

RES 712: Qualitative Research Methods and the Applied Descriptive Qualitative Traditions

Topics—The Phenomenological and Grounded Theory Qualitative Traditions



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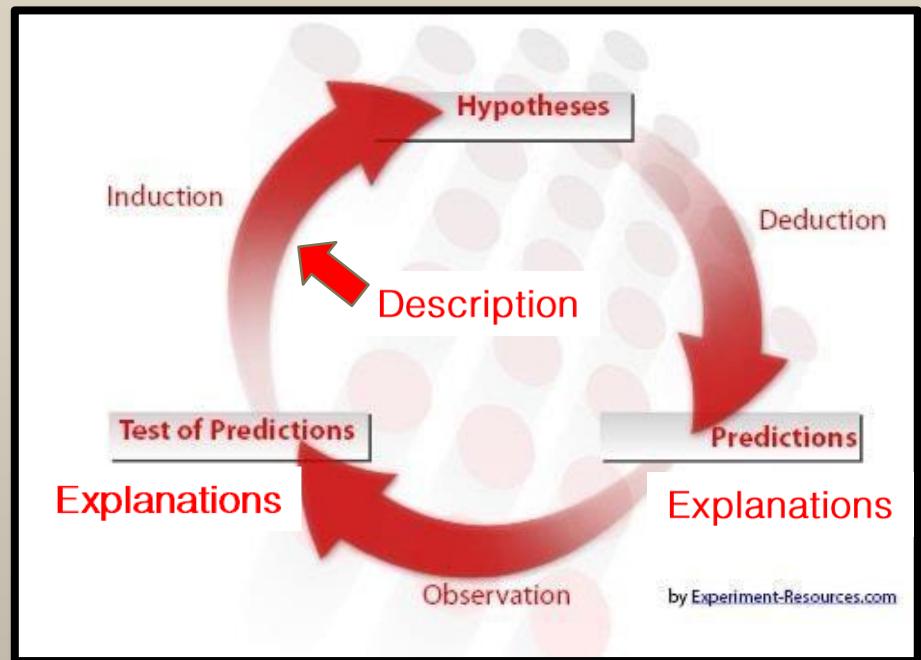
Applied Descriptive Qualitative Traditions: The Phenomenological and “Grounded Theory” Traditions

- The “Applied” Descriptive Qualitative Traditions
- Qualitative Research Designs in an Applied Descriptive Situation
- The Literature Review —*“To Use or Not to Use”*
- Individual Worldview and Schools of Thought
- Strategies of Sampling
- Analysis and Coding
- The Role of the Researcher/Investigator and Interactive Collaboration
- The Phenomenological Tradition (Social Reality)
- The Grounded Theory Tradition



The Descriptive Qualitative Traditions: Description vs. Explanation and Prediction

- Empirical evidence—description vs. explanation and prediction
- The quantitative approach and the importance of explanation and prediction
- Explanation and prediction as a natural outcome of deductive reasoning and application
- The qualitative approach and the critical nature of explanation—what is reality and why?
- Description and exploration as a natural outcome of inductive assessment and confirmation
- Description, explanation, and predication as pillars of holistic human understanding



The Applied Qualitative Traditions: Theory and Application in the Academic and Practitioner's World



- Description as the key for inductive reasoning and understanding
- A clear role for exploratory and deep assessment of the human subject
- Adds a deep understanding, and supports the development of key independent variables (exploratory attributes)
- Provides a solid foundation for explanation and prediction
- Adds a “why” component to the study with “thick data” around quantitative and Big Data
- Allows for inductive theory building with empirical evidence

The Qualitative Explanatory Traditions and Individual Worldview/Schools of Thought

- The critical nature of the researcher/principal investigator—objective, subjective, and normative viewpoints
- Schools of thought—traditional and post-modern
 - Post-Positivist
 - Social Constructivist
 - Pragmatic
 - Critical
 - Participatory
- Multiple-methods and mixed-methods—integration of the post-positivist and social constructivist schools?



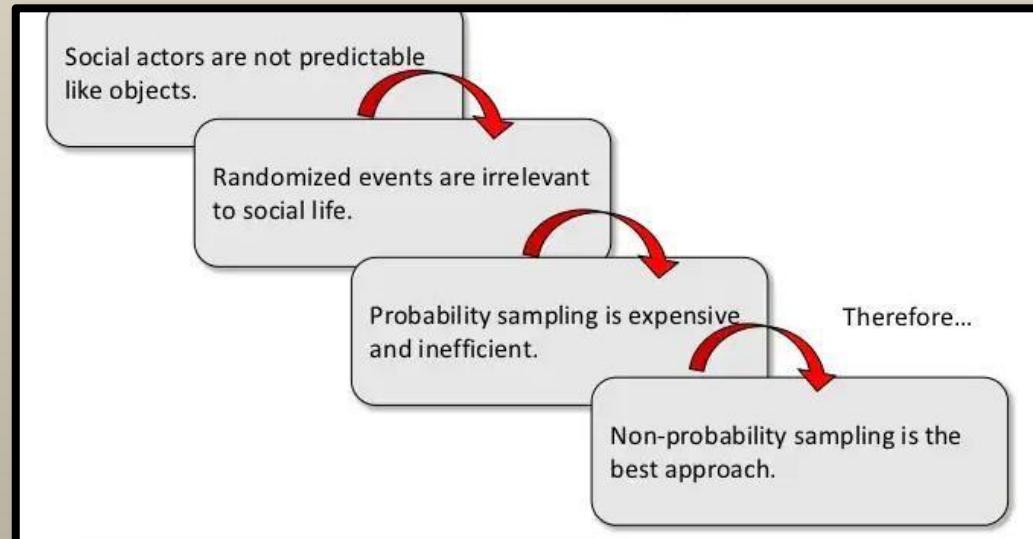
The Role of the Literature Review in the Descriptive Qualitative Traditions



- The role of prior knowledge or “priors” (a-priori) in the research design and research vs. ‘after the fact’ (a-posteriori)
- Priors as key pillars and support for triangulation
- Priors as contamination and a major factor of bias, leading to error and variation
- Alternative compromises—priors or guideposts
 - The issue of an “open” mind—“conflict” with the individual worldview and school of thought association
 - The literature review as knowledge attainment
 - Where to begin on topic knowledge?

