New Ways of Seeing through Qualitative Research

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FROM THE EDITORS

NEW WAYS OF SEEING THROUGH QUALITATIVE RESEARCH

Qualitative research offers critical tools that advance our editorial team's ambition to foster 'new ways of seeing' (see Shaw, Bansal, & Gruber, 2017). By building theory inductively, research based on qualitative data offers insights that challenge taken-for-granted theories and expose new theoretical directions. As we face more wicked problems in our world, scholars are increasingly adopting qualitative methods to unpack these complex challenges. In the last year, qualitative papers hit an all-time high of 20% of submissions to *Academy of Management Journal* (*AMJ*).

Yet, effectively unpacking new theory requires scholars to take advantage of the breadth and variety of approaches to qualitative research. In 2011, Bansal and Corley lamented that qualitative research was norming around a single approach—often, case-based positivist research with systematically coded data—and called for more methodological diversity. As editors, we are now seeing more papers submitted with varied qualitative methods, but these more novel approaches remain in the minority nevertheless. In this editorial, we underscore Bansal and Corley's (2011) argument that such diversity in qualitative research is critical to advancing our current *AMJ* editorial team's desire to foster "new ways of seeing." By exposing the breadth of approaches covered by the single label of "qualitative research," we hope to motivate researchers to more fully embrace opportunities that advance theory through qualitative methods. In so doing, we believe that the theoretical insights will contribute to our collective understanding of tackling some of the world's most intractable management and organizational challenges (Eisenhardt, Graebner, and Sonenshein, 2016).

In this editorial, we describe different qualitative methods as genres—distinct approaches with their own internally coherent epistemology, historical roots, and assumptions. Similar to different works of literature, music, or film, a genre emphasizes variety across types of qualitative research, as well as alignment of logics within each type. Examples of qualitative genres include case study research, process studies, engaged scholarship, historical studies, discourse studies, paradox as a method, dialectical inquiry, and fuzzy set qualitative comparative analysis. Just as the label of 'qualitative research' contains within it a variety of genres, these genres often contain within them gradations and subgenres, which may form their own genre. Indeed, we anticipate that the diversity of methodologies will only expand in scope as the qualitative field continues to mature, but only as long as we remain vigilant in ensuring that the field does not institutionalize around a few norms too quickly.

In this editorial, we first outline the broad category of qualitative research and highlight its value for new ways of seeing. We then expand upon some exemplary genres of qualitative research, noting their internally aligned assumptions as well as their distinctions from other genres. We conclude this editorial by highlighting four core principles that can help both authors and reviewers alike adopt and assess the quality of research that aims to see in new ways.

QUALITATIVE RESEARCH AS A MEANS TO SEE IN NEW WAYS

By 'qualitative research,' we mean scholarship that primarily relies on qualitative data and inductive theorizing. Quantitative data are numerical, and can be added, manipulated, and transformed into efficient data displays. Qualitative data, on the other hand, are nonreduceable text, including words and visuals delivered in static (e.g., paper) or dynamic form (e.g., theater). Although these qualitative data can be digitized, synthesized, and even counted, doing so first requires interpretation of the data to discern patterns and insights. Given the broad forms in which qualitative data may appear, a researcher's onto-epistemological assumptions often shape his/her approaches to this analytical process.

Inductive theorizing is a cornerstone of qualitative research. Whereas quantitative methods deduce new knowledge that relies heavily on logical reasoning based on prior insights and expands understanding

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along existing or adjacent paths, qualitative research surfaces new insights that can often introduce theory in completely new directions. When adopting qualitative methods, scholars draw on the observations from the data to introduce abstracted knowledge that can generalize beyond the specific contexts. Inductive theorizing grounded in data can broaden the researchers' epistemological frame with longer leaps than hypo-deductive logic based on quantitative data, thereby yielding completely novel ideas.

Such inductive theorizing based on qualitative data are particularly appropriate in new or understudied empirical contexts where there is relatively little prior work, as in the case of complex, messy grand challenges (Nadkarni et al., 2018). As Bamberger and Pratt's (2010) *AMJ* editorial advocated, unconventional contexts serve to break our assumed theoretical frames. By starting with the phenomena, researchers can sometimes discern perspectives inaccessible through hypothetico-deductive logic. By enabling lateral shifts in knowledge that are often difficult to observe using deductive methods, qualitative research advances critical thinking and scholarship.

