

Strategic Data Collection for Qualitative Studies

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Important caveats

- Multiple ways to do qualitative work - these work for me and doctoral students I work with (I think...)
- Focusing on field-based qualitative (interviews, observation) not primarily archival
- Building on others' work + co-author insights + my perspective
- Working within publication pressures – but there are no shortcuts to high quality work

The challenge - emergent vs. efficient

- Emergent Designs: “One enters a field site with minimal conceptual baggage and apriori assumptions, leaving the field and the scholar as instruments to drive the process of determining what is interesting, what data to collect, and what ultimately can be theorized about” (Cloutier 2024: 359)
- Potential Problems:
 - Can get lost and stay lost for too long
 - End up recreating what we already know = “old wine in new bottles” problem
- Key Question: How do we balance flexibility/openness with efficiency?
- Today’s Approach: “**Deliberately emergent**” (Cloutier 2024) - strategic preparation for productive emergence

Two Goals of Strategic Data Collection

1. More high-quality data than you need to produce novel analytic insights

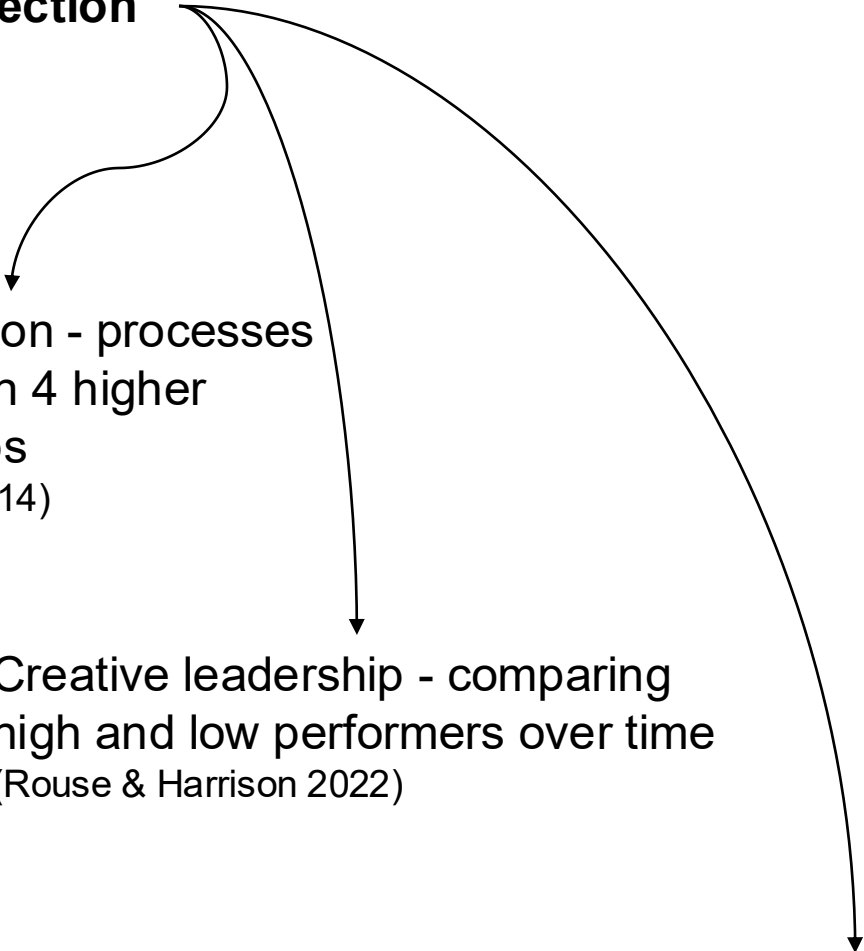
“The amount of skill, attention, discipline and empathy that qualitative researchers need to do a good job of listening, seeing and capturing richness and depth is often underestimated.” (Langley 2017: 466)

