)	<p>Different purposes, different styles</p> <p>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.</p>	<p><u>Readings</u></p> <p><u>Theory and practice:</u></p> <ul style="list-style-type: none"> • O'Reilly, K., D. Paper and S. Marx. 2012. "Demystifying grounded theory for business research," <i>Organizational Research Methods</i>, 15(2): 247-262. • Suddaby, R. 2006. "What grounded theory is not," <i>Academy of Management Journal</i>, 49(4): 633-642. • Reichertz, J. 2004. "Abduction, deduction, and induction in qualitative research," in Flick, U., E. von Kardorff and I. Steinke (Eds.), <i>A Companion to Qualitative Research</i>, London: Sage Publications: 159-164. • Bitektine, A. 2008. "Prospective case study design: Qualitative method for deductive theory testing," <i>Organizational Research Methods</i>, 11(1): 160-180. <p><u>Example:</u></p> <ul style="list-style-type: none"> • Shane, S. 2000. "Prior knowledge and the discovery of entrepreneurial opportunities," <i>Organization Science</i>, 11(4): 448-469. <p><u>Recommended readings</u></p> <ul style="list-style-type: none"> • M&H, chapter 1: "Introduction" • Glaser, B. G. and A. L. Strauss. 1967. <i>The Discovery of Grounded Theory: Strategies for Qualitative Research</i>, Chicago, IL: Aldine. • Strauss, A. L. 1998. <i>Basics of Qualitative Research: Techniques and Procedures for Developing Grounded Theory</i>, Thousand Oaks, CA: Sage Publications. • Fendt, J. and W. Sachs. 2008. "Grounded theory method in management research. Users' perspective," <i>Organizational Research Methods</i>, 11(3): 430-455.

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<p>3 (April 17th)</p>	<p>Study design</p>	<p><u>Readings</u></p> <p><u>Theory and practice:</u></p> <ul style="list-style-type: none"> • Yin, chapter 1: "Introduction" • Yin, chapter 2: "Designing case studies." • Gibbert, M., W. Ruigrok, and B. Wicki. 2008. "What passes as a rigorous case study?" <i>Strategic Management Journal</i>, 29(13): 1465–1474. • Eisenhardt, K. 1989. "Building theories from case study research," <i>Academy of Management Review</i>, 14(4): 532–550. • Dyer, W.G. and A.L. Wilkins. 1991. "Better stories, not better constructs, to generate better theory: A rejoinder to Eisenhardt," <i>Academy of Management Review</i>, 16(3): 613–619. • Eisenhardt, K. 1991. "Better stories and better constructs: The case of rigor and comparative logic," <i>Academy of Management Review</i>, 16(3): 620–627. <p><u>Example:</u></p> <ul style="list-style-type: none"> • Ariño, A, P. S. Ring. 2010. "The role of fairness in alliance formation" <i>Strategic Management Journal</i> 31(10): 1054–1087. <p><u>Recommended readings</u></p> <ul style="list-style-type: none"> • <i>M&H, chapter 2</i>: "Focusing and bounding the collection of data: The substantive start." • Eisenhardt, K. M. and M. E. Graebner. 2007. "Theory building from cases: Opportunities and challenges," <i>Academy of Management Journal</i>, 50(1): 25–32. • Gibbert, M. and W. Ruigrok. 2010. "The "what" and "how" of case study rigor: Three strategies based on published work," <i>Organizational Research Methods</i> 13(4): 710–737. • Siggelkow, N. 2007. "Persuasion with case studies," <i>Academy of Management Journal</i>, 50(1): 20–24. • Easterby-Smith, M., K. Golden-Biddle, and K. Locke. 2008 "Working with pluralism: Determining quality in qualitative research," <i>Organizational Research Methods</i>, 11(3): 419–429.

