

QUALITATIVE RESEARCH METHODOLOGIES AND TECHNIQUES II

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Salvador Carmona is a Professor of Accounting and Management Control at IE Business School-IE University, where he serves as Dean of Faculty and Rector, respectively. His research adopts an interdisciplinary perspective to focus on management accounting and control as well as on the organizational and social aspects of accounting systems. Salvador has got his research published in journals such as Abacus; Accounting and Business Research; Accounting, Auditing and Accountability Journal; Accounting, Organizations and Society; Critical Perspectives on Accounting; European Journal of Operations Research; International Journal of Production Economics; International Journal of Operations and Production Management; Journal of Accounting and Public Policy; Journal of Business Ethics; Journal of Management Development; Management Learning; Organization Studies; Scandinavian Journal of Management. He is an editorial board member of 14 international journals and a past senior editor of Oxford Research Reviews. Salvador and past editor-in-chief of European Accounting Review (2006-2011). He has also served as president of the Academy of Accounting Historians and the European Accounting Association.

OBJECTIVES

Qualitative research is an exciting exercise that will challenge your intellectual curiosity and your creativity. The seminar intends to provide you with a repertoire of solutions and approaches to collect and analyze qualitative data. The purpose of qualitative research is not merely to describe advanced management techniques in a credible way but to contribute to theory building and, hence, the seminar will focus on both research methods and theory building through qualitative research. In particular, the seminar will:

- Provide an understanding of the different research methods used in qualitative research.
- Ensure that data gathering is conducted according to the established standards of reliability and validity.
- Design qualitative research to make both an empirical and theoretical contribution to extant knowledge.

Therefore, the seminar will cover areas such as:

- Methodological foundations of qualitative research.
- Relevance of qualitative research.
- The role of theory in qualitative research.
- Qualitative data gathering and analysis.
- Quality criteria in qualitative research.
- Writing down qualitative research.

METHOD AND APPROACH

The atmosphere in this class should be one of discovery—of stretching our thinking beyond the boundaries of our own pre-conceptions and misconceptions and discovering the exciting world of qualitative research.

The seminar is structured in three parts. To capitalize on the fundamentals of qualitative research, be kindly advised that each of these parts will require your active participation.

A) Sessions 1-10

The first part of the seminar will expose you to the foundations of qualitative research. Students are expected to attend the seminar fully prepared to discuss, question, and comment on the assigned readings, contributing their ideas, issues, and problems they have encountered related to their qualitative research work.

For every session, including the first, double session, assigned readings are to be prepared for discussion. There will be some presentations by the instructor but no formal lectures. Class participation will be strengthened if participants select a topic from the syllabus and facilitate its discussion during a class session. The instructor will ask you for the topic of your choice and your reflections will be discussed with the class.

B) Sessions 11-14

As a central assignment, you are expected to conduct a qualitative research project on a topic of your choice (e.g., your doctoral dissertation?) On this basis, you are asked to produce an essay, which will be individually discussed with the instructor (circa 45 minutes per participant). In order to enhance feedback, the written version of the essay should be forwarded to the instructor by September 10, 2018, at the latest.

C) Sessions 15-16

You are asked to form groups and prepare for a 30-minute presentation plus 15 minutes Q&A with the class. Guidance for the group size will be given in the first session. Your choice of the topics (see below) as well as the groups that will present them to the class, should be forwarded to the instructor by March 12 at the latest. Topics will be assigned on first-come, first-serve basis.

To enhance participation and discussion on your presentations, your .ppt, written notes, etc, should be forwarded to the instructor by September 17, 2018, at the latest. These files will be posted on campus.

PROGRAM

PART A -PROGRAM (SESSIONS 1-10)

SESSIONS 1 - 2

Sessions 1-2: Qualitative Research

Basic Reading:

Galunic, D. C., & Eisenhardt, K. M. (2001). Architectural innovation and modular corporate forms. *Academy of Management Journal*, 44(6), 1229-1249.

(Strongly) recommended readings:

Alvesson, M., & Sandberg, J. (2013). Has management studies lost its way? Ideas for more imaginative and innovative research. *Journal of Management Studies*, 50(1), 128-152.

Eisenhardt, K. M. (1989). Building theories from case study research. *Academy of Management Review*, 14(4), 532-550.

Van Maanen, J. (1979). Reclaiming qualitative methods for organizational research: A preface. *Administrative Science Quarterly*, 24(4), 520-526.

