

# TU-L0031: QUALITATIVE RESEARCH METHODS

3 ECTS OFFERED IN SPRING 2023

DETAILS OF THE SYLLABUS MAY CHANGE. FOR LATEST VERSION PLEASE REFER TO WEBSITE.

## TEACHER-IN-CHARGE

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## ABOUT THE COURSE

Welcome to Qualitative Research Methods! The module described in this syllabus is 3 ECTS.

TU-L0031 provides an overview of qualitative research methods that are commonly used in management research. Different approaches include case studies, action research, ethnography, and historical. We will look at the steps involved in planning a research project, data collection and analyzing, and reporting (i.e. writing up) in a way that is expected for publication in top management journals.

TU-L0031 is an interactive class with learning based predominantly on class discussions and activities. Students are expected to properly prepare for each class, attend class, and actively participate in daily activities and discussions.

### Teaching period

This course is offered in a condensed format in Otaniemi in the TUAS building (Maarintie 8, Espoo) in the AS3 Saab Space - 1021-1022, over two weeks. The days and times are:

Mon 15.5, 9-13

Wed 17.5, 9-13

Fri 19.5, 9-13

Mon 22.5, 9-13

Wed 24.5, 9-13

Mon 29.5, 9-13

### Status of the course:

This is a compulsory course for the students in the field of IEM and an optional course for the Doctoral Program in Science. The course is open to other Aalto University doctoral students (i.e. from Aalto BIZ) and students from other universities as long as the size of class permits.

**Level of the course:** Doctoral level

**Prerequisite:** TU-L0000 Research Methods in Industrial Engineering and Management

**Language of instruction:** English

**Registration:** The course is offered for doctoral students. To enroll see instructions on the course website. The course will be organized if at least four students have enrolled.

**Grading Scale:** 1-5 for the 3 ECTS module; class participation 30% and pre-class assignments 70%

**Workload:** Class participation: 6 classes x 4 hours per class = 24 hours

Pre-class work (2-3 tasks per class): 6 classes x 9.5 hours per class = 57 hours

### Learning outcomes

By the end of the course, you will be able to:

- Understand what qualitative research is
- Understand when to use it
- Understand how to design research
- Understand how to formulate research questions
- Understand how to collect qualitative data
- Understand how to analyze qualitative data
- Understand how to report qualitative research

### OPTIONAL ADVANCED QUALITATIVE RESEARCH METHODS MODULE (3 ECTS):

Students can take an optional ECTS advanced qualitative research methods module. It can be organized on request of students during fall 2023/winter 2023. The model can be organized around selected more in-depth qualitative research methods based on students' interests and initiative to set up such module. For the optional advanced module, I will act as mentor (for groups of 3-4 students) as students work on coding, analyzing and summarizing their own qualitative data.

### GENERAL QUALITATIVE RESEARCH TEXTBOOKS:

There are a number of excellent textbooks that provide an overview of qualitative methods. I encourage you to review the table of contents and sample chapters of the textbooks in the following list and select the one which appeals to you most for your own reference library:

Strauss, A., & Corbin, J. (1998). *Basics of qualitative research techniques*.

Creswell, J. W., & Poth, C. N. (2016). *Qualitative inquiry and research design: Choosing among five approaches* (4<sup>th</sup> edition). SAGE Publishing, Inc.

Denzin, N, & Lincoln, Y. (2017). *The SAGE handbook of qualitative research* (5<sup>th</sup> edition). SAGE Publishing, Inc.

Flick, U. (2018). *An introduction to qualitative research* (6<sup>th</sup> edition). SAGE Publishing, Inc.

Lune, H., & Berg, B. L. (2017). *Qualitative research methods for the social sciences* (9<sup>th</sup> edition). Pearson Education.

Marshall, C., & Rossman, G. B. (2015). *Designing qualitative research* (6<sup>th</sup> edition). SAGE Publishing, Inc.

