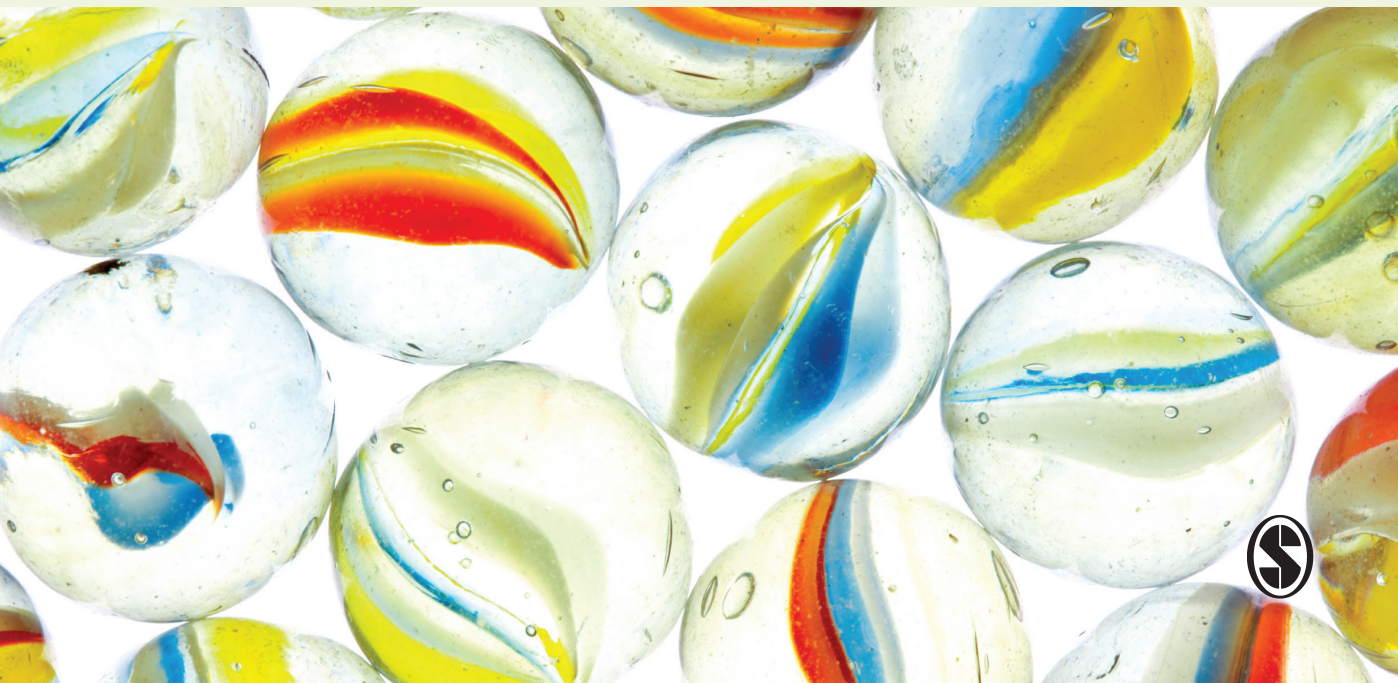GILLIAN SYMON & CATHERINE CASSELL

QUALITATIVE ORGANIZATIONAL RESEARCH

CORE METHODS AND CURRENT CHALLENGES

QUALITATIVE ORGANIZATIONAL
RESEARCH

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GILLIAN SYMON & CATHERINE CASSELL

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CORE METHODS AND CURRENT CHALLENGES

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Contents

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1 Introduction: The Context of Qualitative Organizational Research

Catherine Cassell and Gillian Symon

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 practices, ranging from Denzin and Lincoln's (2005) critique of the threats of evidence-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 researchers, 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 institutional 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 legitimacy of their research along the way. We remain optimistic that the prospects for qualitative researchers are rosy and that the distinctive insights that qualitative 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 suggesting 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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PART I

THE ISSUES AND CHALLENGES OF QUALITATIVE INQUIRY IN ORGANIZATIONAL RESEARCH

2 Philosophies Underpinning Qualitative Research

Joanne Duberley, Phil Johnson and Catherine Cassell

Introduction

As the range of chapters in this book would suggest, there is considerable diversity in the different methods available to the researcher seeking to access the organizational world qualitatively. However, any process of methodological engagement inevitably articulates, and is constituted by, an attachment to particular philosophical or metatheoretical commitments that have implications for research design. As Cunliffe (2010) highlights, 'Our metatheoretical assumptions have very practical consequences for the way we do research in terms of our topic, focus of study, what we see as "data", how we collect and analyse the data, how we theorize, and how we write up our research accounts'. Therefore they are a key part of the methodology within which our methods of data collection and analysis are located. Accordingly, methodology comprises both our philosophical assumptions and our methods. Qualitative research is particularly challenging in this respect, because such methods are used in a range of epistemological and ontological approaches within the management field (Johnson and Duberley, 2000; Johnson et al., 2006; Kelemen and Rumens, 2008; Alvesson and Sköldberg, 2009; Gill and Johnson, 2010). Therefore the qualitative researcher needs to be aware of these commitments and the options available to them, hence the significance of a chapter on the philosophies of qualitative research.

