9

Doing Research With Words: Qualitative Methodologies and Industrial/Organizational Psychology

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Qualitative research uses linguistic symbols and stories to produce descriptions and interpretations of actual behavior in specific settings. Quantitative research is done with numbers and statistics. Although numbers and quantities appear in qualitative research, and words are essential for quantitative studies, the two forms of research—qualitative and quantitative—are clearly distinguished by their emphases on words and symbols versus numbers and statistics. The general objective of this chapter is to persuade scholars that doing qualitative research with a focus on words has potential to advance I/O psychology and to contribute new insights into issues addressed in I/O psychology, a field where quantification is emphasized.

The chapter begins with an overview of key features of qualitative research. I also discuss how the phenomena and findings uncovered through qualitative methods would differ from those produced through quantitative research. Next, the chapter provides a review of important scholarly worldviews or paradigms in the field of social science. Particular qualitative methods are located in relation to these worldviews, and the ways the intellectual commitments of these worldviews influence the nature, meaning, and use of qualitative methods are addressed. An overview of qualitative methodological approaches that have potential to contribute to I/O psychology research is then provided. These methods include: case studies, interviews, observational approaches, document

analysis, computer-aided interpretive textual analysis, and grounded theory. I describe how these approaches have been implemented in past research, explore variations in use of these methods that occur when using different qualitative worldviews, discuss data-analysis strategies used with these approaches, and note benefits and limits of the approaches. The chapter shows how qualitative methods can produce new insights into longstanding concerns in the field and also spur new substantive research. The specific goals of the chapter are thus to: (1) provide an introduction and overview of qualitative methodologies for I/O psychology, (2) show how qualitative methods can contribute to and help advance the field, (3) provide resources for psychologists interested in using qualitative research, or at least becoming better informed about its nature and potential, and (4) persuade readers of the value of qualitative research in I/O psychology.

THE NATURE OF QUALITATIVE RESEARCH

Qualitative research is an "umbrella term" referring to studies that employ a range of interpretive methods to "describe, decode, translate, and otherwise come to terms with the meaning, not frequency, of certain more or less naturally occurring phenomena in the social world" (Van Maanen, 1979, p. 521). Qualitative methods seek to produce historically situated tales or narratives that describe what specific people do in particular places at particular times, and to link these tales to reasoned explanations of what people's conduct means to members themselves (Van Maanen, 1998). The focus is on describing the meaning that concepts have from actors' points of view and the reasoning practices that produce members' points of view (Schutz, 1973; Gephart, 1978, 1997).

It is difficult to specify qualitative work in general owing to its flexibility, emergent character, and the many forms it takes (Van Maanen, 1998, p. xi). Qualitative research tends to be multi-method in focus. It uses an interpretive, naturalistic approach to capture members' meanings in the contexts where they are generated (Denzin & Lincoln, 1994a, 2005). It often uses key experiences of the researcher as data or as events to be understood (Van Maanen, 1979), and it focuses on specific cases and exceptions (Van Maanen, 1998). It thus allows room for unanticipated events or findings.

It also seeks answers to questions about how experience itself is created and given meaning (Denzin and Lincoln, 1994a, p. 4).

The classic Hawthorne Study (Roethlisberger & Dickson, 1939) provides a well-known research investigation that offers an important example of how qualitative research methods can be used to study workplace behavior in a business enterprise. The Hawthorne research helped establish important intellectual bases for industrial psychology, personnel management, and human resources management (Schwartzman, 1993; Zickar & Carter, 2010). This study is one of the most discussed research projects in the history of organizational research (Zickar & Carter, 2010) and may well be the most influential behavioral-science study of a business enterprise ever published (Schwartzman, 1993). It involved three phases: an experimental phase, a large-scale interview phase, and an observational phase. By exploring details of each phase of the study, key features and advantages of each method can be demonstrated. This exploration also demonstrates differences between quantitative and qualitative research regarding documentation of outcomes, as well as the relative benefits of the approaches.

Early experimental studies at the Hawthorne Plant, starting in 1924, attempted to examine the relationship between illumination and productivity (Schwartzman, 1993), but the results were confusing and difficult to interpret. In some cases, increases in illumination were accompanied by an increase in output, but, in other cases, there was no increase and was even a decrease in output. Decreases in illumination led to constant output or increased output, and, in one case, two workers continued to produce at an improved rate even when the light was reduced to the intensity of moonlight.

To understand these puzzling results, a series of experiments that formed the first phase of the Hawthorne Study was designed and implemented in 1927. These experiments addressed the relationship between fatigue and monotony on the one hand and job satisfaction and dissatisfaction on the other. It also sought to assess the impact of varying working conditions (Schwartzman, 1993). The most famous of these experiments involved five female operators who were segregated in a room while they assembled electrical relays for telephones. Baseline data on output were collected. Then, experimental manipulations—rest pauses, shorter workdays, free lunches, small-group incentive plans—were introduced into the setting for 24 experimental periods. The key, controversial finding here was the Hawthorne effect: workers' production of relays rose independently of

changes in work conditions and rewards and also rose once rewards were withdrawn.

Investigators began to consider that the study itself might have contributed to the puzzling results. This was hypothesized to occur because investigators listened sympathetically to workers and accorded them special status and attention as they were being studied. In their efforts to keep subjects co-operative and to keep variables in the setting constant for the experiment, the investigators unwittingly altered the total social situation of the group (Roethlisberger and Dickson, 1939, pp. 182–184, in Schwartzman, 1993, p. 7). This realization changed the character of the inquiry. Researchers moved away from testing for effects of single variables or doing a controlled experiment and began to view the work group as a social system of independent elements that included external events, the meanings individuals assigned to the events, and the attitudes of individuals to events. Psychological factors were thus important variables in the situation and not experimental constants.

Researchers thus sought to explore psychological factors and possibilities for improving supervision. To do so, the study shifted from an experimental method to a large-scale interview study involving 30 interviewers and 20,000 workers, conducted between 1928 and 1931. The interview approach was nondirective and focused on matters of interest and concern to employees. It led to the finding that employees were concerned to remain in a specific work group, even if an alternative job paid more, and it demonstrated how workers could "band together" (Schwartzman, 1993, p. 8) to protect themselves against threats to the work group's welfare.

As a result of the interview phase of the study, investigators decided to examine the development of work groups in greater depth, using observational methods (Schwartzman, 1993).

The study was then modified further into an observational study to explore how the work group influenced worker behavior. This involved direct observation of 14 male operators connecting bands of terminals with colored wires and was conducted in the Bank Wiring Observation Room between November 1931 and May 1932—in the midst of the Great Depression. The group was observed in a separate room, and observations were supplemented with interviews to learn what the workers said they did, and to compare this with what workers actually did at work. The observational approach was based on anthropological fieldwork techniques adapted to modern society. Data collection focused on collection of detailed

information on workers and their relationships with one another, the meaning of their work (e.g. what is a day's work?), and activities in the work context. Data were collected by two different investigators. A disinterested spectator undertook observations on the group from within the Bank Wiring Observation Room and kept a record of work performance, significant events, conversations, and interactions. An outsider–interviewer who did not go into the room kept contact with the observer and conducted interviews with workers to gain insights into their attitudes, thoughts, and feelings.

At Western Electric, a complex piece-rate work system was used. This included an hourly wage and a sum, based on an amount that total department production exceeded, guaranteed hourly earnings of its members. Management assumed workers would attempt to improve or at least maintain total output, and so a day's work would be defined by the point where fatigue costs balanced the estimate of added monetary rewards, and the group would thus exert pressure on slower workers. However, observers noted the opposite occurred. A day's work became defined by workers as a specific number of units produced, and this number was lower than management anticipated. Anyone who exceeded this standard normative number of outputs was viewed with disfavour, negatively labelled (e.g. "rate-buster"), and sanctioned to bring them in line. For example, after one worker (W6) had met the informal production rate, another worker (W8) encouraged him to stop working: "W8: If you don't quit work I'll bing you" (Roethlisberger and Dickson, 1934, p. 9, quoted in Schwartzman, 1993, p. 12). W8 then struck W6 and chased him around the room.

The influence of workers' informal organization on productivity was discovered in this phase of the research: The group's beliefs affected their output of terminal units. A key finding of the observational research phase was thus to demonstrate the importance of informal relationships (the informal organization) in controlling worker behavior, and to show that these relationships could foster or impede economic objectives (Schwartzman, 1993).

This study demonstrates a number of features of qualitative inquiry (Schwartzman, 1993; Van Maanen, 1998; Gephart & Richardson, 2008). First, the study used multi-method research, including observations and interviews to capture members' meanings and interpretations. Second, it used analytic induction to create explanations of actual observations.

Third, it remained close to data. Fourth, it focused on common behavior in everyday work settings.

Fifth, key decisions made in the Hawthorne Study show how qualitative research that allows research questions to emerge and study design to evolve over time can uncover unexpected findings that conventional quantitative research might fail to uncover (Schwartzman, 1993; Roethlisberger & Dickson, 1939). When researchers found inconclusive experimental results and a peculiar positive result, a conventional follow-up study could have been developed to improve the experimental design and strengthen control variables. However, repeating the experiments with improved designs would miss the fact that the psychological variables thought to be constant were influencing behavior in the original study, and an improved experimental design would fail to uncover grounds for members' actions. Researchers decided instead to chase the positive effect variables, changed the methodology, and undertook an interview study. Second, when researchers found that good data could come from questioning workers in interviews, they could have taken a conventional approach to develop a questionnaire and to use improved sampling techniques. Instead, they sought to develop clinical and interview skills. Thus, through interviewing, researchers were able to uncover information on psychological variables and to gain insights into the nature of the work group and its influence on workers that it would not have been possible to develop using only conventional, quantitative methods. If the interview results had not led to the decision to engage in observation of work groups, the strong influence of informal norms on group output would not have been uncovered. If different choices had been made, the Hawthorne Study would not have turned out to be the pioneering study it is thought to be (Schwartzman, 1993, p. 16). This discussion of the Hawthorne Study thus provides a strong argument for use of qualitative methods in organizational psychology.

