How Can I Trust You?
Rethinking Qualitative Methods

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Overview of Talk

- **Setting the stage:** Trustworthiness in qualitative methods sections in organization/management articles

- **Core problem:** Two “camps” on what makes for good/trustworthy qualitative research

- **Solution?:** The rise of templates and the problem with templates

- **Moving forward:** Methodological bricolage
SETTING THE STAGE

https://timewarpwife.com/setting-the-stage-for-their-future/
Qualitative Methods

- “Qualitative research is multimethod research that uses an interpretive, naturalistic approach to its subject matter” (Denzin & Lincoln, 1994, as cited in Gephardt, 2004: 454-455, emphasis mine).
What Is the Purpose of Methods Sections?

- Show **what you have** done &
- Why you did it this way – i.e., describe the critical choices you made regarding your methods

- Both are important to an evaluator to judge whether you have “done it right” (i.e., establish trustworthiness)
Trustworthiness

The basic issue in relation to trustworthiness is simple: How can an inquirer persuade his or her audiences (including self) that the findings of an inquiry are worth paying attention to, worth taking account of? (Lincoln & Guba, 1985: 290)
But What if People Don’t Agree on “How to Persuade Someone?”

- In qualitative research, some debate on what are “good” methods and how to show you have done them well.

- Two (at least) basic camps
  - Good qualitative research follows criteria that is analogous to those used in “traditional” (positivist) research
  - Good qualitative research should be evaluated differently than traditional research
The Core of the Problem is Found in the Roots

Emotions

Core Issue
Communicate About These

Reactions

Obvious

Less Obvious

CORE PROBLEM

https://aulima.hawaii.edu/access/content/user/kfrench/sociology/Family_Text/text251_Chpt_06_Communication.html
Camp #1: Analogous Criteria (Lincoln & Guba, 1985 *Naturalistic Inquiry*)

**Traditional**
- Internal validity - causal relationship between IV and DV
- External validity - *generalizable* to other populations or contexts
- Reliability - similar results obtained when repeated
- Objectivity - not influenced by human bias or error

**Naturalistic Inquiry**
- Credibility - has the investigator “represented those multiple constructions [of reality] adequately?” (p. 296)
- Transferability - is there contextual similarity?
- Dependability - has the investigator taken into account “both factors of instability and factors of phenomenal or design induced change”? (p. 299)
- Confirmability - can the data be verified (note quality of data, not data gatherer)
Camp #1: Analogous Criteria

(Lincoln & Guba, 1985 Naturalistic Inquiry)

- Credibility
  - Prolonged engagement (breadth)
  - Persistent observation (depth)
  - Triangulation (e.g., different data sources, methods, investigators, etc.)
  - Peer debriefing
  - Member checks
Camp #1: Analogous Criteria (Lincoln & Guba, 1985 Naturalistic Inquiry)

- **Transferability**
  - Provide a lot of details (i.e., thick description)

- **Dependability**
  - All the credibility plus a few more (e.g., “stepwise replication” where separate “teams” of inquirers analyze data independently – p. 317)

- **Confirmability**
  - Audit trail – keeping record of data, coding, analysis, etc.
Camp #1: Analogous Criteria in Case Studies (Yin, 2002)

- **Construct validity** – correct operationalization (e.g. is this really “identity”?)
  - Multiple sources of evidence (triangulation)*
  - Establish a chain of evidence*
  - Have key informants review draft* (see also “member checks”)

- **External validity** – can it be generalized and to what domain?
  - Use replication logic in multiple-case studies
  - Analytic generalizability*

- **Reliability** – can it be replicated?
  - Use protocol*
  - Develop case study data base

*often used
What Isn’t Camp #1: Mimicking Quantitative Data Analysis (Pratt, 2008, 2009)

- **Quantification of qualitative data**
  - Misses taken-for-granted meanings
  - Cut-offs?
  - Creates expectations
  - Does violence to experience

- **Inappropriate combination of deductive quantitative techniques in inductive research** (e.g., random sample for grounded theory)

- **Using deductive shorthand** (e.g., controlled for variance by...
Camp #2: Not Analogous Criteria

- “Some time ago, we expressed our hope … that all social scientists could work within a common discourse … such a resolution appears highly unlikely and would probably be less than useful” (Lincoln & Guba, 2000: 185)

- No consistent standards have arisen, but attempts have been made to tackle how to assess “good” qualitative research
Camp #2: How Do Ethnographic Texts Convince? (Golden-Biddle & Locke, 1993)

1. **Authenticity** - that the author was “there” in the field and was genuine to the experience (i.e., did not do violence to experience)

2. **Plausibility** - does the academic audience “buy” it in that it (a) makes sense and (b) makes a contribution?