The primary aim of this chapter is to explore how qualitative organizational research methods may be deployed differently given the various modes of philosophical engagement. For the novice researcher, engaging in philosophical debates for the first time can be somewhat bewildering. However, one intention of this chapter is to provide the reader with an overview of the various philosophical stances within which qualitative research sits so the researcher can be aware of the various consequent methodological assumptions underpinning their research. The chapter is structured in the following way. First we shall attempt to establish how qualitative research initially arises under the umbrella of a shared philosophical critique of certain assumptions deployed by the positivist mainstream – assumptions primarily to do with the nature of human behaviour. Having established this initial philosophical break we shall then proceed to explore some of the other different traditions underpinning qualitative research. These include neo-empiricist qualitative research; interpretivism; critical theory; postmodernism and poststructuralism; and other post traditions. We realize that each of these categorizations will have variation within them, and it is not always possible to draw neat lines around particular approaches; however, they can be seen as useful heuristic devices in structuring our understanding. The chapter concludes by summarizing the key philosophical issues that qualitative researchers should pay attention to in their work.

Before presenting an overview of some of the different philosophical stances that underpin qualitative research, it is useful to define the key terms encountered in these philosophical discussions, notably epistemology and ontology.

Epistemology

As has been argued elsewhere (Johnson and Duberley, 2000: 3) that the philosophical term 'epistemology' derives from two Greek words: *episteme* which means 'knowledge' or 'science'; and *logos* which means 'knowledge', 'information', 'theory' or 'account'. Therefore epistemology is usually understood as being concerned with knowledge about knowledge. In other words, epistemology is the study of the criteria by which we can know what does and does not constitute warranted, or scientific, knowledge. That is, what do we mean by the concept 'truth' and how do we know whether or not some claim, including our own, is true or false? Usually people think that such processes of justifying knowledge claims are in principle straightforward: – in judging the truth or falsity of any such

claim surely 'the facts speak for themselves'? All we need to do is look for the relevant evidence whose content will either support or refute any claim. Thus it is often thought that what is true is something that corresponds with the given facts: empirical evidence is the ultimate arbiter. Perhaps this view of warranted knowledge initially seems harmless and unproblematic. However, it has been subject to much dispute in both the natural and social sciences: a dispute that has had a direct influence on the evolution of qualitative research.

The positivist epistemological commitment that it is possible to objectively, or neutrally, observe the social world in order to either test theoretical predictions, or to describe cultural attributes, has been considerably undermined by those who think that in observing the world we inevitably influence what we see and that notions of truth and objectivity are merely the outcomes of discursive practices which mask rather than eliminate the researcher's partiality (see Willmott, 1998). In other words there is an epistemological choice here which influences the form that qualitative research takes between an objectivist (realist) and a subjectivist (relativist) epistemological stance. If we reject the possibility of neutral observation, we have to admit to dealing with a socially constructed reality that may entail a questioning of whether or not what we take to be reality actually exists 'out there' at all? This leads us to the philosophical issue that revolves around our ontological assumptions.

Ontology

Like the term 'epistemology', the term 'ontology' also is a combination of two Greek words – but in this case they are *ontos* and *logos*. The former refers to 'being' while the latter refers to theory or knowledge, etc. Ontology is a branch of philosophy dealing with the essence of phenomena and the nature of their existence. Hence to ask about the ontological existence of something is often to ask whether or not it is real or illusory. Ontological questions concern whether or not the phenomenon that we are interested in actually exists independent of our knowing and perceiving it – or is what we see and usually take to be real, instead, an outcome of these acts of knowing and perceiving? Here it is useful to differentiate between realist and subjectivist assumptions about the status of social reality. Realist assumptions entail the view that it exists, 'out there', independent of our perceptual or cognitive structures. We might not already know its characteristics, indeed it may be impossible for us ever to know those characteristics, but this reality exists, it is real and it is there potentially awaiting inspection and discovery by us. Taking occupational

stress as an example, an objectivist ontological stance would see stress as a real phenomenon that exists within oneself. It is there to be accessed and measured. A subjectivist ontological stance would, however, position occupational stress some-what differently. From this perspective stress would be something that does not exist in individuals and groups, rather it would be something created through our everyday talk. That is, subjectivist assumptions about the ontological status of the social phenomena we deal with – such as stress – entail the view that what we take to be social reality is a creation, or projection, of our consciousness and cognition. What we usually assume to be 'out there' has no real, independent, status separate from the act of knowing. In perceiving or knowing the social world we create it – we are just not usually aware of our role in these creative processes.