COMPARING QUALITATIVE AND QUANTITATIVE RESEARCH

Qualitative research can be further distinguished from quantitative methods. Qualitative research involves collection of qualitative data—

descriptions of phenomena and observations that are rendered through words, linguistic symbols, and texts (Gephart and Richardson, 2008, p. 31). Qualitative analysis interprets qualitative data using nonquantitative techniques and practices, such as an expansion analysis (Cicourel, 1980)—a line-by-line interpretation of how key concepts operate in a passage of data—or writing a case history that describes key events that emerged over time. In contrast, quantitative data are observations recorded in numeric form, and quantitative analysis involves coding, counting, measuring, and statistically analyzing data. Thus qualitative research implies an emphasis on qualities of entities and on processes and meanings not experimentally examined or measured.

Second, qualitative research generally assumes reality can only be approximated, not fully apprehended, and thus it emphasizes the discovery and verification of theory (Denzin & Lincoln, 2005, p. 11). In contrast, quantitative research often assumes a reality "out there" that can be precisely described and understood (Denzin & Lincoln, 2005, p. 11). Third, both qualitative and quantitative research studies seek to understand social actors' points of view, in group contexts and organizational settings. However, qualitative researchers assume they can get close to the actors' perspective only by using sensitive methods such as interviews and observations that capture human action and meanings. They argue that quantitative techniques such as questionnaires are less able to capture the actor's perspective, because they are distant from actual, situated action and require inferences to be interpretable. In contrast, quantitative researchers seem less concerned with capturing actors' perspectives and may regard interpretive methods as unreliable, impressionistic, and subjective (Denzin & Lincoln, 2005). Fourth, qualitative researchers focus on the specifics of particular cases and contexts and seek to inductively develop emic or insider descriptions and explanations that reflect subjects' worldviews and provide insights into specific contexts. Quantitative research often fails to study phenomena directly, but uses measurement instruments to do so and employs etic or outsider explanations to explain data from local contexts. Quantitative studies also use large sample sizes and seek to develop or deduce general models or explanations that generalize across settings. Fifth, qualitative researchers seek thick descriptions of phenomena, view description as a form of research, and tend to uncover a large range of data from a small number of subjects. Quantitative research is less concerned with rich detail, it separates description from analysis

and explanation, and it uncovers a smaller set of data points from a large number of subjects.

The main strength of qualitative research is its ability to study phenomena simply not available or accessible elsewhere (Silverman, 2006, p. 43) and thus to allow the "real world" of work to inform and shape research and theorizing (Locke & Golden-Biddle, 2004). Silverman notes (2006) that qualitative work can use naturally occurring data to find situations or sequences of actual behavior where situated meanings are deployed to establish the character of a setting. It can examine how apparently stable phenomena (e.g. work under time pressure) are actually "put together" by participants. Qualitative research also provides insights into processes such as meaning construction that are not readily captured with quantitative methods.

Rynes, Bretz, and Gerhart (1991) undertook a study of the role of recruitment in job choice that shows how qualitative research can provide real-world data on members' meanings to address and resolve contradictory findings from quantitative research. Research done just prior to their study used cross-sectional ratings obtained immediately after screening interviews and revealed that recruiting activities were not important to applicants' job choices. However, earlier research using different methodologies, including interviews, archival data analysis, and longitudinal designs, suggested recruitment might have a substantial impact on job choices. Researchers could not answer definitively whether or not recruitment influences job choice on the basis of evidence available at the time.

Rynes et al. (1991) argue that open-ended longitudinal research is likely to give a more accurate description of applicants' search and choice processes than ratings, because it traces actions over time, allows observation of the full range of search and choice processes, and allows for observation of variations in individuals' job-search strategies. Thus, the researchers sought solid, descriptive findings created by "letting job seekers tell us, in their own words, how they made various decisions leading up to job choice" (Rynes et al., 1991, p. 399). These data allow a better understanding of the underlying psychology of job choice and its relationship to organizational recruiting practices and provided grounds for generating future research questions based on close knowledge of the subjects.

Rynes et al. (1991) used a structured, open-ended interview method with 41 graduating students, from four colleges, at two points in time: early in

the second semester and late in the second semester. The first interview sought to understand how applicants formed initial impressions of "fit" with various organizations by, for example, asking subjects to provide examples of a good fit. The second interview focused more on later phases of the search process and general impressions of recruitment practices. Interviews were recorded, transcripts were prepared, and data were content-coded.

As the key objective was to "gain insight into the cognitive processes associated with job search," the analysis emphasized "content-based interpretation" (Rynes et al., 1991, p. 495). After reviewing descriptive statistics for each question (percentage of subjects whose response reflected a surfaced coding category), transcripts were examined "for insight into the incidents, judgements and processes underlying the quantitative results" (Rynes et al., p. 496). In general, the detailed responses and explanations that students provided to questions do not show that ratings of recruitment are "very unimportant" (Rynes et al., p. 510). The importance of recruitment is illustrated by one student who stated, "people do make choices based on how they're treated" (p. 509). Thus, qualitative research can be used to provide rich descriptions of behavior that are not provided by quantitative techniques. These qualitative descriptions can be used as data to understand real work and job-seeking behavior in organizations, and qualitative data from interviews can show how the meanings of phenomena such as recruitment influence subjects' actions. This study thus shows how qualitative research can be used to assess competing theories, and it demonstrates findings that cannot be produced through quantitative research alone.

LIMITATIONS OF QUALITATIVE INQUIRY

Silverman (2006) notes two common features or limitations of qualitative research that often become problems when qualitative research is compared with quantitative research. First, in terms of reliability, some qualitative researchers assert that reliable measures are only needed by positivists, and, as reality unfolds and changes over time, there is no need to worry about the accuracy of measures or the systematic use of methods. Silverman (2006) notes that this argument implicitly assumes that stable properties

of phenomena do not exist. If they do not exist, this rules out "any systematic research," whether it is qualitative or quantitative (Silverman, 2006, p. 47). Thus, Silverman argues, following Kirk and Miller (1986), that, if we concede that stable properties of phenomena exist, "why shouldn't other work replicate these properties?" (Silverman, 2006, p. 47). Second, qualitative research is often accused of anecdotalism or exampling (Glaser & Strauss, 1967), as research reports sometimes use only a few telling examples and ignore less clear, contradictory, or deviant examples and cases. Doubts emerge about an explanation of phenomena when samples are selective and not exhaustively analyzed. This limitation can be overcome by use of systematic, theoretical, or other sampling strategies and comprehensive analysis of datasets or observations (Gephart, 2004). However, it erroneously leads many (quantitative) researchers to downplay the value of all qualitative research (Lee, Mitchell, & Sablynski, 1999).

In addition, it is important to point out that there are strong and weak qualitative studies, just as there are strong and weak quantitative studies, and qualitative research per se is not equivalent to "small n" (or poor quality) quantitative research. For example, Perlow (1997) undertook a well-designed and well-conducted qualitative research project that involved a 9-month participant observation study of work–life conflicts and the high-pressure work environment of 17 engineers in a specific software group. The study sought to understand the time pressures faced by engineers, how engineers viewed these issues, and how the issues and views impacted work–life balance. The study used multiple methods, including interviews, job shadowing, an informant protocol wherein informants recorded their activities on randomly selected days, company records on performance, home visits to engineers' residences that included spousal interviews, and an experiment to understand time pressures on engineers and to assess whether or not existing work practices were necessary (Perlow, 1997, p. 115). By systematically analyzing data from multiple sources and tracking engineers' work and nonwork activities across time and settings, Perlow found that time pressures on engineers emerged from people, including other engineers who interrupted their work. The recurrent but seemingly necessary interruptions led to slower work, a crisis mentality in the organization that required long work hours, and negative consequences for the organization.

In contrast, a small-sample, quantitative study would likely involve structured surveys or interviews with (17) engineers using pre-established

questions. A quantitative study could be designed to collect standardized measures of time pressure or work stress using previously developed instruments and could attempt to relate the dependent variables (e.g. pressure or stress) to other contextual or psychological variables, e.g. marital status, family size, job satisfaction, or work motivation. A conventional study would also likely produce a more limited range of data and data sources for analysis. It would also be unable to inductively uncover unanticipated features of the work setting, such as interruptions, to use observations to track how interruptions impacted other work activities in actual work settings over time, or to undertake home visits and interviews to describe and understand the impacts that time pressures at work have on home life. Given the small sample size, statistical testing of hypotheses may lack power, and valid inference may be problematic. Thus, a qualitative study would provide a richer description of the research phenomena and contexts than a conventional study, it would describe the phenomena in real contexts as they "actually" exist, it would permit discovery of insights from data via induction, and it would provide rigor through providing multiple data sources on given phenomena. On the other hand, a qualitative study would not be able to provide quantitative measures of the relationships among variables or to quantitatively assess reliability of measures, and hypothesis testing would be more equivocal owing to the lack of quantitative methods. The outcomes of a qualitative study and a small-n quantitative study would thus differ. It seems unlikely, for example, that a small-n quantitative study of work–life conflict would be able to develop and substantiate a model of the vicious work cycle and its impact on work–life balance, or that such a study would have sufficient evidence to form the practical recommendations that Perlow (1997) offers for addressing these problems.

APPROACHES TO QUALITATIVE RESEARCH

There are a number of distinct perspectives or paradigms of qualitative research. Each paradigm makes its own important assumptions about the nature of reality, and each perspective has distinct goals, methodological orientations and practices, and research outcomes (Gephart & Richardson, 2008; see also Denzin & Lincoln, 1994b; Lee et al., 1999; Gephart, 2004;

Locke & Golden-Biddle, 2004; Denzin & Lincoln, 2005). I address four of these views: positivism and post-positivism, interpretivism, critical research, and postmodernism. Common, distinct, and central features that distinguish different paradigms or views are discussed, but the discussion is not exhaustive. Familiarity with these paradigms and their features is needed if researchers are to select and use methodologies in a manner that is consistent with the paradigms and assumptions that are made. In actual practice, the paradigms often overlap and, at times, become indistinct.

