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QUALITATIVE META-STUDIES

CARMA 2025-2026 Webcast Lecture Series

Presenter: Dr. Stefanie Habersang



Agenda

- Introduction: Relevance and definition of QMS
- Different approaches to QMS
- Opportunities & Challenges in publishing QMS (and some myths about QMS)
- Open Discussion



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Increasing pile-up of qualitative (case study) research





What is a Qualitative Meta-Study?

- a qualitative research methodology and an umbrella term for multiple methods
- QMS synthesize findings across qualitative investigations to **refine and develop (new) theory by producing more generalizable and, in turn, more comprehensive applications** of previous findings or to create **a new understanding/interpretation that transcends** the insights from the original studies (Habersang & Reihlen, 2025; Hoon, 2013; Rauch et al., 2013)
- different labels exist in our field “qualitative meta-analysis”, “qualitative meta-synthesis”, “metasynthesis”, “meta-ethnography” or “qualitative meta-study”

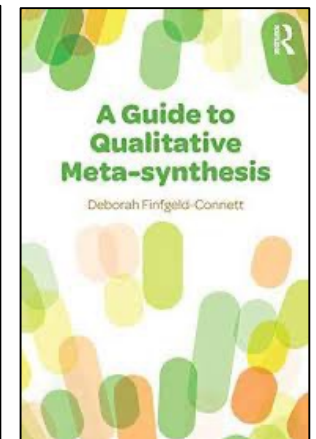
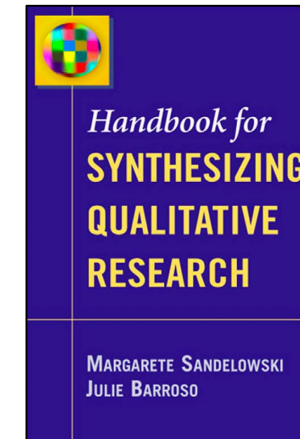
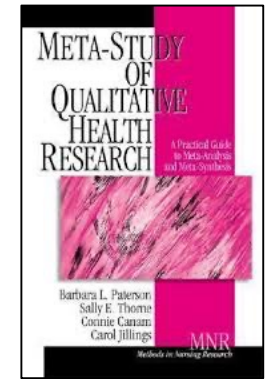


Distinguishing QMS from Literature Reviews

- While a literature review takes the findings and constructs of existing studies and synthesizes them, researchers conducting a QMS do not seek to integrate findings.
- Rather, they “use the rich descriptions embedded in the write-ups as ‘first hand’ data for analysis in order to enable additional and new inferences from the larger pool of data across all qualitative studies in light of emerging or alternative theoretical framing.” (Berente et al., 2019, S. 880).
- In doing so, the themes and **concepts deployed to make sense of across primary qualitative studies often differ from the themes and concepts that the original authors have developed in the primary studies.**
- Looking from a **different theoretical angle or research question** on the primary studies can facilitate novel theory building and allow researchers to recognize patterns across isolated cases that would otherwise go unnoticed without synthesis.