By combining the above ontological assumptions with the competing assumptions regarding epistemology that we have already discussed, we can see some of the different philosophical positions which impact qualitative research. These philosophical assumptions about ontology and epistemology are always contentious and debatable. Indeed we cannot operate without adopting some epistemological and ontological position. Therefore it is impor-tant that we are aware of them; are prepared to defend them; and also pre-pared to consider their implications. It is the variation in these assumptions that leads to some of the different methodological approaches we can identify within qualitative organizational research. It is to these different approaches we now turn.

Positivism

As many authors have highlighted, the development of management and organizational research has been characterized by the domination of positivism as an underlying philosophy. According to some (e.g. Keat and Urry, 1982) two of the most significant characteristics of positivist epistemology concern, firstly, the claim that science should focus on only directly observable phenomena, with any reference to the intangible or subjective being excluded as being mean-ingless; and secondly, that theories should be tested, in a hypothetico-deductive fashion, by their confrontation with the facts neutrally gathered from a readily observable external world.

A key aspect of positivism is the tendency to reduce human behaviour to the status of automatic responses excited by external stimuli wherein the subjective dimension to that behaviour is lost, intentionally or otherwise. This reduction

is achieved by positivists attempting to follow what is presumed to be the methodological approach taken in the natural sciences. This entails ignoring the subjective dimensions of human action. Instead, human behaviour is conceptualized and explained deterministically: as necessary responses to empirically observable, measurable, causal variables and antecedent conditions. The resultant approach, often called *erklaren* (see Outhwaite, 1975), usually investigates human behaviour through the use of Popper's (1959) hypothetico-deductive method. Here the aim is to produce generalizable knowledge through the testing of hypothetical predictions deduced from a priori theory. As such it entails the researcher's a priori conceptualization, operationalization and statistical measurement of dimensions of actors' behaviour rather than beginning with their socially derived (inter)subjective perspectives. This is based on an allegiance to methodological monism: the notion that only natural science methodology can provide certain knowledge and enable prediction and control: it follows that it must be emulated by social scientists (Ross, 1991: 350).

Although positivism and the resultant use of quantitative methods have typically dominated organizational research, concern about the lack of attention given to the subjective nature of human thoughts and actions has led to the promotion of a variety of different philosophical stances aimed at addressing the dominance of positivism within the organizational and management field.

Qualitative Neo-positivism

Even those who reject key aspects of positivism regarding the use of hypothetico-deductive methodology, and the exclusion of the subjective as meaningless, will sometimes retain a commitment to being able to objectively investigate human intersubjective cultural processes by gathering the facts from a readily observable external world. The result is a kind of 'qualitative positivism' (see Knights, 1992; Van Maanen, 1995; Schwandt, 1996; Prasad and Prasad, 2002) or 'neo-empiricism' (Alvesson and Sköldberg, 2009) which, although different from mainstream positivism, shares its commitment to a theory-neutral observational language: that it is possible to neutrally apprehend the facts 'out there'. Therefore although positivism is generally linked with quantitative methods, there are some elements of positivism that continue to exert an influence in certain approaches towards qualitative research. As we have discussed, the belief that science can produce objective knowledge rests on two assumptions: first the assumption of ontological realism – that there is a reality 'out there' to be known – and

second that it is possible to remove subjective bias in the assessment of that reality. These assumptions can be seen to underpin certain approaches towards ethnography, for example. Hammersley and Atkinson (1995) discuss how ethnography is often wedded to the notion of realism, which means that while ethnographers may discuss how the subjects of their study socially construct their realities, they do not apply this constructivism to the ethnographic process (for more on ethnography, see Yanow, Ybema and van Hulst, in this volume). Indeed it was a classic ethnographer Malinowski who argued that 'ethnography's peculiar character is the production of ostensibly "scientific" and "objective" knowledge based on personal interaction and subjective experience' (cited in Yanow and Schwartz-Shea, 2006: 261). Thus what is 'out there' is presumed to be independent of the knower and is accessible to the trained observer or ethnographer following the correct procedures. This leads to a situation where tension exists between a subjectivist attention to actors' meanings and an objectivist treatment of them as phenomena that exist 'out there' independent of observer's identification of them (Weiskopf and Willmott, 1996).

