



BOSTON COLLEGE
Carroll School of Management

Qualitative Research: Looking Back & Looking Forward

MICHAEL G. PRATT



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We've Come a Long Way...

- 📖 *Academy of Management Journal*, *Administrative Science Quarterly*, *Human Relations*, and *Organization Science* currently have multiple editors whose primary area of methodological expertise is qualitative
- 📖 Other major empirical journals in management and organizational psychology have either qualitative editors or advisors
- 📖 50 of the last 100 manuscripts published at *ASQ* included historical or other qualitative data
- 📖 Qualitative research continues to be impactful (Bartunek, et al., 2006; Rynes & Bartunek, 2015) – and this year's winner of *ASQ's Scholarly Contribution Award* was a qualitative study (Carton, 2018).

- I. How has qualitative research methods evolved in organizational studies?
- II. What are some critical issues moving forward?

Part I: Looking Back

How has qualitative research methods evolved in organizational studies?





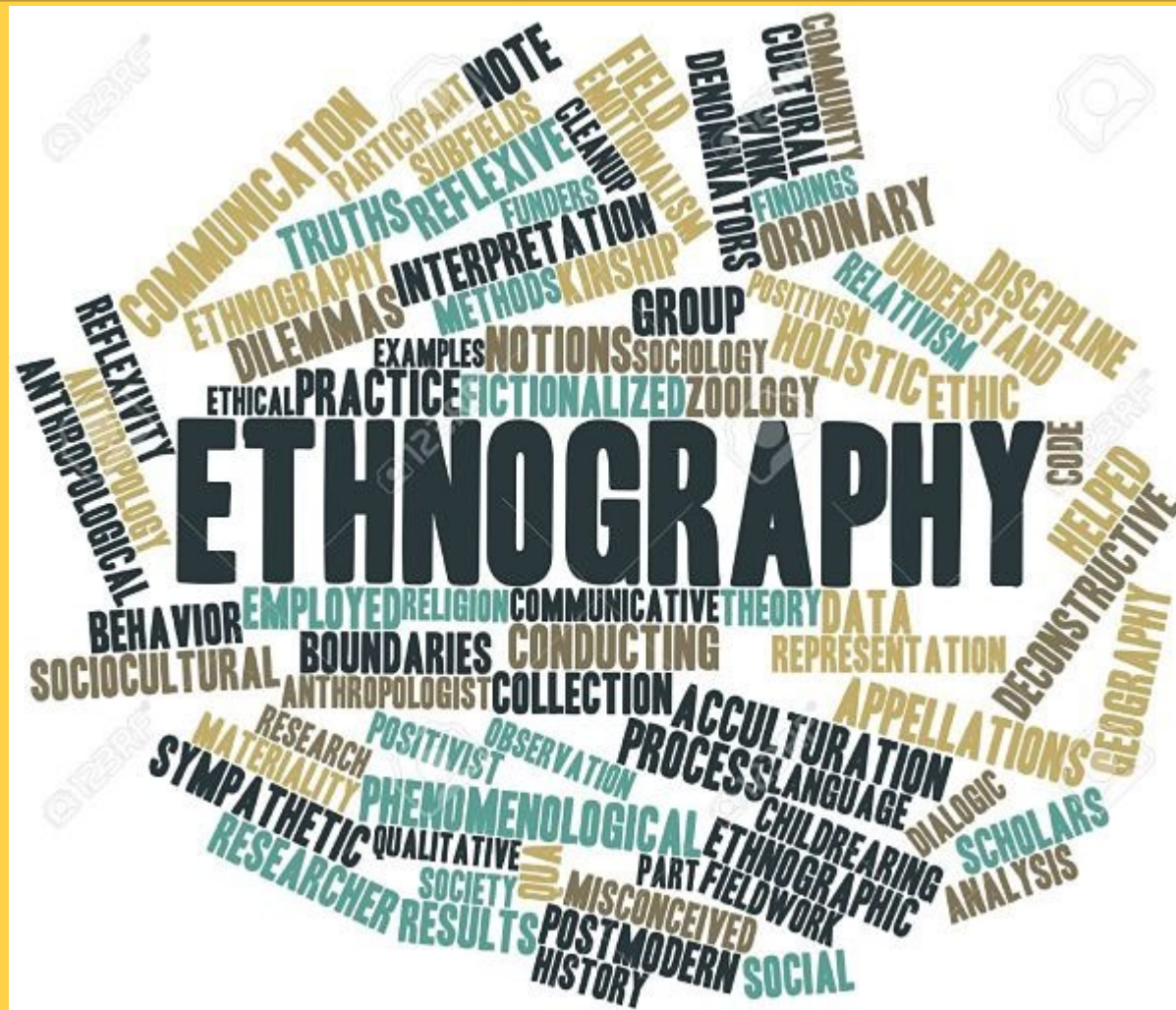
Setting the Stage

- 🏛️ Some decisions (e.g., where to start? what to consider?)
 - 1979 *ASQ* special issue on qualitative research as starting point
 - Focused on work published in organizational outlets or by scholars working in business schools
 - Looked at all qualitative articles in *ORM* from founding until early 2024 (thanks Mary, Nitin & Shannon!)
 - Focused primarily on case studies, grounded theory, and ethnography
 - Made some decisions on what are considered “core texts” regarding those methods in adjacent fields (note: we are relative newcomers to qualitative research compared with anthropology, education, and sociology)
- 🏛️ These decisions shaped by:
 - Socialization and experience doing qualitative research in the U.S. – but I consulted with individuals outside of North America on the ideas presented here
 - Editorial experience (approx. 15 years as associate editor at *AMJ* and *ASQ* and decisioned over 700 manuscripts, mostly qualitative)



Two Areas of Development

- ① How we think about “doing” qualitative research
- ① How we think about assessing “quality”



Doing Qualitative Research



Two Main Areas of Progress

- 1. Translating and extending methodologies from other areas**
- 2. Focusing on issues typically not covered in depth**



1a. Existing Methodologies: Case Studies