3. **Criticality** - does it make you rethink your assumptions about the field or your own work?
Camp #2: “Steps”

- Shared “steps” for writing up specific ways of doing qualitative research (e.g., grounded theory)
  - Code close to the data (e.g., open or first-order)
  - Abstract (e.g., axial or second-order)
  - Explore how abstracted codes fit together (e.g., theoretical coding, aggregate dimensions)
Impasse Between Camps (Pratt, 2009: 856)

For the lack of a boilerplate, there was little direction
Because there was little direction, the author was lost
Because the author was lost (and the reviewer went along) the contribution was missed
Because the contribution was missed, perceived impact was low
Because perceived impact was low, the paper was rejected.
I want to reiterate a key point of this “From the Editors”: because of the equifinality of writing qualitative research, the lack of a boilerplate need not mean that the “kingdom is lost.” What is lost in structure is gained in the ability to be creative. Thus, one might replace a nail with superglue or other bonding agent. However, whatever you use, the burden is on you to make sure the adhesive adheres (i.e., your story coheres) and the shoe holds tight.
SOLUTION?: QUALITATIVE TEMPLATES

<table>
<thead>
<tr>
<th>1st Order Concepts</th>
<th>2nd Order Themes</th>
<th>Aggregate Dimensions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loss of parent company as direct (internal) comparison</td>
<td>Change in Social Referents</td>
<td>Triggers of Identity Ambiguity</td>
</tr>
<tr>
<td>Shift in focus to comparisons with competitors</td>
<td>Temporal Identity Discrepancies</td>
<td>Change Context</td>
</tr>
<tr>
<td>Media attention shifts away from Booz to Industry</td>
<td>Construed External Image Discrepancies</td>
<td></td>
</tr>
<tr>
<td>Who are we going to be? / How will we see ourselves?</td>
<td></td>
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<tr>
<td>This is what independence means</td>
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<td></td>
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<tr>
<td>How do we get there from here?</td>
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<tr>
<td>Misperceptions / false data reported in the media</td>
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<tr>
<td>Quiet periods constrain our internal communications</td>
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<tr>
<td>Stock price does not adequately reflect who we are</td>
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<tr>
<td>Customers don’t know we’re independent</td>
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<td></td>
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<tr>
<td>We don’t even know who we are right now</td>
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<td></td>
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<tr>
<td>Understand the labels, but what do they mean?</td>
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<tr>
<td>Sense of missed opportunity around the spin-off</td>
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<tr>
<td>No consistency in labels during pre-spin-off and spin-off</td>
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<tr>
<td>Growing sense of change overload</td>
<td></td>
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<tr>
<td>Emerging identity tensions</td>
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<tr>
<td>Shift from “independent” and “innovative” to “doing the right thing”</td>
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<tr>
<td>Providing more to work life than just a paycheck</td>
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<tr>
<td>Proactive management of internal and external perceptions</td>
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<tr>
<td>Using branding efforts to change external perceptions</td>
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<tr>
<td>Branding efforts can help employees with disconnects</td>
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<tr>
<td>Behaviors more influential than words</td>
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<tr>
<td>“Walking the talk”</td>
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</tbody>
</table>

Image from Gioia & Corley, 2004)
Rise of Qualitative Templates (Langley & Abdallah, 2011)

- Eisenhardt method (case studies & post-positivist)
  - See Eisenhardt (1989)

- Gioia method (grounded theory & interpretive)
  - See Gioia, Corley & Hamilton (2012)
  - Main criteria: “rigor” (or rigor + creativity)
Multiple scholars have set off ‘alarms’ about the excessive use of templates in qualitative research (Pratt, 2009; Langley & Abdallah, 2011; Cornelissen, 2017; Reay, et al., forthcoming).