Alvesson (2003) further discusses how the qualitative research interview is used by neo-positivists to attempt to access a context-free truth about reality by rigidly following a research protocol and minimizing researcher influence and other potential sources of bias (for more on interviews see Alvesson and Ashcraft, in this volume). He sees the ideal for neo-positivist qualitative research interviewers as being 'a maximum, transparent research process, characterized by objectivity and neutrality' (Alvesson, 2003: 16) with the interview conversation being viewed as 'a pipeline for transmitting knowledge' (Holstein and Gubrium, 1997: 113 cited in Alvesson, 2003: 15). Here researchers attempt to remove themselves from the process, presenting instead an objective picture, free from the potential taint of their assumptions and values. Thus although qualitative researchers may seek to distance themselves from positivism – the reliance on tools and techniques – the assumption that bias can be removed, and that with the right tools and techniques peoples' subjective realities can be accessed, shows some continuity with the past.

Interpretivism

A variety of different philosophical approaches are covered by the loose term 'interpretivism'. Prasad (2005: 13) suggests that 'all interpretive traditions

emerge from a scholarly position that takes *human interpretation* as the starting point for developing knowledge about the social world'. Particularly important in this tradition is a commitment to *verstehen* (Outhwaite, 1975), which entails accessing and understanding the actual meanings and interpretations actors subjectively ascribe to phenomena in order to describe and explain their behaviour through investigating how they experience, sustain, articulate and share with others these socially constructed everyday realities (see Van Maanen, 1979, 1998; Patton, 1990; Guba and Lincoln, 1994; Schwandt, 1996; Denzin and Lincoln, 2005). Examples include qualitative work that is informed by symbolic interactionism, ethnomethodology and hermeneutics.

It is more complicated to locate this whole body of work. Some of these traditions can be seen as similar to that of neo-positivism, in that a realist ontology is utilized – that is, there is a real world with real phenomena to explore – and a subjectivist or constructionist epistemology, in that our understanding of that reality is socially constructed. However, some interpretivist traditions such as ethnomethodology are more subjectivist in their ontological stance. One point of connection, however, is that interpretivists are less likely to be concerned with mirroring the tenets of positivism, in that their search for the understanding of interpretation offers different approaches to how empirical work is conducted and the role of the researcher within it. Indeed the researcher becomes a focal point of interest in some interpretivist traditions. Prasad (2005: 16) suggests that 'although a variety of perspectives come under the banner of interpretivism ideas of social construction, verstehen, intersubjectivity and reification are all integral to the different interpretive traditions ... Yet each tradition appropriates and extends these central tenets quite uniquely'. It is impossible to provide a review of them all here but a brief exploration of hermeneutics and ethnomethodology highlights some of the underlying principles.

Hermeneutics is informed by the European social science traditions of Dilthey, Heidegger and others and initially emerged when the techniques used to interpret biblical works were applied to other texts (Murray, 2008). Alvesson and Sköldberg (2000: 53) suggest that the key principle underlying hermeneutics is that the meaning of a part can only be understood if it is related to the whole. The key heuristic device for understanding and interpretation is the hermeneutic circle. Within the hermeneutic circle the link between pre-understanding and understanding is made. No one comes to interpretation with an open mind, rather there is the pre-understanding of the phenomenon that we already have. Hence the hermeneutic circle focuses upon the iteration

of interpretation where pre-understanding informs understanding and so on, leading to a greater understanding of both. Within qualitative research the development of hermeneutic interpretation forms the basis of some approaches to qualitative data analysis, for example where patterns of interpretation of themes from interview transcripts start to shape our understanding of interviewee accounts (McAuley, 2004).

Ethnomethodology builds on the philosophy of phenomenology to seek to understand and interpret how individuals make sense of their lifeworlds. The key principles are informed by American sociological traditions and particularly the work of Garfinkel (1967) who was interested in the everyday ways in which individuals construct and make sense of complex social situations. Ethnomethodology is thus more interested in the ways in which interpretive schemas are put into practice and accepted, altered or rejected (Prasad, 2005). The methods that tend to be associated with this tradition focus upon examining the social minutiae of happenings in acute detail. For example, various linguistic approaches to qualitative data analysis such as conversational analysis (see Greatbatch and Clark, in this volume) can be located within this approach. Within the business and management field a key use of ethnomethodology is the concept of sensemaking (Weick, 1995). Qualitative research in this tradition has focused upon paying attention to how individuals or groups retrospectively make sense of events such as disasters or crises (Weick, 1993; Brown, 2006). Throughout, these accounts draw upon the documentary method highlighted by Garfinkel (Fox, 2008) with a view that reality is an ongoing and skilful social accomplishment.

Critical Theory

Critical theory focuses on the inherent connection between politics, values and knowledge and thereby provokes a deeper consideration of the politics and values that underpin and legitimize the authority of scientific knowledge (Alvesson et al., 2009). The aim of critical theory-based approaches towards organizational research is to understand how the practices and institutions of management are developed and legitimized within relations of power and domination such as capitalism. Yet critical theory also asserts that systems can and should be changed, thus qualitative research from this perspective tends to have an orientation towards investigating issues such as exploitation, asymmetrical power relations, distorted communication and false consciousness.

