



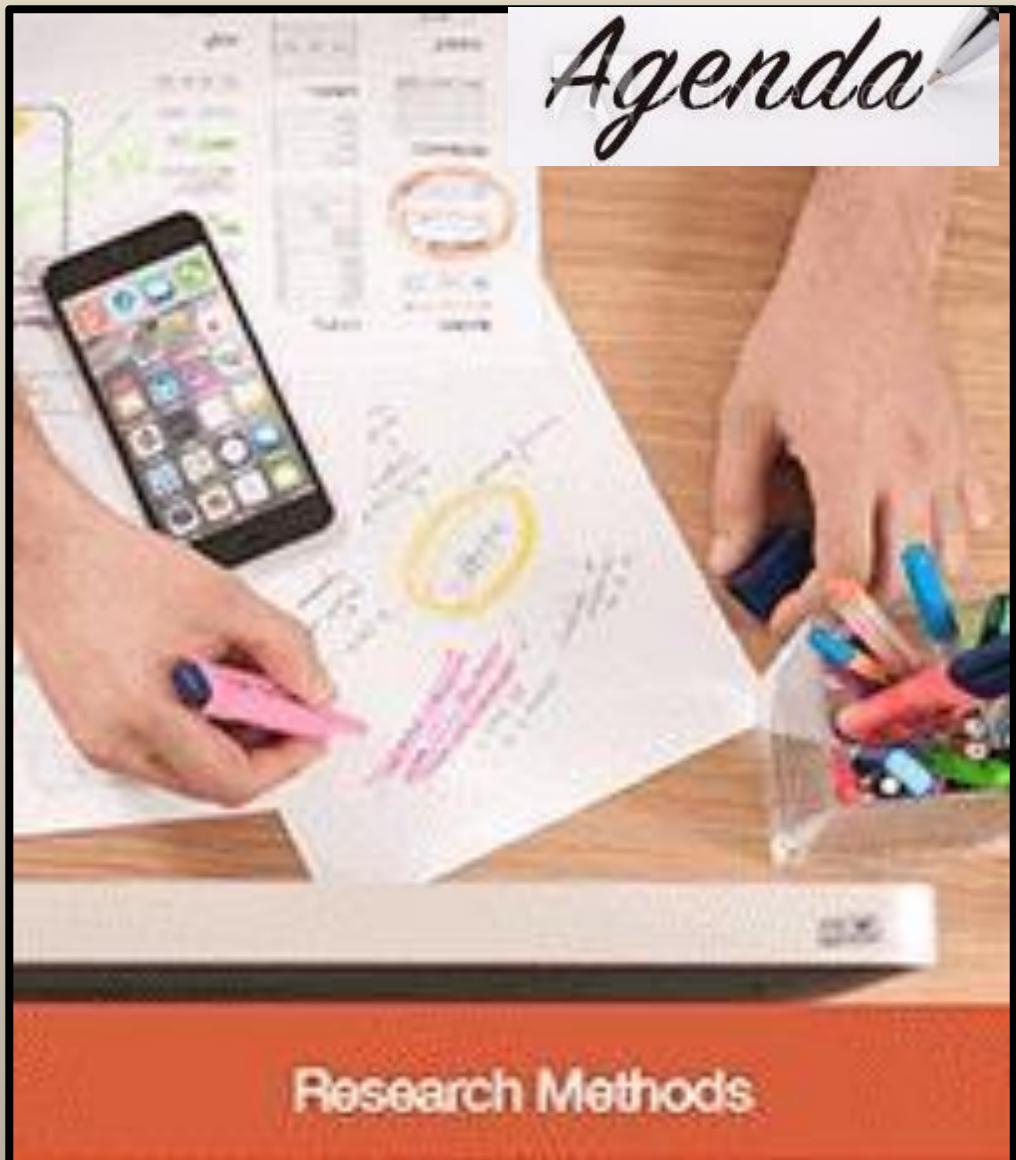
RES 712: The Qualitative Approach— Foundational Principles

Topic—Qualitative Exploration and Theory Building



Research Methods: The Qualitative Research Approach—Foundational Principles

- Why a Qualitative Research Approach?
- What is the Qualitative Research Approach?
- A Brief History of the Qualitative Approach
- Qualitative Research Approach Philosophical Worldviews
- The Basic Principles of the Qualitative Research Approach
- Characteristics of the Qualitative Research Approach
- The Qualitative-Quantitative Debate—Which Approach is ‘Better’?
- Discussion: The Qualitative Research Approach in the Business Discipline



What is the Qualitative Research Approach?

- Based on an exploratory and deep understanding of a particular problem from the “Human” Point of View (POV)
- Very different approach than the quantitative research traditions
- Applied when a subject is unknown, not well understood, or during early theoretical exploration of a particular problem or challenge
- Can be applied as a confirmatory factor on quantitative data and insights
- Focus on the “soft” or emotional aspects of the human subject
- Researcher as participatory element in the research itself