Patton, M. Q. (2015). *Qualitative research & evaluation methods: Integrating theory and practice* (4<sup>th</sup> edition). SAGE Publishing, Inc.

Rossman, G. B., & Rallis, S. F. (2016). *An introduction to qualitative research: Learning in the field* (4<sup>th</sup> edition). SAGE Publishing, Inc.

[SAGE research methods](#), which is available for free through Aalto University, is also a great resource for learning more about qualitative research methodologies. Although none of the textbooks above are included on the site,

there are numerous other resources including domain-specific handbooks of qualitative research and the *little blue book* series, which is an excellent series dedicated to exploring the nuances of qualitative research.

## ASSIGNMENTS AND GRADING

I use the standard Aalto University 1-5 grading scale. I will strive to provide you with feedback on your initial assignments quickly so you will be able to incorporate that feedback as you move forward.

### GRADING POLICY

Participation	In-class participation	30%
Pre-class assignment (3 tasks per class x 6 classes)	<ol style="list-style-type: none"> <li>One-page reflection notes on the article of the day</li> <li>Slides summary of one article of your choice</li> <li>One-page reflection notes on empirical article of the day (all classes except the first class)</li> </ol>	70%

Assignments	How?	Deadline
<b>Day 1:</b> <ol style="list-style-type: none"> <li>One-page reflection notes on the article of the day</li> <li>Slides summary of one article of your choice</li> </ol>	Return MyCourses Assignments	14.05 @22:00
<b>Day 2:</b> <ol style="list-style-type: none"> <li>One-page reflection notes on the article of the day</li> <li>Slides summary of one article of your choice</li> <li>One-page reflection notes on empirical article of the day</li> </ol>	Return MyCourses Assignments	16.05 @22:00
<b>Day 3:</b> <ol style="list-style-type: none"> <li>One-page reflection notes on the article of the day</li> <li>Slides summary of one article of your choice</li> <li>One-page reflection notes on empirical article of the day</li> </ol>	Return MyCourses Assignments	18.05 @22:00
<b>Day 4:</b> <ol style="list-style-type: none"> <li>One-page reflection notes on the article of the day</li> <li>Slides summary of one article of your choice</li> <li>One-page reflection notes on empirical article of the day</li> </ol>	Return MyCourses Assignments	21.05 @22:00
<b>Day 5:</b> <ol style="list-style-type: none"> <li>One-page reflection notes on the article of the day</li> <li>Slides summary of one article of your choice</li> <li>One-page reflection notes on empirical article of the day</li> </ol>	Return MyCourses Assignments	23.05 @22:00
<b>Day 6:</b> <ol style="list-style-type: none"> <li>One-page reflection notes on the article of the day</li> <li>Slides summary of one article of your choice</li> </ol>	Return MyCourses Assignments	28.05 @22:00

### INSTRUCTION FOR PARTICIPATION

Participation is a large part of TU-L0031 as much of the value of this seminar derives from collective discussions that involve everyone. As such, you will be asked to read several articles prior to each class and then actively share your insights through class discussion. We will also engage in hands-on activities designed to introduce

you to the highlighted methodologies in practice. The overall goal for our short time together is for you to improve your ability to contribute to discussions in a meaningful and professionally appropriate way.<sup>1</sup>

## INSTRUCTION FOR PRE-CLASS ASSIGNMENTS

### PRE-CLASS ASSIGNMENT 1 – MAKE NOTES ON THE REQUIRED READING (ONE ARTICLE)

Each day includes one required reading to provide us with a shared introduction to a particular methodology being discussed that day. As you read this article, I encourage you to take notes with a particular focus on:

- 1) what you think are the strengths and weaknesses of the method in general,
- 2) any aspects of the methodology that you want to delve into more deeply, and
- 3) any questions that come to mind as you are reading.

### PRE-CLASS ASSIGNMENT 2 – SLIDE SUMMARY OF ONE CHOSEN ARTICLE

Each class will include a handful of articles from which you may choose the reading that is of most interest to you personally. Building off our common base of understanding from the *Activity One Required Reading*, these articles are meant to foster a diversity of knowledge in our classroom discussion. After reading the article, please prepare a 2 slide summary (PowerPoint or PDF).