Fundamental to this perspective is the belief that these systems can be transformed to enable emancipation, which involves a continuing process of critical self-reflection and associated self-transformation. Prasad and Caproni (1997: 3) identify four broad themes that are integral to research from the perspective of critical theory: an emphasis on the social construction of reality; a focus on issues of power and ideology; the need to understand any social or organizational phenomenon with respect to its multiple interconnections and its location within holistic historical contexts; and the importance of praxis – the on-going construction of social arrangements that are conducive to the flourishing of the human condition.

The presupposition of a theory neutral observational language is rejected by critical theorists who see knowledge as contaminated at source by the influence of socio-cultural factors upon sensory experience (see Habermas, 1974). The researcher is no longer the neutral observer. Instead, for emancipation to take place, there is a need to counter the influence of 'scientism', which occurs when scientific or 'objective' knowledge can lead to domination and dehumanization. Examples from the management and organization arena are highlighted by Willmott (2008: 67) who points out that 'a positivist conception of objective knowledge has filtered into the field of management through the processes of quantification and the development of seemingly impartial means of legitimising instrumental rationalizations [*sic*] – from scientific management through human relations to BPR'. The role of the critical theorist is to critique these forms of scientism and create opportunities for change. The outcomes of research are influenced by the subjectivity of the social scientist and his or her mode of engagement, which leads to the production of different versions of an independently existing reality that we can never fully know. For Habermas (1974), it is only through reference to fundamental interests that it becomes possible to understand first the criteria that are applied in identifying what are taken to be 'real' and second the criteria by which the validity of such propositions may be evaluated.

In order to escape the dangers of relativism where any interpretation would potentially have equal value, Habermas stresses the need for interpretations to be agreed democratically. Thus for knowledge to be legitimate it must be grounded in the consensus achievable in an ideal speech situation where discursively produced agreement results from argument and analysis without any resort to coercion, distortion or duplicity. However, it is evident to Habermas that such a consensus is not attained in everyday social interaction due to the asymmetrical operation of power relations which systematically

distort communication. Therefore it must remain a regulative epistemic ideal against which extant organizational practices may be assessed (Deetz, 1992; Forrester, 1993). Here reflexivity (see Haynes, in this volume) is construed as emancipatory since it sanctions the investigation and problematization of the taken-for-granted social constructions of reality which are located in the varying practices, interests and motives that constitute different communities' sensemaking.

Forrester (1993) argues that doing fieldwork in a Habermasian way enables researchers to examine the processes and the outcomes of relations of power. Thus from a critical theory perspective, qualitative researchers should be concerned to develop new modes of engagement that allow participants to pursue interests and objectives that are currently excluded by the dominant management discourses. As expressed in various forms of participatory management research (e.g. Power and Laughlin, 1992; Reason and Bradbury, 2001), through dialogue participants should democratically co-determine and co-develop the substantive basis of that knowledge so that their interests and objectives become metaphorically permitted and encoded into its 'gaze'.

Given the various commitments of critical theory, a range of different traditions has developed that seeks to apply these principles, so qualitative research within these traditions uses a range of different methods. For example, participant observation and ethnographies are used to highlight the subjective experiences of how dominance and control are exercised in the workplace (see Rosen's (1985) study of an advertising agency and Jackall's (1988) tales of managers and ethics). A commitment to emancipation can also be seen in various forms of participatory action research (e.g. Power and Laughlin, 1992; Reason and Bradbury, 2001).

A range of other perspectives has drawn upon critical theory, for example the development of critical management studies (Alvesson and Deetz, 2000; Kelemen and Rumens, 2008; Hassard and Rowlinson, 2011) and feminism. In feminist and radical feminist epistemologies concepts of sex, sexuality, gender and the enduring nature of patriarchy come to the fore. There has been an ongoing tradition within organization studies of challenging the dominance of patriarchy and its implications for both women and men in the workplace (though it is important to point out that feminist approaches are informed by a range of different epistemological perspectives and not only critical theory; see Calás and Smircich, 1996; Gheradi et al., 2003). Given that the primary objective of feminist informed studies is to understand the subjective life-worlds of women (and liberate them from patriarchal ideals), the methods of

choice in these studies usually require in-depth interviews (see Alvesson and Ashcraft, in this volume) or other methods that require immersion in women's experience (Prasad, 2005). A focus upon the role of the researcher (see Tietze, in this volume) and reflexive critique is also important within this tradition (see Haynes, in this volume).