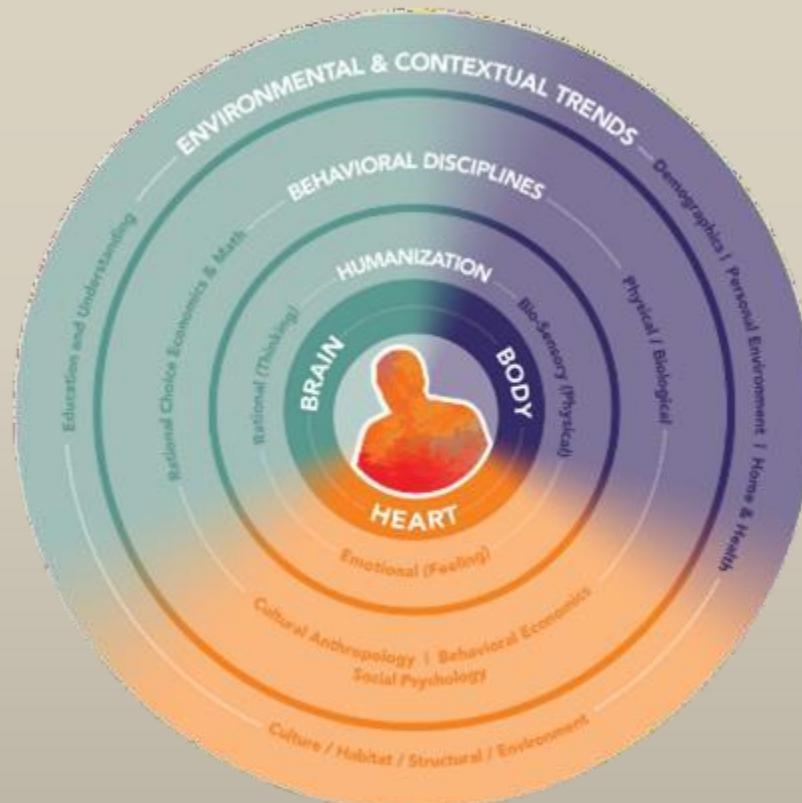
Why Does the Qualitative Research Approach Exist?



- Supports the researcher's understanding of the "holistic" human subject
 - Allows for a deep understanding of the human subject and condition
 - Can integrate human content and their "artifacts/assets"
 - Addresses the question of "why"
 - Can support the traversing of the levels of analysis
 - Addresses the need for point in-time understanding

The Human Decision-Making Condition and the Qualitative Approach

- The human decision-making process (as a holistic focus of study)
- How human subjects interact with the world
- The three levels of human decision-making process:
 1. The Physical
 2. The Emotional
 3. The Rational
- Mirrors the psychology of human thinking
- Provides key inputs not available or operational within the quantitative approach



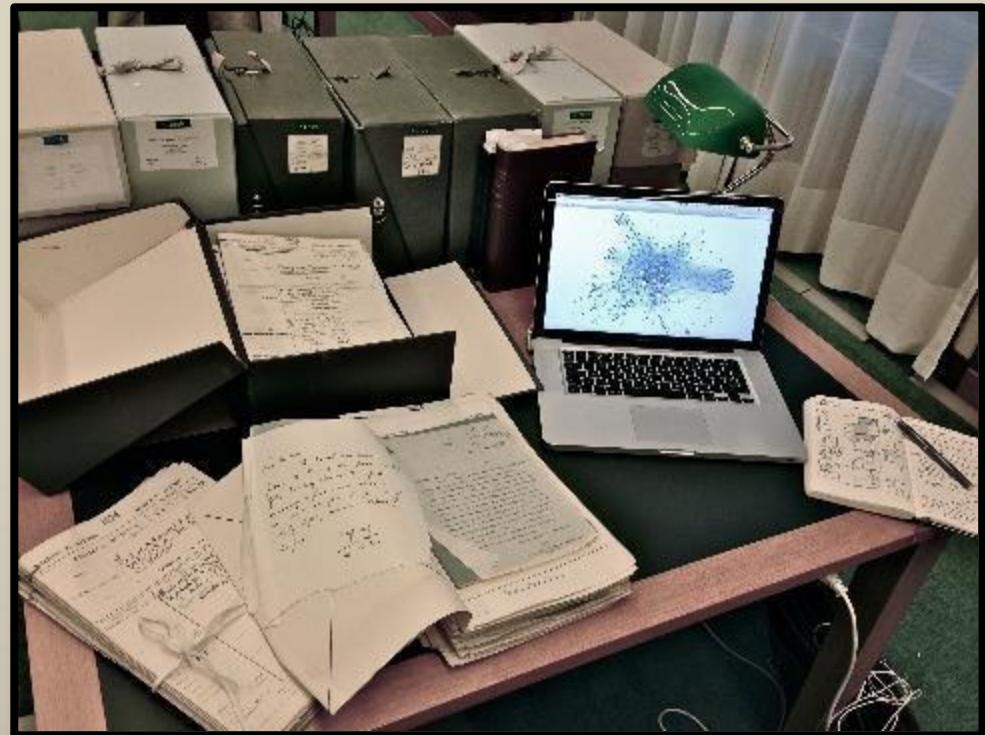
The Humanistic Elements of the Qualitative Approach



- The Individual Level
 - The physical
 - The emotional
 - The rational
- The Meso Level
 - Human and Societal Context
 - Culture
 - Social Groups
 - National-level political, economic, and social structures
- The Macro Level
 - Societal and Global Context
 - The Environments (cross-levels)
 - Historical Trends
 - Global-level political, economic, and social structures

The Lack of Qualitative Legitimacy and the “Paradigm” Wars of the 1980’s

- The evolution of separate qualitative and quantitative approaches
- Conflict with the scientific method
- The onset of the “paradigm wars”
- What role qualitative research
- The psychological and anthropological traditions
- Is qualitative research “true” research?