Specified Sampling in the Descriptive Qualitative Traditions—Role of Theoretical/“Targeted” Sampling

- Qualitative sampling in general
- Targeting or quota sampling
- Theoretical sampling—what is it and how does it work?
- Theoretical sampling vs. quota or targeted sampling
- Theoretical sampling as an iterative process—sample and data
- The interaction of the researcher and inductive-derived data
- Sampling as a dynamic process based on inductive data



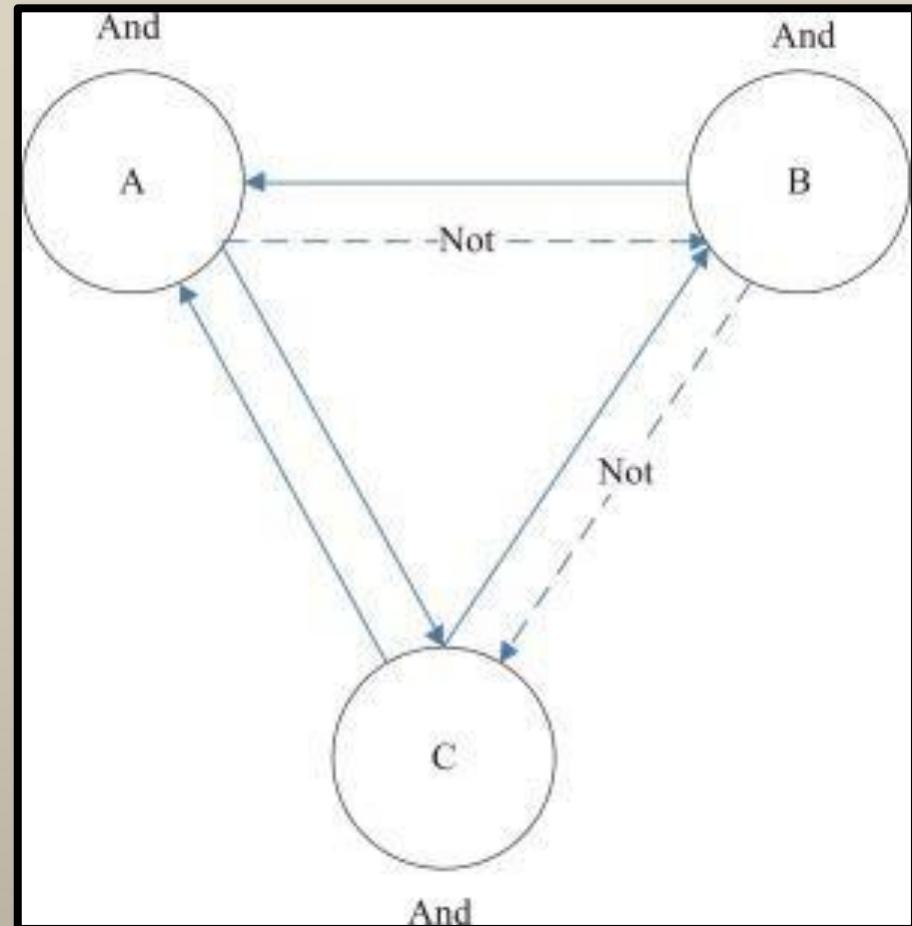
Researcher/Principle Investigator and Research/ Human Subject Cooperation and Collaboration



- Dynamic collaboration and the inductive qualitative research process
- The role of the human subject and the researcher/researcher/principal investigator
- Dealing with dynamic research objectives
- Dynamic updates and the changing research problem
- Developing the research problem and objectives over time
- Dynamic data and analysis updates

Analysis and Assessment: Techniques and the Role of Coding

- The techniques—interviewing
 - Structured vs. unstructured
 - Observation vs. active interviewing
 - Indirect vs. direct observation
 - Static vs. dynamic
- Fieldwork notes and the dynamic process
- Analysis as an iterative and dynamic process (original and coded data)
- Data evolution and the focus of the research
- Analysis as a dialectic or some other dynamic non-linear process
- Non-dynamic and non-linear process functions
- Dynamics driven by inductive empirical data collection and assimilation



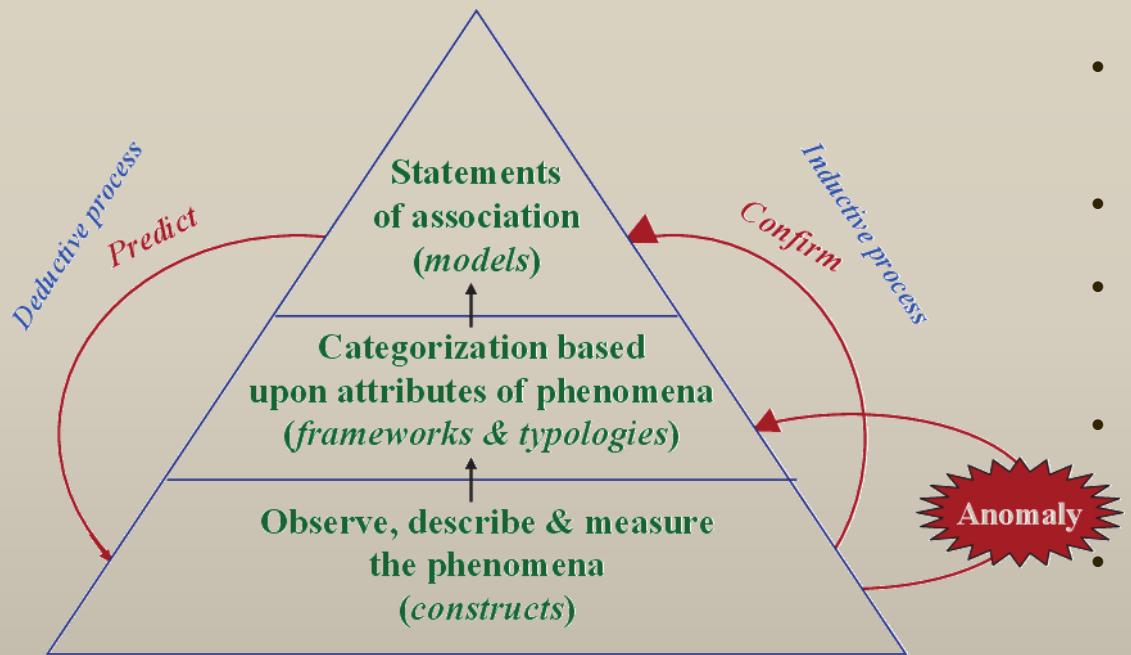
Coding of Verbal and Written Human Content