- 📖 **Core Text(s):** Yin (1984) *Case Study Research* (though I would also recommend Stake (1995))

- 📖 **Development Trajectory:**
 - Translation: Eisenhardt (1989) combines insights from Yin (1984) as well as insights from grounded theory

 - Further Development & Standardization: “Eisenhardt Method” (Eisenhardt, 2021) applied in template fashion (Langley & Abdallah, 2011)

 - Pushback: calls for more creativity (e.g., ORM special issue Köhler & Lambert, eds. 2022)



1b. Existing Methodologies: Grounded Theory

- 📖 **Core Text(s):** Glaser & Strauss (1967) *Discovery of Grounded Theory: Strategies for Qualitative Research*—and later iterations of grounded theory (e.g., Charmaz 2014, Glaser 1992, Strauss & Corbin 1998)

- 📖 **Development Trajectory:**
 - Translation: Locke's (2001) *Grounded Theory in Management Research* (see also Martin & Turner 1986, Suddaby 2006, Turner 1983).

 - Further Development & Standardization: "Gioia Method" (Gioia et al., 2013) is applied in template fashion (Langley & Abdallah, 2011)

 - Pushback: calls for more creativity (e.g., *ORM* special issue Köhler & Lambert, eds. 2022)



1c. Existing Methodologies: Ethnography

📖 **Core Text(?):** Spradley (1979) *The Ethnographic Interview*

📖 **Development Trajectory:**

- Lack of standardization “there is still not much of a technique attached to ethnography despite the last twenty years of trying to develop a standard methodology” (Van Maanen, 2010, p. 251) (cf., Pratt, 2023)
- Pushing methodological boundaries either by focusing on **particular dilemmas** or challenges in using the method, or by drawing upon **new technologies** that allow ethnographers to gather new types data (e.g., video) and change ethnographic practices in new ways (e.g., no longer single research at single site – see Marcus, 1995; Smets et al. 2014; Jarzabkowski et al. 2015)

2. Contributions to Areas Common across the Research Process*

- 🧠 Focusing on issues typically not covered in depth (e.g., designing research questions, gaining access) to help make **implicit craft knowledge more explicit**
- 🧠 Thinking more deeply about **coding** (not just “how to” code) and how to move from **analysis to theorizing** (e.g., abduction)
- 🧠 **Writing** and **publishing** (“induced” lessons)
- 🧠 Carving out **new** (or relatively new) **areas**
 - Process theorizing (not exclusive to qualitative)
 - Video & digital ethnographies?