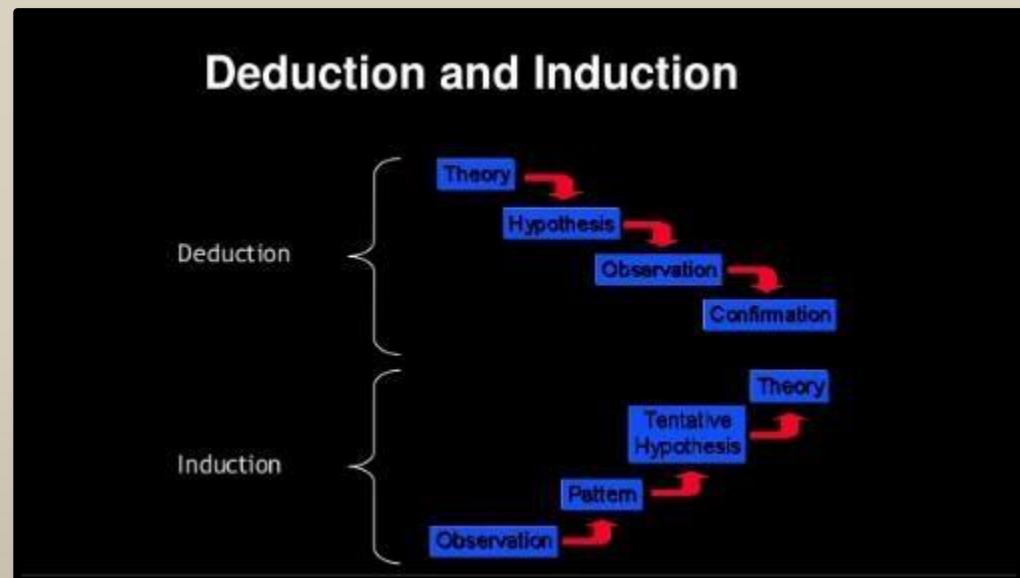
The Evolution of the Qualitative Approach and the Search for Research Diversity



- The need for a normative approach for research
- Research as a normative objective
- The role of qualitative research and human diversity
- Representation of marginal groups or subjects:
 - Racial
 - Gender
 - Post-Colonial
 - Feminist
 - Marginalized ethnic and religious groups
 - Radical (both right and left of the political spectrum)
 - Marxist and other social theorists

The Qualitative Approach and Inductive Development

- Focus: inductive vs. deductive
- The theoretical power of inductive reasoning
- The scientific power of deductive reasoning
- Evidence based research: deductive from inductive
- Inductiveness and the “radical” progression of knowledge
- The qualitative approach as a champion of inductive development
- The qualitative approach and the rise of quantitative Big Data
- The qualitative approach as an interpreter of inductive evidence



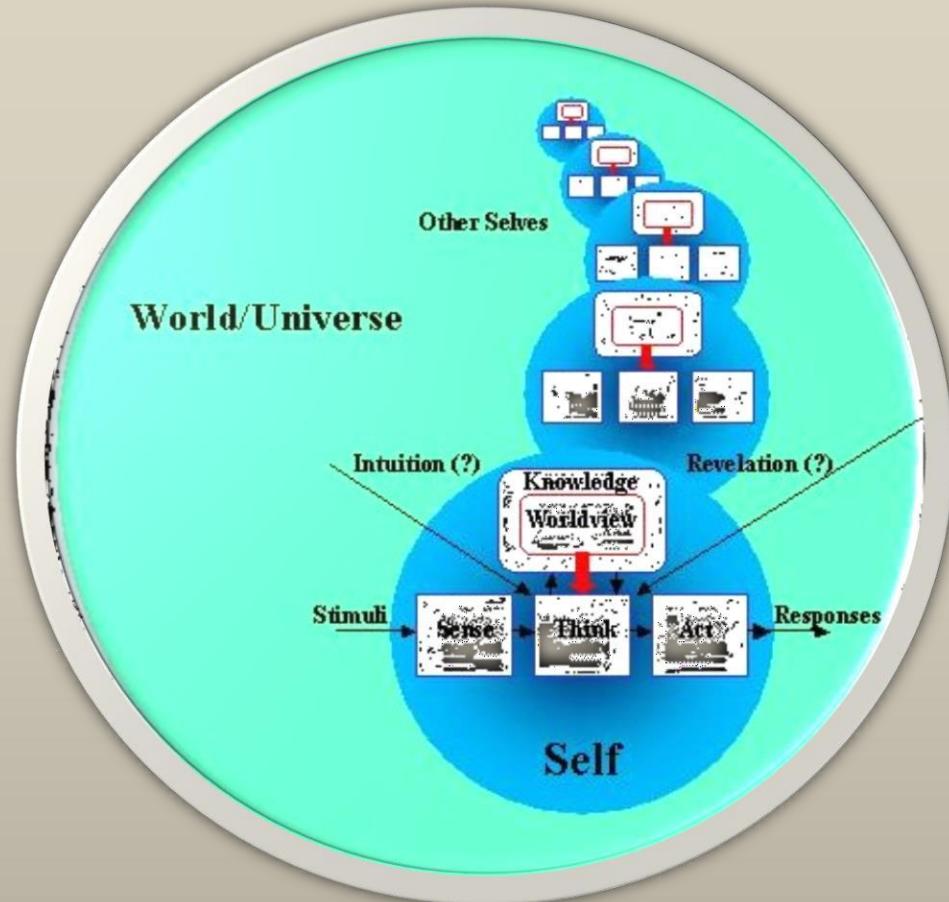
Researcher Values: Objective, Subjective, and Normative Principles