**Slide 1:** A summary of the article (e.g. main topic, suggestions, recommendations and/or conclusions)

**Slide 2:** Your opinion (e.g. key learnings, opinions, what you found most interesting, and/or what YOU perceive as strengths and weaknesses) Hint: Be sure to clearly distinguish your thoughts from the those of the author(s).

**Note:** Different information will be more or less relevant depending on the article you chose. Please decide what is most valuable for your summary as in one to two slides you will not be able to include all of the examples provided in the brackets. Please be prepared to present your summary slide(s) to the group in class.

To help easily identify which slides summarize which article please save your slide in the following format: 1stAuthorLastNameYear (e.g. Aastrup2008.pptx). Thanks.

### PRE-CLASS ASSIGNMENT 3 – CRITIQUE OF METHODOLOGY IN PRACTICE (ONE EMPIRICAL ARTICLE)

Having been introduced to the focal methodology in activities one and two, activity three provides you with the opportunity to read and review an article that uses the focal methodology and has been published in a top journal. After reading the article, please answer the following questions.

- 1) Why (or why not) is the qualitative method used appropriate for answering the authors' research question(s)? (Hint: If the authors explicitly state their rationale don't just rely on their thinking – apply what you have learned about the methodology to your own explanation)

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<sup>1</sup> Group discussion is a skill and like all skills requires practice. In our first class we will spend some time discussing our opinions on what behaviours facilitate good discussions with the goal of developing classroom norms. You may find the following article to be useful in thinking about what you value in discussion and what you would like to improve during our time together: Hollander, J.A. (2002). "Learning to discuss: Strategies for improving the quality of a class discussion." *Teaching Sociology*, 30(3), 317-327.

- 2) What assumptions (explicitly or implicitly stated) did the authors have going into the analysis?
- 3) What makes the qualitative analysis powerful (i.e. what insights were the authors able to make because of the methodology they used)?
- 4) What are the challenges or limitations of their approach? (Hint: most papers include a boilerplate of limitations, I challenge you to go beyond the authors' own stated limitations and to tell me what you think are the limitations given the method employed)
- 5) How could this analysis be improved? Be specific and practical (i.e. do not make suggestions that you could not realistically envision yourself implementing).

**Note:** Question one is meant to be more abstract and answer the question about general types of studies (e.g. process questions lend themselves to method x because of reason y), whereas the remaining questions are specific to the analysis in the article (e.g. because the authors watched the exchange between the doctor and nurse for the duration of the entire surgery they were able to not only capture the oral conversation, but the body language that undermined the respectful tone of the conversation).

Please write your single-spaced response using 12-point Times New Roman or similar font and use 2.5 cm margins. Thanks.

## ASSIGNMENTS FOR EACH CLASS

### MON 15.5, 9-13: SESSION 1 – INTRODUCTION TO QUALITATIVE RESEARCH

#### ARTICLE FOR PRE-ASSIGNMENT 1:

Gephart, R. P. (2004). Qualitative research and the Academy of Management Journal. *Academy of Management Journal*, 47 (4), 454-462.

#### ARTICLES FOR PRE-ASSIGNMENT 2:

**Note:** Select one reading from either group below.

##### GENERAL

Alvesson, M., & Kärreman, D. (2007). Constructing mystery: Empirical matters in theory development. *Academy of Management Review*, 32(4), 1265-1281.

Hackman, J.R. (2003). Learning more by crossing levels: Evidence from airplanes, hospitals, and orchestras. *Journal of Organizational Behavior*, 24, 905-922.

Van Maanen, J., Sorensen, J. B., & Mitchell, T. R. (2007). The interplay between theory and method. *Academy of Management Review*, 32(4), 1145-1154.

##### RIGOR

Combs, J. G. (2010). Big samples and small effects: Let's not trade relevance and rigor for power. *Academy of Management Journal*, 53(1), 9-13.