2. Logical, transparent decisions you can defend and that demonstrate rigor

An example: dance project

- The Setup:
 - Spencer Harrison + I wanted to collaborate on group creative process
 - George (2007): didn't know much about this phenomenon
 - Dance as context: physicality helps us see group dynamics over time
 - Inspired by Eisenhardt and colleagues' comparative approach
- Context and sample:
 - Choreography program: multiple groups, same timeline & process
 - Similar experience ranges, external performance metric
 - Got access: 6 groups (session 1) + 2 groups (session 2) + feedback sessions
- Data: interviews, video observation, in-person observation, short surveys, focus groups

One Extensive Data Collection



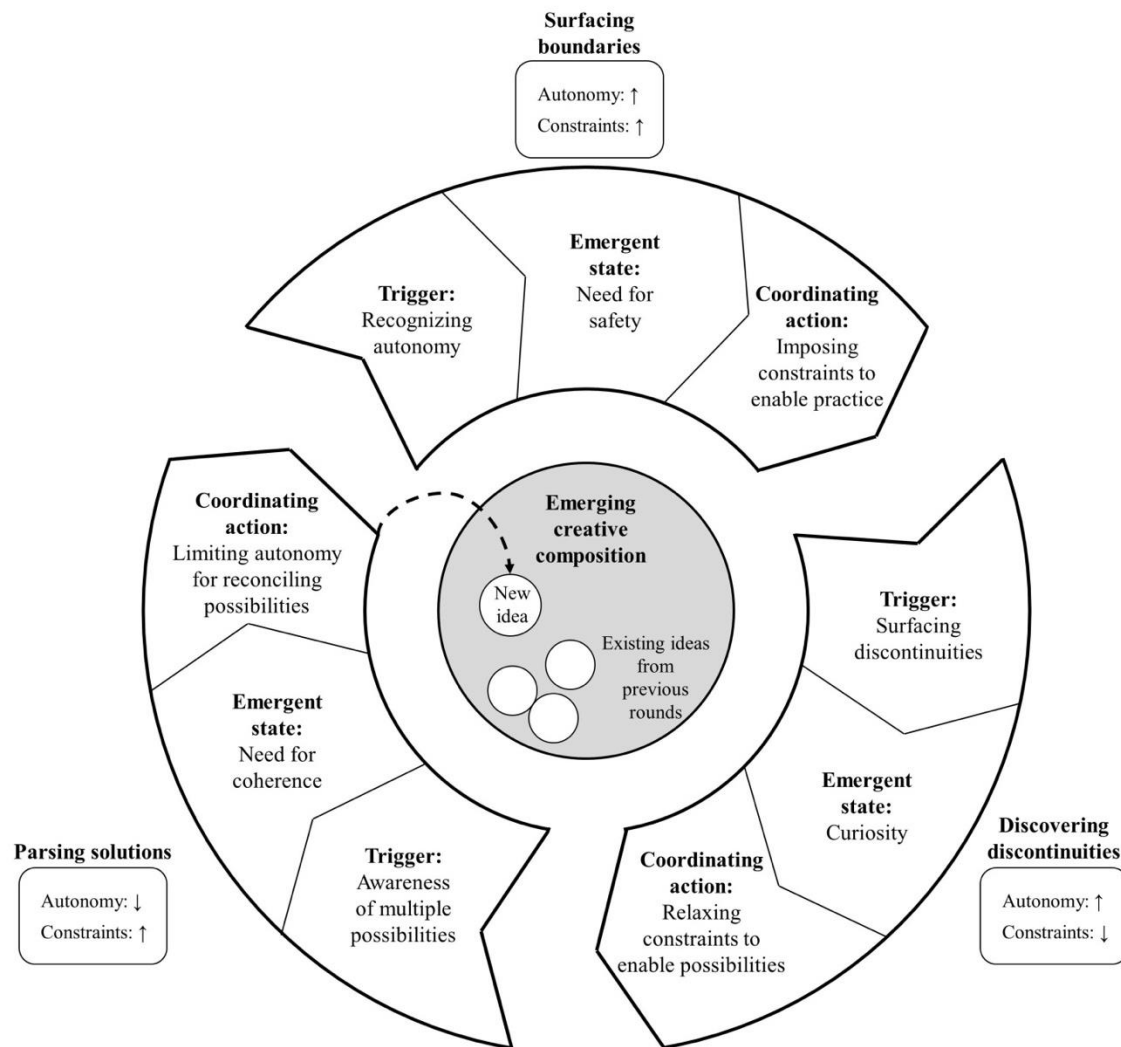
Elastic coordination - processes
within meetings in 4 higher
performing groups
(Harrison & Rouse 2014)