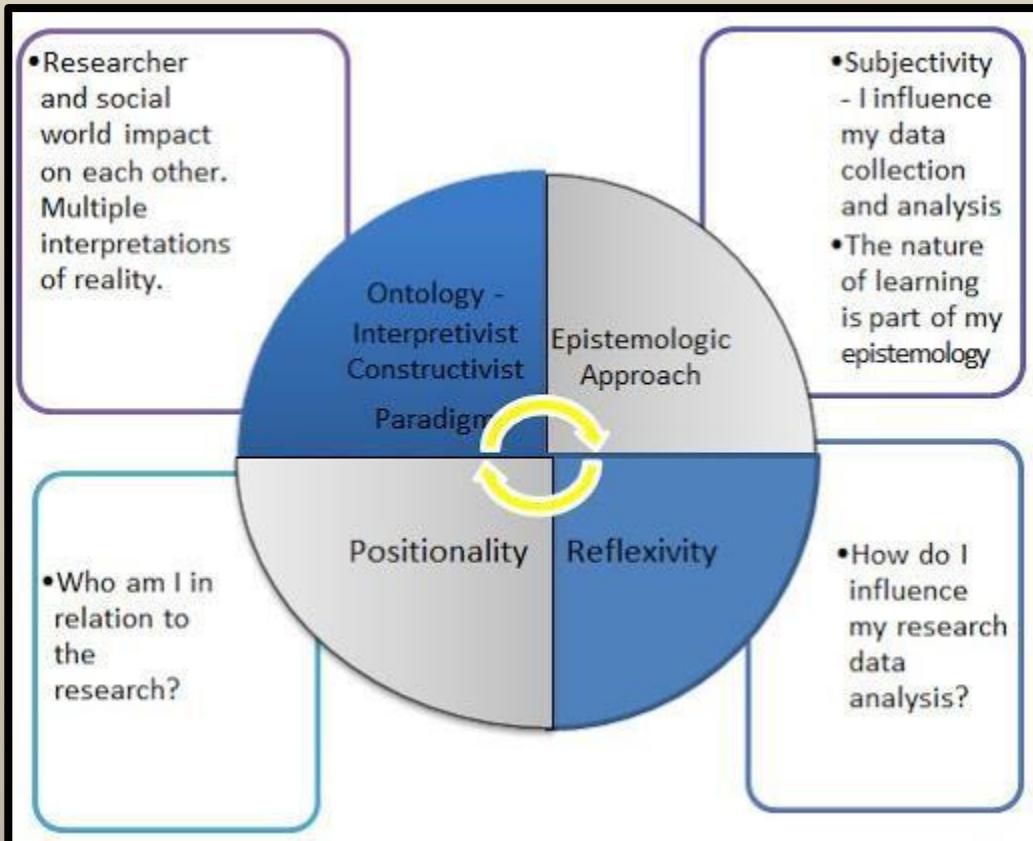
- The role of the researcher or principal investigator
- Science and objective assessment
- Subjective assessment and the research design
- Normative values and the research process
- Values and the researcher's worldview
- Values and the various schools of thought
- The “power” of values and the research approach

The Researcher and the Qualitative Approach: Individual Worldview and Research

- The individual's worldview
- The worldview as a foundation/guide
- The critical nature of the worldview
- The worldview and diversity of subject
- Individual worldview and objective, subjective, and normative input
- The balance of the worldview and bias
- Balancing the worldview for the research



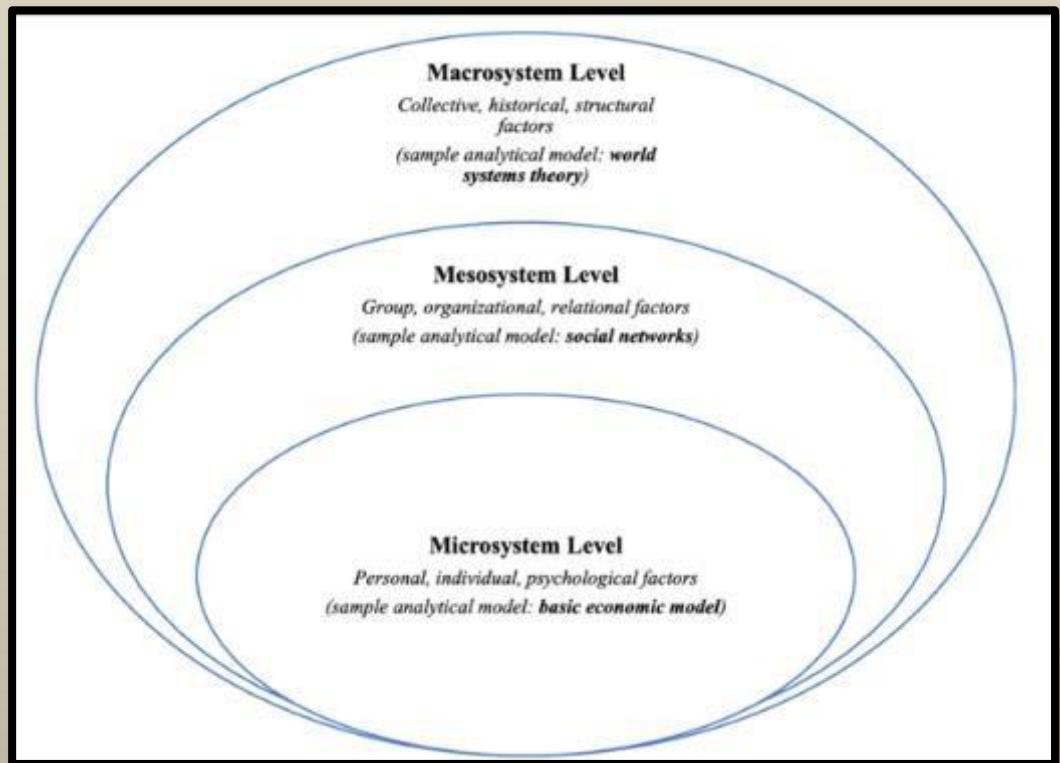
The Philosophical Worldview of the Qualitative Research Approach