WEEK	DESCRIPTION	CASE/ACTIVITY
4 (April 24 th)	<p>Data collection</p> <p>In this session, we consider the theoretical and practical issues in method "triangulation", with particular emphasis on alternative data sources</p>	<p><u>Readings</u></p> <p><u>Theory and practice:</u></p> <ul style="list-style-type: none"> • Yin, chapter 3: "Preparing to collect case study evidence." • Yin, chapter 4: "Collecting case study evidence" • Huber, G. P. and D. J. Power. 1985. "Retrospective reports of strategic-level managers: Guidelines for increasing their accuracy," <i>Strategic Management Journal</i>, 6: 171-180. • Morgan, D. L. and M. T. Spanish. 1984. "Focus groups: A new tool for qualitative research," <i>Qualitative Sociology</i>, 7(3): 253-270. • Flick, U. 2004. "Triangulation in qualitative research," in Flick, U., E. von Kardorff and I. Steinke (Eds.), <i>A Companion to Qualitative Research</i>, London: Sage Publications: 178-183. • Turner, S. F., L. B. Cardinal, and R. M. Burton. 2017. "Research design for mixed methods: A triangulation-based framework and roadmap," <i>Organizational Research Methods</i>, 20(2): 243-267. <p><u>Example:</u></p> <ul style="list-style-type: none"> • Caprar, D. V. 2011. "Foreign locals: A cautionary tale on the culture of MNC local employees," <i>Journal of International Business Studies</i>, 42: 608-628. <p><u>Recommended readings</u></p> <ul style="list-style-type: none"> • M&H, chapter 3: " Focusing and bounding the collection of data: Further design issues." Cunliffe, A. L. and R. Alcadipani. 2016. "The politics of access in fieldwork," <i>Organizational Research Methods</i>, 19(4): 535-561. • Webb, E., and K. E. Weick. 1979. "Unobtrusive measures in organizational theory: A reminder," <i>Administrative Science Quarterly</i>, 24(4): 650-659. • Bouchard, T. J. 1976. "Unobtrusive measures: An Inventory of Uses," <i>Sociological Methods & Research</i>, 4(3): 267-300. • Jick, T. D. 1979. "Qualitative and quantitative methods. Triangulation in action," <i>Administrative Science Quarterly</i>, 24(4): 602-611. • Edmondson, A. C. and S. E. McManus. 2007. "Methodological fit in management field research," <i>Academy of Management Review</i>, 32(4): 1155-1179.

WEEK	DESCRIPTION	CASE/ACTIVITY
5 (April 26 th)	<p>Early analysis during data collection</p> <p>In qualitative methods, the researcher is a research instrument. In this session, we examine how qualitative researchers analyze their data as they collect it.</p>	<p><u>Readings</u></p> <p><u>Theory and practice:</u></p> <ul style="list-style-type: none"> • Van Maanen, J. 1979. "The fact of fiction in organizational ethnography," <i>Administrative Science Quarterly</i>, 24(4): 539-550. • Miles, M. B. 1979. "Qualitative data as an attractive nuisance: The problem of analysis," <i>Administrative Science Quarterly</i> 24(4): 590-601. • M&H, chapter 4: "Early steps in analysis." Note: pay special attention to Sections B to E. <p><u>Example:</u></p> <ul style="list-style-type: none"> • Moschieri, C. 2011. "The implementation and structuring of divestitures. The unit's perspective," <i>Strategic Management Journal</i>, 32(4): 368-401. <p><u>Recommended readings</u></p> <ul style="list-style-type: none"> • Holstein, James A. 1995. <i>The Active interview</i>, Thousand Oaks, CA: Sage Publications.
6 (May 8 th -11 th)	<p>Data analysis: Atlas.ti program</p> <p>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.</p>	<p><u>Example:</u></p> <ul style="list-style-type: none"> • García-Alvarez, E. and J. López-Sintas. 2001. "A taxonomy of founders based on values: The root of family business heterogeneity," <i>Family Business Review</i>, XIV(3): 209-230. <p>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.</p> <p><u>Recommended readings</u></p> <ul style="list-style-type: none"> • Weitzman, E. A. 2000. "Software and qualitative research," in Denzin, N. K. and Y. S. Lincoln (Eds.) <i>Handbook of Qualitative Research</i>. Thousand Oaks, CA: Sage Publications, pp. 803-820.

