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A Commentary on "What Grounded Theory Is . . . ": Engaging a Phenomenon from the Perspective of Those Living it

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Abstract

In my editorial and authorial experiences, Grounded Theory approaches to organizational research have proven to be some of the most powerful forms of inquiry we have into modern organizing and organizations. And part of that power comes from its ability to utilize both qualitative and quantitative data. But unlike Walsh et al., I do not believe Grounded Theory is capable of being an all-encompassing research paradigm, nor should it be. The heart and soul of GT methodologies lies in *engaging a phenomenon from the perspective of those living it*, which means it is most suited toward inductive examinations seeking deep insight into a phenomenon and its connections with the context. Likewise, I also disagree that a GT approach is best used as a sequential, lockstep set of techniques that should be followed precisely; the power of GT approaches is partly derived from the potential to let those closest to the phenomenon influence how it is studied. Yes, I agree that there are key components to the methodology that must be used in combination, but each study is unique (because each phenomenon is unique) and thus there must be room for adaptation and creativity in the implementation of the approach. Ultimately, then, we agree that GT approaches are a powerful way to examine the world around us, but I see much more promise in letting GT bloom and adapt to the phenomena and contexts under study, as opposed to strictly adhering to the original ideas extended by Glaser & Strauss (1967).

Keywords

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As an advocate and user of grounded theory (GT) methods and techniques, I read the commentaries of Walsh et al. with great interest. I just recently completed a 3-year term as associate editor at the

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Academy of Management Journal, where I dealt exclusively with inductive (i.e., theory-building) manuscripts. Based on my experiences reading hundreds of inductive research manuscripts, most of which either used methods and techniques from the grounded theory tradition or at least cited Glaser's or Strauss's work, I can wholeheartedly agree that the term *grounded theory* has taken on a life of its own. It is no longer possible to tell precisely what researchers have done methodologically when they say they used "grounded theory methods" or used Glaser and Strauss (1967) as a methodological guide (for more on this, see Locke, 1996). This is perhaps not surprising given what we know from reader-response theories about readers attributing their own meanings to a text and thus interpreting and acting on an author's writing differently than perhaps the author originally intended (Golden-Biddle & Locke, 1993; Iser, 1978, 1989). Thus, I acknowledge Walsh et al.'s desire to "right the wrongs" sustained over the past decades and argue for a reorienting of grounded theory claims back to Glaser's originally intended meaning. Yet, I also recognize that a lot has changed since Glaser and Strauss wrote their original pieces. Much of that change has led to improvements and advancements in grounded theory methods and techniques beyond where they began all those years ago. So my intent in this essay is to provide a perspective that balances Walsh et al.'s arguments with the realities of researching the ever-changing complexities of modern organizing and organizations.

As an avid user of grounded theory methods and techniques for most of my scholarly career, I have found the approach extremely useful in studying organizational phenomena, especially those involving change (e.g., Corley & Gioia, 2004; Harrison & Corley, 2011; Huy, Corley, & Kraatz, 2014). I have also worked to advance and improve the use of grounded theory approaches (Gioia, Corley, & Hamilton, 2013) and worked as an editor to further the place of qualitative, inductive research in our discipline (Bansal & Corley, 2011, 2012). In all that time, and across all those varied experiences, I have seen the power of GT methodologies and believe them to be some of the best approaches for gaining insight into the complexities and intricacies of the modern organization. Yet, based on those same experiences, I firmly believe GT's best use is not as a "big-tent" paradigm able to support all types of research, as Walsh, Holton, and Levina seem to suggest. No, if GT really is simply about "looking for patterns of behavior that explain a main concern" as Prof. Glaser describes it, then I would argue that it is a methodological approach best suited for the inductive study of phenomena with little theoretical understanding.

The papers I have reviewed and edited over the years support this too; those that attempted to use GT techniques for deductive purposes (a small subgroup of submissions) or provided only descriptive findings were always the ones that met with the most resistance from reviewers and were least likely to make it through the review/revision process to publication. It wasn't really about the type of data used in the study (i.e., qualitative vs. quantitative); it was about the ultimate goal of the research (build theory vs. test theory vs. describe phenomenon) and whether "looking for patterns in the data" was a justified approach to examining that phenomenon. I really have no issues with the argument that GT can rely on quantitative data as well as qualitative data; after all, data choice should always be in service to the research questions being asked. From that perspective, there is nothing particularly interesting about the claim that quantitative data can be used in GT approaches; the only thing that makes it interesting is that it so rarely happens in our discipline.