Positivism and Post-Positivism

Qualitative positivism and post-positivism tend to make many of the same assumptions as quantitative positivism and post-positivism, but differ insofar as qualitative positivism and post-positivism use qualitative data and not quantitative measures of phenomena (Gephart & Richardson, 2008, p. 32). Positivism uses a realist ontology and assumes the existence of an objective world that can be described and represented in a direct, mirror-like manner if one uses unbiased methods (Silverman, 2006, p. 122). The key focus is on variables that are assumed to compose (or at least represent) real features of the world. The purpose or aim of positivist science is to discover unknown but actual facts (Silverman, 2006). This is done by developing measures or other representations of key constructs, using these measures or representations to uncover deterministic, causal relations among variables (Gephart & Richardson, 2008), and then testing hypotheses that specify the expected relationships anticipated by theory. Post-positivism differs from positivism primarily by assuming the world is probabilistic and not deterministic, and, hence, one can only falsify, not confirm, hypotheses (Gephart & Richardson, 2008, p. 32). The general research process involves identification, operationalization, and measurement of key variables, followed by determining relationships among variables qua facts. These relationships are then compared with hypotheses for confirmation or testing. A key potential limitation of qualitative positivism and post-positivism is the lack of explicit qualitative methods that can be used to establish relationships among qualitative variables or to test or falsify hypotheses involving qualitative variables (Gephart & Richardson, 2008).

Lee et al. (1999) provide a review of qualitative research in organizational and vocational psychology from a positivist perspective. They argue the

key value of qualitative methods is to provide "more tools and methods to facilitate our research agenda" (Lee et al., 1999, p. 163). They state that the key purposes of qualitative research are to generate, elaborate, or test theories from organizational psychology. Theory generation occurs when qualitative research "produces formal and testable research propositions" (Lee et al., 1999, p. 164). Theory elaboration occurs when pre-existing conceptual ideas are used, but formal hypotheses or propositions are not present (Lee et al., 1999), and, hence, theory elaboration involves developing explicit hypotheses from relatively simple conceptual models. Theory testing occurs when explicit hypotheses are specified and evaluated in research.

Lee et al. (1999) point out several reservations about qualitative methods that are common among psychologists who subscribe to modernist assumptions and positivist worldviews. First, qualitative methods are seen by psychologists as having too many unconscious biases operating (Lee et al., 1999, p. 182). Second, method descriptions in qualitative articles are seen to "insufficiently describe how they conduct their applications" (Lee et al., 1999, p. 182). Third, there is the view that qualitative methods produce poor-quality research. They argue that, "these tensions . . . derive from differing philosophies of science" (Lee et al., 1999), and that qualitative research may not typically fit with the worldview of traditional I/O psychology research.

Lee et al. (1999) use a conventional positivist view to offer a solution to these limitations that may help qualitative research move beyond "a second-class status" (Lee et al., 1999, p. 184) in industrial psychology. The solution is to

> adopt the conventional and widely accepted ideal for methodological descriptions. Simply put, an article's description of its method must be sufficiently detailed to allow a reader (or our peer reviewers) to replicate that reported study either in a detailed hypothetical or in an actual manner.
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> (Lee et al., 1999, p. 184)

Although this argument provides one basis for strengthening the role of qualitative methods in I/O psychology, it may not go far enough to be responsive to the range of assumptions made by different paradigms, and a more complete methods discussion does not guarantee that the findings are replicable, meaningful, valid, or important. Thus, it may be important

for authors to demonstrate: the appropriateness of methods used in a given study to the questions addressed; the connections with existing theory demonstrated; the reasonableness of criteria used to select cases or subjects; the systematic nature of data collection and analysis; use of accepted procedures for analysis; how themes, concepts, and categories were developed from data; and evidence for and against the researcher's argument; it may also be important to clearly distinguish between data and interpretation (Silverman, 2006).

Lee, Mitchell, Wise, and Fireman (1996) demonstrate the use of qualitative research to provide data for theory testing and elaboration in a situation where quantitative methods alone were not sufficient for testing or elaborating a theory. This study tested a model of voluntary employee turnover (Lee and Mitchell, 1994) that challenged prevailing models of turnover. Conventional models of turnover focused on how job dissatisfaction leads to leaving. In contrast, the Lee and Mitchell (1994) model of turnover was based in image theory and specifies four multiple decision paths of voluntary turnover that are characterized by shocks and by the amount of psychological analysis that precedes a decision to quit. Lee et al. (1996) used a quantitative survey methodology and qualitative interviews to produce data on voluntary turnover among nurses. Semi-structured interview questions were designed to assess the seven major components of the new turnover model, and pattern matching was used to locate features of the model evident in interview responses. For example, Decision Path 1 involves a shock, a matching script, no job search, no evaluation of alternatives, and no offers in hand. Two remaining variables —image violation and disaffection—were not applicable to this path. An example of turnover reflecting this path involved a nurse who quit because her husband planned to move to seek employment. Whereas most traditional turnover models depict quitting to be "the focal and distinct event" (Lee et al, 1996, p. 18), the six cases the authors uncovered that represent Path 1 depict quitting as of secondary importance—a step to a more salient outcome. Traditional models also depict job satisfaction as important to quitting, but the six cases show job satisfaction to be irrelevant.

The study shows that there are new and different ways to conceptualize the turnover process. It uncovered evidence of processes that cannot be explained by traditional turnover theories, and it calls into question some common assumptions in the management literature concerning turnover. Qualitative research was necessary to provide "reliable and valid indicators"

to test and thus show the value of the newer turnover model (Lee et al., 1996, p. 28).

The positivistic use of qualitative analysis in I/O psychology research is also evident in Pratt's (2000) ethnographic study of Amway distributors. In this study, Pratt depicted Amway as an organization attempting to manage the identification of its employees with the company. He examined the process of identification through a combination of qualitative data-gathering methods, including participant observation, open-ended interviews, and archival data gathering. Specifically, he worked alongside informants as a normal employee for almost 2 years, sold products, attended formal and informal meetings, and wrote down his observations in a research journal. In addition, a total of 17 current distributors and 16 non-distributors (people who had resisted Amway's practices) were interviewed to gain insights into how individuals viewed their experiences in the organization. Furthermore, the archival data (company books and booklets, audiocassette tapes, stories in magazines, and website) provided the contextual information on the company and on the technical sources that the company used to motivate distributors. The data were reviewed and analyzed iteratively for dominant themes. The results reveal two types of practice used to manage identification: Sensebreaking practices broke down existent meanings, and sensegiving practices provided new meanings. When either practice fails, members may fail to identify with the company or may experience ambivalent identification with the organization. This study is an illustration of the positivistic paradigm in three aspects. First, the researcher's primary consideration was developing theory that reflected the facts of an objective world. Second, language and accounts in this study were used as a resource to provide facts, rather than to understand the worldviews and lives of informants. Last but not least, although there were no specific hypotheses proposed at the outset of the study, the study uncovers and depicts models of identification management and offers several hypotheses at the end of the article that call for future testing and generalization.

Pratt's (2000) study reveals things that can be uncovered and addressed with a good qualitative study, but that cannot be readily uncovered or examined through a good quantitative study. In his study, Pratt sought to illuminate the practices and processes involved in aligning individual and organizational values. Much research has shown that attempts to transform identity tend to fail, but it is not known why. Qualitative research was thus

needed to provide more detail on successful and unsuccessful identity-transformation processes (Pratt, 2000), as deep understanding of the processes or dynamics of identification is needed to build theory in this domain. It is difficult to discover social and cognitive processes with quantitative research, whereas one can often observe such processes using qualitative techniques. For example, there is considerable research on "fit," but little on processes that underlie fit.

Pratt (2000) thus used three qualitative methods to explore identification processes and to uncover details that quantitative research could not uncover: semi-participant observation, open-ended interviews, and archival data analysis. Semi-participant observation involved observing distributors and engaging in distribution. These observations and participation were needed to study complex and morally charged processes, such as identity transformation, where natural participation is the best method to get at the phenomenon (Pratt, 2000, p. 460). Natural participation allowed the researcher to gain the trust of employees and to ask questions that might otherwise seem unusual to a co-worker. Open-ended interviews were used to gain insights into how individuals viewed their organizational experiences, and archival data provided insights into Amway's belief system, as well as information about techniques used to indoctrinate members. Rich data on these phenomena as discussed by members themselves would be difficult to produce or capture using quantitative techniques that seek to measure discrete variables at specific points in time. One needs instead to describe in detail how identification as a process occurs in talk and documents and unfolds in specific settings over time.

The unique qualities of rich data collected using multiple methods thus allowed Pratt (2000) to engage in inductive theory building that would be difficult to undertake from quantitative data. First, qualitative findings allow Pratt (2000) to move beyond merely positing identification practices to understand how practices of identification work in processes that lead to multiple forms of identification. Second, Pratt (2000) was able to link motivation to sensemaking in new ways, and to show how the need to create meaning motivates identification when one is confronted with a disparity in identities. Third, the rich data collected over time allowed Pratt (2000) to be the first to show how organizational practices can lead to a wide range of identifications. Fourth, by following identification processes across social actors and situations, Pratt (2000) was able to demonstrate that the process of identification is dynamic and not stable.

The Interpretive Paradigm

Interpretive research seeks to understand the production of meanings and concepts by social actors in real scenes of action (Gephart, 2004). It takes the view that reality is socially constructed (Berger & Luckmann, 1966) and seeks to understand how people create and maintain a sense of shared meaning or intersubjectivity in interaction (Schutz, 1973). In simple form, the social construction of reality is a dialectical process wherein people are born into an objective world, they learn about this world through intersubjective processes that develop subjective meanings for the world, communicate these meanings to others during interaction (intersubjectivity), and use these meanings to create objective realities such as buildings and books. They then give these realities subjective (cognitive or personal) and intersubjective meaning. Intersubjective meaning can be conceived as the sense of shared meaning that is produced in and through social interaction and that exists only during the perishing occasions of social conduct (Schutz, 1973; Cunliffe, in press).