WEEK	DESCRIPTION	CASE/ACTIVITY
7 (May 15 th)	Data analysis: Within case analysis.	<p><u>Readings</u></p> <p><u>Theory and practice:</u></p> <ul style="list-style-type: none"> • Yin, chapter 5: "Analyzing case study evidence" • Langley, A., C. Smallman, H. Tsoukas, and A. Van.de.Ven. 2013. "Process studies of change in organization and management: Unveiling temporality, activity, and flow," <i>Academy of Management Journal</i>, 56(1): 1-13. • Langley, A. 1999. "Strategies for theorizing from process data," <i>Academy of Management Review</i>, 24(4): 691-710. <p><u>Example:</u></p> <ul style="list-style-type: none"> • Ariño A. and J. de la Torre. 1998. "Learning from failure: Towards an evolutionary model of collaborative ventures" <i>Organization Science</i>, 9(3): 306-325 <p><u>Recommended readings</u></p> <ul style="list-style-type: none"> • M&H, chapter 5: "Within-case displays: Exploring and describing" • M&H, chapter 6: "Within-case displays: Explaining and predicting"

WEEK	DESCRIPTION	CASE/ACTIVITY
8 (May 22 nd)	Data analysis: across case analysis	<p><u>Readings</u></p> <p><u>Theory and practice:</u></p> <ul style="list-style-type: none"> • Durand, R. and E. Vaara. 2009. "Causation, counterfactuals, and competitive advantage," <i>Strategic Management Journal</i>, 30: 1245-1264. • M&H, chapter 10: "Making good sense: Drawing and verifying conclusions." <p><u>Example:</u></p> <ul style="list-style-type: none"> • Davis, J. P. and K. M. Eisenhardt. 2011. "Rotating leadership and collaborative innovation. Recombination in symbiotic relationships," <i>Administrative Science Quarterly</i>, 56(2): 159-201. <p><u>Recommended readings</u></p> <ul style="list-style-type: none"> • M&H, chapter 7: "Cross-case displays: Exploring and describing" • M&H, chapter 8: "Cross-case displays: Ordering and explaining" • Folger, R. and C. Stein. 2016. "Abduction 101: Reasoning processes to aid discovery," <i>Human Resource Management Review</i>, in press, http://dx.doi.org/10.1016/j.hrmr.2016.08.007

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<p>9 (May 29th)</p>	<p>Reaching closure</p>	<p><u>Readings</u></p> <p><u>Theory and practice:</u></p> <ul style="list-style-type: none"> • Yin, chapter 6: "Reporting case studies: How and what to compose" Pentland, B. 1999. "Building process theory with narrative: From description to explanation," <i>Academy of Management Review</i>, 24(4): 711-724. • Michailova, S. et al. 2014. "Breaking the silence about exiting fieldwork: A relational approach and its implications for theorizing," <i>Academy of Management Review</i>, 39(2): 138-161. • Bansal, P., and K. Corley. 2012. "Publishing in AMJ - Part 7: What's different about qualitative research?" <i>Academy of Management Journal</i>, 55(3): 509-513. <p><u>Example:</u></p> <ul style="list-style-type: none"> • Faems, D., M. Janssens, A. Madhok, and B. Van Looy. 2008. "Toward an integrative perspective on alliance governance. Contract design, trust dynamics, and contract application," <i>Academy of Management Journal</i>, 51(6): 1053-1078. <p><u>Recommended readings</u></p> <ul style="list-style-type: none"> • M&H, chapter 9: "Matrix displays: Some rules of thumb" • Wolcott, H. F. 2001. <i>Writing up qualitative research</i>, Thousand Oaks, CA: Sage Publications.

WEEK	DESCRIPTION	CASE/ACTIVITY
10 (June 5 th)	Writing and publishing qualitative research	<p><u>Readings</u></p> <p><u>Theory and practice:</u></p> <ul style="list-style-type: none"> • "M&H, chapter 12: "Producing reports" • Pratt, M. G. 2008. "Fitting oval pegs into round holes: Tensions in evaluating and publishing qualitative research in top-tier North American journals," <i>Organizational Research Methods</i>, 11(3): 481-509. • Jonsen, K., J. Fendt, and S. Point. 2018. "Convincing qualitative research. What constitutes persuasive writing," <i>Organizational Research Methods</i>, 21(1): 30-67. <p><u>Example:</u></p> <ul style="list-style-type: none"> • Monin, P., N. Noorderhaven, E. Vaara, and D. Kroon. "Giving sense and making sense of justice in post-merger integration," <i>Academy of management Journal</i>, 56(1): 256-284. <p><u>Recommended readings</u></p> <ul style="list-style-type: none"> • Pratt, M. G. 2009. "From the editors. For the lack of a boilerplate: Tips on writing up (and reviewing) qualitative research," <i>Academy of Management Journal</i>, 52(5): 856-862.