What troubles me more, however, is any suggestion that GT is appropriate across all philosophical foundations. The heart and soul of GT methodologies is *engaging a phenomenon from the perspective of those living it*—a belief that rests solely outside the functional/positivist paradigm that still largely drives the organizational sciences. This engagement with those living the phenomenon and attempting to understand it from their perspective is why GT is such a powerful approach for gaining new theoretical insights and pulling back the curtain on the complexities of modern life. As a researcher discovers emerging patterns in the data (as Prof. Glaser explains it; see also Strauss & Corbin, 1990) and then seeks out those living the patterns to gather further

insights (via constant comparison and theoretical sampling), ultimately working toward the development of theoretical explanations for the existence and functioning of those patterns (as Fernandez highlights), what emerges is more than simply a description of "what" is happening—we get deep insight into "why" it is happening, and "how" it is happening, and "how and why" it is intimately connected with the contexts in which the researcher observes it.

Weick (1979) vividly highlights this distinction in his retelling of a story by John Steinbeck (1941) about coming to understand the nature of the Mexican Sierra fish. As Steinbeck explains, it is possible to know the number of spines on a Mexican Sierra's dorsal fin in numerous ways. One of those ways is by sitting in a laboratory and counting the spines on a dead Mexican Sierra fish:

> To sit in a laboratory, open an evil-smelling jar, remove a stiff colorless fish from the formalin solution, count the spines, and write the truth. . . . There you have recorded a reality which cannot be assailed—probably the least important reality concerning either the fish or yourself. . . . The fish is not that color, that texture, that dead, nor does he smell that way. (Steinbeck, as cited in Weick, 1979, p. 29)

An alternative understanding emerges from experiencing the Mexican Sierra fish in its native habitat (Sea of Cortez), wrestling with the line that you are using to capture the fish, watching the fish struggle and writhe in pain on the boat deck, and counting the dorsal fin spines while realizing they are only one aspect of the fish's nature and way of life. In this manner, "a whole new relational externality has come into being—an entity which is more than the sum of the fish plus the fisherman" (Steinbeck, as cited in Weick, 1979, p. 29).

Researchers using a GT approach seek out this "whole new relational externality" in the belief that the knowledge gained though its understanding, while not necessarily replicable by others who did not directly experience it, provides novel and theoretically interesting insight to organizational life beyond what we gain from other, more positivistic forms of data collection and analysis. Thus, it might be that, as Holton (2015) explains, "classic GT is ontologically and epistemologically flexible"; but it would seem counter to the essential nature of what makes GT so empirically useful to suggest that it is equally applicable across all paradigms and types of research (as Fernandez suggests). Until such time that there exists strong exemplars and how-tos for applying a GT approach to deductive research, I suspect we will continue to see most published examples of GT in the organizational sciences falling squarely in the realm of inductive research from an interpretive/phenomenological perspective.

If you accept this premise that a key strength of GT is its engagement with those living the phenomenon, then I would also argue that it is hard to agree with Prof. Glaser that the GT approach is best used as a sequential, lockstep set of techniques that should be followed like a recipe in a cookbook. If you are relying on your informants to guide you on what is important and where to find more data on that important stuff, how can you know the best sequence for collecting and analyzing your data a priori? Yes, I very much agree that there are key components to the methodology—emergence, theoretical sampling, constant comparison (as Holton describes), open coding, selective coding, memoing (as Glaser explains)—that must be used in conjunction to have the best chance at truly uncovering novel and theoretically interesting patterns in the data. But I don't agree there is one best sequence to follow in deploying those techniques, nor do I believe that effective GT research can be anything other than cyclical, reciprocal (almost by definition, if you take Glaser's and Strauss's descriptions of constant comparison to heart), and even a bit messy.

To help illustrate this difference in perspectives, I'll share a conversation I had with another GT scholar, Davide Ravasi, who uses GT approaches in his research and assesses GT manuscripts as a journal editor in our field. Davide and I have spent many hours discussing inductive research, and one of the topics we touched on, since we both work with and train doctoral students in GT research,

is how to describe the fundamental differences between deductive and inductive research (see also Bansal & Corley, 2011 for more on this topic). As Davide loves to cook (and is quite good at it, if I may say so), his choice in metaphors often takes a culinary path. And for this discussion Davide highlighted the differences this way: Deductive research is like baking a cake, while inductive research is best thought of like cooking a sauce or stew. As Davide explained, when baking a cake:

> You have to be very precise in the preparation phase (mix all the ingredients in the right sequence and in the right content, warm up the oven at the right temperature, etc.), then, if the recipe is good, you'll get the results you expected. But there's no room for adjustments at that point (i.e., you can't taste a morsel of cake from the oven).

Similarly, in deductive research you need to carefully design your study, select previously validated measures, be sensible in selecting pre- and posttreatments, carefully design and test your survey instrument, and so on. Once the survey is mailed or the experiments are carried out (i.e., once the cake is in the oven), there's little to no room for adjustments. If you realize, by looking at the survey results, that there was a flaw in the questionnaire/measures that biased results, for instance, it is too late: You throw away the cake and start over.