Tracy, S. J. (2010). Qualitative quality: Eight "big-tent" criteria for excellent qualitative research. *Qualitative Inquiry*, 16(10), 837-851.

#### ARTICLE FOR PRE-ASSIGNMENT 3:

No pre-class assignment for this session

#### EXTRA READINGS (OPTIONAL)

Creswell, J. W., & Creswell, J. D. (2017). *Research design: qualitative, quantitative and mixed methods approaches* (6<sup>th</sup> edition). SAGE Publishing, Inc.

Lincoln, Y. S., & Guba, E. G. (1985). *Naturalistic inquiry*. SAGE Publishing, Inc.

O'Leary, Z. (2005). *Researching real-world problems: A guide to methods of inquiry*. SAGE Publishing, Inc.

**WED 17.5, 9-13: SESSION 2 – INTERVIEWS AND INTERVIEWING TECHNIQUES**

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**ARTICLE FOR PRE-ASSIGNMENT 1:**

Vuori, T. O. (2017). An open-ended interview approach for studying cognition and emotion in organizations. In *Methodological Challenges and Advances in Managerial and Organizational Cognition*. 59-71. Emerald Publishing Limited.

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**ARTICLE FOR PRE-ASSIGNMENT 2:**

**Note:** Select one reading from the list below.

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**GENERAL**

Guest, G., Bunce, A., & Johnson, L. (2006). How many interviews are enough? An experiment with data saturation and variability. *Field Methods*, 18(1), 59-82.

Morris, Z. S. (2009). The truth about interviewing elites. *Politics*, 29(3), 209-217.

Podsakoff, P. M., MacKenzie, S. B., Lee, J., & Podsakoff, N. P. (2003). Common method biases in behavioral research: A critical review of the literature and recommended remedies. *Journal of Applied Psychology*, 88, 879-903.

Schwarz, N. (1999). Self-reports: How the questions shape the answers. *American Psychologist*, 54, 93-105.

Golden, B. R. (1992). The past is the past—or is it? The use of retrospective accounts as indicators of past strategy. *Academy of Management Journal*, 35(4), 848-860.

Miller, C. C., Cardinal, L. B., & Glick, W. H. 1997. Retrospective reports in organizational research: A reexamination of recent evidence. *Academy of Management Journal*, 40(1): 189-204.

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**ARTICLE FOR PRE-ASSIGNMENT 3:**

Vuori, N., Vuori, T. O., & Huy, Q. N. (2018). Emotional practices: How masking negative emotions impacts the post-acquisition integration process. *Strategic Management Journal*, 39(3), 859-893.

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**EXTRA READINGS (OPTIONAL)**

Babbie, E. R. (1990). *Survey research methods* (2nd edition). Cengage

Weiss, R. (1994). *Learning from strangers: The art and method of qualitative interview studies*. The Free Press.

**FRI 19.5, 9-13: SESSION 3 – CASE STUDY, ACTION RESEARCH, MIXED METHOD**

**ARTICLE FOR PRE-ASSIGNMENT 1:**

Eisenhardt, K. M. (1989). Building theories from case study research. *Academy of Management Review*, 14(4), 532-550.

**ARTICLE FOR PRE-ASSIGNMENT 2:**

**Note:** Select one reading from either group below.

**CASE STUDY APPROACHES**

Dubois, A. & Gadde, L.-E. (2002). Systematic combining - An abductive approach to case research. *Journal of Business Research*, 55, 553-560.

Ketokivi, M., & Choi, T. (2014). Renaissance of case research as a scientific method. *Journal of Operations Management*, 32(5), 232-240.

Siggelkow, N. 2007. Persuasion with case studies. *Academy of Management Journal*, 50, 20-24.

**ACTIONS RESEARCH**

Góral, Anna, Beata Jałocha, Grzegorz Mazurkiewicz, and Michał Zawadzki. "Action research: a handbook for students." (2021).