Questions:

What is the Galunic and Eisenhardt's paper about?

Which are its objectives?

How is the paper structured?

Why do the authors use a qualitative approach?

Which alternative research designs could have been used?

R.A.: Galunic, D. C., & Eisenhardt, K. M. (2001). Architectural innovation and modular corporate forms. Academy of Management Journal, 44(6), 1229-1249.

R.A.: Alvesson, M., & Sandberg, J. (2013). Has management studies lost its way? Ideas for more imaginative and innovative research. Journal of Management Studies, 50(1), 128-152.

R.A.: Eisenhardt, K. M. (1989). Building theories from case study research. Academy of Management Review, 14(4), 532-550.

R.A.: Van Maanen, J. (1979). Reclaiming qualitative methods for organizational research: A preface. Administrative Science Quarterly, 24(4), 520-526.

SESSIONS 3 - 4

Sessions 3-4: Methods and Theories in Qualitative Research

Baard, V., 2010. A critical review of interventionist research. *Qualitative Research in Accounting & Management*, 7(1), 13-45.

Boje, D.M., 1995. Stories of the storytelling organization: A postmodern analysis of Disney as "Tamara-Land". *Academy of Management Journal*, 38(4), 997-1035.

Elharidy, A.M., Nicholson, B. and Scapens, R.W., 2008. Using grounded theory in interpretive management accounting research. *Qualitative Research in Accounting & Management*, 5(2), 139-155.

Gioia, D.A. and Pitre, E., 1990. Multiparadigm perspectives on theory building. *Academy of management review*, 15(4), pp.584-602.

Questions:

How important is research design in qualitative research?

How flexible should one be once in the field?

Make a case of interventionist qualitative research and be specific about how you would apply it to your research questions.

Is storytelling a scientific exercise?

What is not grounded theory?

R.A.: Baard, V., 2010. A critical review of interventionist research. Qualitative Research in Accounting & Management, 7(1), 13-45.

R.A.: Boje, D.M., 1995. Stories of the storytelling organization: A postmodern analysis of Disney as "Tamara-Land". Academy of Management Journal, 38(4), 997-1035.

R.A.: Elharidy, A.M., Nicholson, B. and Scapens, R.W., 2008. Using grounded theory in interpretive management accounting research. Qualitative Research in Accounting & Management, 5(2), 139-155

R.A.: Gioia, D.A. and Pitre, E., 1990. Multiparadigm perspectives on theory building. Academy of management review, 15(4), pp.584-602.

SESSIONS 5 - 6

Sessions 5-6: Data Collection.

Butterfield, L. D., Borgen, W. A., Amundson, N. E., & Maglio, A. S. T. (2005). Fifty years of the critical incident technique: 1954-2004 and beyond. *Qualitative Research*, 5(4), 475-497.

Kraaijenbrink, J. (2012). Integrating knowledge and knowledge processes: A critical incident study of product development projects. *Journal of Product Innovation Management*, 29(6), 1082-1096.

Qu, S. Q., & Dumay, J. (2011). The qualitative research interview. *Qualitative Research in Accounting & Management*, 8(3), 238-264.

Questions:

Which data sources are you planning to use in your dissertation?

Are you planning to use interviews? Why? How?

Which kind of interviewees are you planning to use? How many?

Which are the differences between the critical interview and the semi-structured interviews? Focus on Kraaijenbrink's piece, which are the strengths and limits of the critical interview method?

R.A.: Butterfield, L. D., Borgen, W. A., Amundson, N. E., & Maglio, A. S. T. (2005). *Fifty years of the critical incident technique: 1954-2004 and beyond*. *Qualitative Research*, 5(4), 475-497.

R.A.: Kraaijenbrink, J. (2012). *Integrating knowledge and knowledge processes: A critical incident study of product development projects*. *Journal of Product Innovation Management*, 29(6), 1082-1096.

R.A.: Qu, S. Q., & Dumay, J. (2011). *The qualitative research interview*. *Qualitative Research in Accounting & Management*, 8(3), 238-264.

SESSIONS 7 - 8

Sessions 7-8: Single and Multiple Case Studies.

Andriopoulos, C. and Lewis, M.W., 2009. Exploitation-exploration tensions and organizational ambidexterity: Managing paradoxes of innovation. *Organization Science*, 20(4), pp.696-717.

Burgelman, R.A., 1994. Fading memories: A process theory of strategic business exit in dynamic environments. *Administrative Science Quarterly*, pp.24-56.