Inductive research is different in that there is not only more room for in-process adjustments, they are almost required given the nature of the approach. As Davide explained, it is much more like cooking a sauce or stew:

> When you make a stew or a sauce, some basic rules still matter (you DO have to wait until onions get soft before adding tomatoes!), but there's more room for adjustments as the work is inmprogress. If your stew is too dry or not flavorful, you can add broth, brandy, or spices. Or you can decide to turn a simple tomato sauce into a puttanesca or arrabbiata if you realize that the tomatoes you are using are not tasty enough. And your personal experiences [cooking stews and sauces] is usually more important than the recipe.

The same applies to inductive research (and, by extension, GT approaches): You begin with a general idea of what you want to understand and carefully construct guiding research questions, but then there is room to adjust your sampling and interview protocol, reframe research questions, and so on as you begin to familiarize yourself with the research context and collect preliminary data. When you are tasting a stew or a sauce and adjusting for salt or spices, you're basically "iterating between theory and data" (Charmaz, 2006) and "theoretically sampling" to find the best blend for that particular effort. And you often rely on what worked best the last time you were in the field as your prior experiences with stews or sauces (or interviewing, or coding) provide more insights than the recipe (or textbook description of the method).

As an aside, this is part of what makes the dissertation process for inductive research trickier for a student's committee than with a deductive study. The amount of flexibility and adaptation required during the course of the project is immense, from writing the proposal (which is more tentative in its methodological descriptions and will likely look different when the project is complete) to the final defense (where committee members must assess the project on what it ultimately achieved, not what the student proposed to achieve).

For those who have done GT research before, this baking/cooking comparison really shouldn't be that surprising when you think about the idea of doing research on a phenomenon from the perspective of those living it—if we don't know what patterns we will find in the data a priori, then how can we know exactly which collection methods will provide us the most appropriate data a priori, which analysis techniques will provide the most robust insights from those data a priori, and in what order we will need to implement those methods and techniques to find and flush out

those patterns in the data a priori? Given this, it's not unexpected that all the powerful examples of grounded theory research we have in our field do not all look the same and have not all followed Glaser and Strauss's (1967) original GT prescriptions to their precise letter. What these papers do have in common is that all have faithfully followed the spirit of the GT approach and done nothing to violate any of its main tenets.

Ultimately, I see a lot of value in the ideas shared by Walsh and her colleagues, most especially their call for users of the GT methodology to include quantitative data in their efforts (when appropriate and helpful). In that sense, what I really see this set of essays as doing well is further reinforcing the calls for more multimethod (and multi-technique) approaches to our scientific practice by narrowing that criticism and call down to a particular subset of scholars. Essentially what Walsh and colleagues are saying is, "Hey, GT scholars! Wake up and recognize the need for more complex approaches to our studies because the phenomena we study are too complex for a mono-method, mono-data approach." I would echo that wake-up call into other methodological camps and communities as well—all of the Academy needs to recognize the necessity of shifting to multimethod and multi-technique approaches, not just GT scholars. But perhaps this is the way it must be done—focused efforts on specific communities within the broader Academy instead of the broad calls for action across the entire Academy that we've seen for the past decade. If that's the case, count me among the choir.

Beyond this point, however, I think Walsh et al.'s desire to see GT go back to its original roots and be known as a general research paradigm capable of crossing all paradigmatic boundaries is currently a nonstarter. For one, the genie is out of the bottle in the sense that the broad proliferation of GT approaches beyond Glaser and Strauss's (1967) original statement have been too successful in providing theoretical and empirical insight for us to believe that we can step backwards in time and practice. Second, the essential nature of GT as engaging those living the phenomenon of interest makes it extremely challenging to apply GT to deductive ambitions. Perhaps down the road somewhere, after further improvements and many how-tos on the details of applying GT beyond its inductive strengths, GT may yet prove to be a grand paradigm of research that can encapsulate both inductive and deductive goals and be the approach of choice regardless of the research question or empirical setting. But until that happens, I think the best GT research has to offer will be found in inductive research from a non-positivistic perspective.

Does this make me a skeptic and malcontent set in his ways and afraid of change? I think not—to the opposite, I believe we need to embrace the change that has already happened to the methodology. Instead of looking at changes to GT methodology as blasphemous, we need to recognize that adaptation of the approach and "taking on a life of its own" are hallmarks of a successful methodology. And to the extent that scholars are true to the spirit of GT, its widespread adoption and customization should be seen as a positive thing for the future of GT, as a way to help ensure its continued vitality in the face of changing phenomena. This means we need to be open to the inevitable new changes that will arise as GT scholars continue to push the boundaries of phenomenologically focused research. We don't yet know what patterns of use lay ahead for GT research, and that should be perfectly comfortable for scholars used to adapting to what emerges in the course of their research.

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