EXAMPLES OF MORE-ESTABLISHED AND LESS-ESTABLISHED GENRES

Qualitative research includes many genres, each offering a different lens with which to view phenomena. We describe several examples of qualitative research, seeking to highlight the rich breadth of insights through different qualitative genres drawn from management research and from scholarly traditions developed in other fields of social sciences and the humanities. The connection to these other traditions helps researchers see the links to other onto-epistemological assumptions, recognizing the origins of the ideas and their related traditions. Our examples are meant to be illustrative not comprehensive; we invite scholars to recognize and deploy a full range of genres that fits their research endeavor, aligns with their data, and reflects their own personal research preferences.

Variance-Based Case Studies

Variance-based case studies build an understanding of the relationships between well-defined constructs, so that the proposed relationships transcend a specific context (Eisenhardt, 1989). These studies often aim to unpack "what causes what," as researchers seek to understand the factors that can explain different outcomes.

Multiple case studies use a replication-and-comparison logic to see patterns in a data set. Cases with outcomes that vary (e.g. success and failure) are useful in eliciting different explanatory variables; multiple cases with the same outcomes (e.g. success or failure) strengthen the reliability of the theory. Even single case studies can be used to support variance-based theorizing, comparing the current data against insights from received theory. These variance-based approaches tend to follow a positivist paradigm, so that other researchers can assess the validity of the theory and constructs by applying them to different empirical settings.

More than any other qualitative method, this positivist genre dovetails most closely with deductive, quantitative research. Whereas a hypothetico-deductive approach to theorizing starts with prior theory, an inductive approach starts with the data or context-specific problem (Weick, 1992). However, the propositions derived in this type of positivist analysis can extend prior work and stimulate future deductive work (Eisenhardt & Graebner, 2007), though doing so in ways that offer potential leapfrogs in theorizing. For example, Plowman, Baker, Beck, Kulkarni, Solansky, and Travis (2007) used a single case study to observe how a series of small events—specifically, offering hot breakfasts— ultimately contributed to radical changes in a church. To understand this phenomenon, the authors applied complexity theory to theorize how such small triggers could result in such radical changes. Complexity theory had previously received little attention in mainstream management journals. By applying this theory, the authors expanded our field's engagement with it.

Process Studies

Process studies explore change, emergence, adaptation, and transformation. Whereas variance approaches prioritize static entities, unpack their stable structures and constitutive features, and identify the factors that lead to specific outcomes, process ontology shifts the focus to the ongoing, dynamic, and shifting experiences. Early process studies considered how entities changed from one time period to the next (Mintzberg, 1978; Pettigrew; 1990). Starting in the late 1990s, however, scholars argued for a 'strong' process approach that diminishes entities altogether and explores phenomena as always changing (for an overview, see Langley & Tsoukas, 2010, 2017). For example, Tushman and Romanelli's (1985) work on punctuated equilibrium represents an early approach to process studies, highlighting

the adaptive states of "variation and selection" that stimulate organizational innovation and change between more stable states of "retention." In contrast, Weick and Quinn (1999) proffered a strong process model, suggesting that change is not episodically occurring between more static periods, but continuous and ongoing, such that there are no static periods.

Process studies draw from rich philosophical roots (i.e., Dewey, 1938; James, 1952; Whitehead, 1978), relying on a dynamic, relational, and antidualistic ontology. This ontology describes a world that is in constant flux, where individuals and environments are mutually constitutive. The nature of these flowing relationships take primacy, such that, in the extreme, the dualistic distinctions we make between the individual and the environment, the self and the other, the mind and the body absolve to focus only on their dynamic interactions.

Adopting a process view then invites us to observe flows, changes, and relationality. For example, a more variance-oriented study might identify routines and ask how particular routines lead to more or less impact on organizational outcomes. A strong process view, in contrast, explores the underlying motor of routines, and how routines themselves are in constant flux and change informing as well as informed by the users that adopt them (Feldman & Pentland, 2003). Similarly, a more variance-oriented study of hybridity might hold constant competing logics, goals, and identities and explore organizational factors that lead to increased or decreased conflict between these competing demands (Battilana & Dorado, 2010; Pache & Santos, 2013). A process-oriented view might explore the morphing and changing of competing logics, goals, and identities in relation to one another over time (Ashforth & Reingen, 2014; Jay, 2013; Smith & Besharov, 2017).

Engaged Scholarship

In most positivist research, we expect the people conducting the research to distance themselves from the 'thing' they are observing. Doing so protects the researchers' objectivity and ensures that their biases do not influence scholarly outcomes. 'Engaged scholarship' challenges this assumption of distance and objectivity. According to this genre, qualitative researchers cannot be disentangled from their context; the very presence of a researcher in the context will ultimately influence the research context such that ultimately the two may be mutually constituted (Van de Ven, 2007). Instead, these connections between the researcher and the researched can be considered a strength for insights, as the people being studied are often seen as collaborators in the research process.