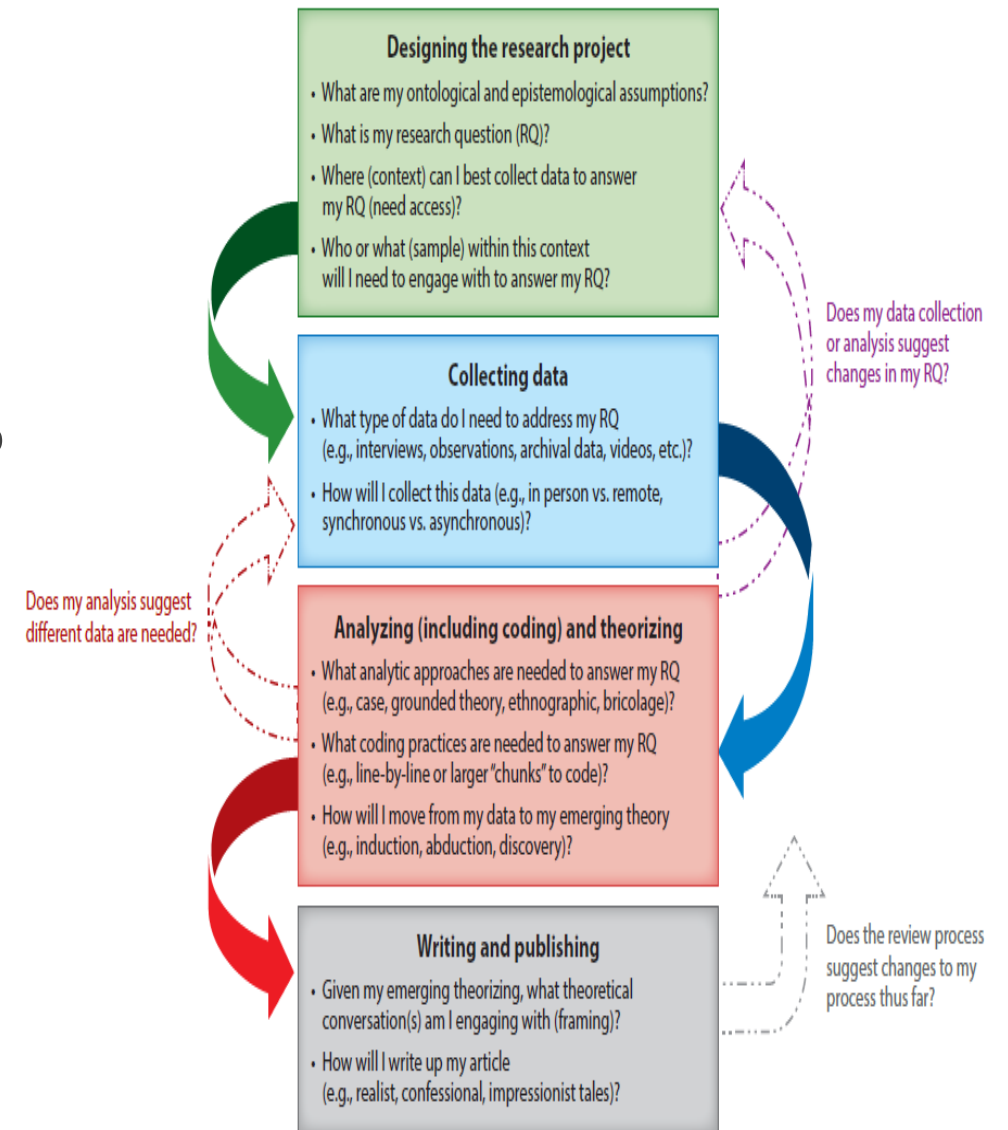


Figure 1

A stylized overview of the qualitative research process: iterative phases and questions to address within each.