Creative leadership - comparing
high and low performers over time
(Rouse & Harrison 2022)

Feedback interactions - noticed during
observation, expanded to other contexts
(Harrison & Rouse 2015)

***Strategic upfront decisions created
multiple potential pathways to explore data***

Elastic coordination - processes *within* meetings in 4 higher performing groups



Legend

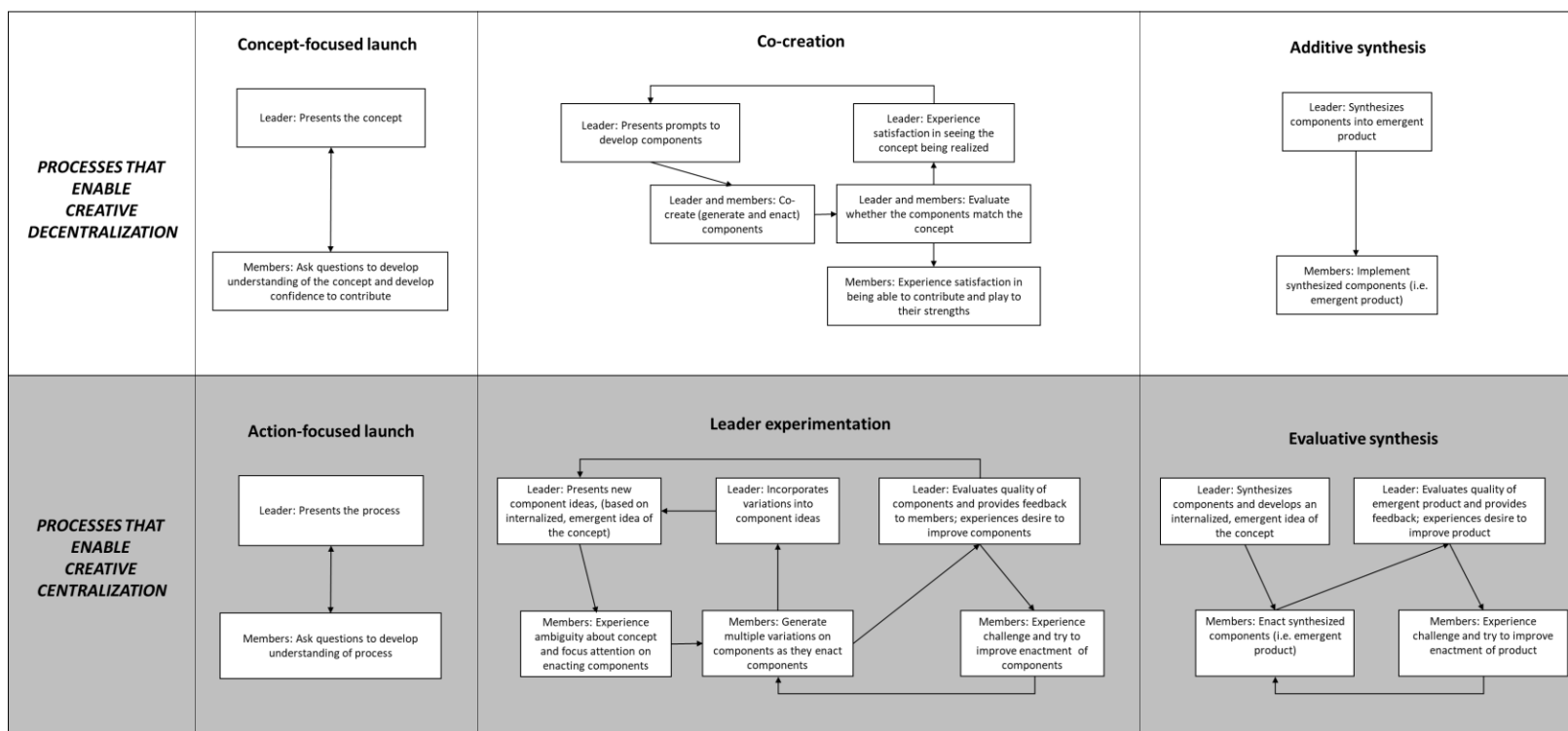
Indicates trajectory of usage

Autonomy: ↓

Grey area indicates theorizing beyond scope of this paper



Harrison SH and Rouse ED (2014). Let's dance! Elastic coordination in creative group work: A qualitative study of modern dancers. *Academy of Management Journal*; 57:1256-1283.