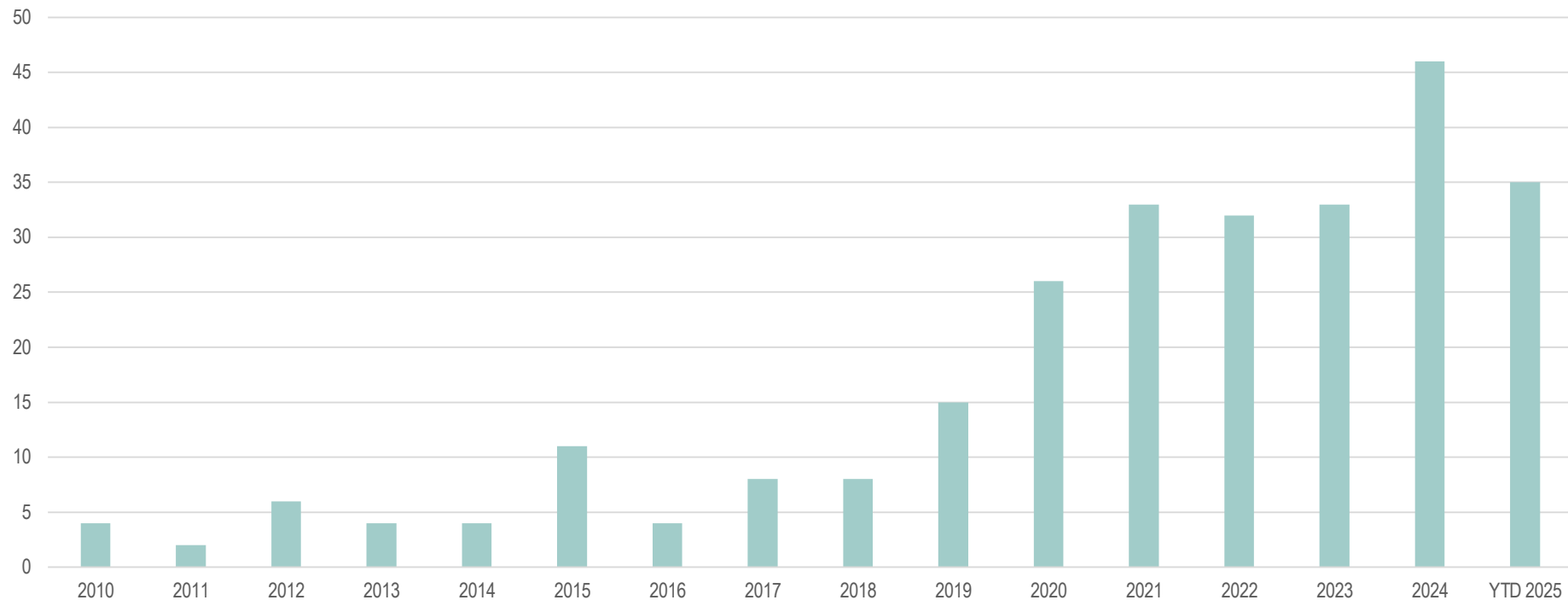


- META-ETHNOGRAPHY:
Synthesizing
Qualitative Studies**
- George W. Noblit
R. Dwight Hare
- QUALITATIVE
RESEARCH
METHODS
SERIES
11
- A SAGE
UNIVERSITY PAPER
- 





Increasing number of published QMS according to Web of Science* in Business & Management Studies



*Search terms: “qualitative meta-study” OR “qualitative meta-analysis” OR “qualitative meta-synthesis” OR “meta-synthesis” OR “metasynthesis”; WoS Category: “Business” and “Management”; Years covered: 1980-2021



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— Introduction: Relevance and definition of QMS

— **Different approaches to QMS**

— Opportunities & Challenges in publishing QMS (and some myths on QMS)

— Open Discussion



Multiple protocols in use in organization & management research



Multiple protocols in use in organization & management research

Authors	Hoon (2013)	Rauch et al. (2014)
Field	Organization & Management	Entrepreneurship
Definition of QMS	“[...]an exploratory, inductive research design to synthesize primary qualitative case studies for the purpose of making contributions beyond those achieved in the original studies. [...] it involves the accumulation of previous case studies’ evidence, and more specifically its extraction, analysis, and synthesis.”	“[...] The goal of the systematic synthesis of qualitative case studies is to accumulate, organize, and interpret the studies, with the aim of achieving a level of understanding that transcends the results of the individual studies.”
Steps involved in QMS	Step 1: Framing the research question Step 2: Locating relevant research Step 3: Setting criteria for inclusion Step 4: Extracting and coding data Step 5: Analyzing on a case-specific level Step 6: Analyzing on a cross-case level Step 7: Synthesizing on an across-study level Step 8: Building theory from meta-synthesis Step 9: Discussing results	Step 1: Defining a research question Step 2: Developing criteria for study location Step 3: Developing criteria for study inclusion Step 4: Conducting within-case analysis Step 5: Conducting cross-case analysis

Habersang & Reihlen (2024)



Multiple protocols in use in organization & management research

Authors	Hoon (2013)	Rauch et al. (2014)	Noblit & Hare (1989)	Sandelowski & Barroso (2007)	Schreiber et al. (1997)	Timulak (2014)
Field	Organization & Management	Entrepreneurship	Education	Nursing	Nursing	Psychotherapy
Definition of QMS	“[...]an exploratory, inductive research design to synthesize primary qualitative case studies for the purpose of making contributions beyond those achieved in the original studies. [...] it involves the accumulation of previous case studies’ evidence, and more specifically its extraction, analysis, and synthesis.”	“[...] The goal of the systematic synthesis of qualitative case studies is to accumulate, organize, and interpret the studies, with the aim of achieving a level of understanding that transcends the results of the individual studies. ”	“Meta-ethnography is the synthesis of interpretive research. To preserve the uniqueness and holism that characterize qualitative studies, we argue that one form of meta-ethnography involves the translation of studies into each other. ”	“Qualitative research synthesis refers to a process and product of scientific inquiry aimed at systematically reviewing and formally integrating the findings in reports of completed qualitative studies.”	“[...] the aggregating of a group of studies for the purposes of discovering the essential elements and translating the results into an end product that transforms the original results into a new conceptualization. ”	“[...] a secondary analysis of the primary, original, studies addressing the same research questions. It has two main aims: (1) to provide a concise and comprehensive picture of findings across those studies; and (2) to examine and evaluate the impact of methodological influences in the original studies on their findings.”
Steps involved in QMS	Step 1: Framing the research question Step 2: Locating relevant research Step 3: Setting criteria for inclusion Step 4: Extracting and coding data Step 5: Analyzing on a case-specific level Step 6: Analyzing on a cross-case level Step 7: Synthesizing on an across-study level Step 8: Building theory from meta-synthesis Step 9: Discussing results	Step 1: Defining a research question Step 2: Developing criteria for study location Step 3: Developing criteria for study inclusion Step 4: Conducting within-case analysis Step 5: Conducting cross-case analysis	Step 1: Getting started Step 2: Deciding what is relevant to the initial interest Step 3: Reading the studies Step 4: Determining how studies are related Step 5: Translating studies into one another Step 6: Synthesizing translations Step 7: Expressing the synthesis	Step 1: Conceiving relevance and purpose Step 2: Searching for and retrieving qualitative research reports Step 3: Appraising reports of qualitative studies Step 4: Classifying the findings in the qualitative research reports Step 5: Synthesizing qualitative research findings Step 6: Ensuring validity	Step 1: Identifying purpose and envision outcome Step 2: Adhering to philosophical tenets Step 3: Creating decision trail (Data sampling and scope) Step 4: Conducting analysis Step 5: Clarifying contextual issues	Step 1: Defining the research question Step 2: Selecting primary studies Step 3: Appraisal of primary studies Step 4: Preparing data Step 5: Analyzing data Step 6: Credibility checks Step 7: Synthesis and presentation of findings