Interpretivists seek to understand the world of lived experience and thus to grasp actors' definition of the situation from the point of view of social actors participating in this world (Schwandt, 1994, p. 118). Interpretive scholars assume that understanding the world of meaning requires interpreting this world of meaning and elucidating processes of meaning construction to understand how meanings become embedded in language and action (Schwandt, 1994). Interpretive research thus assumes that researchers must engage directly with their subjects of study and participate in their worlds (subjective, intersubjective, objective) to understand these worlds and the meanings used to create and sustain them (Locke & Golden-Biddle, 2004). This is done with sensitive methodologies, including observational research and ethnography, that allow researchers to observe and understand members' perspectives and meanings for phenomena, events that are observed, and the actions that flow from these events and meanings (Locke & Golden-Biddle, 2004).

In interpretive research, a relativist stance toward meaning is adopted (Gephart, 2004). It is assumed that different groups or persons may interpret phenomena differently. Interpretive research explores how meanings are created, negotiated, sustained, and modified in specific contexts (Schwandt, 1994, p. 120), and how different interpretations lead to different actions and outcomes (Gephart, 1978). It inductively constructs second-

order concepts of social science from first-order or situated concepts of social actors (Schutz, 1973). Interpretive qualitative work thus focuses on language use in social settings and seeks to provide thick descriptions of talk and nonverbal action in such settings (Gephart, 2004, p. 457). The interpretive focus on understanding members' meanings and interpretive processes, rather than on producing qualitative facts, is consistent with the view that what we take to be objective knowledge and truth is the result of perspective. Knowledge and truth are produced in and through social interaction and not merely discovered by the mind (Schwandt, 1994, p. 125). It is important to note that interpretive research does not refer to all forms of research that interpret data. Rather, interpretive research has emerged from specific scholarly domains that address the nature and construction of meaning (Schutz, 1973; Schwandt, 1994).

Interpretive research in I/O psychology provides opportunities to (1) observe and understand actual meanings in the settings in which they are produced, (2) describe and understand how different meanings influence behavior, and (3) explore how context shapes meanings, interpretations, and behavior (Locke & Golden-Biddle, 2004).

Isabella's (1990) study of how managers' interpretations evolve as organizational change unfolds is a classic and award-winning example of research that uses the interpretive perspective.

The study made a number of critical assumptions that reflect the interpretive paradigm. First, organizational members are assumed to create the reality they inhabit. Second, there are shared frames of reference within a collective. Third, managers' interpretations and views are important to organizational change, although they are often made a posteriori, i.e. after events have transpired (Isabella, 1990, p. 10). Isabella thus used an inductive study to explore how managers interpret events over time, and how these interpretations or viewpoints influence change. A sample of 40 managers at all organizational levels was selected for semi-structured interviews that included open-ended questions. The managers were asked to describe and discuss five specific critical events uncovered in a pilot study conducted in the organization, e.g. the acquisition of the company by an international firm. The analysis used a grounded-theory approach, where data were compared with an emerging theory as data collection proceeded, and interview questions were adjusted to respond to emerging insights. Preliminary categories were uncovered by review of data and were used to organize data. Isabella (1990) provides a description of the initial and final categories

she used. About 200 excerpts of data were coded inductively into the inductively developed categories. The data revealed that interpretations of key events reflect the stages of anticipation, confirmation, culmination, and aftermath. Each stage is described in detail, using quotations from data to substantiate key points. Then, processes that move individuals from one interpretive stage to the next were recovered from the data, showing the bases for shifts from each stage to the next. A model of evolving interpretations was then inductively constructed. The model reveals several important aspects of changing interpretations, including the importance of cognition and interpretive triggers that accompany the process of change (Isabella, 1990, p. 33).

Isabella's (1990) study shows a number of things that would be missing from a good quantitative study. First, through a pilot study using open-ended interview questions, the researcher was able to get informants to describe in detail the critical events they had experienced. This information made it possible for the researcher to select the five events all informants mentioned, to help structure data-oriented interviews. Second, data-oriented interviews asked informants to describe in detail how each event unfolded, and these interviews provided rich data that described actors' views. The interviews were flexibly undertaken, using questions that covered the same topics for each informant, but the questions were adapted to individual informants to explore areas of specific interest. This flexible approach to adapting interview questions would be unlikely to be used in quantitative studies, where standardization across participants is thought to be critical. Third, an evolving grounded theory was developed from rich data sources by using constant comparisons and contrasting theory and data. Detailed descriptive data are unlikely to be produced in quantitative research, and it would be difficult to inductively uncover substantive patterns or themes from numeric data. Thus, the systematic production of rich qualitative data over time, concerning interpretations of organizational change, allowed Isabella (1990) to see how managers construe events over time and to produce a stage model of change with four analytically discrete stages. The qualitative data and analysis also allowed Isabella to link viewpoints to shifts in interpretive perspectives, to identify cognitive patterns associated with change processes, and to see resistance as an inherent element of the change process, rather than being an obstacle to change, as it is depicted in conventional change literature.

Critical Theory and Research

The critical-research tradition is grounded in the works of Karl Marx and the Frankfurt School in Germany (Morrow, 1994) and has been elaborated by a number of social researchers and philosophers, including, in particular, Jürgen Habermas (1973, 1979) and Claus Offe (1984, 1985). The term "critical" has a range of meanings that include critique oriented toward unveiling ideological manifestations in social relations; critique as methodology that establishes the underlying presuppositions of theories that address the nature of reality, knowledge, and explanation; and critique as a process of self-reflection wherein the investigator is aware of being subject to, or part of, the critique (Morrow, 1994, p. 7). Critical theory provides (a) an approach to the human sciences, (b) a conception of society, and (c) a vision for creating certain social values. As an approach to the human sciences, critical theory insists on analyzing the objective structures that constrain human imagination (Morrow, 1994, p. 9). It is allied with anti-positivist and interpretive approaches in asserting that social facts are qualitatively different from "facts" of nature, because social facts are human creations. Second, as humans create society, the use of social science is not analogous to control of physical nature (Morrow, 1994, p. 9). Thus, critical theorists make a case that social-science research is different from natural-science research. Critical research explores this distinction through a historical approach.

Critical theory can be used to study phenomena and to learn about them—the focus of this chapter. It can also be used to develop political strategies for action (Kincheloe & McLaren, 2005). Further, although power and control are common topics in critical research, critical scholarship has been used to analyze a wide range of topics, including business ethics (Boje, 2008), pedagogy and a range of cultural issues (Kincheloe & McLaren, 2005), and industrial accidents (Gephart & Pitter, 1993). However, the basic focus of critical theory is the historical emergence of capitalism (Gephart, 2004) and the ways that fundamental contradictions in capitalist society play out in social life. A key goal is to create or enhance democracy in society and organizations.

A basic contradiction that is examined by critical theory is that, in a capitalist society, the owners of production have the right to appropriate surplus value from labor and to retain it (Gephart & Richardson, 2008, p. 34). This contradiction produces other contradictions and inequalities

in society (Gephart & Pitter, 1993) that often create management and labor relations concerns. These contradictions and capitalist structures emerge historically and may become reified or taken for granted as "immutably concrete and inevitable" natural facts of social life (Gephart & Richardson, 2008, p. 34) that structure social relations in ways that lead certain groups to dominate and oppress other groups. As a result, critical theory is intensely concerned with the ways power operates to dominate and shape consciousness (Kincheloe & McLaren, 2005, p. 309) and to produce alienation that "inhibits the realization of human possibilities" (Morrow, 1994, p. 10). Through critical reflection (Poutanen & Kovalainen, 2010), people can learn to de-reify the taken-for-granted structures and inequalities and thus critique and escape these structures. Recently, critical theory has also addressed the productive aspects of power—the ability to empower, to facilitate democracy (Kincheloe & McLaren, 2005), and to help people become reflectively aware of the social constraints on their lives. Critical theory thus seeks to change the world (Calhoun & Karaganis, 2001).

Critical scholarship is a diverse domain that extends beyond critical theory. It is bounded by Marx on the left and the German social theorist Max Weber (1978) on the right (Morrow, 1994). Critical research uses a dialogic and dialectical methodology involving dialog between the investigator and the subjects of inquiry in an effort to transform ignorance and misapprehensions or false consciousness into more informed or true consciousness (Guba & Lincoln, 1994). However, a variety of methodologies can be used in critical inquiry, and it is arguably the use of critical reflection in conjunction with common qualitative and quantitative methods that produces a critical perspective in research. Indeed, some critical scholars work to build falsifiable theory, some use a more traditional grounded, qualitative approach, and others reject post-positivist and traditional methods altogether (Denzin & Lincoln, 1994b). The validity of critical research is often assessed by scholars in the tradition in terms of the ability of research to produce critical reflexivity that comprehends ideology and transforms repressive structures of domination into democratic structures (Gephart & Richardson, 2008).

Laurie Graham's (1995) covert, ethnographic study of the Japanese model of lean production at work in the Subaru–Isuzu plant in Lafayette, Indiana, provides an example of research from the "left" side of the critical-scholarship domain. She uses a labor-relations perspective and starts by

noting a common assumption that the Japanese model "creates a structure that provides for meaningful worker participation in decision making" (Graham, 1995, p. 2). To explore and critique this view, Graham worked as a covert participant observer at Subaru–Isuzu Automotive for about 6 months. She took extensive field notes on workplace events and behavior and developed a detailed case study of her experiences. Her method reflects many aspects of interpretive research, such as seeking workers' views on issues, observing action as it unfolded, and using informal interviews to supplement observations (Graham, 1995, pp. 16–17). Her extensive and detailed data provide thick descriptions of work on the assembly line and the functioning of teams during vehicle assembly. For example, her rich data allow her to describe such common features of Japanese-based work culture as setting and modifying what the company referred to with the unique term "takt time"—the standard time that each worker is allowed to complete a task (Graham, 1995, p. 75).