Creative leadership - comparing high to low performers over time using 6 groups

Rouse ED and Harrison SH (2022). Choreographing creativity: Exploring creative centralization in project groups. *Academy of Management Discoveries*; 8: 384-413.

TABLE 1
Summary of Data Collection by Type

Wave	Group	Formal interviews with choreographers and dancers ^a	Rehearsal observation ^{b, c}	Questionnaires completed ^a	Showings ^a	Focus group ^b
1		6 dancers and 6 choreographers				
2	Chimera	6	20	3	2	2
	Segments	9	15	9	2	2
	Itch	4	10	4	2	2
	Poem	6	6	8	2	0
	Cancer	4	16	6	0	2
	Mystery	5	11	4	1	2
3		1 dancer, 4 choreographers, and 2 critics		4 dance experts		
	<i>Total</i>	<i>53</i>	<i>78</i>	<i>38</i>	<i>9</i>	<i>10</i>

^a Number.

^b Hours.

^c Video observation also occurred for each rehearsal, including the ones we did not observe in person.

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Five Strategic Questions

- 1. Where Are You Headed?** Crafting orienting research questions
- 2. Where Should You Look?** Purposeful sampling & context selection
- 3. What Data Should You Gather?** Designing data collection over time
- 4. What Do You Actually Have?** Prototyping - iterative checking & adjustment
- 5. How Do You Explain Your Choices?** Making methodological decisions transparent

Q1 - Where Are You Headed?

- Orienting Research Questions: Use theory/literature to establish direction (knowing it will change)
- Sensitizing Concepts: Initial ideas to pursue – “points of departure.” “A place to start, not to end” (Charmaz 2010: 17)
- Consider: Are you studying individuals, groups, organizations? What are you “holding constant”?
- Examples:
 - Dance project: Group creative process → stayed open to what aspects emerged
 - Kahn and Rouse (2021): Org creativity → Hierarchical understanding of socioemotional routines

Q2 - Where Should You Look?

Purposeful Sampling: Selection of information rich cases for in depth study (Patton 1990)

“In the process of developing the research design, the evaluator or researcher is **trying to consider and anticipate the kinds of arguments that will lend credibility to the study as well as the kinds of arguments that might be used to attack the findings**. Reasons for site selections or individual case sampling need to be carefully articulated and made explicit. Moreover, it is important to be open and clear about the study's limitations...” (Patton 1990: 181)

- Context Selection Balance:
 - Extreme contexts can be useful, but consider transferability
 - Reviewers ask: “How many papers on [unusual context - dance] do we need?”
 - Are you just applying what we know to understudied contexts?

What a Theoretical Contribution is NOT

Pathways to Theoretical Contribution

Beyond Fascinating Settings

Not just studying unique contexts

Leverage the Unusual

Make sure research question is driven by a theoretical puzzle
Develop constructs that are applicable beyond the specific context

Beyond Patterns and Regularities

Not just empirical patterns without explanation

Leverage Inference

Move from describing patterns to explaining mechanisms
Answer "why" questions using induction, abduction, or retrodution

Beyond Opening the Black Box

Not just mapping sequences without mechanisms

Leverage Tensions

Explore fundamental tensions that drive organizational dynamics
Consider combining process and variance perspectives

Beyond Boxes and Arrows

Not just visual representations without theory

Leverage Visualizations

Move from showing what happens to explaining why it happens
Embrace complexity rather than forcing data into neat linear models

Beyond Hyperbole

Not just excessive claims or "straw man" arguments

Leverage Language

Substantiate claims by building fair, comprehensive arguments
Craft theoretical and empirical storylines to show their coupling