Habersang & Reihlen (2024)



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Field	Organization & Management	Entrepreneurship	Education	Nursing	Nursing	Psychotherapy
Definition of QMS	“[...]an exploratory, inductive research design to synthesize primary qualitative case studies for the purpose of contributing to those already in the literature.”	“[...] The goal of the systematic synthesis of qualitative case studies is to accumulate, organize, and synthesize the results of individual studies.”	“Meta-ethnography is the synthesis of interpretive research. To preserve the uniqueness and holism that involves the translation of studies into each other.”	“Qualitative research synthesis refers to a process and product of scientific inquiry aimed at completed qualitative studies.	“[...] the aggregating of a group of studies for the purposes of discovering the essential elements and results into a new conceptualization.”	“[...] a secondary analysis of the primary, original, studies addressing the same research questions. It has two main findings across those studies; and (2) to examine and evaluate the impact of methodological influences in the original studies on their findings.”
Steps involved in QMS	Step 1: Framing the research question Step 2: Locating relevant research Step 3: Selecting studies Step 4: Extracting data Step 5: Analyzing on a case-specific level Step 6: Analyzing on a cross-case level Step 7: Synthesizing on an across-study level Step 8: Building theory from meta-synthesis Step 9: Discussing results	Step 1: Defining a research question Step 2: Developing criteria for study location Step 5: Conducting cross-analysis	Step 1: Getting started Step 2: Deciding what is relevant to the initial interest Step 7: Expressing the synthesis	Step 1: Conceiving relevance and purpose Step 2: Searching for and retrieving qualitative qualitative research findings Step 6: Ensuring validity	Step 1: Identifying purpose and envision outcome Step 2: Adhering to philosophical tenets Step 5: Clarifying contextual issues	Step 1: Defining the research question Step 2: Selecting primary studies Step 6: Credibility checks Step 7: Synthesis and presentation of findings

Different protocols follow different purposes

But they all follow a similar, highly sequential synthesis approach

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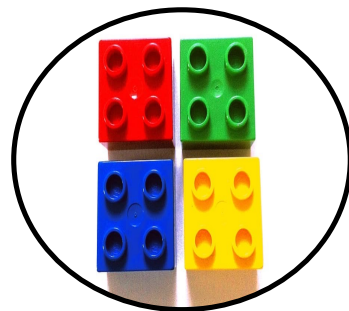


Different approaches to synthesis

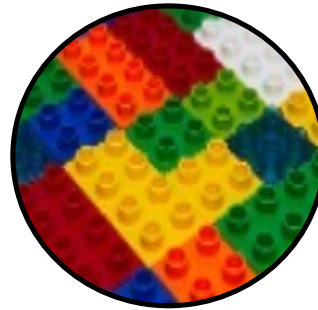
Degree of
interpretation and
iteration

high

low

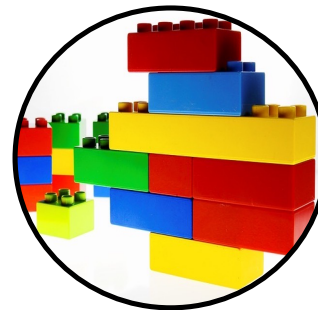


Describing



Configuring → Exploratory

*Inductively or abductively developing new theory. The QMS is used to as a tool to **develop novel insights not to test insights**.*



Aggregating → Confirmatory

*Deductively testing and refining existing theory through **a priori hypotheses**. The QMS is used to **validate, falsify, and/or refine** theory.*

Theory building capacity

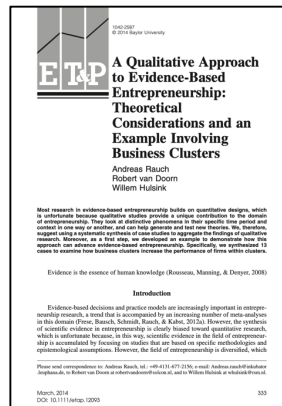
low

high

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Different approaches to syntheses



