1 Introduction: The Context of Qualitative Organizational Research

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Introduction

This is the fourth collection we have put together on qualitative methods in organizational research. There have been some changes since our first book in 1994. Certainly, qualitative methods are now far more widespread within organizational research than they were at that time. Additionally it would seem that there is now less of a need to document the wide variety of methods available to the qualitative researcher as this has been done by ourselves and others elsewhere during recent years (Cassell and Symon, 1994; Symon and Cassell, 1998; Cassell and Symon, 2004; Thorpe and Holt, 2008; Eriksson and Kovalainen, 2008).

In the introduction to our last book, *Essential Guide to Qualitative Methods in Organizational Research,* published in 2004, we suggested that this was 'our last venture into this particular genre' (Symon and Cassell, 2004: 1), so why another text now? Three things have influenced the development of this collection. Firstly, together with our colleagues Phil Johnson, Vicky Bishop and Anna Buehring, an ESRC project entitled *Benchmarking Good Practice in Qualitative Management Research* (grant number H333250006) enabled us to discuss with a range of different stakeholder groups the

processes that went into the production of good qualitative research. It also enabled us to devise a range of training materials for qualitative researchers (see www.restore.ac.uk/bgpinqmr/). From this project we learned a lot, notably about the complexity of criteria for qualitative organizational research and the criteriological debates associated with discussions of quality criteria (see Symon and Cassell, in this volume). Secondly, we set up a new journal in 2006 entitled *Qualitative Research in Organizations and Management: An International Journal* (*QROM*). The aim of the journal is to publish exemplars of excellent qualitative empirical work. Through our experiences of the editorial process and our interactions with our informed and constructive editorial board and contributors we have developed more insights into the struggles that qualitative researchers experience in turning their empirical work into high quality output. Thirdly, we have taught many different groups of students the joys of qualitative methods over recent years. These include undergraduates; postgraduates in work psychology, HRM and other management disciplines; doctoral students; MBAs and DBAs. With all of these groups we have seen the demands made upon them in encountering qualitative methods and using them in their dissertations for what in many cases is the first time.

From these experiences we have become more aware that the processes that go into the production and practice of high quality qualitative research are both complex and context bound. Therefore we believe there is a need for a text that not only covers key methods but also addresses the issues of research practice faced by the qualitative organizational researcher. This is what we seek to do in this book. We see it as a companion text to the *Essential Guide*, which focuses more exclusively on detailing the range of methods available. However, there have been some changes in the field of qualitative organizational research since we published the *Essential Guide* eight years ago. Indeed the context in which qualitative organizational research is conducted and assessed seems to be forever changing. In the remainder of this introductory chapter we outline what we see to be some of the key dynamics in the current context as a way of setting the scene for the chapters that follow.

Current Concerns in Research Practice

In the introduction to the *Essential Guide* we stated that: 'our intention has always been to influence research practice within our own discipline' (Symon

and Cassell, 2004: 4). There are four particular things that concern us about research practice at the current time and looking towards the future: the teaching training of qualitative researchers; the impact of a variety of institutional pressures on the conduct of qualitative research; the potential standardization of qualitative research; and contemporary concerns with ethics and evidence. It is to these issues that we now turn.

Teaching and training qualitative researchers

In regard to the teaching and training of qualitative researchers, there are now clearly more resources available in terms of textbooks which outline the potential uses of qualitative research. Previously we mentioned the training materials we developed through our ESRC project (see www.restore.ac.uk/ bgpiqmr/). From the empirical research we conducted for that project we investigated what kinds of knowledge and skills were perceived as necessary to conduct good qualitative research. Our analysis suggested that novice researchers needed to learn a range of skills including those of data collection; data analysis; writing; and critique and evaluation. They also needed to acquire knowledge about the various different methods of qualitative research available and the philosophical methods that underpin method use. Hence the inclusion in this collection of a chapter by Joanne Duberley, Phil Johnson and Catherine Cassell about the different philosophies that underlie qualitative research. Finally, we suggested that qualitative researchers also needed to develop three types of research practices for the accomplishment of good qualitative research: reflective practice, reflexive practice and phronesis (Cassell et al., 2009). The term 'reflection' as used here draws upon the work of Schön (1983) and refers to when the researcher explores the impact of their research in a problem-solving manner with the intention of generating some form of learning upon which future action can be based. Reflexivity (see Haynes, in this volume) encourages the researcher to understand and make sense of their research by challenging and critiquing their assumptions and research practices throughout the research process. Phronesis was originally a term used by Aristotle to describe a form of value-laden knowledge that we could draw upon to respond appropriately within a given – in this case, research – context. The experienced qualitative researcher can, for example, respond to a difficulty in an interview situation in a way that is informed by their previous understanding of how they should act within that situation given the particular set of values that inform