Graham (1995, p. 98) found that the work team was "the driving structure behind the hegemonic system" that controlled workers. This system used several nested forms and levels of compliance: self-discipline, peer pressure, mutual support, and direct authority. Exploring the theme of domination and alienation, Graham (1995, pp. 136–137) argues that the expressed purpose of the system was to involve workers in managerial decision-making, but this was "not the true purpose of the system." Instead, she notes, "I view its purpose in exactly opposite terms" (Graham, 1995, p. 137). "The intent of this web-like system is to create an inescapable, highly rationalized system of worker compliance" (Graham, 1995, p. 138).

An example from the "right" side of critical scholarship is provided by Barker (1998, originally published in 1993), who used participant observation to explore self-managed work teams at a small manufacturing firm. Barker focuses on concertive control, where workers collaborate to develop their own means of control (Barker, 1998, p. 130). His theoretical context employs concepts of control examined in labor-relations theory and in the social theory of Max Weber. Barker's (1998) focus emerged during the course of fieldwork as he sought to explore how control practices in the research setting differed from the bureaucratic practices in place previously in the setting and prior to the introduction of teams (Barker, 1998, p. 137). He visited the manufacturing facility for one half-day per week for 6 months before beginning extended data collection. Multiple types of data were collected, including in-depth interviews, observations,

and documents. The sample of interviews was stratified "as much as possible" (Barker, 1998, p. 137) across teams, employment types (full time, part time), and ethnic and gender lines. A total of 275 research hours were involved in the study, and 37 in-depth interviews were conducted. He found that, although peer pressure was essential to team work, peer pressure and power games were a manifestation of concertive control that rested on the team's values and norms. These team norms became reified and acted as a set of rational rules (Barker, 1998, p. 147). However, the authority to command obedience to rules moved from managers to the team members themselves (Barker, 1998, p. 152), and thus team members became "their own masters *and* their own slaves" (Barker, 1998, p. 152; italics in the original). Barker thus provides a description of work in the new team-based management system that critiques and counters dominant claims that the new system empowers employees and gives them greater control over their work. Referring back to Max Weber's famous idea that bureaucracy can create an iron cage through hierarchical rules, Barker notes an ironic paradox in team-based management: "The iron cage becomes stronger," and "the concertive system creates a new iron cage whose bars are almost invisible to the workers it incarcerates" (Barker, 1998, p. 155). To resist this control, workers "must be willing to risk their human dignity" (Barker, 1998, p. 156). Barker thus exemplifies critical scholarship by using traditional qualitative methods to describe reified structures and taken-for-granted truths about the new team-based structures, to contest these "truths" and show they are false, and to show the hidden managerial and capitalist interests that the contradictions of the workplace serve.

These studies address issues and uncover insights that quantitative research would find it difficult to provide. It is not possible to use quantitative tools such as questionnaire items to describe rich details of factory settings, such as workplace interactions as they unfold, and to do this covertly, as Graham (1995) did. Rich descriptions and in situ observations allow qualitative researchers to record what occurs and to make reasoned interpretations based on complex contextual knowledge and observations of actual experience—those of subjects and of the observer.

Quantitative studies could, however, use questionnaires to explore the nature and correlates of meaningful participation in shop work. For example, one could measure how job satisfaction is related to participation. One could also content-code documents to develop measures of participation to test whether or not a flexible work setting allows participation.

One could also assess which pre-specified forms of participation exist therein. Quantitative studies could also be improved through grounding measurement instruments in the realities of the work setting, e.g. by developing questions about barriers to participation. Clearly, there are real differences in the outcomes of qualitative and quantitative studies of worker participation.

The Postmodern Perspective

Postmodernism is a term with many meanings and a "huge variety of ideas" (Locke & Golden-Biddle, 2004). It is based in philosophy, the humanities, and literature. It can be defined as the era after modernity and as a style of intellectual production (Jameson, 1991). The postmodern perspective on knowledge thus provides a humanistic, rather than a scientific, perspective on organizations and develops research reports that have the character of essays rather than empirical studies. It seeks to re-conceptualize how we experience and explain the world (Rosenau, 1992, p. 4) and to show the "impossibility of establishing" any foundational underpinnings for knowledge (Rosenau, 1992, p. 6). In contrast to modernist research, postmodernism looks to the unique, rather than the general, phenomenon. It examines intertextual relations (how texts become embedded in other texts) rather than causal relations, and explores the unrepeatable rather than the recurrent (Rosenau, 1992, p. 8). From this view, there is no singular reality or truth: There are only multiple realities and multiple truths, none of which is superior to other realities or truths.

Postmodernism offers I/O psychology the opportunity to challenge the content and form of dominant (modernist) models of knowledge, to explore the political and discursive processes that create features of the world that dominate people, and to understand how social categories such as "employee" are produced as totalizing or standardizing tools of control (Locke & Golden-Biddle, 2004). Postmodern scholarship also provides an opportunity to develop "alternative representations" to explore new viewpoints and perspectives (Gephart, Boje, & Thatchenkery, 1996, p. 8). I address important aspects of postmodern scholarship that could help organizational psychologists better understand and critique forms of knowledge in the field, develop new approaches to knowledge formation, and uncover important new questions and topics for study. Given the rapid growth and prevalence of postmodern qualitative research, it is also

important for readers to be familiar with the perspective, even if they are not likely to adopt the approach.

Postmodernism assumes that realities are value-laden and that they contain contradictions (Gephart & Richardson, 2008). Postmodern research explores the values and contradictions in organizational life, studies how hidden dichotomies of power operate, and addresses how social categorization is used to control and dominate specific groups and individuals. Reality is seen as a representation created by particular discourses or language systems in specific historical contexts (Locke & Golden-Biddle, 2004). Truth is conceived as an outcome or product of language and power relations in which everyone is embedded. Multiple realities thus exist, and no single reality should be privileged over others (Locke & Golden-Biddle, 2004). Postmodern scholarship challenges the value-free nature of scientific research and asks, "whose interests are being served?"

The focus in postmodern research is often discourse—spoken and written uses of language (Fairclough, 1992) in conversations, stories, and texts that categorize actors (managers, workers) and limit their opportunities for action. Postmodern scholarship explores the political and discursive processes that create features of the world, such as the "employee," and seeks to understand how categories are shaped and used as (often tacit) tools of domination in social life. The goal is to uncover and displace or challenge hidden aspects of communication and discourse (Locke & Golden-Biddle, 2004). Valid or useful postmodern research thus seeks to influence readers' views of the world (Gephart & Richardson, 2008) and to produce "reading effects" that may unsettle a scholarly community such as organizational researchers (Calás & Smircich, 1991). Methodologically, postmodern research tends to focus on texts and to use discourse analysis, narrative analysis, rhetorical analysis, deconstruction, and textual analysis.

Features of postmodern organizational scholarship can be illustrated through an example of deconstruction in organizational research (Martin, 1990). Deconstruction, a perspective on literary criticism developed in the writing of Jacques Derrida (see, e.g., Derrida, 1974; Culler, 1982), uses methods of literary criticism to challenge the consistency and claims of a given text and to uncover underlying literary practices that accomplish meaning in a text (Gephart, 1988, p. 14). For example, Martin (1990) deconstructs a conference speech by a corporation president who claims

to be "deeply concerned" about the well-being of employees. Because of an upcoming new product launch, a young woman employee "has arranged to have her Caesarean yesterday in order to prepare for the event" (Martin, 1990, p. 339). Martin deconstructs this story to show how gender conflict is suppressed and thus allowed to continue. In so doing, Martin (1990) examines what is said, what is not said, and how the story could be reconstructed differently to challenge or resist tacitly gendered constructions that de-privilege women at work. The focus of analysis is on "interpretations that lie between the lines" (Martin, 1990, p. 341). Martin dismantles the dichotomy in the story between the public world of work and the private world of the family by exploring silences and disruptions in the story and metaphors that invoke ideological assumptions that de-privilege women. Next, Martin (1990) reconstructs the gender conflicts uncovered by deconstruction by substituting phrases that invert the meaning of the story to reveal how gender inequalities can be discursively alleviated. She concludes by suggesting that some familiar dichotomies and categories in organizational research might need to be abandoned or rethought, and alternatives developed. This research establishes there are important domains of organization, such as gender conflict, that have not been adequately explored or exposed. Through deconstruction, these issues can be uncovered and addressed.

A quantitative study could potentially be designed to content-code the text of the speech that Martin (1990) analyzed or a larger sample of corporate presidents' speeches. Some properties of the text, such as the use of gender-related terms or the presence of textual contradictions, could be counted and, hence, measured, but it would be difficult for quantitative research to provide a line-by-line interpretation of gendered statements in an unfolding speech, to uncover hidden dichotomies, or to propose reconstructed speech acts that avoid producing gender conflict. Thus, many insights into gender conflict in organizations uncovered by Martin (1990) would likely be missed in a good quantitative study.

Comparing Perspectives

Each perspective or paradigm has specific assumptions about the nature of reality. Each has different goals, distinct methodological foci, and different methods and approaches, and each perspective assesses knowledge in different ways. These features are summarized in Table 9.1. A given

TABLE 9.1

Paradigms of Qualitative Research

Dimension	Positivism and post-positivism	Interpretive research	Critical theory	Postmodernism
Nature of reality	Single, objective reality independent of people	Socially constructed reality integrating subjective, inter-subjective, and objective features	Dialectical reality with contradictions that produces power relations, inequities	Multiple, fragmented realities
Goal	Discover facts and interrelationships among facts	Understand how members' meanings and practices in natural contexts create realities	De-reify taken-for-granted meanings; emancipation; social change	Understand how discourses produce social categories and disrupt categorization
Methods foci	Variables, hypotheses, quantification	Language use, communication, meaning	Contradictions, relations of domination and oppression	Discourse, texts
Methods orientation	Ability to mirror reality with reliable and valid measures	Capture meanings and behaviors with linguistic signs and stories	Reflection, critical reflexivity, dialectical methods	Textual analysis
Assessing knowledge	Hypothesis testing, falsification	Capability of scientific interpretations to recover members' knowledge and reasoning processes in actual settings and provide second-level scientific interpretations	Subject knowledge claims to critique; valid knowledge eliminates false consciousness and changes power relations	Ability of analysis to uncover contradictions, expose hidden interests served, critique and displace dominant knowledge claims

methodology can often be used by different paradigms, but the ways that the methodologies are used are shaped by paradigmatic commitments and assumptions.