Aggregating

Vertical notion of knowledge accumulation

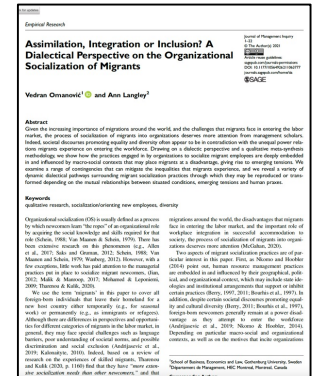


Configuring

Horizontal notion of knowledge accumulation



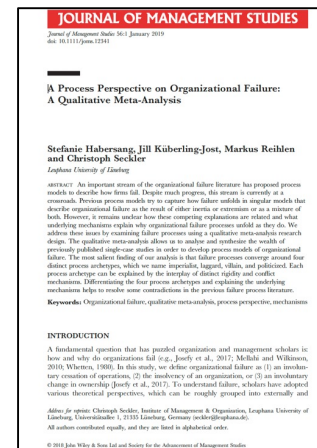
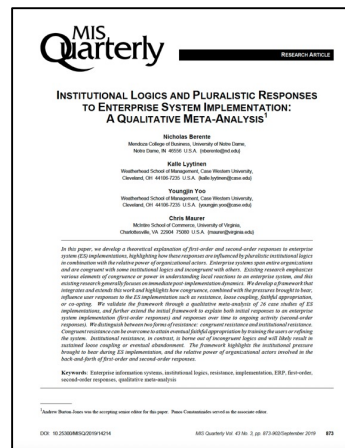
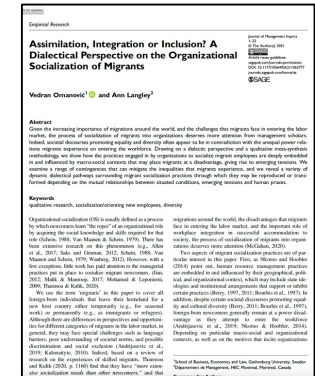
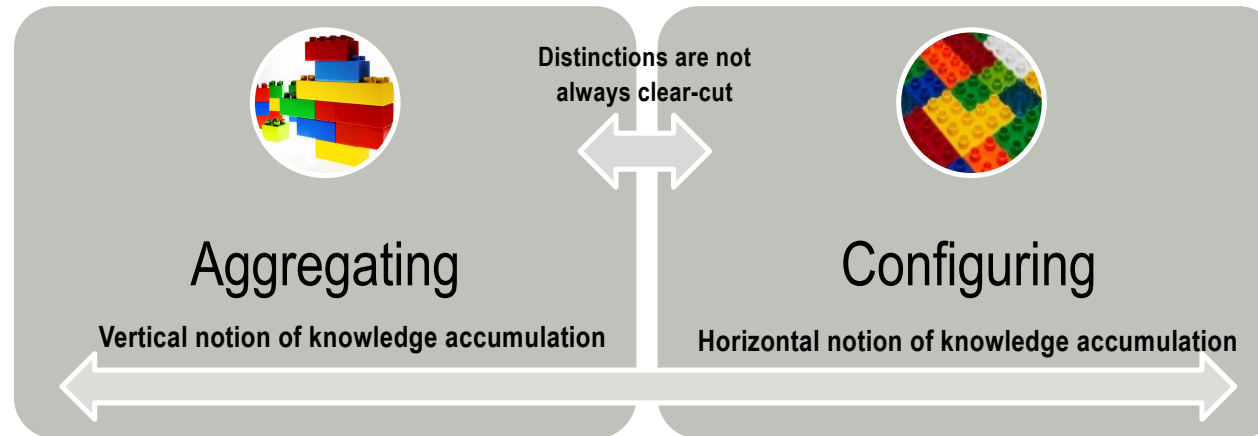
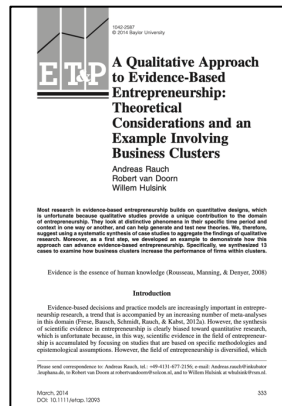
Describing



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Different approaches to syntheses





Making sense of different approaches in QMS

Article

Advancing Qualitative Meta-Studies (QMS): Current Practices and Reflective Guidelines for Synthesizing Qualitative Research

Stefanie Habersang¹  and Markus Reihlen¹

Abstract
Qualitative meta-studies (QMS) have emerged as a promising methodology for synthesizing qualitative research within organization and management studies. However, despite considerable progress, increasingly fragmented applications of QMS impede the advancement of the methodology. To address this issue, we review and analyze the expanding body of QMS in organization and management studies. We propose a framework that encompasses the core decisions and methodological choices in the formal QMS protocol as well as the reflective—yet often implicit—meta-practices essential for deriving meaningful results from QMS. Based on our analysis, we develop two guidelines to help researchers reflectively align formal methodological choices with the intended purpose of the QMS, which can be either confirmatory or exploratory.

Keywords
qualitative meta-study, synthesis, theory building, theory refinement, reflection

Introduction
In the last decade, scholars have begun to devote attention to qualitative meta-studies (QMS) as a novel and fruitful methodology to generate new insights in organization and management research (Combs et al., 2019; Graebner, 2021; Hoon, 2013; Kunisch et al., 2018; Rousseau et al., 2008). A QMS systematically synthesizes primary qualitative accounts with the aim of refining, extending, and building new theories while preserving much of the primary accounts' rich insights. Especially in fields such as nursing and healthcare (e.g., Campbell et al., 2011; Finfgeld-Connett, 2018; Sandelowski & Barroso,