- Applied when subject is unknown or not well understood
- Theory development and the inductive approach
- Firmly in the non-empiricist or non-positivist worldview
- Where does this leave “science”?
- Philosophy, knowledge, and reflexivity
- Integrate the subjective and normative with the objective
- The researcher as valid “input” (subjective view)
- Interpretation as part of the design

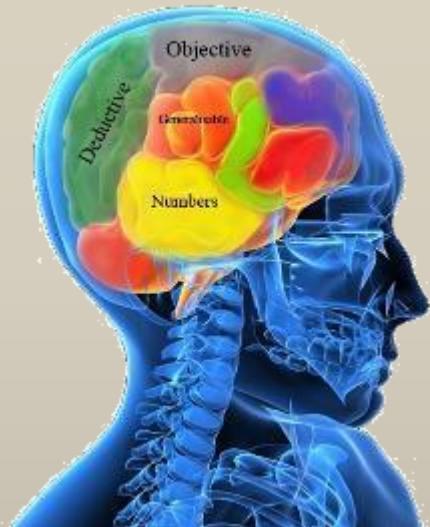
The Qualitative Approach and the “Level of Analysis Problem”

- How the qualitative approach addresses the level of analysis problem
- Integrating variables across various levels
- The level of analysis and the holistic nature of the research
- Addressing research subjects across the various levels

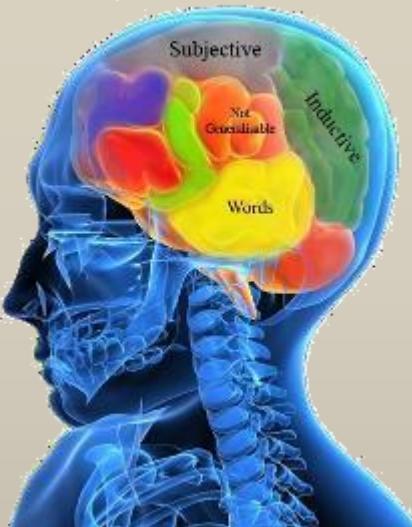


The Qualitative-Quantitative Divide and the Search for Qualitative Legitimacy

Quantitative



Qualitative



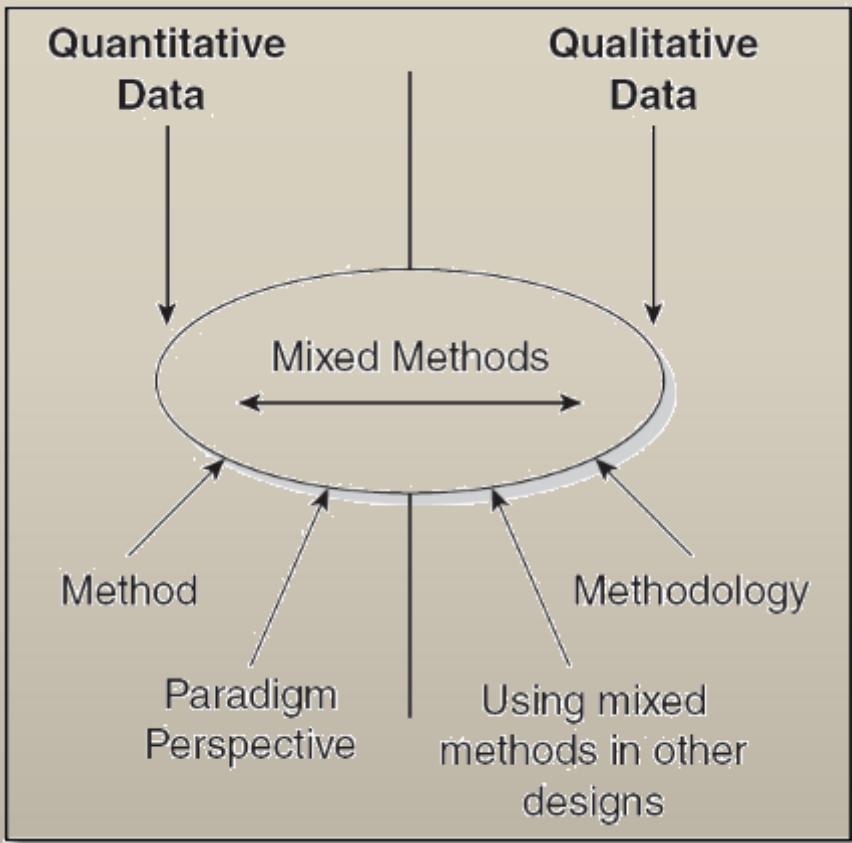
- Coming to terms with the qualitative-quantitative divide
- Mutual need, or mutual respect?
- The what, when, where, and how of quantitative vs. the why of qualitative
- When quant becomes qual and qual becomes quant...the “mixing” of the human assessment
- The onset of “thick data”
- Understanding human subjects through the qual-quant lens