Beyond Emulating Past Work

Not just copying or applying old theories to new contexts

Leverage the Moment

Adapt, extend, or innovate prior theories for contemporary contexts
Balance AI with human interpretation of context and meaning

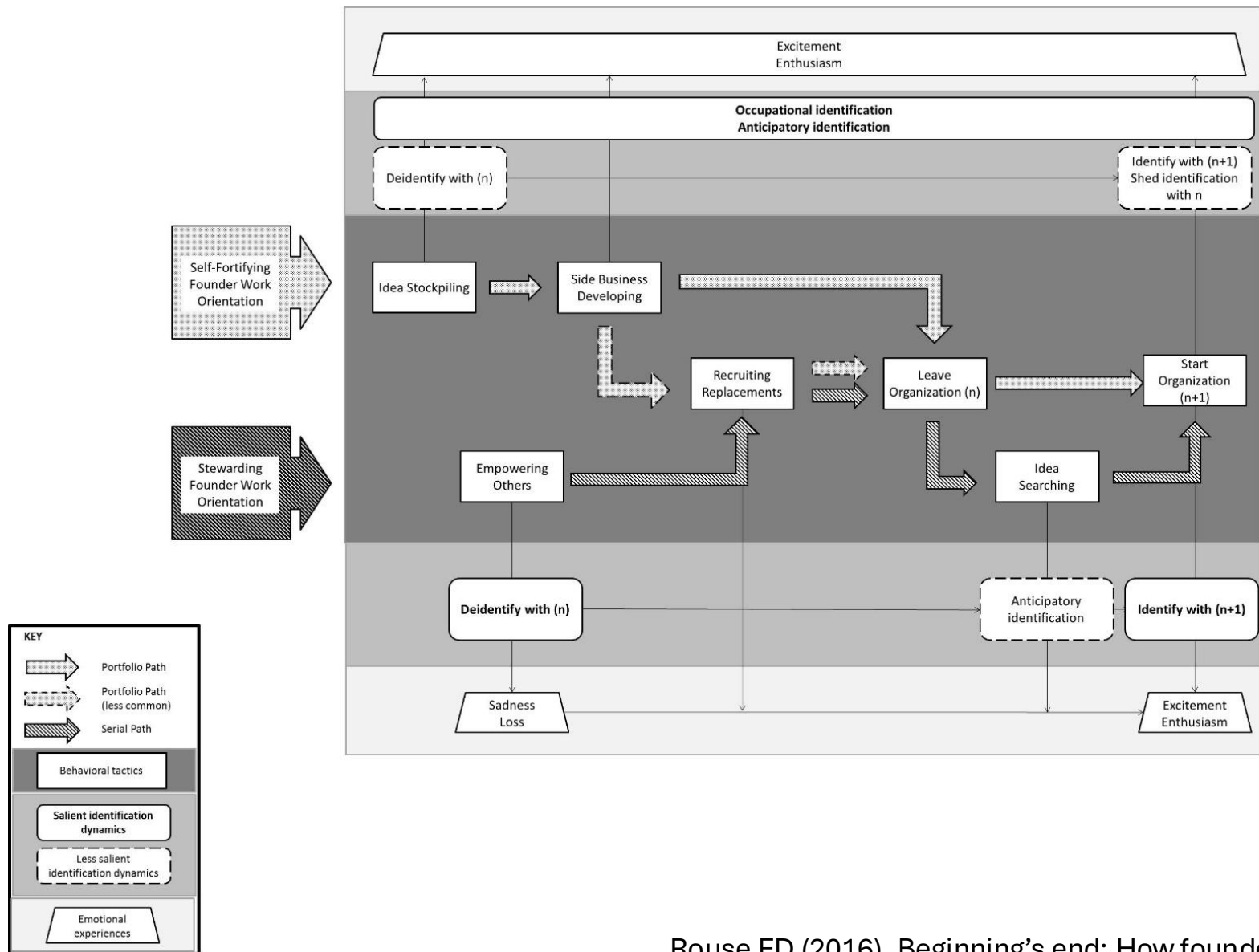
Rouse ED, Reinecke J, Ravasi D, Langley A, Grimes M, Gruber M (2025). Making a theoretical contribution with qualitative research. *Academy of Management Journal*; 68: 257-266.