Postmodernism and Poststructuralism

There is considerable debate within the literature about whether postmodernism and poststructuralism can be seen as having unique identities, or whether poststructuralism is another variant of postmodernism. Given that they share similar concepts such as a focus upon language, discourse and deconstruction, we will treat them together here, though as Prasad (2005) suggests, poststructuralism does have some distinctive features of its own, particularly relating to the focus upon language as it relates to institutions and power. It is important to recognize that these approaches emerged as a response to what were seen as the constraints and excesses of modernism, and are therefore, as Chia (2008: 162) suggests, 'experimental and reactionary'.

   Qualitative researchers from these traditions favour a position where subjectivist ontology is combined with a subjectivist epistemology. This involves abandoning 'the rational and unified subject in favour of a socially and linguistically decentred and fragmented subject' (Best and Kellner, 1991: 4). Postmodernist epistemology dismisses the positivist rational certainty in the attainability of epistemic privilege and replaces it with a relativist view of science and knowledge. From a postmodern perspective any attempt to develop a rational and generalizable basis to scientific enquiry that explains the world from an objective standpoint is flawed. Lyotard (1984: xxiv) calls this 'an incredulity towards metanarratives'. Instead postmodernists put forward a perspective where all knowledge is indeterminate: what we take to be reality is itself created and determined by those acts of cognition. The social world is not seen as external to us, waiting to be discovered; everything is relative to the eye of the beholder.

   A key element of postmodern research has been a renewed focus on language. The 'linguistic turn' suggests that language is never innocent; that no meaning exists beyond language; that knowledge and truth are linguistic entities and constantly open to revision (Lyotard, 1984). There is an emphasis in

postmodernism on the role of discourses. These are subjective, linguistically formed ways of experiencing, acting and constituting phenomena which we take to be 'out there'. These discursive conceptions are 'collectively sustained and continually renegotiated in the process of making sense' (Parker, 1992: 3). Thus what we take to be knowledge is constructed in and through language. The language of science cannot represent or illuminate some external reality – there is no discoverable true meaning, only a variety of different interpretations. Hence for postmodernists reality can have an infinite number of attributes, since there are as many realities as there are ways of perceiving and explaining. Influential upon our linguistically derived sensemaking are our social interactions in various milieux, which bias us towards particular ways of viewing the world. Usually we remain unaware of these constructive socio-linguistic processes, thus although we may perceive things as objective and separate from ourselves, as 'out there', through language we are active participants in creating what we apprehend (Chia, 1995).

However, people are not free to make their own interpretations. Instead the decentring of the subject that is associated with postmodern writings places emphasis on the development of shared discourses through exposure to which the individual is constituted. Human beings therefore make sense of the world through particular historical and socially contingent discourses. These discursively produced hyper-realities can be mistaken for an external reality. Postmodernists counter this through the use of deconstruction, which is a key element of poststructuralist approaches informed by the work of writers such as Derrida, Foucault and Lacan. This originally derives from literary criticism where texts are analysed in order to reveal their inherent contradictions, assumptions and layers of meaning. In organization studies, deconstruction attempts to show how any claim to truth, whether made by social scientists or practising managers, is always the product of social construction and therefore always relative (Johnson and Duberley, 2000). This is attempted by showing how texts contain taken-for-granted ideas which depend upon the exclusion of other things. Often this will involve identifying the assumptions that underpin any truth claim and the identification of the absent alternatives whose articulation may produce an alternative rendition of reality. Thus deconstruction denies that any text is ever settled or stable. However, it does not offer a tool to find 'the truth'. At most it offers alternative social constructions of reality within a text, which are themselves then available to deconstruction and thereby not allowed to rest in any finalized truth. Thus there is a strong strand

of postmodern writing focusing on the deconstruction of existing works in organization studies (see for example Kilduff's (1993) deconstruction of March and Simon's work and Carter and Jackson's (1993) examination of motivation theory), which focuses on the logics and contradictions of existing theories, examining gaps and instabilities in time, space and text (Cooper, 1989).

While there is a degree of scepticism about empirical work and a recognition that scientific methodology 'loses its status as the chief arbiter of truth' (Gergen and Thatchenkerry, 1996: 12), postmodernism offers some important insights into research methodology. Qualitative research from this perspective focuses upon gaining an understanding of a situation at a particular point in time, recognizing that this is only one of a number of possible understandings. There is no reliance on particular methods to provide an accurate correspondence with reality and while there appears to be a preference for qualitative approaches in much postmodernist work, research methods are viewed as embodied in cultural practice and no particular approach is considered to have a privileged status. Thus some management researchers have focused on the liberating potential of the postmodern perspective, arguing that it frees researchers to mix and match various perspectives or research styles in order to challenge conventional wisdom (Kilduff and Mehra, 1997; Gergen and Thatchenkerry, 1996).