The Structure of the Qualitative Research Approach

- The natural setting—context, culture, and the environment—external (intervening or confounding) or independent variables?
- Inductive approach—build theory—themes/trends
- Theoretical lens
- Interactive (dynamic vs. static)
- Holistic framework
- Multiple sources of “data”
- Research content as instrument
- Participant's meanings
- Emergent designs: across time, sources, and space

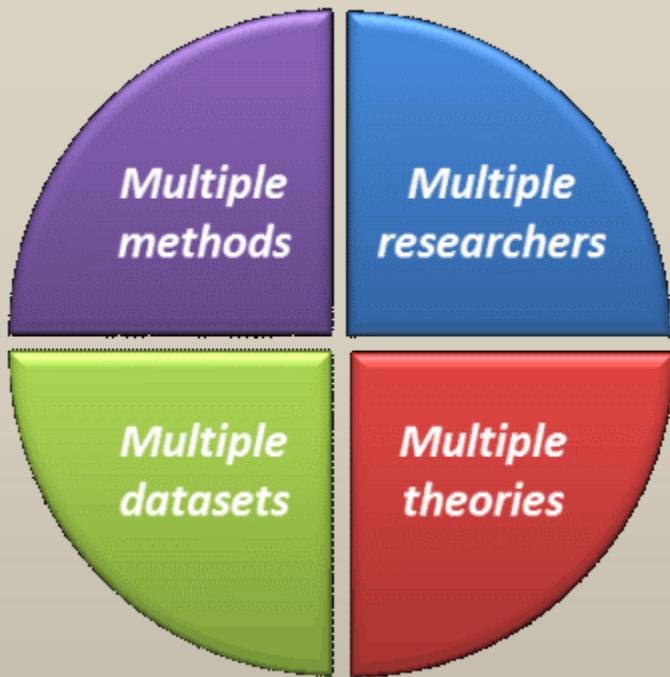


The Qualitative Research Approach and the Onset of Mixed-Methods Designs



- The role of the qualitative approach in mixed method designs
- From separate to integrated approaches
- Mixed method designs as triangulation/*confirmation of insights*
- Mixed method designs as triangulation/*different insights*
- Mixed method designs as *exploration*
- Mixed methods as *evolutionary identification and new knowledge attainment*

The Qualitative Research Approach and the Power of Triangulation



- Triangulation and Confirmation
- Various triangulation modes:
 - Methods triangulation
 - Investigative triangulation
 - Data triangulation
 - Theoretical triangulation

Validity, Reliability, and “Generalizability” with the Qualitative Research Approach

- Validity:
 - Validity vs. accuracy
 - Data and codes—intcoder agreement
- Reliability:
 - Qualitative (human interpretation) check vs. statistical check
- Generalizability:
 - Sample size and generalizability