What We Have Accomplished*

Table 1 Evolution in how we do research

Area of contribution	Description	Illustrative example(s)
Designing research and collecting data	Research questions	Alvesson & Sandberg 2011, 2013; Pratt 2015
	Comparative research design	Bechky & O'Mahoney 2015
	Case replication logic	Eisenhardt 1989, 2021
	Qualitative restudies/reexaminations	Köhler et al. 2023, Pratt et al. 2024
	Managing difficult informant dynamics (e.g., withdrawal, resistance)	Dundon & Ryan 2010, Thorpe 2014
	Gaining access	Feldman et al. 2004, Peticca-Harris et al. 2016
	Global and team-based multisite ethnography	Jarzabkowski et al. 2015, Smets et al. 2014
	Collecting observational data	Pratt & Sala 2021
	Data collection via video	Gylfe et al. 2016, LeBaron et al. 2018
	Immersion in the field	Dumont 2023
	Role identity/researcher stance	Bolade-Ogunfodun et al. 2023, Cunliffe & Karunanayake 2013
	Video and digital ethnography	Akemu & Abdelnour 2020, Hassard et al. 2018, Jarrett & Liu 2018, Smets et al. 2014, Whiting et al. 2018
Analyzing (including coding) and theorizing	Abduction	Bamberger 2018, Behfar & Okhuysen 2018, Locke et al. 2008
	Coding and analysis practices	Grodal et al. 2021; Locke et al. 2015, 2022; Pratt 2023
	Analyzing process data	Langley 1999, Langley & Ravasi 2019
	Member checks	Locke & Velamuri 2009
	Translating and extending grounded theory for organizational studies	Gioia et al. 2013; Locke 1996, 2001; Martin & Turner 1986; O'Reilly et al. 2012; Suddaby 2006; Turner 1983
	Translating and extending case studies for organizational studies	Eisenhardt 1989, 2021; Hoon 2013
	Translating and extending ethnography for organizational studies	Pratt 2023
	Pushing back against overly narrow views of cases, grounded theory, and methodological templates	Locke et al. 2022, Mees-Buss et al. 2022, Piekkari & Welch 2018, Pratt et al. 2022, Welch et al. 2011
Writing and publishing	Ethnographies	Van Maanen 1988, Zilber & Zanoni 2022
	Case studies	Gibbert & Ruigrok 2010
	General	Bansal & Corley 2012; Golden-Biddle & Locke 1997; Jonsen et al. 2018; Köhler 2016; Langley & Klag 2019; Pratt 2008, 2009; Rockmann & Vough 2023

Green = focused primarily on case studies; yellow = focused primarily on ethnography; blue = focused primarily on grounded theory.

* From Pratt (in press), On the Evolution of Qualitative Methods in Organizational Research, *AROPOB*



Taking Stock: Doing Qualitative Research

- ④ From map to territory -- foundational texts lacked the specificity needed, especially as qualitative research moved into the mainstream and away from more idiosyncratic, craft knowledge

- ④ Standardization vs. creativity -- codification has lead to standardization and pushback to allow more diversity and creativity in how qualitative research is done (see JOM special issue)
 - Methodological bricolage
 - Increasing number of methodologies used
 - Technology



Assessing Quality

Building on and Questioning Foundations*

📖 As with “doing” qualitative research, initial forays into quality built upon work in other areas.

📖 Two particularly influential texts are:

- Yin (1984) *Case Study Research*
- Lincoln & Guba (1985) *Naturalistic Inquiry*

📖 Currently a highly contested area in qualitative research

Table 2 Traditional means of establishing trustworthy qualitative research

Method/approach	Assessment	Defining question	Illustrative practice
Case studies/positivism (Yin 1984)	Construct validity	Can the data be verified? This is a quality of the data, not the investigator.	“Use multiple sources of evidence; establish a chain of evidence; have key informants review draft” (p. 34)
	Internal validity	Is there a causal relationship between variables or constructs?	“Do pattern-matching; do explanation-building; address rival explanations; use logic models” (p. 34)
	External validity	Can findings be generalized and to what domain?	“Use theory in single-case studies; use replication logic in multiple case studies” (p. 34)
	Reliability	Can it be replicated across cases in the study?	“Use case study protocol; develop case study database” (p. 34)
Naturalistic inquiry (Lincoln & Guba 1985)	Credibility	To what degree has the investigator given voice to the different constructions of reality found in one’s data? Credibility is assessed by those one has studied.	“Prolonged engagement” (p. 301); “persistent observation” (p. 304); triangulation (e.g., different data sources, methods, investigators, etc.); “peer debriefing” (p. 308); “negative case analysis” (p. 309); “referential adequacy” (p. 313); “member checks” (p. 314)
	Transferability	Is there contextual similarity between the context one is studying and other contexts? The burden of proof for such a comparison lies with those who want to compare findings to other contexts more than with the original investigator.	Providing a lot of details (e.g., thick description) to “show” not “tell” the reader the findings
	Dependability	Has the investigator taken into account “both factors of instability and factors of phenomenal or design induced change”? (p. 299)	All the practices of credibility plus “stepwise replication” within the dataset (p. 317) and “inquiry audit” (p. 317)
	Confirmability	Was there a process for verifying the data? Confirmability is a characteristic of the data, not the investigator.	Inquiry audit; triangulation; “reflexive journal” (p. 319); “audit trail” (p. 319); “audit process” (p. 320)