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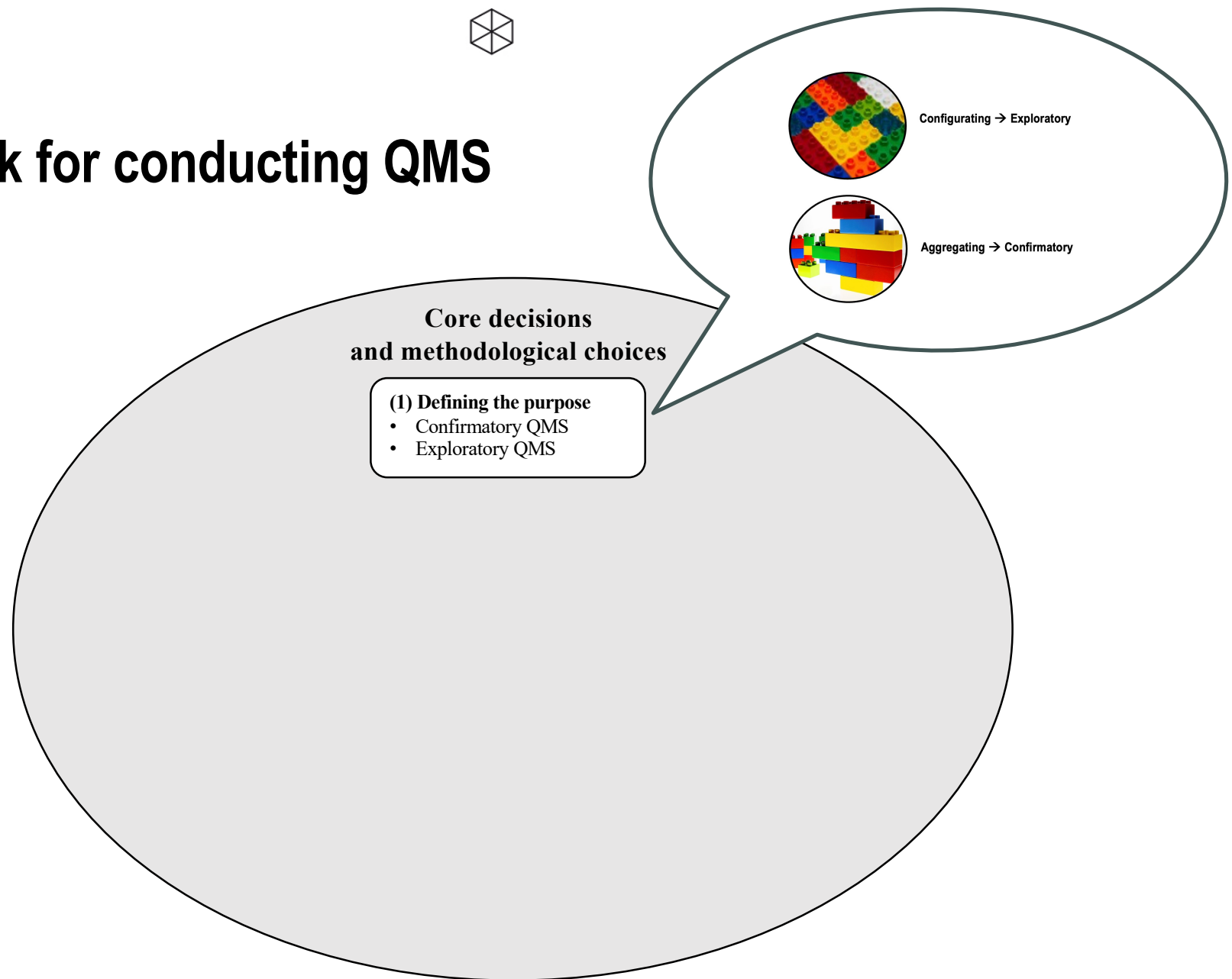
 Sage

- Mapping the landscape of published QMS and their approaches to synthesis
- Developing reflective guidelines that account for different purposes and, consequently, different logics of synthesis in QMS
- Providing guidance for scholars on how to engage in reflective meta-practices in QMS that move beyond the mere application of step-by-step protocols / templates