Rigor and Quality in Qualitative Research Methods

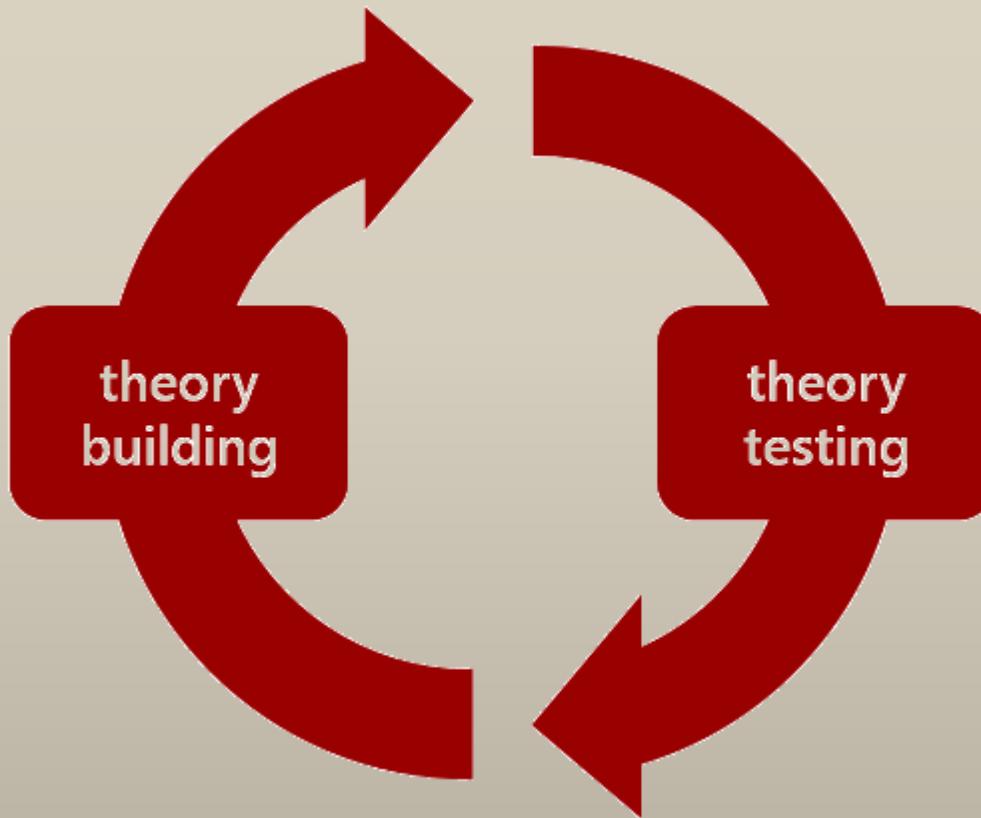
Quantitative

- Internal Validity
- External Validity
- Reliability
- Objectivity

Qualitative

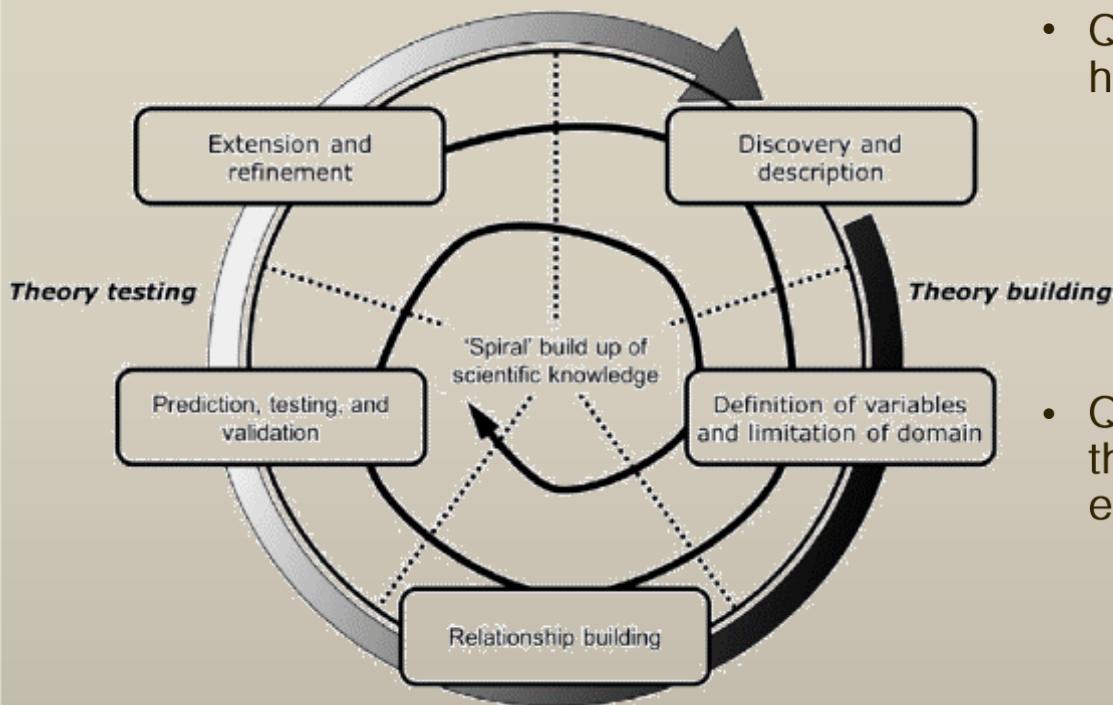
- Credibility (truth value)
- Transferability (applicability)
- Dependability or Trustworthiness (consistency)
- Confirmability (neutrality)

The Qualitative Approach and Theory Construction/Building—The Search for “Truth”?



- Natural world vs. the human world
- *Hypothetico-Deductive Model* vs. the *Inductive-Synthesis Model*
- The power of evidence by hunches
- Inductive vs. deductive viewpoints/windows
- Why is theory so important to research?
- Paradigms, models, theories, and hypotheses
- Theory construction and building within the qualitative approach—new ideas in a rapidly changing world

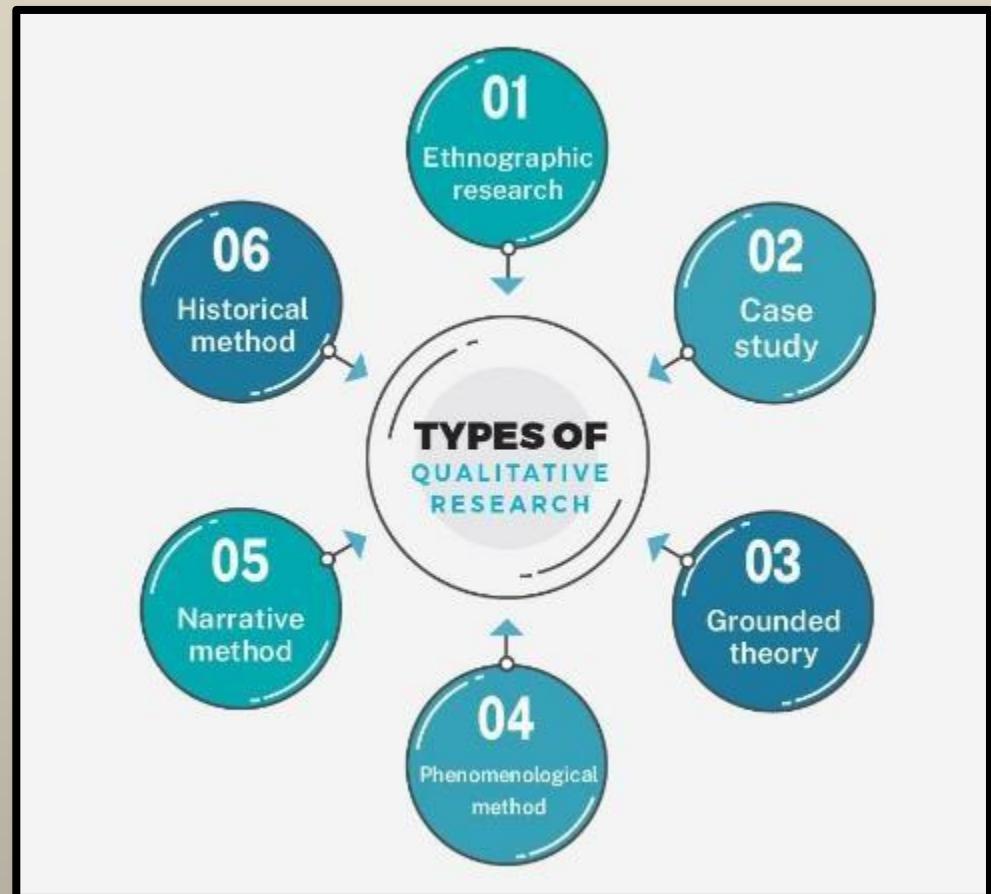
The Qualitative and Quantitative Approaches in the Construction and Building of Theory