Theme	Advantages	Quotation
Customer communication	1. Passive tracking of consumer reactions. 2. Optimise response options and make them more prompt.	1. "Many companies already implement social listening to quickly learn about any criticisms or appraisals on social media". 2. "The inability to respond to the consumers addressing your organisation in the public domain within several hours may already be recognised as ignoring them or having poor customer service quality".
Customer servicing	Instantly identify loyal consumers returning with new orders.	"It may seem like a small thing but imagine making a second booking at the same hotel you stayed at with your family last year and receiving a reply, "John, thank you for choosing us again" or a Christmas greeting wishing all the best to your wife and two children".
Data processing	Track all consumer operations longitudinally.	"Additionally, you may track the whole consumer journey rather than just the moment of the purchase to analyse your marketing effectiveness".
Performance monitoring	Reliable productivity tracking.	"This also allows them to track their productivity and really know when they are performing well".
Services personalisation	1. Better consumer experience. 2. Upselling.	1. "This personalisation is highly convenient for making every consumer feel valued". 2. "At the individual level, personalisation supports upselling. If the system recognises the 'business-type reservation' on the basis of customer data, a live customer support specialist may offer additional services such as office space, a business lounge for work or photocopying and translation".
Predictive analytics	Capability to optimise dynamic pricing and room management.	"This is especially important for hotels that need to use dynamic pricing and have to close some rooms for refurbishment or basic repairs".

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- Orders of coding
 - 1st order (key concepts)—markers
 - 2nd order (themes and trends)
 - 3rd order (Interpretation and integration)
- Specifying codes and key words/phrases
- Assessing thematic content
- Adding interpretative understanding
- Moving the qualitative tradition into hyper-quantitative

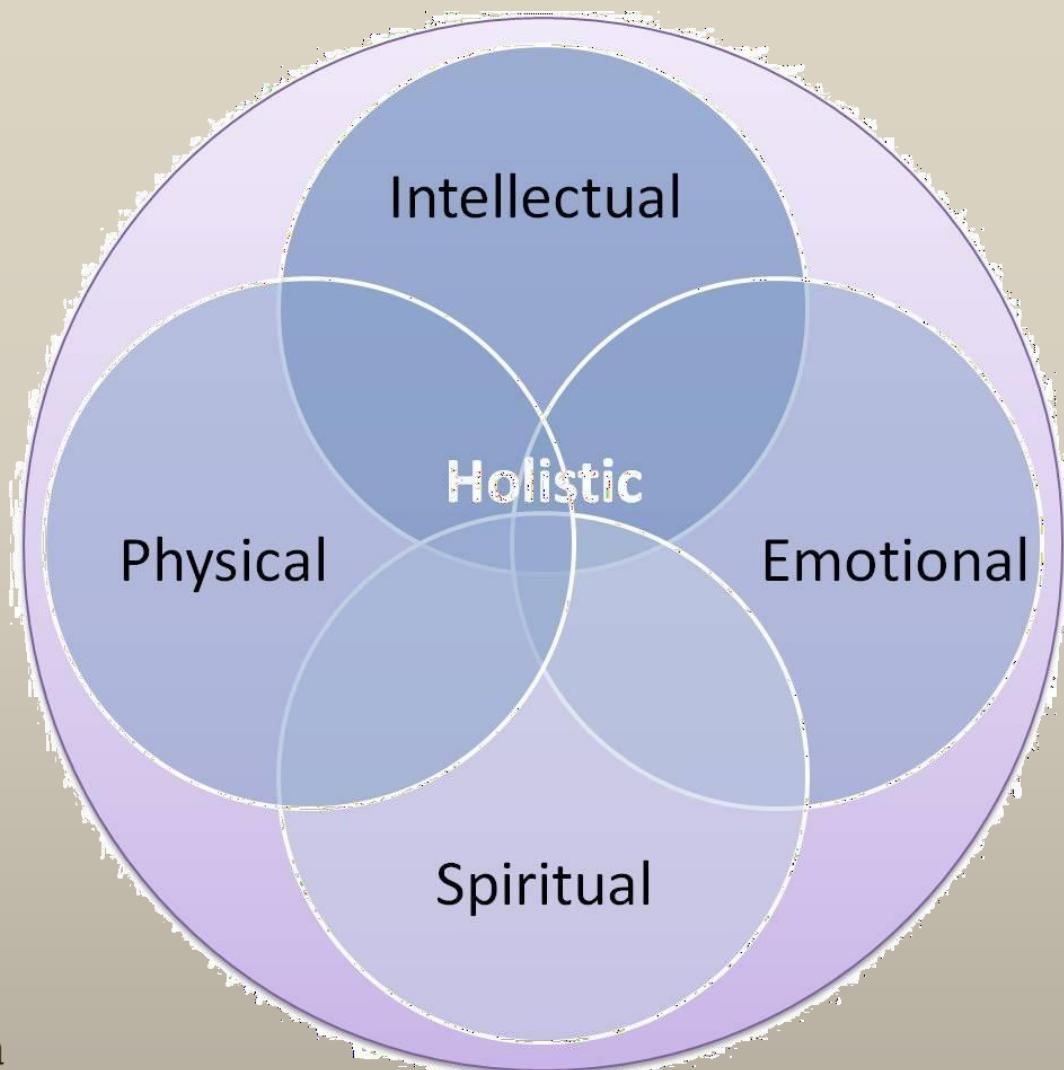
The Power of Theory Identification and Theory Building/Construction