Designing for Contrasts & Comparisons

- Compare contexts/org: “By uncovering surprising commonalities or differences across divergent field settings, comparative methods are more likely to generate novel theories” (Bechky & O'Mahony 2015)
- Key Sampling Strategies w/in a Context (Patton 1990):
 - Maximum Variation: Cast a wide net to try understand themes that cut across a range
 - Stratified Purposeful: Look at different bands/categories w/in the context to compare across sub-groups
- Examples:
 - Dance: Multiple groups, same constraints
 - Video game development: Different creative workers + all hierarchical levels

Q3 - What Data Should You Gather?

- Design for Process, Collect Data Over Time
 - Consider spacing: daily, weekly, quarterly, yearly
 - Tradeoff between how much you can ask from others and rigor
 - Follow-up interviews when possible



Rouse ED (2016). Beginning's end: How founders psychologically disengage from their organizations. *Academy of Management Journal*; 59:1605-1629.

Q3 - What Data Should You Gather?

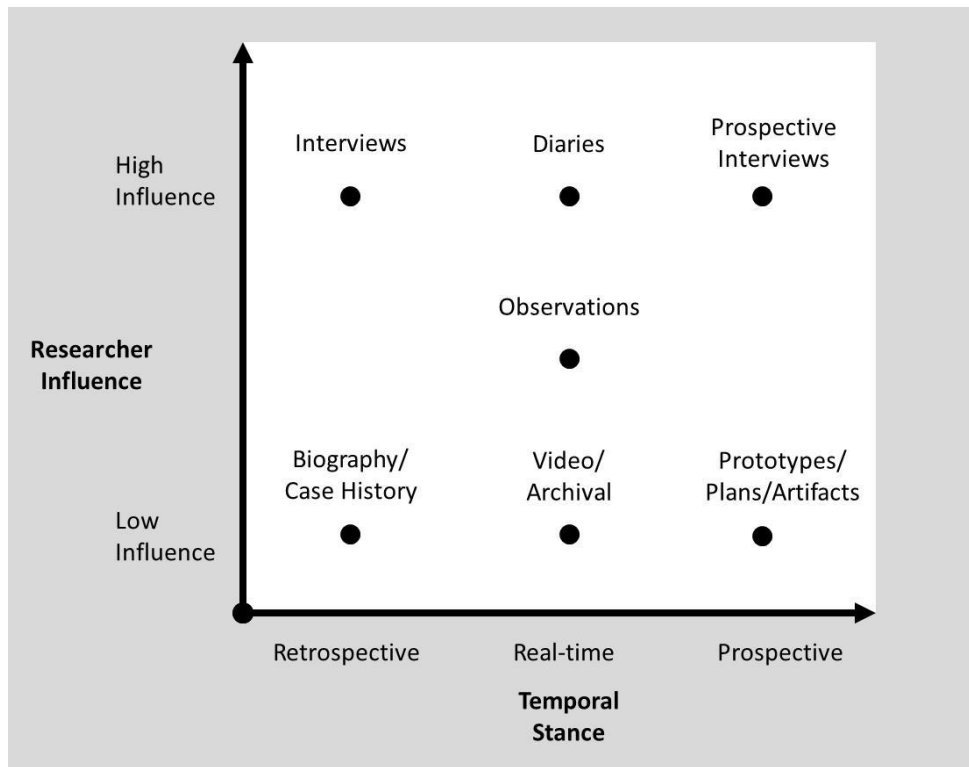
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 - Alternatives to longitudinal: Sample people at intervals, use narratives
 - Example: : Fetzer G, Harrison SH, and Rouse ED (2023). Navigating the paradox of promise through the construction of meaningful career narratives. Academy of Management Journal; 66: 1896-1928.