Salvador, F., Forza, C., & Rungtusanatham, M. (2002). Modularity, product variety, production volume, and component sourcing: theorizing beyond generic prescriptions. *Journal of operations management*, 20(5), 549-575.

Questions:

Focus on Burgelman's paper: a) what is its main contribution? How a theoretical-deductive paper could have made a similar contribution? How a single-case study can make Burgerlman's point? What does Burgelman do to establish the credibility of its conclusions? Can the findings of this piece be generalized? How?

What makes a good case for a single case study?

How do you analyze data from a single case?

How can you reinforce the theoretical side of your paper?

Focus on Salvador et al's (2002) paper: How sampling, data analysis and generalization differ from Burgelman (2004). Which are the differences between single and multiple-case study?

Focus on Andriopoulos and Lewis' (2009) paper: Answer the questions raised in Salvador et al (2002), above. How does this paper differ from Galunic and Eisenhardt (2002)?

R.A.: Andriopoulos, C. and Lewis, M.W., 2009. *Exploitation-exploration tensions and organizational ambidexterity: Managing paradoxes of innovation*. *Organization Science*, 20(4), pp.696-717.

R.A.: Burgelman, R.A., 1994. *Fading memories: A process theory of strategic business exit in dynamic environments*. *Administrative Science Quarterly*, pp.24-56.

R.A.: Salvador, F., Forza, C., & Rungtusanatham, M. (2002). *Modularity, product variety, production volume, and component sourcing: theorizing beyond generic prescriptions*. *Journal of operations management*, 20(5), 549-575.

SESSIONS 9 - 10

Sessions 9-10: Generalization and Triangulation.

Bernstein, E.S., 2012. *The transparency paradox: A role for privacy in organizational learning and operational control*. *Administrative Science Quarterly*, 57(2), pp.181-216.

Malina, M.A., Nørreklit, H.S. and Selto, F.H., 2011. *Lessons learned: advantages and disadvantages of mixed method research*. *Qualitative Research in Accounting & Management*, 8(1), pp.59-71.

Olsen, W., 2004. *Triangulation in social research: Qualitative and quantitative methods can really be mixed*. *Developments in sociology*, 20, pp.103-118.

Salvato, C. (2009). *Capabilities unveiled: The role of ordinary activities in the evolution of product development processes*. *Organization Science*, 20(2), 384-309.

Questions:

Which are the pros and cons of using mixed methods in qualitative management research?

Are you planning to use theoretical triangulation in your thesis? If not, why not?

Similarities and differences between Bernstein and Salvato's pieces.

Are you planning to generalize the findings of your dissertation? How?

R.A.: Bernstein, E.S., 2012. *The transparency paradox: A role for privacy in organizational learning and operational control*. *Administrative Science Quarterly*, 57(2), pp.181-216.

R.A.: Malina, M.A., Nørreklit, H.S. and Selto, F.H., 2011. *Lessons learned: advantages and disadvantages of mixed method research*. *Qualitative Research in Accounting & Management*, 8(1), pp.59-71.

B.C.: Olsen, W., 2004. *Triangulation in social research: Qualitative and quantitative methods can really be mixed*. *Developments in sociology*, 20, pp.103-118.

R.A.: Salvato, C. (2009). *Capabilities unveiled: The role of ordinary activities in the evolution of product development processes*. *Organization Science*, 20(2), 384-309.

SESSIONS 11 - 14

PART B -INDIVIDUAL PROJECTS (SESSIONS 11-14)

As a central assignment, you are expected to conduct a qualitative research project on a topic of your choice (e.g., your doctoral dissertation?) On this basis, you are asked to produce an essay, which will be individually discussed with the instructor (circa 45 minutes per participant). In order to enhance feedback, the written version of the essay should be forwarded to the instructor by September 10, 2018, at the latest.

SESSIONS 15 - 16

PART C —TOPICS FOR PRESENTATIONS (Sessions 15-16)

1. Methodological foundations of qualitative management research: Contrasting positivism with interpretivism and critical research.

- What does 'methodology' mean?
- Why is it important for management researchers to reflect upon methodological issues?
- Which are the methodological foundations of qualitative management research and how does it differ from quantitative research?

Basic readings

Alvesson, M., 2003. Beyond neopositivists, romantics, and localists: A reflexive approach to interviews in organizational research. *Academy of management review*, 28(1), pp.13-33.