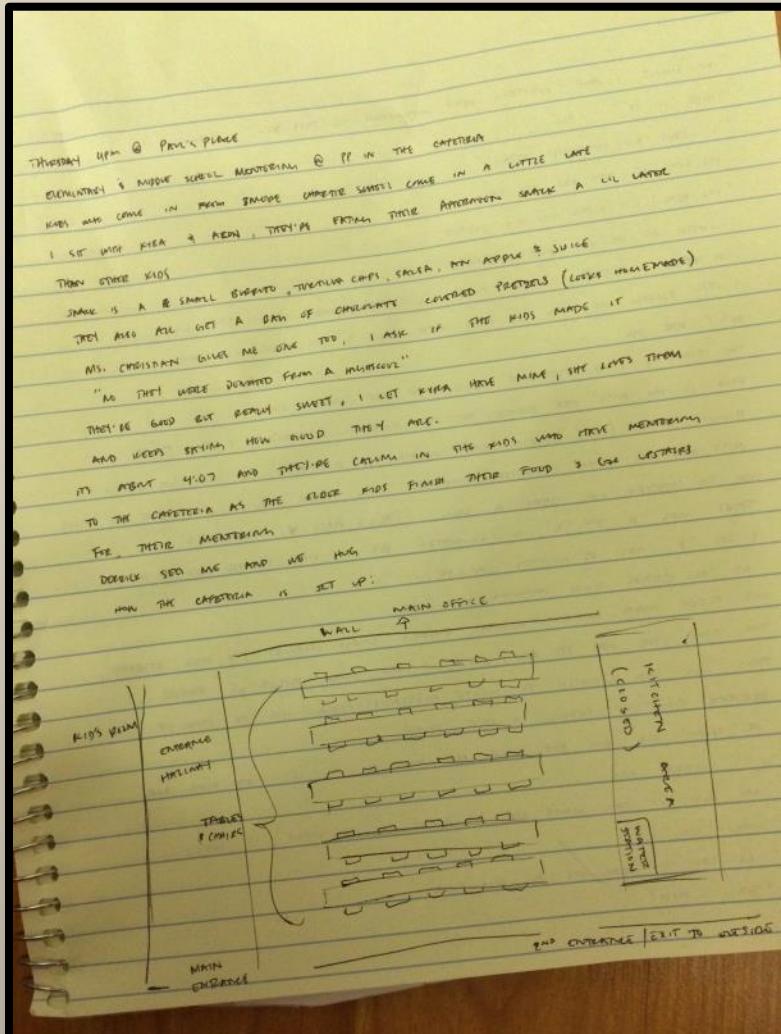
- Theories as “hunches”—its advantages and limitations
- Theory development based on data and “empirical” evidence
- Theory from an inductive pool
- Inductive-based theory as a reflection of reality (checked against data)
- Deductive and inductive theory: is there a process or a relationship? Multiple-methods/mixed-methods and the holistic nature of theory development
- From where does theory originate and how does it become the foundation for paradigms?

Descriptive Qualitative Techniques and the Search for Interpretation, Trends, and Reality

- Qualitative interviews
 - Structured or Unstructured—advantages and disadvantages
 - Verbal questions/discussion vs. direct/indirect observation
- Observation
 - Intervention
 - Non-intervention
- Application of ethnographical methods (culture, as well as context and environment)
- Documents, and other non-verbal assets as data
- Pictures and videos as data
- Subject-based assets as data
- Integrating and explaining data from a human subject holistic viewpoint



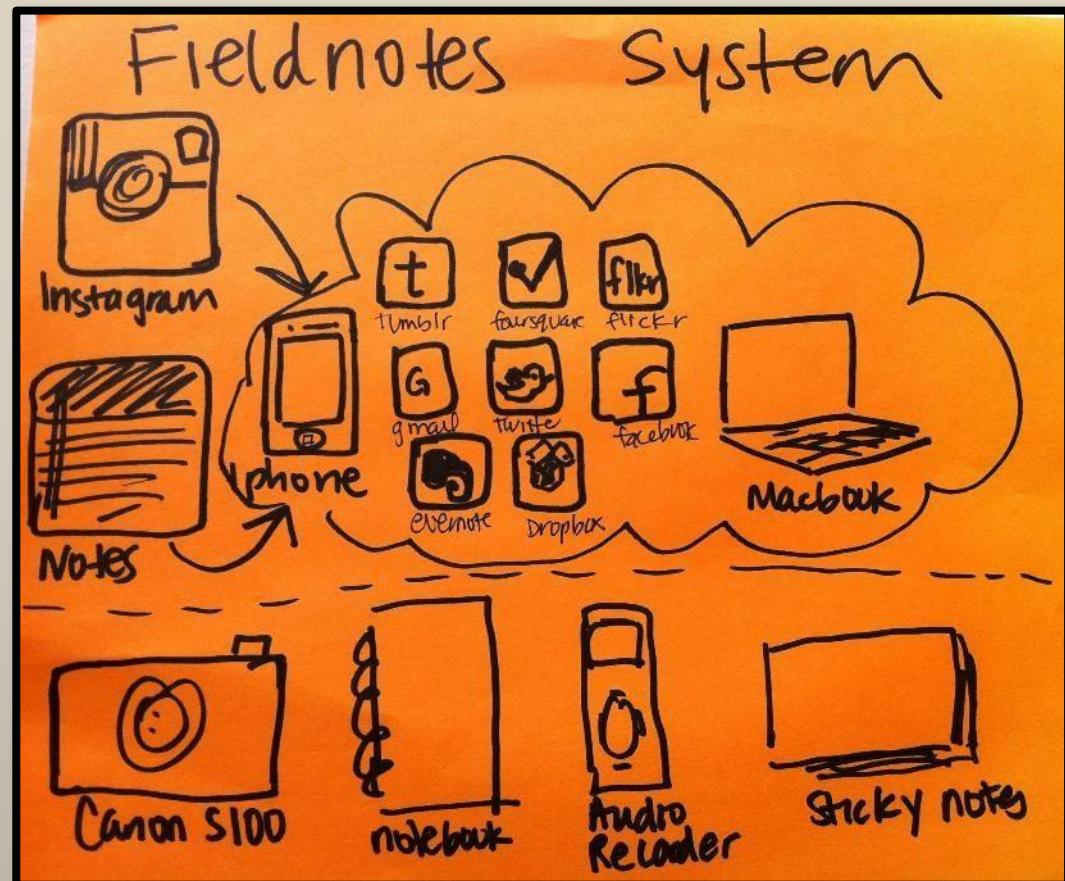
Fieldwork Notes and Assessment: Importance for Qualitative Descriptive Approaches