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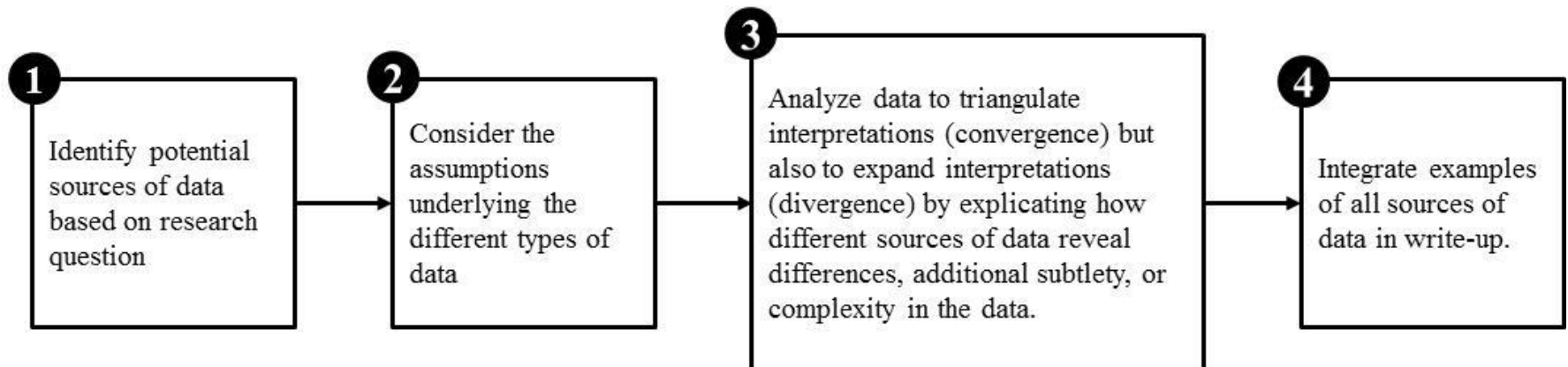
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- Be Data Hungry

Data Triangulation vs. Expansion

- Traditional Data Triangulation Assumption: Using multiple data sources enables convergence or corroboration among the sources
- Data Expansion: Use multiple data sources to reveal divergence to gain new insights about a phenomenon (Rouse & Harrison 2016)
- Different Data Sources Achieve Different Things:
 - Interviews: “Situated retellings” where individuals craft coherence (Mishler 1999) – retrospective can be a strength in narratives
 - Observations/Archival/Diaries: Less colored by retrospection, but subject to momentary bias



Rouse ED and Harrison SH (2016). Triangulate and expand: Using multiple sources of data for convergence and expansion to enrich inductive theorizing. In KD Elsbach & RM Kramer (Eds.) Handbook of qualitative organizational research: Innovative pathways and ideas. 286-297. New York: Routledge



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 - Alternatives to longitudinal: Sample people at intervals, use narratives
- Be Data Hungry
 - Collect more than you think you need
 - Sometimes entire data collections get cut
 - Accept that some data won't be used
- Take theoretical saturation seriously: “The point when all categories are well developed and further data gathering and analysis add little new to the conceptualization” (Corbin & Strauss 2008: 263)