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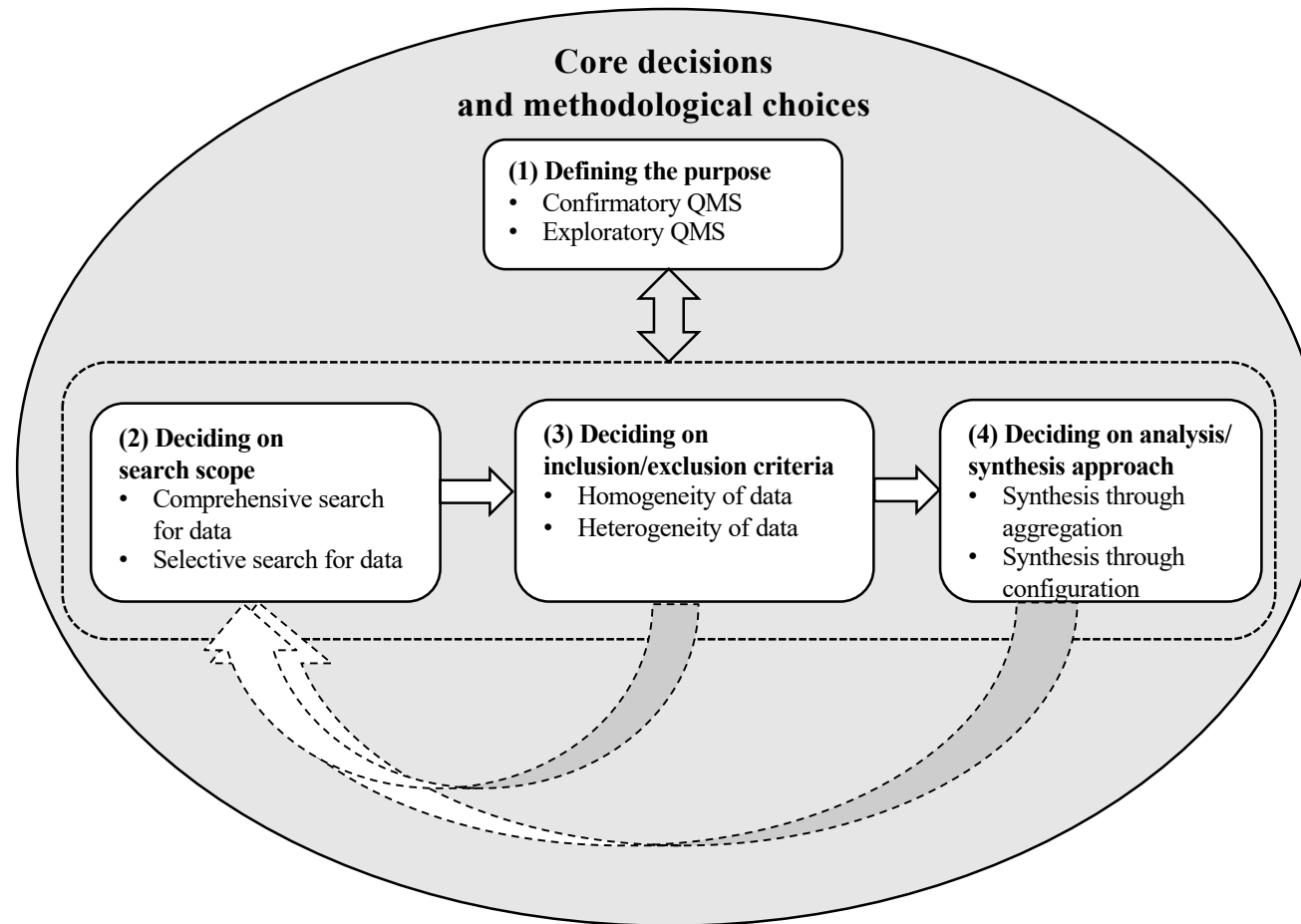
Framework for conducting QMS



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Framework for conducting QMS



Habersang & Reihlen (2024)



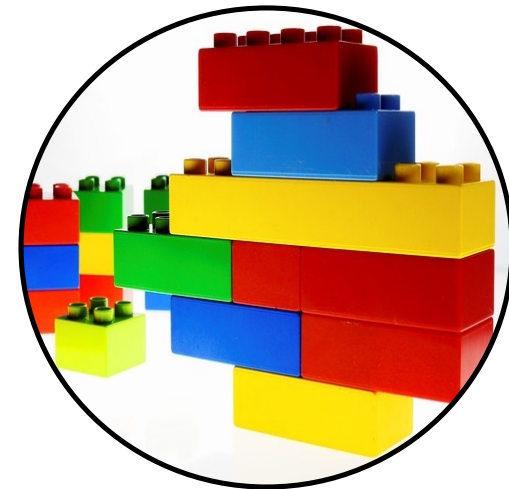
Analysis and synthesis approach

Synthesis through aggregation

Integrating or merging **comparable cases** with the aim to **generalize research evidence**. Researchers **compile large amounts of data into discrete constructs** and use these constructs to **identify patterns and relationships across cases**.

Methodological practices:

- Developing **deductive coding** schemes with standardized construct operationalizations that are used across all cases. Inductive coding may follow deductive coding.
- Focusing the analysis on those parts of the primary accounts that are relevant for **verifying or falsifying hypotheses** – mostly the findings.
- Using categorization strategies to cluster cases based on their contribution to **validate, refute, or refine hypotheses**.
- Using quantification and/or visualization strategies as supplementary form of analysis.





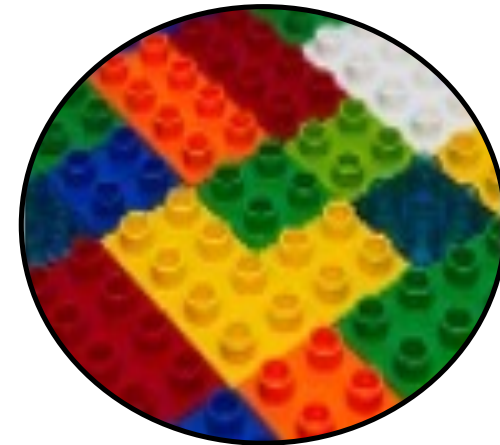
Analysis and synthesis approach

Synthesis through configuration

*Recomposing the primary cases findings with the aim to **meshing them into a new theoretical whole**. Researchers develop **new knowledge configurations** through reinterpreting findings.*