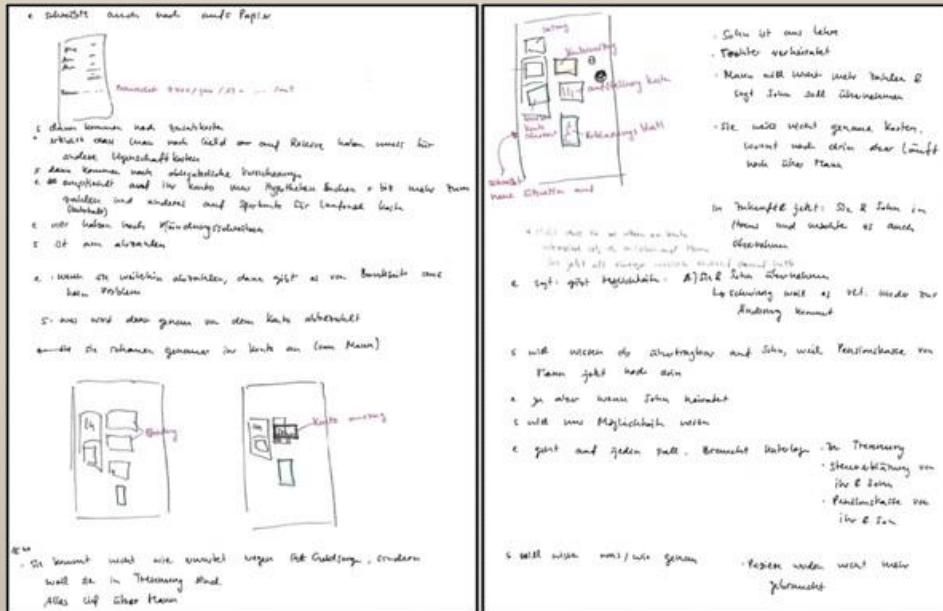
- The role of note taking in the qualitative descriptive approach
- Notes as content collection across a dynamic process
- Notes as content interpreters (across and between dynamic levels)
- Produce meaning and an understanding of the context, culture, social situation, and specific phenomenon being studied
- Establish a record for review and input for analysis
- Fieldwork notes as a research technique

Descriptive Fieldwork Notes: Taking Notes at the Researcher's Level

- The natural setting: context, culture, the environment, as well as other non-individual level variables (societal and global)
- Importance of audio and video recordings
- Application of content transcripts
- The interpretation of human content/assets—audio, text, pictures, video, and research tools
- Working with a translator—simultaneous and static



Descriptive Fieldwork Notes: Researcher Interpretation and Assessment



- The critical nature of researcher interpretation of the fieldwork notes
- Integrate notes with interpretation of context (as viewed), culture, and the environment
- Confirmation of empirical evidence in a dynamic format
- Review of notes in relation to the larger research problem, both static and over time
- Interpretation as a context for uncovering or identifying trends and tendencies within and across human subjects

Fieldwork Notes: Uncovering “Trends” and “Tendencies” within Descriptive and Dynamic Qualitative Content

- Trends and tendencies in fieldwork notes over time and iterations
 - Confirmation of trends and tendencies across iterations
 - Integrating fieldwork note trends with the literature or as a main driver of literature development
 - Identifying trends and tendencies across research
 - Comparing notes within and across subjects
 - Reflexivity and trends (internal)—across time and iterations
 - Triangulation and trends (external) across time and iterations

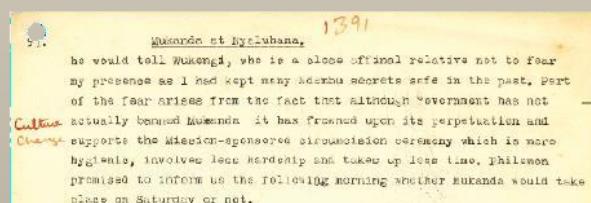
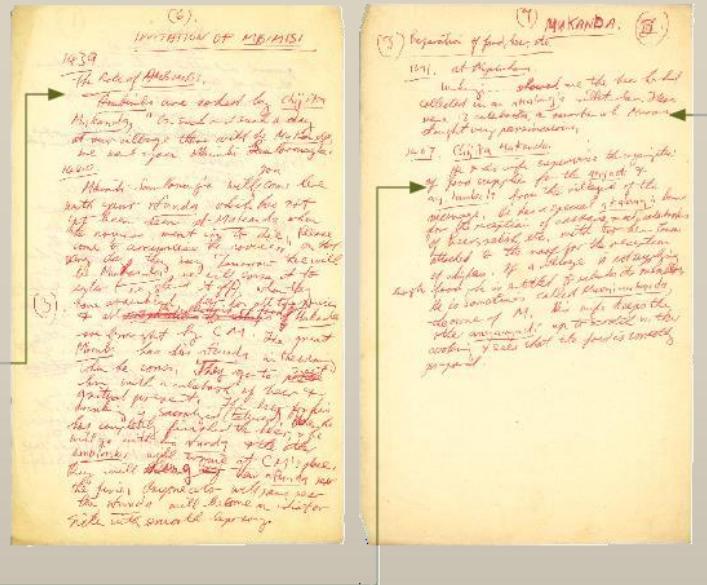
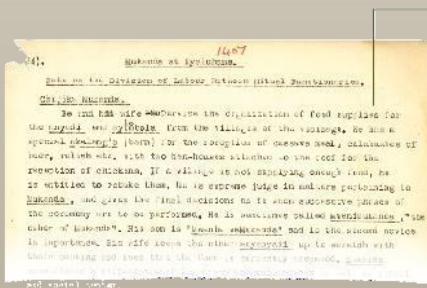
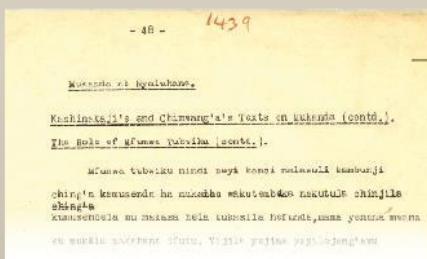