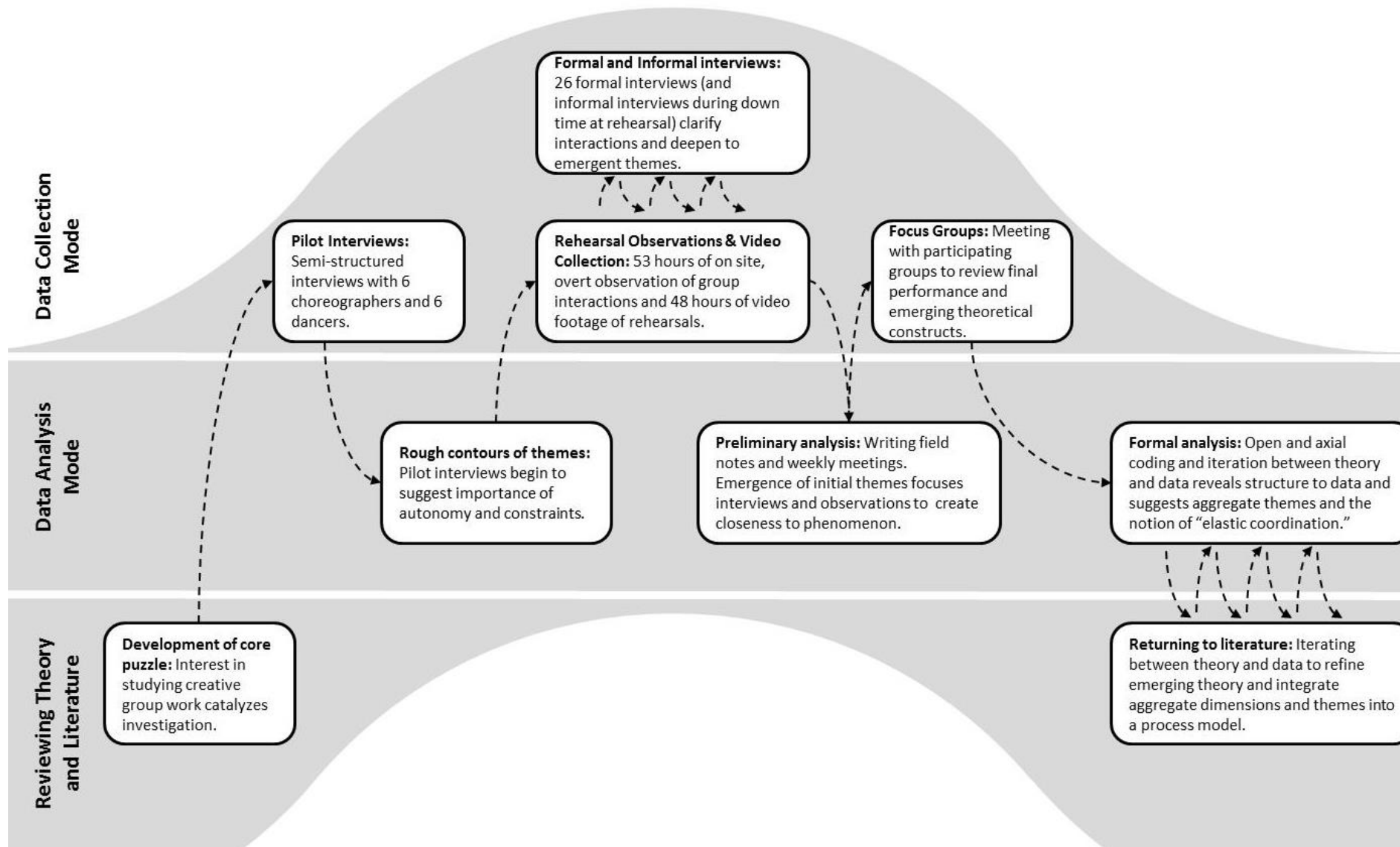
Q&A Break

Q4 - What Do You Actually Have?

- Don't mistake numbers for richness: volume $\neq$ interesting insights
- Prototyping & Iterative Checking
 - The Critical Exercise: "If I had to write a paper today, what would it be about?:"
 - Do this after every 5-10 interviews/hrs of observation
 - What are key literatures? What is new? Draw a model. Reshape protocols
 - Engage with theory throughout in a truly iterative way
 - Pause, analyze, revise protocol
 - What can't I explain?
- Move from purposeful to theoretical sampling (guided by emerging insights)
 - For example, confirming & disconfirming cases (Patton 1990)

Q5 - How Do You Explain Your Choices?

- Make methodological decisions transparent
- Show logical progression of data collection choices
- Explain how emerging insights shaped subsequent data collection + analytic choices
- Anticipate reviewer questions about context/sampling decisions (especially, transferability)



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Five Strategic Questions

1. Where Are You Headed?

→ Craft orienting research questions - sensitizing concepts as “points of departure”

2. Where Should You Look?

→ Purposeful sampling & context selection - design for contrasts and comparisons

3. What Data Should You Gather?

→ Design for process over time - be data hungry, triangulation vs. expansion

4. What Do You Actually Have?

→ Prototyping & iterative checking - the critical exercise after ~5 interviews

5. How Do You Explain Your Choices?

→ Make methodological decisions transparent - anticipate reviewer questions

Thank you