Lüscher, L. S., & Lewis, M. W. (2008). Organizational change and managerial sensemaking: Working through paradox. *Academy of management Journal*, 51(2), 221-240.

**MIXED METHODS DESIGN AND APPROACHES**

Small, M. L. (2011) How to conduct a mixed methods study: Recent trends in a rapidly growing literature. *Annual Review of Sociology*, 37, 55-84.

Fonti, F., Maoret, M., & Whitbred, R. (2017). Free-riding in multi-party alliances: The role of perceived alliance effectiveness and peers' collaboration in a research consortium. *Strategic Management Journal*, 38(2), 363-383.

Malhotra, A., Majchrzak, A., & Niemiec, R. M. (2017). Using public crowds for open strategy formulation: Mitigating the risks of knowledge gaps. *Long Range Planning*, 50(3), 397-410.

**ARTICLE FOR PRE-ASSIGNMENT 3:**

McDonald, R. M., & Eisenhardt, K. M. (2020). Parallel play: Startups, nascent markets, and effective business-model design. *Administrative Science Quarterly*, 65(2), 483-523.

**EXTRA READINGS (OPTIONAL):**

Stake, R. (1995). *The art of case study research*. SAGE Publishing, Inc.

Yin, R. K. (2018). *Case study research: design and methods* (6<sup>th</sup> edition). SAGE Publishing, Inc.

Eden, C., & Huxham, C. (1996). Action research for management research. *British Journal of management*, 7(1), 75-86.



**MON 22.5, 9-13: SESSION 4: QUALITATIVE DATA CODING AND ANALYSIS**

**ARTICLE FOR PRE-ASSIGNMENT 1:**

Strauss, A., & Corbin, J. (1998). Basics of qualitative research techniques. **Page 55-100**

**ARTICLES FOR PRE-ASSIGNMENT 2:**

**Note:** Select one reading from either group below and complete pre-class activity two for your chosen article.

**QUALITATIVE CODING, GROUNDED ANALYSIS AND DISCOURSE ANALYSIS**

Strauss, A., & Corbin, J. (1998). Basics of qualitative research techniques. Open coding. **Page 101-123**

Strauss, A., & Corbin, J. (1998). Basics of qualitative research techniques. Axial coding. **Page 123-143**

Strauss, A., & Corbin, J. (1998). Basics of qualitative research techniques. Selective coding. **Page 143-163**

Grodal, S., Anteby, M., & Holm, A. L. (2020). Achieving rigor in qualitative analysis: the role of active categorization in theory building. *Academy of Management Review*. Advance online publication.

**ARTICLE FOR PRE-ASSIGNMENT 3:**

Ibarra, Herminia. "Provisional selves: Experimenting with image and identity in professional adaptation." *Administrative science quarterly* 44.4 (1999): 764-791..

**EXTRA READINGS (OPTIONAL)**

Bernard, H.R., Wutich, A., & Ryan, G. W. (2016). *Analyzing qualitative data: Systematic approaches* (2<sup>nd</sup> edition). SAGE Publishing, Inc.

Suddaby, R. (2006). What grounded theory is not. *Academy of Management Journal*, 49(4), 633-642.

Boje, D. M. (2001). *Narrative methods for organizational & communication research*. SAGE Publishing, Inc.

Gioia, D. A., Corley, K. G., & Hamilton, A. L. (2013). Seeking qualitative rigor in inductive research: Notes on the Gioia methodology. *Organizational Research Methods*, 16(1), 15-31.

Corbin, J., & Strauss, A. (2015). *Basics of qualitative research: Techniques and procedures for developing grounded theory* (4<sup>th</sup> edition). SAGE Publishing, Inc.

Leitch, S., & Palmer, I. (2010). Analyzing texts in context: Current practices and new protocols for critical discourse analysis in organization studies. *Journal of Management Studies*, 47(6), 1194-1212.

Phillips, N., & Hardy, C. (2002). *Qualitative Research Methods: Discourse analysis*. SAGE Publishing, Inc.