Later reconsidered



Reconsidering Quality

- 🏠 Interpretivist researchers, in particular, have been at the forefront of articulating quality criteria that are not direct analogs found in positivist research
- 🏠 This articulation has been challenging since there are different types of interpretivist researchers (Amos & Silk, 2008):
 - Quasi-foundationalist – quality is inherent in the techniques one uses
 - Nonfoundationalists – quality is inherent in intent (right moral reasons)
- 🏠 One challenge for many (especially the quasi-foundationalists) is to **acknowledge the limitations of objectivity but not succumb to relativism**
- 🏠 Another challenge is how to **communicate quality**



What We Have Accomplished

☞ Although much qualitative research continues to draw upon foundational texts for legitimation, at least two trends have occurred:

1. Standardization/ “templates-in-use” (Eisehnardt, 1989, 2021; Gioia, et al., 2013 → Langley & Abdallah, 2013)
2. Articulating new criteria (sometimes induced from published research) that fit with different ontological and epistemological assumptions

What We Have Accomplished*

Table 3 Evolution in how we assess qualitative research

Assessment	Defining questions/definitions	Source
Convincing	<i>Authenticity</i> : That the author was “there” in the field and was genuine to the experience (i.e., did not do violence to experience) <i>Plausibility</i> : Does the academic audience “buy” it in that it (a) makes sense and (b) makes a contribution? <i>Criticality</i> : Does it make you rethink your assumptions about the field or your own work?	Golden-Biddle & Locke 1993: “Appealing work: an investigation of how ethnographic texts convince”
Truth as intentional fulfillment	<i>Communicative validity</i> : Perceived fulfillment established by (a) a community of interpretation and dialogical conversation in data collection, (b) coherent interpretations, and (c) discussing findings with academic peers and practitioners <i>Pragmatic validity</i> : Viewing fulfillment in practice in the interview process (e.g., deliberately misunderstanding) or via observations/participant observation <i>Transgressive validity</i> : Showing the indeterminate nature of fulfillment through such techniques as looking for contradictions and ambiguity <i>Reliability</i> : Are the procedures for producing truth themselves trustworthy? Achieved by fostering one’s own “interpretive awareness”	Sandberg 2005, p. 59: “How do we justify knowledge produced within interpretive approaches?”
Validation	<i>Ethical validation</i> : Is one’s investigation useful to those studied? <i>Substantive validation</i> : Has the researcher taken efforts to reflect on their own biases throughout the research process (e.g., design, collection, analysis)? <i>Researcher quality</i> : Has the researcher made a “valid interpretation of their topic”? (See also minimizing “violence to experience”)	Leitch et al. 2010, p. 74: “The philosophy and practice of interpretive research in entrepreneurship: quality, validation, and trust”
Convincing	<i>Confident, clear, and candid rhetoric</i> : “Different narrative styles (from highly personalized to visual, to realist) that elegantly combine both journey and resulting theory...” (p. 33) <i>Solid and transparent methodological craftsmanship</i> : “Adhesion to canons (e.g., in the basic flow from introduction to problem statement, methods, data, discussion, and conclusion) on the one hand, and deviation from them on the other hand...” (p. 33) <i>Compelling, lively authenticity and energy</i> : “Energy in narrating the meanders of (particularized moments in) the everyday realities encountered in the field and conveying both the rich cognitive and emotional process of immersion and the synthetically substantiated theories—and elegantly oscillates between them” (p. 33) <i>Serious reflexivity</i> : “Reflexivity in terms of the writing as a cognitive process designed to reflect and relate to the readers’ worlds, yet asymmetrical enough to attract the audience’s full attention and scrutiny” (p. 33) <i>Touch of imagination, some brave abductive leaps</i> : “A trust in one’s mind, instincts, and intuition to trigger generative, insightful moments; the sagaciousness to understand and value such moments not merely as introspectively satisfactory, but as data in their own right, and, conjectured from them, novel sketches of seeing and organizing the world” (p. 33)	Jonsen et al. 2018: “Convincing qualitative research: What constitutes persuasive writing?”