Edmondson, A.C. and McManus, S.E., 2007. Methodological fit in management field research. *Academy of management review*, 32(4), pp.1246-1264.

Gummesson, E. (2003). All research is interpretive! *Journal of business & industrial marketing*, 18(6/7), 482-492.

Morgan, G., & Smircich, L. (1980). The case for qualitative research. *Academy of management review*, 491-500.

2. The role of case studies in researching accounting and management practices (2-3 students)

- What is case study research and what can we learn from it (especially from single case studies)?
- What different forms of case studies do exist and what different purposes do they have?
- How can we build theory from case study research?
- What does a persuasive case study look like?
- (How) can case studies support quantitative research?

Basic readings

Eisenhardt, K. M. (1991). Better stories and better constructs: The case for rigor and comparative logic. *Academy of Management review*, 16(3), 620-627.

Eisenhardt, K. M., & Graebner, M. E. (2007). Theory building from cases: Opportunities and challenges. *Academy of management journal*, 50(1), 25-32.

Flyvbjerg, B. (2006). Five misunderstandings about case-study research. *Qualitative inquiry*, 12(2), 219-245.

Siggelkow, N. (2007). Persuasion with case studies. *The Academy of Management Journal*, 50(1), 20-24.

3. What is organizational ethnography?

- What is organizational ethnography and why is it relevant for management research?
- What does ethnography seek to capture and why?
- How to design, conduct and assess ethnographic organizational research?
- What challenges might organizational ethnographers face?

Readings

Reeves, S., Kuper, A., & Hodges, B. D. (2008). Qualitative research methodologies: ethnography. *BMJ: British Medical Journal*, 337: 512-514

Golden-Biddle, K., & Locke, K. (1993). Appealing work: An investigation of how ethnographic texts convince. *Organization science*, 4(4), 595-616.

Kunda, G. (2013). Reflections on becoming an ethnographer. *Journal of Organizational Ethnography*, 2(1), 4-22.

Van Maanen, J. (1979). The fact of fiction in organizational ethnography. *Administrative Science Quarterly*, 539-550.

Van Maanen, J. (2011). Ethnography as work: Some rules of engagement. *Journal of Management Studies*, 48(1), 218-234.

R.A.: Alvesson, M., 2003. *Beyond neopositivists, romantics, and localists: A reflexive approach to interviews in organizational research*. *Academy of management review*, 28(1), pp.13-33.

R.A.: Edmondson, A.C. and McManus, S.E., 2007. *Methodological fit in management field research*. *Academy of management review*, 32(4), pp.1246-1264

R.A.: Gummesson, E. (2003). *All research is interpretive!* *Journal of business & industrial marketing*, 18(6/7), 482-492.

R.A.: Morgan, G., & Smircich, L. (1980). *The case for qualitative research*. *Academy of management review*, 491-500

R.A.: Eisenhardt, K. M. (1991). *Better stories and better constructs: The case for rigor and comparative logic*. *Academy of Management review*, 16(3), 620-627.

R.A.: Eisenhardt, K. M., & Graebner, M. E. (2007). *Theory building from cases: Opportunities and challenges*. *Academy of management journal*, 50(1), 25-32.

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R.A.: Siggelkow, N. (2007). *Persuasion with case studies*. *The Academy of Management Journal*, 50(1), 20-24.

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R.A.: Van Maanen, J. (2011). *Ethnography as work: Some rules of engagement*. *Journal of Management Studies*, 48(1), 218-234.

EVALUATION CRITERIA

Criteria	Percentage	Comments
Class Participation	40 %	Class Participation (Sessions 1-10)
Individual Project	35 %	Individual Projects (Sessions 11-14)
Workgroups	25 %	Workgroups (Sessions 15-16)

CLASS PARTICIPATION (Sessions 1-10): Class participation grades are based on the quality, not the quantity of the contribution; therefore students who participate often will not necessarily receive a better grade than those who participate less often. One must recognize, however, that there is an art to quality participation that is only learned by trial and error. Therefore, students are encouraged to begin contributing to the discussions early in the course. The best grades will be given to students who make the best contributions to the discussions. These involve applying conceptual material from the readings or lectures, and applying them to the discussion, integrating comments from previous classes into the current discussion, taking issues with a classmate's analysis, pulling together material from several places in the case, drawing parallels from previous classes, or by consistently demonstrating that you have carefully read the assigned material and given it careful thought.