Although scientific knowledge and practical knowledge are different, they can inform each other and the greater embeddedness of the researcher in his or her context will favor deeper insights and empathy for those that he or she is researching. Engaged scholarship, then, offers new ways of seeing, as the insights not only incorporate the perspective of managers, but also benefit from the creative abrasion of the two different types of knowledge systems to give meaning to the research context. Further, one of the greatest strengths of engaged scholarship is that it can help to mobilize the insights in real time, which means that researchers can sometimes even assess the efficacy of their findings in real time (Rynes, Bartunek, & Daft, 2001).

Relatively few research articles based on engaged scholarship or action research make it into the pages of *AMJ*, because authors have difficulty describing their experience and describing their role. However, given that many qualitative researchers are engaged scholars, it is important for researchers to be forthright about their role. Jay's (2013) article on the transformation of the Cambridge Energy Alliance from a client-oriented business to a public service nonprofit offers a good exemplar of engaged scholarship. During his two-year ethnography as an organizational historian, he shared with his informants his insights about the context, actions, and outcomes, which he recognized likely shaped the views of his informants. He countered the criticisms for such close engagement by being transparent and reflexive, while also keeping a 'fourth notebook.' He also recognizes that he gained deep, first-hand insights into the conflicts that his informants experienced in the change process, which gave him an emic perspective of the organization's transition process.

Historical Studies

Although longitudinal case studies or process studies often analyze historical data, we are witnessing a 'historical turn' in management and organization studies (Godfrey, Hassard, O'Connor, Rowlinson, & Ruef, 2016; Kipping & Üsdiken, 2014; Rowlinson, Hassard, & Decker, 2014). This turn is shifting attention from the simple use of

historical data to the value of these analyses in making us see the social, cultural, and institutional construction of organizational and managerial phenomena in historical context. Whereas hypothetico-deductive logic seeks universal laws or mechanisms, historical analysis recognizes the temporal and spatial historical embeddedness of organizational phenomena. Such analysis requires access to or ability to gather appropriate data, as well as the key principles of historical analysis: a preference for authentic archival data over retrospective material, comprehensive source criticism, and researchers' reflexivity in constructing the narrative.

Although few in number, we have increasingly seen more historical papers published in leading journals such as *AMJ*. For instance, Cattani, Dunbar, and Shapira (2013) provided an exemplary historical analysis of value creation and knowledge loss by studying how value has been attributed to Cremonese stringed instruments from the 16th to the 19th centuries. Hampel and Tracey (2017) offered an illuminating institutional analysis of how Thomas Cook's travel agency moved from stigmatization to legitimacy among the elite of Victorian Britain. Such studies successfully highlight historically embedded processes and practices and their changes over time.

There are, however, many ways of conducting historical work, and these can be understood as subgenres. For instance, Vaara and Lamberg (2016) distinguished between realist, interpretative, and poststructuralist approaches to using historical methods and conducting historically oriented strategy research. Each of these approaches can elucidate particular aspects of historical phenomena, but they also imply very different kinds of perspectives on empirical material, methods of analysis, and the ways in which research findings are articulated in papers. For instance, as in the studies mentioned above, realist historical analysis can uncover the process dynamics and help to elucidate the historically embedded agency of decision-makers or managers, implying a need to focus on as accurate a reconstruction of historical events and trajectories as possible. More interpretative studies, such as microhistorical analyses, can instead illuminate the role of specific events and practices and how they exemplify typical characteristics of a particular time period from the perspective of the key actors involved. Poststructuralist historical studies can in turn problematize typically held historical interpretations, requiring a special emphasis on reflexivity and criticality.

Discourse Studies

There are many discursive approaches to analyzing organizational data, such as content analysis, conversation analysis, critical discourse analysis, Foucauldian discourse analysis, and narrative studies (Phillips & Oswick, 2012; Vaara, Sonenshein, & Boje, 2016). Although it is somewhat problematic to lump these approaches together, they share some common elements that can be described under one heading. Specifically, this genre assumes a socially constructed or poststructuralist understanding of social reality that seeks to uncover and deconstruct meanings, rather than seek to discover causal connections (Fairclough, 2003; Foucault, 1977). Thus, this genre offers a unique way of seeing the construction of organizational and managerial phenomena through discursive practices. By so doing, discourse analysis not only emphasizes the role of language or communication per se, it also offers ways to problematize commonly held conceptions and to conduct critical research. This approach, however, requires an ability to combine detailed linguistic analysis with critical analysis of specific organizational phenomena.