Working with Fieldwork Notes: Evolution and Confirmation

USE CASE

Reconstruct events via field notes for theoretical analysis

In his analysis of the Mukanda, a boys' initiation ceremony among the Ndembu, students can see how Victor Turner pieced his field notes together to recreate chronological events and to analyze the temporal structure of events and its subsequent meaning.



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Descriptive Qualitative Tradition: Phenomenology

(Assessing Social Reality from a Common Phenomenon)

- Focus on human consciousness (a phenomena or experience to understand social reality)
- Study several humans to understand reality/experiences and the human phenomenon
- Search for individual experiences connected to criteria in personal/ historical context (space and time across individuals [personal context] and cultures)

Phenomenological Study

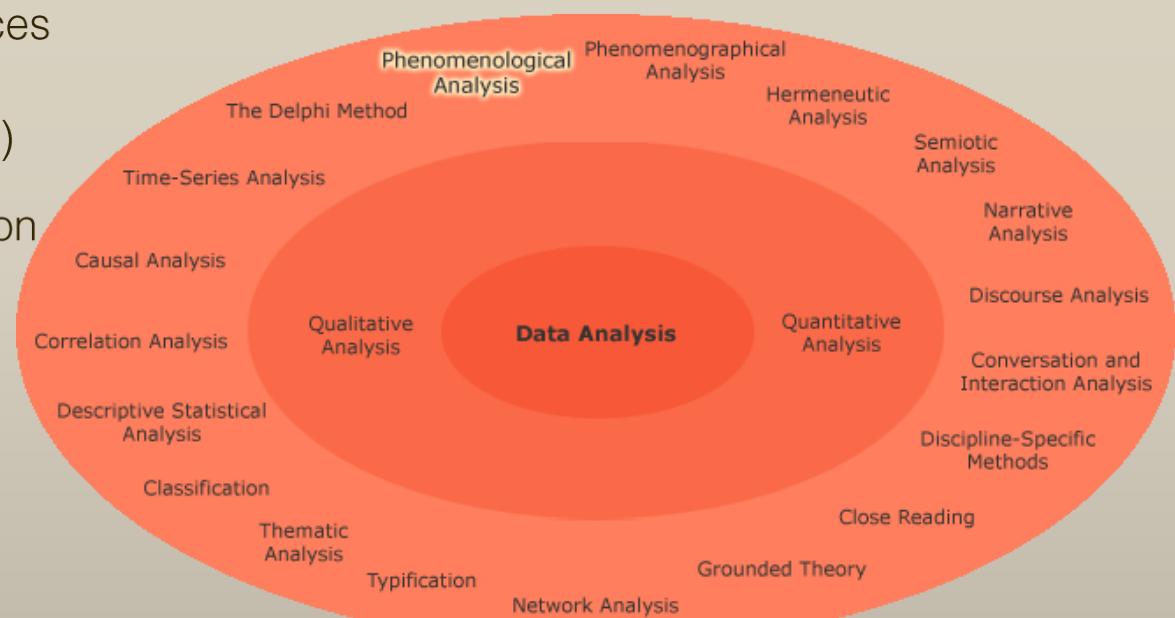
- Understanding an experience from a research participant's point of view
- Interview several participants as to their perceptions of an experience
- Try to build a picture of the experience through using a combination of theories, literature in the area, illustrated by anecdotes, to build a detailed portrait of the experience

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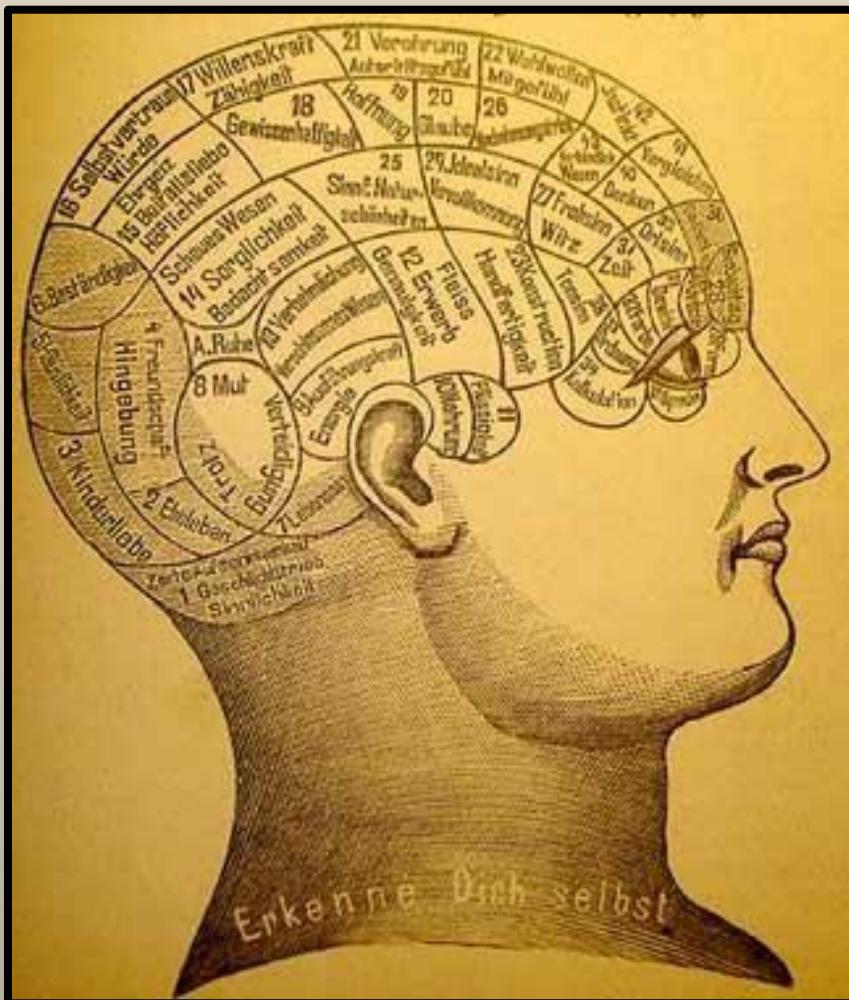
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The Phenomenology Qualitative Tradition: Background and Attributes