it. This is something the qualitative researcher learns through the experience of conducting qualitative research. Clearly this is a somewhat demanding set of requirements, not all of which can be learned in the classroom. Further details of what can be achieved in the classroom can be found in Learmonth and Humphreys (Chapter 13 in this volume).

A further issue here is the extent to which students have access to training in qualitative methods in business schools. Indeed a number of our respondents in our ESRC project mentioned that the inclusion of qualitative research methods in a doctoral training programme was often dependent upon having an enthusiast on the faculty rather than upon such training being viewed as part of the mainstream curriculum. The complex nature of the research questions we face adds another dimension. For example, Lowery and Evans (2004: 307) in reviewing the changing standing of qualitative research in the discipline suggest that the big questions we face require 'the rigorous use of a broader range of research strategies and tools than those usually taught' in business schools. Indeed they raise the question 'Do we teach quants and stats because they lead to useful outcomes or because they are the only ones we know how to teach?' (2004: 318). Therefore there still seems to be need for greater provision of learning opportunities for researchers who want to use qualitative techniques. This is interesting given that the debates within the UK recently about the skills of graduates of UK doctoral programmes have focused upon highlighting concerns regarding the lack of doctoral students sufficiently trained in quantitative skills (e.g. Wiles et al., 2009).

Institutional concerns

Our experience thus far has been that our academic lives are being increasingly measured and audited in line with the moves towards an audit society (Power, 1997). Elsewhere we have highlighted some of the institutional pressures faced by academics and qualitative researchers in this climate (Symon et al., 2008). The increased emphasis on research audit (for example through the Research Assessment Exercise/Research Excellence Framework in the UK) means that successful academic careers rely upon publishing in what are considered to be the top journals in the field. However, it may be difficult for qualitative researchers to publish in those journals which are dominated by the North American research community and positivist traditions (Singh et al., 2007). Although Buchanan and Bryman (2007: 485) suggest that the organization and management field 'is no longer dominated or constrained by positivist

or neo-positivist epistemology and its extended family of primarily quantitative hypothetico-deductive methods', publishing in these journals is still challenging for the qualitative researcher (see Cornellissen, Gajewska-de Mattos, Piekkari and Welch, in this volume). This is despite the attempts by editors of those journals to signify their openness to qualitative research (e.g. Gephart, 2004; Pratt, 2009; Bansal and Corley, 2011). It would seem therefore that despite our best efforts and those of others, there still seems to be a long way to go before we reach the stage where qualitative methods are accepted as part of the mainstream. Further discussion on this can be found in the chapter on writing up and publishing qualitative research by Joep Cornellissen, Hanna Gajewska-de Mattos, Rebecca Piekkari and Catherine Welch.

A parallel development is the growing significance in UK business schools and in other organizations of journal ranking lists such as the *Financial Times* list of journals and the Association of Business Schools' journal quality ranking guide. These seem to be used increasingly as shorthand indicators of quality research with potentially devastating consequences for new journals and more diverse or non-traditional methodological approaches. Indeed we experience this with our own journal *QROM* where as editors we feel the pressure to enhance the profile and ranking of the journal on the various quality lists so that people will want to submit their best work to it. We are not alone in noting these trends and expressing concern about their implications. Indeed numerous authors have paid attention to the impact of the increased culture of performativity on academic researchers (e.g. Sparkes, 2007; Bell, 2011; Willmott, 2011). Here our key concern is the implications that such institutional pressures will have upon people's desire to conduct qualitative research. Indeed we have met early-career researchers who have been advised against conducting qualitative research because of the potential career costs in terms of publication.