Even warnings by “creators” of how their work is being used (Eisenhardt, et al., 2016; Gioia, et al., 2013: 25-26):

... Even a number of methodology sections now seem to be adopting formats and procedural descriptions that are almost identical to those in the published works. This trend is something of a concern...we see it as a flexible orientation toward qualitative, inductive research that is open to innovation, rather than a “cookbook.”

Special issue in ORM!
Pros & Cons of Templates (Pratt, Sonenshein, Feldman, 2019)

**Pros**
- Conform to many of the Camp #1 practices for trustworthiness
- Have made qualitative research more accessible – especially to those who may not have access to mentors/ courses on qualitative research (authors and reviewers)

**Cons**
- Researcher confusion
  - People fail to recognize that all templates are inherently incomplete
  - 3 column “structure” (Gioia methodology) is the outcome of analysis – not the analysis
  - Researcher may not be able to adequately explain what s/he did
  - This all can lead to rejected papers for people who believed they followed the template!
- Narrowing the field
  - Templates cover narrow range of qualitative methods & cannot even reflect complexities within a method (e.g., grounded theory)
  - Restricts how “stories” can be told – which can lead to less potent theorizing
MOVING FORWARD:
METHODOLOGICAL BRICOLAGE

http://boldtendencies.com/site-specific-art-commissions/
Alternative to Templates: Methodological Bricolage  
(Pratt, Sonenshein & Feldman, 2019)

- Bricolage as metaphor highlights:
  - Authors’ agency & creativity
  - Knowledge of available resources
  - Combining resources for a new purpose
  - “Making do” with the tools at hand to create an effective arrangement
What is an “Effective Arrangement”? (Pratt, Sonenshein, Feldman, 2019)

- Using “moves” from different methodologies to address one’s research question*

- Example from Pratt & Rosa (2003)
  - RQ: Why do NMOs highlight work-family tensions as a way to motivate their workforce?
  - Challenge: goes against literature (theoretical); original study and two new cases -- combining multiple qualitative data sets
  - Bricolage: moves that borrowed from different methodologies’ strengths (e.g., case for study design, ethnography for inductive data collection & grounded theory for analysis)

* Broader than just methods sections
What is an “Effective Arrangement”? (Pratt, Sonenshein, Feldman, 2019)

- Reclaiming “Trustworthiness” (Mayer et al., 1995)
  - Dilemma: how do you create trustworthiness if you use different combination of moves?
  - Inductively examined multiple qualitative papers in top-tier journals. Each paper used moves to create a sense of:
    - **Competence:** Do researchers know what they are doing? (externally validated, such as citing appropriate sources)
    - **Integrity:** do the various methodological choices and moves “fit together”? (e.g., showing timeline for longitudinal research)
    - **Benevolence:** do the researchers show fidelity to their data? (e.g., not doing violence to experience; long time in field, using long quotes)
Cons & Pros of Methodological Bricolage  
Sonenshein, Feldman, 2019

**Pros**

- Deeper connection to data because you have to think about the choices you make *in light of the unique challenges you face*
- Allows you solutions that are unique to your study but recognizable to a broader audience (not “anything goes”)
- Can result in methodological innovations
- Can help us identify where moves are lacking (e.g., how one moves from specific to more general codes)

**Cons**

- If not used judiciously, can lead to excessively long methods sections (though you should tailor moves to specific paper – e.g., more competency moves if challenging the status quo)
- Approach can be subverted – must be done mindfully!
- Requires methodological sophistication from reviewers and editors
Conclusion

- The purpose of methods sections are to create a sense of trustworthiness
- How to create trustworthiness in qualitative research has been the subject of debate
- Recent trends towards using methodological templates try to provide a solution
- However, we may want to think about using methodological bricolage rather than using templates
Questions?
Some **Basic Questions** (Pratt, 2009)

1. **Why this study?**
   a. Why are qualitative methods appropriate?
   b. Am I building, elaborating, or testing theory?

2. **Why study here?**
   a. What is the nature of the context I am examining?
   b. What was my rationale for choosing this context?

3. **What am I studying and why?**
   a. Am I sampling events, cases, people, etc.?
   b. What is my sampling strategy?

4. **How did I study these things?**
   a. How did I analyze the data?
   b. How did I link data with theory?
Three-Horned Dilemma

Figure 2: Research Strategies
From Runkel and McGrath, 1972.