An early example of discourse studies is Boje's (1995) poststructuralist narrative analysis of Disney, which focused on the stories used to construct the history of the company. This analysis revealed the alternative stories and marginalized voices in this historical construction. More recently, Maguire and Hardy (2013) have studied the discursive processes and practices through which products "become" seen as risky, considering the implications for identity and power. Such studies have elucidated the role of discourse and discursive practices and also paved the way for other types of analysis, such as conversation analysis or the more detailed critical discourse analysis.

PUBLISHING ACROSS QUALITATIVE GENRES

While qualitative research uses data and analyses that can flex to fit the researchers' preferences, scholars must still ensure rigor and fit. We offer four core principles to help scholars more effectively write, review, and read qualitative papers across the broad range of qualitative genres.

Principle #1: Know Your Epistemology

Specific genres reflect particular onto-epistemological assumptions that should be taken seriously through the research process and writing the paper. The

majority of papers submitted to and published in journals such as *AMJ* tend to subscribe to the paradigm of normal science that aims to find relationships among valid constructs that can be replicated by anyone. In such cases, researchers may not need to explicitly elaborate on onto-epistemological issues, which is the case with variance-based case studies. However, genres that deviate from normal science require researchers to often explicitly state their onto-epistemological assumptions. For instance, process studies need to state their relational and temporal ontology in order to discriminate themselves from more variance-based approaches to change. Similarly, poststructuralist forms of discourse studies must make their epistemological assumptions explicit to differentiate them from other types of studies and to help others see the value in this kind of critical work.

Principle #2: Ensure that the Research Questions, Data, and Analysis are Internally Consistent

Effective scholarship requires alignment between one's research questions, data, and analysis. Whereas quantitative scholars often make decisions at the start of a project to ensure that the data collection and analysis fit with the research question, qualitative, inductive approaches often require rethinking these questions throughout the project. Insights emerging while collecting data often reveal new ideas that might inspire new data collection, alternative analytical processes, and even a modified research question. While this process enables more flexibility, the final scholarship still requires alignment across the research question, data collected, and analytical processes—as well as alignment between these design choices and the overall genre's epistemology. Therefore, scholars must be open and transparent about their assumptions and maintain internal consistency throughout the paper. Moreover, scholars engaged in inductive inquiry must often be familiar with a variety of genres to be able to deliberately and purposely make choices that align the research question, data, and analytical methods in the final manuscript. Although we appreciate and encourage scholars to boldly discover and follow new theories and methods, this should be done in a careful manner that is mindful about the differences between various genres and subgenres. For instance, when engaging in discourse analysis, the tradition of conversation analysis is very different from Foucauldian discourse analysis.

Principle #3: Be Authentic, Detailed, and Clear in Argumentation and Style of Writing

The writing up of qualitative papers should be detailed and authentic in terms of the genre followed. In particular, the methods sections should be as complete as possible, and researchers must be able to defend the decisions they make to their specific context. For example, almost all researchers impact their organizational context, especially when they are deeply embedded in their research context, as in the case of ethnographic research. We encourage researchers to not only explicitly report their impact on their context, but also to be reflexive in their data collection, so they recognize the role they play in shaping the organizational outcomes or their own implicit biases in interpreting the result(s). Similarly, we advise researchers to be authentic in the way they write up their findings sections and conclusions. This is not, however, always easy, as there is a need to apply and adjust the original ideas in new contexts. Thus, for instance, historical analysis can rarely be reported in as detailed a way as historians ideally would want to have it because that would require more space than we usually have and leave less room for theoretical contributions than is needed in our own field. Similarly, discourse analysis should focus attention on the linguistic micro processes and practices, but this should not eat up all the space needed to make specific points about the role discourse in the managerial or organizational phenomena one is studying.

Principle #4: Use Exemplary Papers, but Do Not Force Fit Your Scholarship with Existing Templates

We applaud the increasing scholarship advancing clear prescriptions and developing exemplary papers, which collectively advance methodological rigor and ensure the value of our insights. We encourage scholars using new genres to continue to find exemplars and templates to help ensure such rigor. However, given that most genres are context specific, following prior work too closely can result in force fitting analysis that does not cohere with one's own approach. Authors must see their work as unique and seek to continue to innovate and develop the qualitative methods to avoid orthodoxies. We also maintain that juxtaposing methodological approaches against one another can help inspire innovation within and across genres (see Gehman, Glaser, Eisenhardt, Gioia, Langley, & Corley, 2018).

Adopting qualitative, inductive methods allows scholars to surface new insights and enable new ways of seeing. The types of qualitative methods are rich and varied. By focusing on a narrow set of qualitative methods, we limit the types of insight we surface as qualitative scholars. Our hope is to inspire more scholarship that adopts these broader genres and extends new ways of seeing in management and organizational research.

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