The standardization of qualitative research

A further concern is that these kinds of developments lead to an increased standardization in what is viewed as good qualitative research. In seeking to address the difficulties in publishing qualitative research, a number of editors have produced guidelines and editorial advice regarding what it is that makes a piece of qualitative research publishable (e.g. Gephart, 2004; Pratt, 2009; Bansal and Corley, 2011). Although we recognize that these guides can be valuable to qualitative researchers, journal editors are important 'epistemological gatekeepers' (Symon and Cassell, 1999) and it is potentially a formulaic kind of

qualitative research that follows a standardized route which gets published (Bansal and Corley, 2011; see also Cornellissen, Gajewska-de Mattos, Piekkari and Welch, in this volume). Hence more diverse or alternative accounts of qualitative research are potentially marginalized. Perhaps it is not surprising that as Gephart (2004) suggests, a large proportion of the qualitative submissions to the *Academy of Management Journal* have a positivist or post-positivist orientation and seek to mirror quantitative techniques.

It is important to recognize here that definitions of the 'top' journals are often equated with North American outlets, yet as numerous authors have noted there are different international traditions of qualitative research and internationally prestigious – yet European based – journals such as *Organization Studies* and *Human Relations* which do publish qualitative and interpretivist studies (Prichard et al., 2007; Yanow and Ybema, 2009; Bell, 2011). We are keen not to engender some self-fulfilling failure prophecy here and would not want to deter our readers from submitting their work to top international outlets. Rather our concern is that in what seems to be an increased move towards standardization, the diversity and consequent richness of different qualitative methodological approaches are potentially compromised.

The emphasis on ethics and evidence

There are two other areas of concern regarding the potential standardization of qualitative research designs: those of ethics and evidence. Our recent explorations into the world of our US colleagues have highlighted the concerns that they have about the increased ethical regulation of research more generally and the potential impact of this for qualitative researchers. For example, North American based qualitative researchers from other disciplines have drawn attention to the impact and pressure of Institutional Review Boards on the design and funding of qualitative research (e.g. Lincoln and Cannella, 2004). Elsewhere management researchers have commented that ethical governance structures tend to be devised to work with clear pre-determined research strategies that are more suitable to quantitative research (Bell and Wray-Bliss, 2009). Given that qualitative research is more messy and that 'consent is contingent and situated' (Bell, 2011: 129) it is potentially difficult for qualitative researchers to meet the demands of these ethical procedures.

A similar concern lies with the arguments regarding the utility of evidence-based practice that have emerged in the organization and management field in recent years. Within our own discipline of organizational psychology,

for example, evidence-based practice has been hailed as something that can develop and enhance the discipline so that it is in a better position to speak to practitioners and have a more meaningful impact on the world of work more generally (Briner and Rousseau, 2011). However, a concern we have with this movement is again the potential it offers for methodological standardization. This potential move towards uniformity in research methods has also been noted in other areas where there has been the advocacy of evidence-based prac-tices, ranging from Denzin and Lincoln's (2005) critique of the threats of evi-dence-based methodologies to qualitative health and education research to the critical voices that have emerged within the management field (e.g. Learmonth and Harding, 2006; Learmonth, 2011). Examples of such uniformity can be found in some of the systematic reviews advocated by evidence-based research-ers, where any research that is not informed by randomized control trials or based upon experimental designs is ruled out of consideration (Cassell, 2011).

In summary then, our key concerns at the current time for the future of qualitative research focus upon the pressures that arise from a variety of insti-tutional sources. The reader will see that these challenges provide the context for the chapters that follow. Having outlined our concerns, we do not want to leave the impression that we are somewhat depressed about the prospects for qualitative research in this field. As we suggested earlier, the current context seems to be continuously shifting and the history of qualitative research tells us that qualitative researchers have always had to face challenges to the legiti-macy of their research along the way. We remain optimistic that the prospects for qualitative researchers are rosy and that the distinctive insights that quali-tative research can provide into the organizational arena are increasingly being recognized (Bansal and Corley, 2011).