- Both a philosophy and research tradition
- The meaning of human experiences within individual contexts (from individual to social level networks)
- Human subject-researcher iteration
- Comparative assessment
- Personal or group interviews
- Assess the phenomenon across individuals and collective groups
- Exhausts descriptive meanings
- Confirm collective assessment (trends and tendencies) of the phenomenon under study



The Phenomenology Qualitative Tradition: Advantages and Disadvantages



Advantages of the Phenomenological Tradition

- Unique Perspectives—there is value in focusing research on how people perceive an event or phenomena, rather than simply how the phenomena exists in a vacuum
- Understanding—provides a profound and detailed understanding of a single phenomena
- Rich Data—the data is rich and impressive. This is a form of research that allows for a truly unique approach to understanding a phenomena

Disadvantages of the Phenomenological Tradition

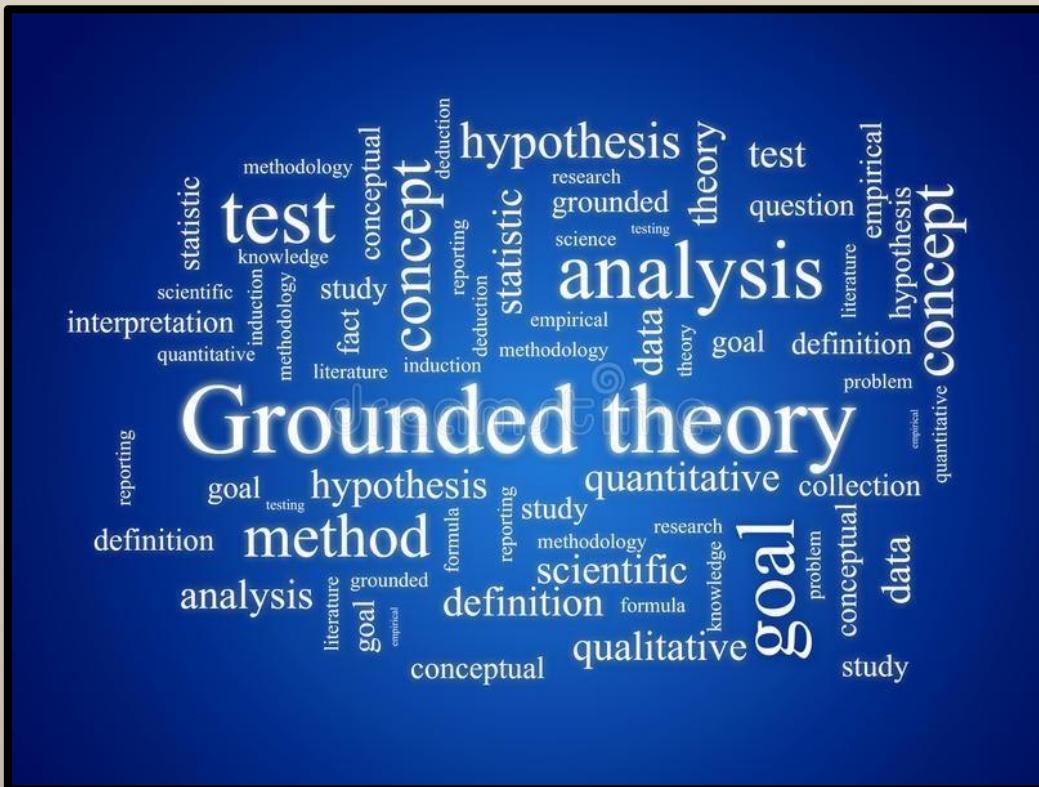
- Can be difficult to interpret, analyze, and summarize
- Difficult to generalize to a larger population
- May be difficult to report or illustrate the findings
- Hard to establish the relationship between story elements and reality (context)
- Difficulty to detect or prevent researcher induced biases

The Phenomenology Qualitative Tradition: Examples across the Business Disciplines

- Women as business leaders and managers
 - Marketing in a global market, such as China
 - Women's experience with breast cancer
 - Working from home with new technologies and processes



Descriptive Qualitative Tradition: Grounded Theory (Building Theory from Empirical Evidence Inductively)