Others, however, see postmodernist perspectives as aligned with qualitative methods (Kondo, 1990), in particular ethnography, which Linstead claims is '*the* language of postmodernism' (Linstead, 1993: 98) because it has the ability to evoke rather than just describe. This, according to Linstead, requires both poetic and conceptual rigour from the author in order to produce an account 'poised in the space between fact and fiction' (1993: 70). Other methods informed by these perspectives are the analysis of stories, for example Boje's (1991, 1995) explorations of the multiple stories in use at Disney, and the analysis of narratives in relation to how identities are constructed (e.g. Brown, 2006; Beech, 2008; and see Maitlis, in this volume). An important method is also discourse analysis (see Oswick, in this volume), which has been used to explore a range of organizational phenomena. Oft-quoted examples of this kind of work include Linstead's (1985) study of shopfloor discourse, Kondo's (1990) examination of the production of identity in Japanese workplaces, and Ely's (1995) study of sex roles in organizations. More recent examples are studies of HRM (Harley and Hardy, 2004), entrepreneurship (Perren and Jennings,

2005), public policy (Motion and Leitch, 2009), and management strategy (Greckhamer, 2010).

As has been discussed in detail elsewhere (Johnson and Duberley, 2000), postmodernism demands that researchers are sceptical about how they engage with the world, the categories they deploy, the assumptions they make, and the interpretations they impose. It encourages irony and humility as well as rebellion against the imposition of any unitary scientific discourse (Cooper and Burrell, 1988). It elevates the role of both the producer of research accounts and the reader of them. Authors from this perspective recognize that their work may be interpreted in a multitude of different ways depending on the perspective of the reader (Parker, 1992; Burrell, 1997). Thus it has been argued that postmodernist approaches enable us both to know more and yet doubt what we know (Richardson, 1998: 358).

Postcolonialism and Indigenous Epistemologies

Recent years have seen the development of further epistemological approaches which may encompass qualitative research. These encourage the framing of research questions in different ways. For example, postcolonialism has surfaced within business and management research (Prasad and Prasad, 2002; Prasad, 2005). As Prasad (2005: 263) suggests: 'postcolonialism is extraordinarily relevant to management and organization studies because it offers an alternative historical explanation for many commonplace business practices that have their origins in colonial structures'. Indeed she argues that the intensification of globalization makes postcolonialism especially pertinent in that it becomes 'particularly important in understanding some of its [globalization] less visible and more unsavoury facets' (2005: 263). Such colonial practices include epistemic coloniality (Ibarra-Colado, 2006: 464) where 'the processes by which the institutionalization of knowledge as scientific knowledge permitted the integration of native elites into the dominant Anglo-Euro-Centric ideology of modernity' (Florescano, 1994: 65).

Alongside the challenges of postcolonial approaches to accepted perspectives, indigenous scholarship has become apparent within the literature on qualitative research (e.g. Smith, 1999), and more recently within qualitative management research (e.g. Ruwhiu and Cone, 2010; Stablein and Panoho, 2011). Stablein and Panoho (2011: 78) outline how Kaupapa Maori epistemology and methodology are examples of how 'throughout

the world the relationship between indigenous peoples and academic research is being challenged'. Rather than the traditional route of indigenous people being studied as different by those on the outside, Maori epistemology starts from their inside knowledge and worldview (Smith, 1999). For qualitative management and organizational researchers, such epistemological approaches offer new ways of critiquing management processes and practices and the possibility of framing research questions in innovative ways. Traditional ways of constructing questions about groups must be questioned. A further example here is the lens of queer theory, which is relatively new to management research (e.g. Parker, 2002; Butler, 2004; Tyler and Cohen, 2008). Parker (2002: 164) suggests that queer theory questions knowledge claims, ethics and language and also that it 'endangers a nervousness about categories' because from this perspective identities consist of many different elements; therefore to assume that people can be viewed collectively on the basis of one shared characteristic (for example being a woman) is flawed.

Conclusion

In this chapter we have tried to outline the variety of philosophical debates and commitments that implicitly and explicitly underpin different approaches to undertaking qualitative organizational research. Qualitative researchers are increasingly being called upon to reflexively think through their own beliefs and how those beliefs will have repercussions for our engagements with areas of interest (Willmott, 1998; Prasad, 2005; Alvesson and Sköldberg, 2009). This involves reflecting upon how those often tacit, unacknowledged pre-understandings impact upon: how those 'objects' of research are conceptually constituted by the researcher; what kinds of research question are then asked by the researcher; and how the results of research are arrived at, justified and presented to audiences for consumption (e.g. Holland, 1999; Chia, 1995; Alvesson and Sköldberg, 2009). Caelli, Ray and Mill (2003) argue that to have credibility, qualitative research papers must address the following four areas (see also Symon and Cassell, in this volume):

1   The theoretical positioning of the researcher, including motives, presuppositions and personal history, which leads them towards and shapes a particular inquiry.