Core Methods and Key Challenges in Qualitative Inquiry

The book is divided into core methods and key challenges. We realize that sug-gesting that some methods are core implies that others may be peripheral, therefore this is somewhat controversial. However, our intention in providing these chapters is to offer the reader an overview of what are the most well-used methods of qualitative data collection and analysis. In choosing these methods as core we also wanted to display methods that could be used from

a range of philosophical viewpoints. The core methods of data collection covered are interviews (Mats Alvesson and Karen Lee Ashcraft); focus groups (Binna Kandola); participatory visual methods (Russ Vince and Sam Warren); participant observation (Matthew Brannon and Teresa Oultram); autoethnography (Michael Humphreys and Mark Learmonth); and ethnography (Dvora Yanow, Sierk Ybema and Merlijn van Hulst). We then have case studies (David Buchanan); action research (Julie Wolfram Cox); and document analysis (Bill Lee), which comprise both data collection and analysis. In regard to different methods for the analysis of qualitative data, we have grounded theory (Graham Kenealy); template analysis (Nigel King); conversation analysis (David Greatbatch and Timothy Clark); discourse analysis (Cliff Oswick); and narrative analysis (Sally Maitlis). We believe this to be a comprehensive overview of what can be seen as the core methods currently in use in our field. As highlighted earlier we envisage that readers will still refer to the *Essential Guide* for details of other methods.

This book also covers issues of research practice, which we consider to be important for qualitative organizational researchers. Some of these issues have particularly come to the fore more recently since our last book. In our own teaching experience we increasingly encounter students who are conducting research in their own organizations. This raises a distinctive set of concerns, which Susanne Tietze addresses in her chapter. Another matter commonly raised in the classroom and one that concerns novice qualitative researchers particularly is the ideal sample size for qualitative research. This is particularly a challenge for those who may be more familiar with the demands of quantitative research where there are clear prescriptive guidelines for sample size. Mark Saunders's chapter on choosing research participants seeks to address this topic. Furthermore, there is an increased use of software to support the analysis of qualitative data and data management, something addressed by Rudolf Sinkovics and Eva Alfoldi in their chapter. We have also noticed that there is little work published providing advice for qualitative researchers regarding how to combine different methods of data collection. The terms 'mixed methods' and 'hybrid methods' seem to imply mixing the qualitative with the quantitative, yet there are also challenges that occur when seeking to combine different types of qualitative methods in a single investigation, hence Katrina Pritchard's chapter on mixing methods. In a similar vein there are the distinctive issues associated with conducting qualitative research longitudinally, which is something that Ann Langley and Inger Stensaker consider in their chapter. Increasing globalization also draws attention to the

dynamics associated with conducting qualitative research across cultural boundaries, which is the subject of Laurie Cohen and M.N. Ravishankar's contribution. Whereas we expect that authors will highlight any distinctive ethical issues in their individual chapters we also thought it would be useful to include a chapter that provides a basis for a philosophical understanding of ethical issues in qualitative research. This is the focus of Robin Holt's chapter.

Conclusion

Clearly any edited collection will reflect how the authors understand and construct the field and their own place within it. Our issues as qualitative researchers are different now from what they were when we edited the first book in 1994. Although our commitment to raising the profile of qualitative methods in organizational research still remains, we are now far more experienced in using qualitative methods and in teaching, editing and publishing. Our intention is that this book covers what we think the qualitative organizational researcher needs to know regarding methods and also some of the issues they may encounter within the contexts in which qualitative research is conducted. The aim then is that this book will become a key resource for qualitative organizational researchers. Although we can never replace what is gained from the actual experience of doing qualitative research, our contributors generously share the expertise they have gained through doing their own qualitative research and showcase examples of the rich research opportunities offered by qualitative approaches. Gaining insights into organizing and organizations through qualitative research methods is something that has inspired us for many years. We hope that we can encourage our readers to be just as enthused as we are about the prospect.

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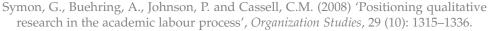
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