(Continued)

Table 3 (Continued)

Assessment	Defining questions/definitions	Source
Rigor	<i>Logical consistency</i> : (a) Methodological coherence—consistency of ontological, empirical, and methodological assumptions with method and theoretical claims; and (b) logical coherence—“the extent to which there are explicit logical links provided in a manuscript that lead from data to theoretical presuppositions, to candidate theoretical frameworks, and to actual theoretical inferences” (p. 244) <i>Inference of the best explanation</i> : (a) Considering multiple explanations, (b) “contrastive reasoning” (p. 245), and (c) convergence of likeliest and loveliest explanations	Harley & Cornelissen 2022: “Rigor with or without templates? The pursuit of methodological rigor in qualitative research”
Interpretive rigor	<i>Data-interrogating heuristics</i> : “What is really going on here?” E.g., “data problematization, i.e., focusing on breakdowns and clues” and “skepticism towards data” (p. 421) <i>Theory-generating heuristics</i> : “What does this mean in theoretical terms?” E.g., “cycle of posing, verifying, rejecting thought trials, to produce plausible theories” and “skepticism towards theoretical interpretations” (p. 421) <i>Plausibility heuristics</i> : “How might I be wrong?” E.g., “theory interrogation: focusing on conflicting evidence” and “skepticism towards scientific credibility of theories” (p. 421)	Mees-Buss et al. 2022: “From templates to heuristics: how and why to move beyond the Gioia methodology”
Trustworthiness	<i>Competence</i> : Do researchers know what they are doing? (externally validated, such as citing appropriate sources) <i>Integrity</i> : Do the various methodological choices and moves “fit together”? (e.g., showing timeline for longitudinal research) <i>Benevolence</i> : Do the researchers show fidelity to their data? (e.g., not doing violence to experience; long time in field, using long quotes)	Pratt et al. 2022: “Moving beyond templates: a bricolage approach to conducting qualitative research”



Taking Stock: Assessing Quality

- 📖 Moving beyond criteria that are analogs to positivist quantitative criteria for all qualitative research (e.g., reliability and validity)
- 📖 Quality should be assessed within the ontological and epistemological assumptions of one's methods
- 📖 Commonalities across efforts:
 - Importance of transparency in all phases of the research process
 - Importance of “triangulation” either to demonstrate consensus or differences
 - Some agreement that good interpretivist research should reflect multiple voices and not do “violence to experience”



Taking Stock: Looking Back

- We have or are making progress in:
 - Articulating parts of the research process that were not well-explored in the traditions we borrow from
 - Thinking more deeply about analyzing and theorizing (process)
 - How we write
 - How we assess quality

- But there are challenges ahead

Part II: Looking Forward

Three Issues to Ponder





Challenges

📌 Global proliferation of qualitative research

- Double translation problems
- Further challenges

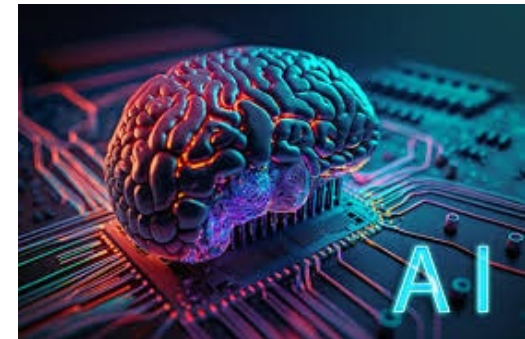


📌 Threats to positivist social science

- Uninformed/ mindless application of 'solutions' to qualitative research (see Pratt, et al, 2020)
- Faulty research (handled via socialization of authors, editors and reviewers)
- Fraudulent research? (Is it a problem? If so, what is the scope? When could it likely happen?)

📌 Emergence of AI

- So many questions....





Some questions involving AI

- Will researchers codesign their projects with AI, including sampling decisions?
- If we use AI to transcribe our interviews, do we know where that information goes, especially if the software uses inputted data to influence AI machine learning? Could AI undermine confidentiality?
- How might AI influence the coding and analysis of data? Can AI “make sense” of the data for someone? How might this work, and what assumptions should be in place when making these decisions? For example, would a researcher view an interview text at face value and use AI to look for obvious patterns?
- Regarding the above, who might program AI to do this, and/or who might serve as experts in advising AI programming?
- Alternatively, if you believe that informants lie or do not know themselves enough to provide “truthful” answers, can a researcher use AI to ferret out inconsistencies, ambiguities, and “what isn’t being talked about”?
- How might AI affect the standardization-creativity tension?
- How might AI be used to fabricate data or possibly detect such fabrication?





If you would like more detail on the topics I discussed today, please see my forthcoming article that will be published in January:

Pratt, M.G. (2025) On the evolution of qualitative methods in organizational research. To appear in the *Annual Review of Organizational Psychology and Organizational Behavior*.