2 The congruence between methodology, reflecting the beliefs about knowledge that arise from the philosophical framework being employed, and the methods or tools of data collection and analysis.

3 Strategies to establish rigour – in other words they must evaluate their research in a way that is philosophically and methodologically congruent with their enquiry.

4 The analytical lens through which data are examined, in terms of the epistemological and ontological assumptions researchers make in engaging with their data.

This seems a useful starting point to ensure that researchers at least consider the philosophical assumptions they are making when undertaking qualitative research. Of course, it may not be possible to draw neat lines around particular approaches. As we mentioned at the beginning of this chapter, these categorizations are a useful heuristic. Each contains within it a variety of alternative approaches and reality is always far messier, where qualitative researchers face contested ideas and multiple ongoing influences. The challenge is not to be able to fit one's research approach neatly into any particular category but to ensure self-reflexivity and an awareness of the various ways in which our philosophical assumptions have influenced our research.

Further Reading

For a more in-depth discussion of the philosophical underpinnings of qualitative research, see Denzin and Lincoln's (eds) (2007) *The Landscape of Qualitative Research* (3rd edn), which examines the competing paradigms that underpin qualitative research and their implications for methods. Prasad's (2005) *Crafting Qualitative Research: Working in the Postpositivist Traditions* similarly provides a clear and concise view of alternative traditions that exist within the qualitative field. Marshall's (2006) *Designing Qualitative Research* gives a useful overview of the implications of various philosophical positions for methodology and also provides interesting vignettes to illustrate the methodological challenges of qualitative research. Finally, Alvesson and Sköldberg's (2009) *Reflexive Methodology* (2nd edn) gives a thought provoking analysis of the linkages between philosophical assumptions and methods employed, which they see as both an 'intellectualization of qualitative method' and 'a pragmatization of the philosophy of science' (p. vii). It is to be recommended for those wishing to explore the underpinning assumptions of qualitative research in more depth.

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Choosing Research Participants

Mark N.K. Saunders

Introduction

Within qualitative research choice of research participants is, invariably, constrained by what is practicable. While in an ideal world we may wish to collect data from participants in a particular organization or a number of organizations, our abilities to do this are dependent upon gaining access to these organizations and our intended participants, as well as being granted permission to collect the data we require. Once physical access has been granted and permission obtained (Gummesson, 2000), it may occasionally be possible to collect data from the total population, for example all of an organization's employees, but for most research projects this will be impossible. As a condition of our access, our potential population of research participants may be constrained to a smaller sub-group. The resources we have available to support our research may also constrain the amount of data we can collect and analyse, almost invariably resulting in it only being practicable to collect data from a sample of our population of research participants (Fink, 2003; Saunders et al., 2009b). Consequently for virtually all qualitative research it will be necessary to consider carefully how we will choose those research participants, our sample, from whom we will collect data to answer our research question and meet our research aim.

This chapter takes as its starting premise that there is a clear connection between our research aim and our research design (Kvale and Brinkmann,

2009). Our choice of research participants should be determined by the focus of our research, thereby enabling us to meet our research aim and answer our research question. Choosing research participants is likely to be difficult until we are clear regarding the focus of our research. The chapter commences with a discussion of the main concerns and debates associated with choosing participants for qualitative organizational research. Within this I consider the importance of gaining access, the need for the sample to enable collection of appropriate data, the use of different non-probability sample selection techniques and the number of participants needed. These are illustrated subsequently by two examples drawn from my own and colleagues' research experiences. The first focuses on the selection of a single case study, issues of access and purposive sampling techniques. The second explores the use of a self-selection sample to choose participants drawn from a variety of organizations and the issues associated with sample size. The chapter closes with guidelines for new qualitative researchers when choosing participants and suggestions for further reading.

Main Concerns and Debates

Gaining access

Like all organizational researchers, when undertaking qualitative research we are dependent upon gaining access. Without paying careful attention to how we will gain access, interesting research aims may flounder, proving impractical or problematic when we attempt to gain permission to collect data. Inevitably as researchers our position is weak compared to that of organizations as we have relatively little to offer (Lee, 1993). Many organizations receive frequent research requests for access and would find it impossible to agree to all or even some of these. Equally our requests may fail to interest the gatekeeper who controls research access, resulting in a refusal. This may be for a number of reasons such as a lack of perceived value of the research to the organization, the time required of participants (who are first and foremost employees), the intrusive nature or sensitivity of the research and associated confidentiality issues, scepticism regarding the role of outsiders, or even concerns about the competence of the researcher (Coleman, 1996; Laurila, 1997; Saunders et al., 2009b). Finally, even when access has been promised, often through an existing