Silver, C., & Lewins, A. (2014). *Using software in qualitative research* (2<sup>nd</sup> edition). SAGE Publishing, Inc.

WED 24.5, 9-13: SESSION 5 – ETHNOGRAPHY AND PROCESS STUDIES

ARTICLE FOR PRE-ASSIGNMENT 1:

Langley, A., Smallman, C., Tsoukas, H., & Van de Ven, A. H. (2013). Process studies of change in organization and management: Unveiling temporality, activity, and flow. *Academy of Management Journal*, 56(1), 1-13.

ARTICLES FOR PRE-ASSIGNMENT 2:

**Note:** Select one reading from either group below and complete pre-class activity two for your chosen article.

ARCHIVAL DATA

Bowen, G. A. (2009). Document analysis as a qualitative research method. *Qualitative Research Journal*, 9(2), 27-40.

Ventresca, M. J., & Mohr, J. W. (2002). Archival research methods. In J. A. C. Baum (Ed.), *The Blackwell companion to organizations* (pp. 805-828). Blackwell Publishing.

Burgelman, R. A. (2011). Bridging history and reductionism: A key role for longitudinal qualitative research. *Journal of International Business Studies*, 42(5), 591-601.

PROCESS ANALYSIS

Langley, A. (1999). Strategies for theorizing from process data. *Academy of Management Review*, 24(4), 691-710.

Pettigrew, A. M. (1997). What is a processual analysis? *Scandinavian Journal of Management*, 13, 337-348.

Pettigrew, A. M., Woodman, R. W., & Cameron, K. S. (2001). Studying organizational change and development: Challenges for future research. *Academy of Management Journal*, 44(4), 697-713.

ARTICLE FOR PRE-ASSIGNMENT 3:

Lifshitz-Assaf, H. (2018). Dismantling knowledge boundaries at NASA: The critical role of professional identity in open innovation. *Administrative science quarterly*, 63(4), 746-782.

EXTRA READINGS (OPTIONAL)

Guest, G., Namey, E. E., & Mitchell, M. L. (2012). *Collecting qualitative data: A field manual for applied research*. SAGE Publishing, Inc.

Miles, M. B., Huberman, A. M., & Saldaña, J. (2018). *Qualitative data analysis: A methods sourcebook* (4<sup>th</sup> edition). SAGE Publishing, Inc.

**MON 29.5, 9-13: SESSION 6 – YOUR PRESENTATIONS**

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**ARTICLE FOR PRE-ASSIGNMENT 1:**

Pratt, M. (2009). From the editors: For the lack of a boilerplate: Tips on writing up (and reviewing) qualitative research. *Academy of Management Journal*, 52, 856-862.

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**ARTICLES FOR PRE-ASSIGNMENT 2:**

**Note:** Select one reading from either group below and complete pre-class activity two for your chosen article.

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**THE PROCESSES OF QUALITATIVE INQUIRY**

Langley, A., & Abdallah, C. (2011). Templates and turns in qualitative studies of strategy and management. *Research Methodology in Strategy and Management*, 6, 105-140.

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**WRITING UP THE ARTICLE**

Bansal, P., & Corley, K. (2012). Publishing in AMJ—Part 7: What's different about qualitative research? *Academy of Management Journal*, 55(3), 509-513

Pratt, M. (2009). From the editors: For the lack of a boilerplate: Tips on writing up (and reviewing) qualitative research. *Academy of Management Journal*, 52, 856-862.

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**ARTICLES FOR PRE-ASSIGNMENT 3:**

No pre-class assignment 3 for this session

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**EXTRA READINGS (OPTIONAL)**

Golden-Biddle, K., & Locke, K. (2007). *Composing qualitative research* (2<sup>nd</sup> edition). SAGE Publishing, Inc.

Holloway, I., & Brown, L. (2012). *Essentials of a qualitative doctorate*. Routledge.

Strauss, A., & Corbin, J. (1998). Basics of qualitative research techniques. Page 243-s