METHODS FOR COLLECTING AND ANALYZING DATA

This section describes widely used qualitative-research methods that hold promise for I/O psychology. The methods are addressed individually, but the use of multiple methods is common in qualitative research.

Conventional research, including quantitative studies, tends to be described, composed, and enacted through a series of stages where a literature review is completed, hypotheses are developed, measures are selected, data are collected and analyzed, and results and findings are produced. Research designs are thus created in advance of data collection and, generally, are followed with only limited adjustment. In contrast, qualitative research is often open, flexible, and emergent, and may unfold in a nonlinear way (Van Maanen, 1998), and the key foci, purposes and goals, appropriate data, and other design aspects may be determined only late in the research process. Thus, an initial design may guide qualitative research, but many aspects of the design emerge as the research progresses. This section addresses features of specific qualitative methodological approaches, but does not emphasize formal aspects of qualitative-research design.

Case Study

The case study is a widely used method that is difficult to define in a simple manner (Locke & Golden-Biddle, 2004). The qualitative case study "aims to describe a particular phenomenon and how it changed over time in a specific context, emphasizing processes that underlie the phenomenon and respective changes" (Gephart & Richardson, 2008, p. 36). It has three characteristics: (1) a focus on contextual interrelationships that compose a specific research object or entity, e.g. an organization; (2) an analysis of the relationship between contextual factors and the focal entity; and (3) the use of insights about interactions between the contextual factors and the entity to generate or address existing theory (Mills, Durepos, &

Wiebe, 2010, p. xxvii). The object or entity is thus the "case." Case studies can be either qualitative or quantitative or a mix of these approaches (Yin, 1981). For example, Lips-Wiersma and Hall (2007) conducted an in-depth case study to explore whether individuals take more responsibility for their career during times of organizational change. They used the term "case study" to refer to a sample of 50 employees, drawn from a single organization in New Zealand, who were interviewed. The interviews, quantitative information from surveys, and other sources were used to understand how employees manage their careers during significant organizational change.

Different types of case study are possible, including exploratory, descriptive, and explanatory studies (Yin, 1981, p. 59). Case studies can reflect different traditions, such as sociology or anthropology (Hamel, Dufour, & Fortin, 1993). The typical case study is a lengthy description in narrative form (Yin, 1981, p. 64), possibly reflecting the history of specific events. Case studies are often complex, and Yin (1981) recommends that they be organized or built on a clear conceptual framework, so that they can be comprehended more readily. Case studies can thus contextualize phenomena, provide in-depth descriptions and understanding of phenomena, and provide insight into multiple dimensions of phenomena (Yin, 1981; Gephart & Richardson, 2008). Further, although case studies are often conceived to be limited to a single case or instance, Campbell (1975) argues that case studies allow examination of multiple theoretical implications in a single study. Indeed, a case study can recover multiple examples of a given phenomenon, such as employee reactions to organizational change, and can permit comparative analysis of phenomena that recur over the time period in which the case is examined. A variety of qualitative-research methods including ethnography are frequently composed and described as case studies.

The choice of methodology in case-study research is influenced by the paradigmatic and theoretical perspectives used to analyze the case. A positivist case study takes a realist view and examines the facts of a case to recover true descriptions of real-life practices and actors' views. For example, Lips-Wiersma and Hall (2007) used a positivist qualitative approach to determine whether or not individuals do in fact take greater responsibility for career choices when faced with organizational change. An interpretive case, as illustrated by Isabella's (1990) study of managerial interpretations, seeks to describe different perspectives or interpretations

among different groups of actors, how these meanings and interpretations evolve or change over time, and their organizational implications. A critical case study often involves examination of views of different actors and contradictory features of meanings and settings that emerge. The accounts of actors are interpreted to reveal how actors' accounts or actions are selectively composed, how they distort or transform meanings, and the ways they privilege certain interests and viewpoints and de-privilege others. For example, Graham's (1995) study of Subaru–Isuzu examines how workers' views differed from management views of work, how management views dominated worker views, and, thus, how problems of work on the shop floor were disguised, hidden, or suppressed in organizational discourse. These factors limited workers' ability to bring about positive changes on the shop floor. A postmodern case study explores values and contradictions in organizational life and attempts to uncover hidden dichotomies of power that operate to control groups and individuals. For example, Boje, Fitzgibbons, and Steingard (1996) undertake a case study of reactive trends evidenced by publications in *Administrative Science Quarterly* (*ASQ*). They use textual excerpts from *ASQ* and other sources to show how editors at *ASQ* "used their powers to establish and enforce a structural/functional/rational or systemic modernist knowledge of administrative science" (Boje et al., 1996, p. 87). These authors encourage researchers to reject the dominance of modernist thinking and to use critical postmodernism to "revitalize the organizational discipline by reconnecting them to their pluralist roots" (Boje et al., 1996, p. 91).

Case studies are useful where researchers seek to gain insights into discrete phenomena that change over time, where detailed descriptions of specific phenomena are sought, where there are multiple data sources available, and where processes are a focus for investigation (Gephart & Richardson, 2008, p. 37). Case-study researchers need to (1) bound the case carefully and conceptualize the object of study, (2) select key phenomena to emphasize, (3) find patterns in data, (4) explore different sources of data and find common grounds for interpretations of the data, (5) examine and eliminate alternative explanations for phenomena, and (6) develop generalizations about the case (Stake, 2005, p. 448).

Interviews

Interviews are very common in management and social research and are used as a method in 90 percent or more of reported social-science studies

(Holstein & Gubrium, 1995). An interview is a kind of speech event (Spradley, 1979, p. 55), where a researcher asks questions of an informant, respondent, or subject, and the subject responds to the questions (Gephart, 2004). Interview questions can be either (1) closed-ended or forced-choice questions that force the informant to select a single response from a list or (2) open-ended questions that allow the informant to decide which details to recount. Qualitative interviews can be standardized such that all respondents are given the same questions in the same order (Fontana & Frey, 2005, pp. 701–702), or they can be nonstandardized, where different questions may be asked of different informants (Spradley, 1979). As with other methodologies, the paradigmatic and theoretical commitments of researchers and the questions posed will influence the form the interview takes and the manner in which interview data are interpreted.

Positivist interviews assume: (1) the aim of research is to discover facts, (2) asking questions is an effective and unbiased means to find information on reality that is "out there," (3) respondents have mental structures that match researchers' reasoning and language, and (4) methodological problems of eliciting accurate descriptions of reality are largely technical in nature (Silverman, 2006, p. 122). A conventional interview study develops a sample of subjects by identifying people who are members of a target population and then interviewing them (Gephart & Richardson, 2008). Data are the responses of respondents. Analysis generally involves systematically grouping responses to identify and display key themes. The facts uncovered in interviews thus compose a description of "what happens" in the domain addressed by interview questions. Positivist research thus often uses interview questions to search for the "facts" about behavior and attitudes (Silverman, 2006, p. 119), and such conventional interviews can provide six types of information: facts, beliefs about facts, feelings and motives, standards of action, present or past behavior, and conscious reasons (Silverman, 2006, p. 120).

For example, Rynes et al. (1991) studied the impact of recruitment activities on a job applicant's job choices through use of standardized, open-ended interviews with 41 graduating university students in the U.S. They administered the same questions to all respondents, but used open-ended questions rather than fixed-category-response choices. The interview questions were "designed to elicit information about the reactions to specific companies and specific decisions" (Rynes et al., 1991, p. 494). They thus sought to elicit facts about recruitment, beliefs, feelings and

impressions, and other types of information consistent with the conventional interview (see the interview questions used in Rynes et al., p. 521). They used these data to identify a variety of roles that recruitment practices play in job-seeker decisions.

Interpretive, critical, and postmodern forms of scholarship often take an "active" perspective on interviews: scholars assume the interview involves an active process of meaning construction involving the interviewer and informant, rather than a one-sided process that produces meanings that passively reflect reality and constitute facts (Holstein & Gubrium, 1995). Hence, an interview conceived as an active production of reality is analyzed to uncover the practices through which informants and researchers co-construct reality. The ethnographic interview (Spradley, 1979; McCurdy, Spradley, & Shandy, 2005) illustrates an active strategy of interviewing used in interpretive research. Its main objective is to gain insight into features of a culture and how members experience them (Gephart & Richardson, 2008). The term informant is used to refer to a native speaker who can communicate with a researcher and, through informal and unstructured interviews, can teach the researcher about the informant's culture and to help uncover folk concepts informants use to classify experience (Spradley, 1979).

Spradley (1979) outlines a developmental research sequence for producing ethnography. The ethnographic interview is a key aspect of this sequence. Although the ethnographic interview is often an impromptu and informal discussion with informants, a more structured approach can be used by employing five types of descriptive question in ethnographic interviews (Spradley, 1979, pp. 86–91; McCurdy et al., 2005, pp. 33–66). First, grand-tour questions ask for an overview of a domain of cultural knowledge, e.g. "Can you describe a typical day at work?" Second, mini-tour questions are similar to grand-tour questions but deal with a smaller domain of experience, for example a given work task such as taking a call (Spradley, 1979, p. 88). Third, example questions are even more specific and request examples of specific things, e.g. the last call taken. Fourth, experience questions request descriptions of experiences in a given setting. Fifth, native-language check questions are used to identify the key terms that informants use in the interview and to ensure that these terms are actually the terms commonly used in their culture. These questions are used to produce data and allow a structured approach to uncovering themes to be used (Spradley, 1979; McCurdy et al., 2005).

The ethnographic interview is useful where researchers seek to understand features of organizational cultures and settings, to understand what informants know about phenomena, to understand folk theories, and to gain an emic or insider understanding of phenomena (Gephart & Richardson, 2008).