Methodological practices:

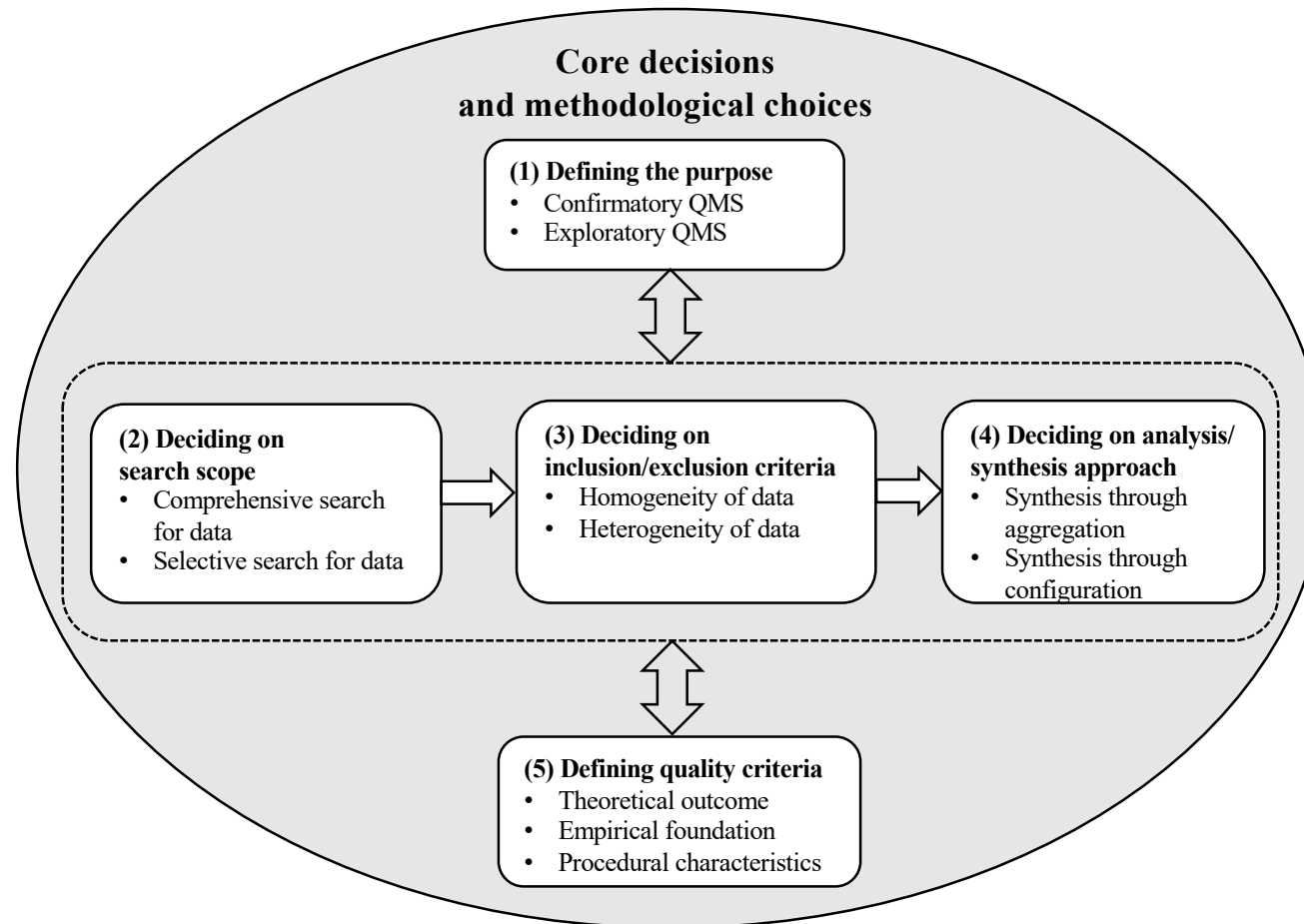
- Engaging in **inductive, yet theoretically pre-informed open coding** accompanied by “**disciplined imagination**” (descriptive analysis, comparative analysis, and concept-driven analysis).
- Focusing on the findings or the entire study depending on the degree of heterogeneity between cases
- Using **categorizing and connecting strategies to reconfigure a new theoretical “whole”** of the cases.
- Using visualization and/or quasi-statistics as supplementary from of analysis.