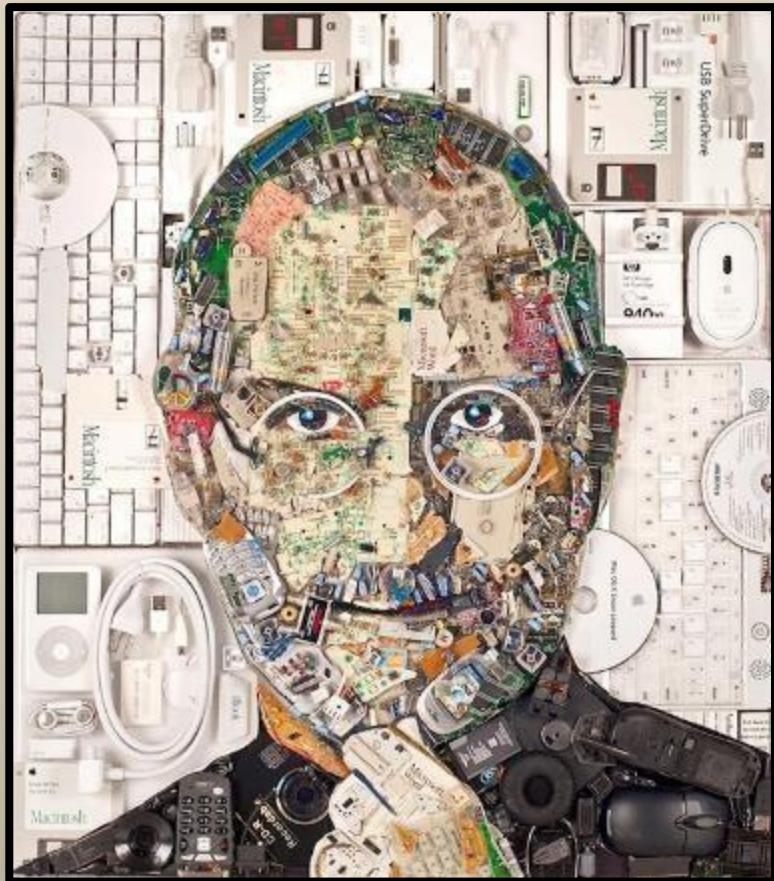
- Quantitative: deductive approach—
hypotheses generation and testing
 - Confirmation or rejection
 - Limited impact on actual theory development
 - Testing over time and space
- Qualitative: inductive approach—
theory development from empirical evidence
 - Exploration and assessment
 - True theory development
 - Identification at a single point in time
- An opportunity for integrative theory development?

The Qualitative Approach and Its Key Traditions within the Business and Social Science Disciplines

1. The Historic Tradition
2. The Bibliographic Tradition
3. The Narrative Tradition
4. The Participatory Tradition
5. The Ethnographic Tradition
6. The Grounded Theory Tradition
7. The Phenomenological Tradition
8. The Case Study Tradition



The Exploratory Nature of the Qualitative Approach within the Business Discipline



- Discovery and innovation
- Future innovation
- Confirmation across time and space
- Understanding current problems and situations
- Gaining a deep dive into quantitative data
- Understanding cross levels
- Triangulation with quantitative research
- As part of a mixed-mode approach

The Future of Qualitative Research within the Business and Social Science Disciplines

- Virtual and digital coverage—employees, leaders, customers, etc.
- Addressing more holistic and complex problems and challenges
- Deeper global and cross level assessment (external national)
- More cross-cultural assessment (internal societal)
- Integration of researcher and research problem to a much deeper level
- Integration of social, business, political, and economic



Discussion: The Power and Limitations of the Qualitative Approach

- Exploratory and deep in-depth research
- The Subjective and normative with the objective
- Holistic (human) in nature—"big picture"
- Natural settings/environment
- Researcher as participant and observer (deep involvement)
- Gets at the "why", to supplement the what, where, and how
- Judgement for major research "checks"—reliability, validity, and generalization
- Sample size: relatively small—no representation to or of the population