The life-story interview (Atkinson, 1998), a second type of active interview, explores the subjective essence of a person's life (Atkinson, 1998, p. 3) and seeks to produce a narrative of this life that is as complete and honest as possible. It uses mainly open-ended questions and can explore a range of work- and life-related issues. This approach to interviews is appropriate for gaining in-depth insights into a wide range of personal experiences and to understand the lives of a small number of people of interest to the researcher (Gephart & Richardson, 2008). For example, Savishinsky (2000, p. 26) undertook a planned sequence of three rounds of life-history interviews with 26 retirees from Shelby, New York, to explore how they experienced the first 3 years of retirement. He notes the organizational and work relevance of the research by stating that, "studying peoples' feelings about retirement is also to study their attitudes to work" (Savinshisky, 2000, p. 27). Information was gathered on informants' biographies, employment histories and experiences, feelings about jobs they had held, and the formal and informal rituals and ceremonials of retirement. Savinshisky (2000) came to see retirement as a process and not an event. He explores how people prepare for and master retirement and, in so doing, provides a moving narrative of the people's experiences leaving the work force and adjusting to retirement. Although the interpretation of a life story is a highly subjective action, criteria that can be used to assess the method include internal consistency or lack of contradictions in the interview, corroboration on the life story when read by the informant, and the persuasiveness of the story (Atkinson, 1998).

The long interview (McCracken, 1988), another type of active interview, uses an extended interview and a structured interview format to produce focused and intensive interview processes (McCracken, 1988) to take the researcher into the mental worlds of the informant. In this method, interview responses are analyzed to determine "the categories, relationships and assumptions" informing the respondents' view of the world and the specific topic (McCracken, 1988, p. 42). The long interview is useful where in-depth knowledge of a work setting or organizational phenomenon is needed, but where the researcher lacks time or other resources to conduct

deep and intensive research. Second, it is useful when rich and abundant data are sought. Third, the method is appropriate where research seeks to develop important details of a phenomenon from a limited number of informants, rather than a large sample. Finally, the long interview can be used to explore important issues, such as consumer behavior, in detail. The unique features of the long interview include the following: (1) it is more efficient and less intrusive than the ethnographic interview, (2) it does not require extensive cultural immersion by the researcher, and (3) it differs from the life-story interview because it explores cultural categories and meanings, rather than individuals' experiences and emotions.

In general, active interviews reflect the interpretive perspective, although they may be used in critical and postmodern studies or even positivist studies. Reliability can be discerned by assessing if the interview information is consistent for a given informant across time. Validity can be assessed in terms of respondents' ability to convey realities in particular settings, rather than through correspondence between claims and objective evidence (Gephart & Richardson, 2008).

Observational Methods and Ethnography

Observational methods immerse the researcher in actual settings, where direct observations of phenomena are undertaken, and a record of the observations can be created. Participant observation (McCall & Simmons, 1969, p. 1) is a blend of methods that involves some extended social interaction with subjects in a study, direct observation of events that occur in the setting, formal and informal interviews, systematic counting of certain features of settings and behavior, and an open approach to determining the direction of the study. In participant observation, the observer's role can vary from full participation in the setting to simply being an observer (Gephart & Richardson, 2008). The researcher can also play either a covert role, by concealing their research identity from subjects, or an overt role, where their research obligations are disclosed to subjects. Overt research is more readily defended from an ethical viewpoint, although covert research may reduce reactivity of subjects to the observer and allow a more "natural" setting to emerge. There are important issues in preparing for entry into the field, and some knowledge of the setting is important before commencing research. Data collection generally includes

some form of field notes—written descriptions of observations. Analysis typically includes searching for patterns or themes in field notes and data and may also involve grounded-theory development (Glaser & Strauss, 1967), which is discussed below.

Participant-observation research has been used in many studies in management and human-resource management (Gephart & Richardson, 2008). Classic examples of participant observation include Barker's (1993, 1998) study of self-managing teams and Melville Dalton's *Men who manage* (1959), a covert study of management that sought "to get as close as possible to the world of managers and to interpret this world and its problems from the inside" (Dalton, 1959, p. 1).

Ethnography is a form of participant observation oriented to cultural questions and is perhaps the best known (and mislabelled) observational method (Lee et al., 1999). It is a distinct form of participant observation, owing to its focus on understanding features of culture. We explore ethnography in some detail in this section to illustrate observational strategies that include field research and participant observation.

Ethnography has several distinct features. First, ethnography attempts to understand phenomena using the point of view of group members (Agar, 1980). The goal is to discover and disclose the socially shared understandings necessary to be a member of a specific group or culture (Van Maanen, 1981). Culture is the collective knowledge that is learned, shared, and used to generate behavior and interpret experience (McCurdy et al., 2005). Second, ethnography searches for patterns or schemata that reflect how organizational members organize and interpret events (Agar, 1980). These patterns or schemata, including language used in specific settings, constitute the local culture's system for perceiving, believing, evaluating, and acting (Van Maanen, 1981). Third, ethnography generally involves prolonged contact with group members. An observer becomes an apprentice to an informant who is a group member, so as to learn the culture (Agar, 1980; Van Maanen, 1981). The key assumption is that close and prolonged contact with people allows ethnographers to gain a better understanding of their beliefs, motivations, and behavior than could be gained using any other available approach (Tedlock, 2000). Fourth, ethnographic work produces ethnography—a written representation involving a thick description of features of culture or of a culture as a coherent whole (Van Maanen, 1981, 1988; Tedlock, 2000). Ethnography is thus a "storytelling institution" (Van Maanen, 2006, p. 1) with a literary

aspect or emphasis (Van Maanen, 2006; Zickar & Carter, 2010) that uses field-research designs and techniques to produce "historically, politically and personally situated accounts, descriptions, interpretations and representations of human lives" (Tedlock, 2000, p. 455).

Ethnographic methods have three salient features. First, they emphasize "thick descriptions" (Geertz, 1973) of behavior in actual contexts, developed from ongoing involvement by the researcher in these contexts. Second, ethnographic methods examine ideas and practices of members of society that may be taken for granted and unnoticed by them, but that influence how their lives evolve (Schwartzman, 1993). Third, ethnography examines everyday routines and what people say and do, and, hence, ethnography helps us understand and change organizations (Gephart & Richardson, 2008).

Zickar and Carter (2010) note that use of ethnography was important in the early development of I/O psychology. It helped to ground readers in a sense of the reality of the workplace and the actual meanings of workers and managers (Zickar & Carter, 2010). Ethnography declined in use in the 1960s, but, in recent years, there has been a resurgence of ethnography in organizational research (e.g., Agar, 2010; Cunliffe, 2010; Goodall, 2010; Shotter, 2010; Van Maanen, 2010). This may be owing to the fact that many scholars now recognize that any method—quantitative or qualitative—suffers from researcher bias (Zickar & Carter, 2010), and, hence, ethnography is no longer seen as uniquely biased. In addition, the benefits or value of ethnography are now more widely appreciated. Ethnography is consistent with newer interpretive, critical, and postmodern perspectives, it produces insights into contexts and cultures that are hard to obtain with other methods, it grounds researchers in the realities of the workplace, and it thus provides contextual information to support or inform other forms of research, including quantitative scholarship (Zickar & Carter, 2010).

Van Maanen's (1973) study of socialization into a police organization provides a classic example of organizational and occupational ethnography. Van Maanen spent considerable time gaining access to a police department. Once he had secured the opportunity to study police, he spent 3 months undergoing police training and another 4 months riding in patrol cars. He kept field notes on conversations and conducted formal and informal interviews with people involved in, or impacted by, the police world—recruits, vets, administrators, spouses, and others. His observational data

were based on his own experiences and experiences that others reported to him. Through this research, he was able to develop a thick or rich description of police activities and worldviews and to understand how they do their work (Van Maanen, 1981). By reviewing his extensive data and uncovering patterns and themes in data, he was able to construct a "paradigm" of the making of police that includes four stages of socialization: pre-entry/choice; admittance/introduction; change/encounter; and continuance/metamorphosis. He describes important features of each stage and illustrates these through important examples recorded in his data. Other, more recent examples of organizational and occupational ethnography include Watson (1994), Graham's study of the Japanese production model (1995), Barker's study of self-managed teams (1988), and Perlow's study of work–life balance (1997).

Document Analysis

Documents are written texts prepared for personal rather than official purposes (Hodder, 2000, p. 703). Documents are distinguished from records, which are prepared to attest to some formal transaction (Hodder, 2000, p. 703). Texts involve documents that consist of words and images that are recorded without the intervention of a researcher (Silverman, 2006, p. 153). Texts and documents in general are composed largely from linguistic data. Documents and texts endure physically, they can be separated across space and time from the author or producer and user, and they produce "mute" evidence, as they often have to be interpreted without the benefit of commentary by the document producers (Hodder, 2000). Documents and texts are particularly important to organizational research, as documents are commonly produced and used in organizations and may describe, reflect, or influence behavior.

Documents and textual data have several important advantages for research (Silverman, 2006, p. 157). First, they are rich sources of data that reveal subtleties. Second, they evidence relevance and effect, as texts often describe important issues and influence how people see and act in the world. Third, texts are naturally occurring phenomena, and, hence, they reveal what participants do without researcher intervention (Silverman, 2006). Indeed, the information provided by documents may differ from other accounts of phenomena, such as interview responses, and some documentary information is not available in spoken form (Hodder, 2000,

p. 704). Finally, documents offer the advantage of availability and can often be accessed by researchers without the need to confront ethics issues (Silverman, 2006).

Procedures used to interpret documents are similar to procedures used to interpret data in case studies, interviews, and observational studies (Hodder, 1994, p. 400). An important limitation to the interpretation and use of documents is that documents provide "mute" evidence. Thus, documents can be read, but meaning does not reside in the materials themselves. Meaning is produced by reading, discussing, and using the materials (Hodder, 1994). Thus, documents cannot be questioned to gain insights into the conditions of their production, interpretation, and use by those who create or use documents. Interpreting documents poses special challenges, including the need to understand contexts where the documents were meaningful, to understand the interpretations and understandings of document producers and users, and to understand how context influences the interpretation of documents (Hodder, 1994).