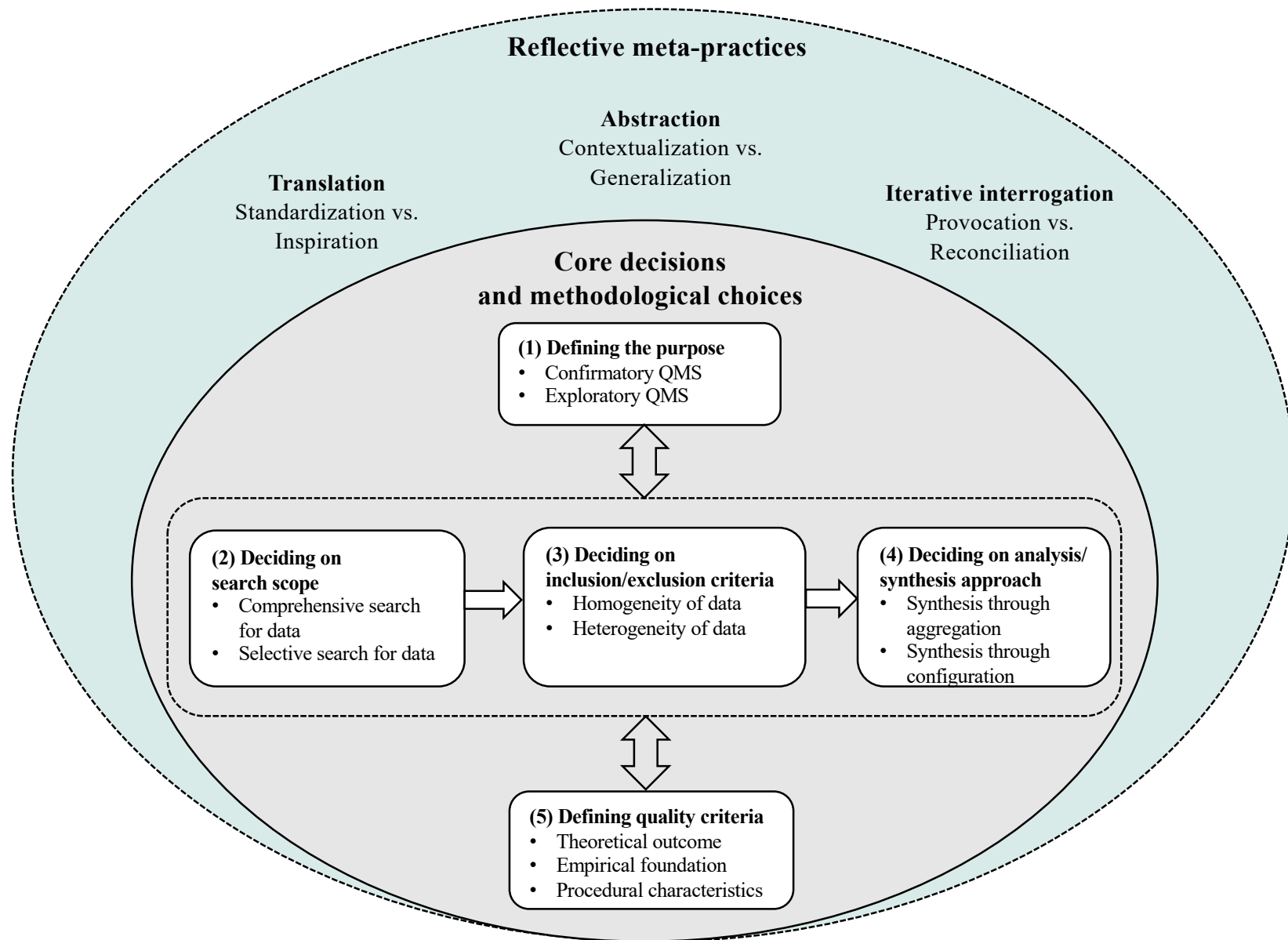
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Framework for conducting QMS



Habersang & Reihlen (2024)



Habersang & Reihlen (2024)



Reflective meta-practices in QMS

- **Abstraction:** Navigating between contextualization and generalization
- **Translation:** Navigating between standardization and inspiration
- **Iterative Interrogation:** Navigating between provocation and reconciliation



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Opportunities

- QMS provides ways to advance theory refinement and theory building
- QMS can help to understand and relate (contextualized) evidence
- QMS can help to address the problem of knowledge fragmentation
- QMS can allow for the development of practice and policy recommendations



Challenge 1: QMS is restricted by what is already available in the literature

Some claim that QMS can only study topics that other researchers have investigated before and that synthesis is constrained by the information that is provided in the primary qualitative accounts.

- Make sure to advance theory either by refinement of exiting theory or developing novel insights that become visible only through the synthesis of studies (that would have remained hidden without looking at the studies together)



Challenge 2: Qualitative approaches offer too much variety to make a meaningful synthesis

Some claim that QMS cannot lead to a meaningful outcome as too many different methodologies (e.g., grounded theory, phenomenology, case studies,...) exist and language ambiguity restricts researchers to identify those methodologies that “are” similar.

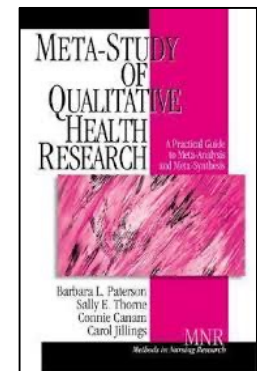
- A homogenous case selection helps to avoid this issue
- Multi-paradigm synthesis is for sure more complicated – more to come...



Challenge 3: Researchers strip way context in QMS

Some argue that QMS must lead to thinned descriptions as considering primary qualitative research together takes away the “vitality, viscosity, and vicariism of the human experiences represented in the original studies.” (Sandelowski et al., 1997)

- Often used by scholars drawing on an strong interpretivist paradigm
- Recent examples show that preserving (some) context is possible (Omanovic & Langley, 2023)
- Sensitivity to the meta-practices involved in QMS





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