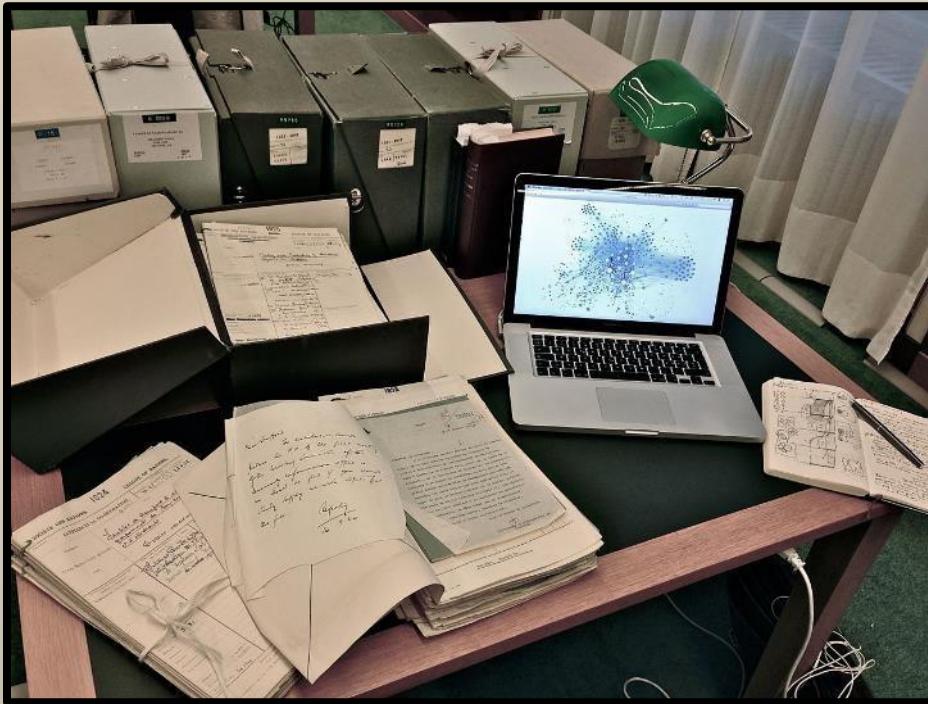
- Remove a-priori ideas, theories, and hypotheses from the focus of study (“*clean sheet of paper*”)
 - Builds theory “inductively” based on empirical content, data, and sources, not hunches which must be tested empirically
 - Develop a theory “grounded” from fielded data and sources
 - Theory content based on “empirical” evidence and its surroundings
 - Theory evolves inductively over time and space

The Grounded Theory Qualitative Tradition: Designs and Techniques

- Data identified and collected inductively through interviews, group discussion, and observation
- Empirical data studied and integrated dynamically into theory identification
- Human subject context related to the social process (cross levels)
- Theory identified and developed through engagement with data
- Theoretical sampling applied to capture the most opportune human subject information
- Coding applied to identify and direct theory development



The Grounded Theory Qualitative Tradition: Designs and Techniques



The Assessment of Specific Human Activities

- Uncover the unknown based on individual and group traits
- Address unanswered or limited research questions
- Assess the trends from current data
- Understand human context within specific subjects
- Supports the development of new theories and paradigms

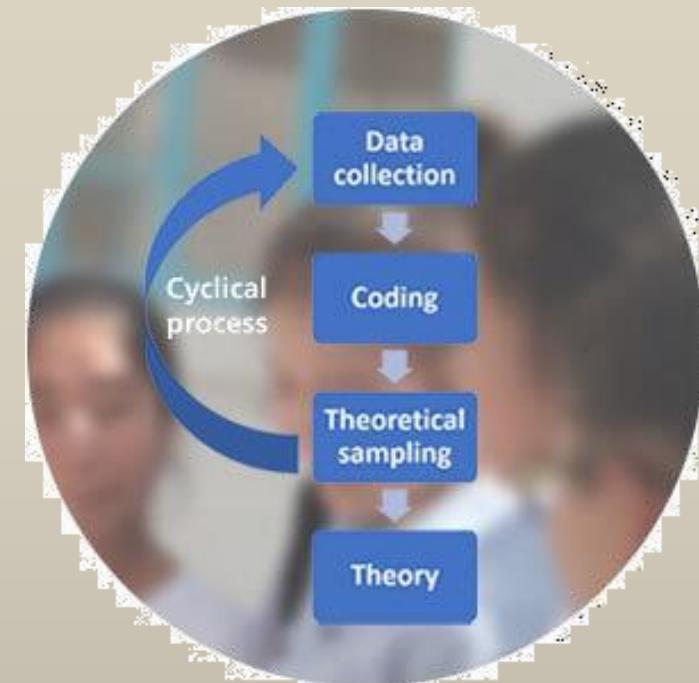
Techniques

- Qualitative techniques (various techniques focused on empirical human data collected inductively)
- Focused Individual and Group discussions and assets
- Qualitative techniques—individual and group/comparative analysis
- Coding creation and analysis
- Specific theoretical sampling based on individual and societal traits

The Grounded Theory Qualitative Tradition: Advantages and Disadvantages

Advantages of the Grounded Theory Tradition

- No predetermined a-priori view about social phenomena—avoids making assumptions
- Methodology not pre-formed or pre-theoretically developed with existing theories and paradigms
- Particularly well suited for investigating social processes that have attracted little prior research
- Produces a 'thick" description that acknowledges areas of conflict and contradiction
- Determines what happens
- Adapts readily to studies of diverse phenomena
- Changes as conditions that affect behavior change



Disadvantages of the Grounded Theory Tradition

- Can be difficult to interpret and understand
- May be difficult to report or illustrate
- Hard to establish relationship between elements and reality
- Assessment and presentation a challenge

The Grounded Theory Qualitative Tradition: Examples Across the Business Disciplines



- Understand the role of therapeutic distance for adult clients with attachment anxiety
- Nursing home preparedness needs in relation to Hurricane Katrina refugees
- Managers to explain the ways in which organizational characteristics identify co-worker support
- Study daily stand-up meetings
- Study the use of computer technology by older adults

Overview of Qualitative Research Traditions: Where do the Phenomenological and Grounded Theory Traditions Fit Within the Qualitative Approach?

Discipline	Domain	Research Tradition	Area of Inquiry
Anthropology	Culture	Ethnography	Holistic view of a culture
Psychology/ Philosophy	Lived experience	Phenomenology	Experiences of individuals within their lifeworld
		Hermeneutics	Interpretations and meanings of individuals' experiences
Sociology	Social settings	Grounded theory	Social psychological and structural process within a social setting
History	Past behavior, events, conditions	Historical research	Description/interpretation of historical events

Discussion: Applying the Applied Qualitative Traditions in Research

- Thinking about your subjects of interest and research topics, how could you envision applying either the phenomenology or grounded theory qualitative traditions to your research?
- How would you specify and apply it for your research or problem?



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