Different paradigms lead to different approaches to understanding and interpreting documents. For positivist researchers, documents are often treated as a resource for research and are used as sources of facts in some domain. For example, news media articles could be read to determine what organizational leaders say and do about workplace violence. Positivist uses of documents thus often treat documents and records as objective evidence of reality. They seek to uncover the facts disclosed in the documents, and to compare these documented facts to hypotheses or theories (Gephart & Richardson, 2008). Many case studies rely on documents to create a conventional history of the facts of organizational events. A case study may thus organize the facts associated with the events and show how the facts and events unfolded over time.

A key method used to analyze documents from a positivist perspective is content analysis (Silverman, 2006). Content analysis provides a means to quantify qualitative data and is a quantitative rather than a qualitative research method, although it is often misconstrued in this manner. In content analysis, the researcher establishes a set of categories that reflect topics of interest in the document and then counts the number of instances that fall into a category. This process requires selecting texts for research, developing a sample of texts to analyze in detail, constructing a coding frame or categorization scheme, pilot-testing the coding scheme and defining explicit coding rules, testing the reliability of codes, coding the

sample, and then statistically analyzing data. Computer-aided text analysis (Kelle, 1995) allows one to use computers for content analysis of texts (Kabanoff, 1997). For example, Palmer, Kabanoff, and Dunford (1997) explored the themes or rationales that managers use to explain and justify downsizing in Australian organizations. To do so, they undertook a computer-aided content analysis of a convenience sample of 87 large Australian organizations for the time period 1986–1992 and sought to determine whether or not there had been a shift in management language and rationales for downsizing during this time period. A computer-based dictionary was created that contained words and phrases that refer to downsizing. Next, the downsizing dictionary was used to analyze the entire dataset to identify all references to downsizing that appeared in the annual reports, and 275 downsizing references were recovered. A coding scheme was then devised based on reading the downsizing references and was used to code these references in terms of explanations, rationales, and justifications. The coded references were then used to formulate nine main downsizing themes, e.g. cost reduction, globalization. Then, each reference was re-read and coded into one of the nine themes. Coding reliability was assessed. The frequency of occurrences of downsizing themes for each organization was used to construct an index to measure actual downsizing activity by organizations. The authors report that the analysis of downsizing showed three languages or interpretations of downsizing: a strategic language, a process language, and a cost-versus-consideration language.

In contrast to positivist document analysis, interpretive researchers use a constructionist perspective to understand how documents are assembled and thus treat documents as topics for analysis in their own right. Questions that interpretive scholars might ask in regard to analysis of documents are: (1) How are documents produced in organized settings? (2) How are documents used by actors in everyday life? (3) How do documents enter into the manufacture of self and identity (Silverman, 2006, p. 155)? Garfinkel (1967) has shown, for example, that there are "good organizational reasons" that many organizational documents and records are incomplete, as these documents are created and produced for particular audiences and purposes. Thus, data are selectively recorded, and this selectivity cannot be easily remedied, as the local conditions and contingencies of work will influence what is recorded and how it is recorded. The task for interpretive scholars is thus to explore how these contextual processes operate in documents.

Interpretive analysis of documents and texts can involve several strategies and perspectives. One approach is *narrative analysis* (Reissman, 1993; Czarniawska-Joerges, 1998; Boje, 2001), which addresses first-person accounts of events or experiences (Reissman, 1993) and uncovers structural and literary aspects of texts. Narrative analysis explores how stories are assembled and uncovers the cultural and linguistic resources used to construct narratives and stories (Reissman, 1993). Narratives provide insight into past actions of people, and analysis of narratives shows us how people interpret and understand these actions. For example, Barry and Elmes (1997) provide a narrative analysis of the discourse of organizational strategy.

A second approach is *rhetorical analysis* (McCloskey, 1985), which explores the art of speaking or communicating and studies how narratives and speech acts persuade readers and listeners about their authenticity (Gephart, 2007, p. 134). From this view, documents are forms of discourse designed and used to persuade readers of their truthfulness and are not "true" accounts. Rhetorical analysis has examined a variety of ways that texts persuade readers, for example, through use of figures of speech that are compelling (McCloskey, 1985). Brown (2000) provides a rhetorical analysis of the Allitt Inquiry report on attacks on children at a hospital in the United Kingdom. The inquiry sought to explain how a nurse could murder young patients and, yet, do so undetected, as these actions challenged the effectiveness of institutions and professionals who worked at these institutions. Brown uncovered rhetorical practices in the inquiry report that made the failure to detect the murders appear sensible. For example, although the nurse in question had exhibited potential disorders, the report described her behavior as unexceptional, and thus it did not signal a problem. By showing how an alternative, demonizing narrative might have been constructed to describe the nurse, Brown (2000) shows that the constructed explanation that things were normal was contestable, and that there were other reasonable interpretations that could also have been made.

A third approach to text analysis is deconstruction, which uses literary techniques to reveal contradictions in a text and thus offer the possibility of other readings of a text (e.g., Culler, 1982). Examples of deconstruction in organizational research include Martin's (1990) study of gender conflict discussed above, Calás and Smircich's (1991) deconstruction of the gendered nature of management texts, Mumby and Putnam's (1992)

(re-)reading of bounded rationality, McCloskey's (1985) deconstruction of economic theorizing, and Gephart's (1986) deconstruction of the rhetoric of quantification in social-science methodological research.

Narrative analysis, rhetoric, and deconstruction are three of the major approaches used for interpretive analysis of texts and documents. Gephart (2007) outlines several other useful approaches, including ethnomethodology, conversation analysis, and the analysis of speech acts from a critical (Habermasian) perspective. These approaches are often used in critical and postmodern research as well. The often-subtle differences in paradigm-based uses of these methods relate to the fact that critical studies may focus on ideological features and power implications of texts and address critical-theory topics, whereas postmodern studies tend to emphasize and uncover the fragmented and discontinuous nature of texts, encourage multi-vocal interpretations of texts, and explore postmodern topics and theories.

Computer-Aided Interpretive Textual Analysis

Qualitative computing is often used to understand the meaning of texts and, hence, can be regarded as an additional approach (or set of approaches) to document analysis. However, qualitative computing can also be used for other types of language-based data. The central task of qualitative computing is to understand the meaning of texts using nonmathematical operations to explore data, uncover themes in data, and display data and findings. It is important to note that computers can support routine data-analysis tasks, such as generating lists of key words, attaching codes to segments of text, and searching for and recovering coded text segments (Wolfe, Gephart, & Johnson, 1993). However, computers cannot perform qualitative analysis, as the process is not mechanical or rule-governed, and they cannot interpret data.

Computer-aided interpretive textual analysis (Gephart, 1997, 2010) helps researchers to develop or recover themes from data, to provide thick descriptions of how concepts operate in data, and to ground theory in data (Gephart, 1997, p. 585). In particular, software can be used to compose textual data displays that recover all theoretically meaningful words, phrases, or terms from data and to organize the data in ways that suit researcher needs. Several software programs have been used in qualitative research. These include ATLIS.ti (Bassett, 2010a), Kwatlitan (Peters, 2010), MAXQDA (Humble, 2010), NVIVO (Bassett, 2010b), Ethnograph

(www.qualisresearch.com), and TACT (Bradley, 1990). Some programs (e.g. Ethnograph) are oriented to open coding of data files, so that researchers can readily embed codes in data files as they work with the data. Other programs (e.g. TACT) require data be pre-formatted with codes (e.g. speaker, page number, organization), and databases must be compiled, and, hence, it is difficult to add new codes once the database is compiled. Further, some programs provide statistical tools to quantitatively analyse data, as well as to support qualitative-analysis tasks. Furthermore, the functions and capabilities of given programs are subject to ongoing change. Hence, researchers must carefully consider the functions of specific textual-analysis software packages and even specific versions of these packages to determine how these functions fit with the qualitative-research tasks they seek to undertake (Wolfe et al., 1993, p. 654). It is important to emphasize that there is no magic computer button to push to create results and findings from textual data, and computer software does not automate qualitative research. Analysis requires researchers do interpretive work with texts.

Grounded Theory

Grounded theory (Glaser and Strauss, 1967) is arguably the most widely recognized method for collection and analysis of qualitative data. Grounded theory involves the inductive creation of theory from systematically obtained and analyzed data (Glaser and Strauss, 1967). Grounded theory and related techniques are used in positivist and post-positivist, interpretive, and critical research. Grounded theory has been adopted in many fields of scholarship, including education and nursing, and grounded theorizing can use data generated with a range of methods, including interviews, observations, and documents. There is much confusion regarding the meaning of grounded theory, and many uses of the term in organizational research seem distant from primary accounts of the method (Suddaby, 2006). The summary of grounded theory here seeks to offer readers a view of the approach that resonates with foundational conceptions of grounded theory.

Grounded theory emerged as a critique of a priori or grand theory (Glaser and Strauss, 1967), such as Talcott Parson's (1951) general theory of social systems. Grand theory was often developed in abstract spaces using any ideas, evidence, and concepts a theorist might choose to employ. Grand or a priori theory (theory created prior to close examination

and analysis of data) thus lacked empirical grounding and created a differentiation between theorists who create deductive theory and empirical researchers who test or seek to confirm theories. A very large number of potential theories can be generated a priori and can provide almost innumerable deductive testing opportunities for researchers. In contrast to a priori theory, grounded theory begins with observations or data and seeks to induce empirical generalizations and concepts that reflect the contours or features of data. It thus provides low-level theory that is data driven and reflective of specific contexts.

There are several steps in doing grounded theorizing: reviewing data to discover or surface and label categories and/or themes in data; comparing incidents or data segments that are applicable to categories; finding properties of categories by comparing incidents; delimiting theory; and writing the theory (Glaser and Strauss, 1967; Locke, 2002). Two important aspects of grounded theory are theoretical sampling and the constant comparative method (Glaser and Strauss, 1967; Strauss and Corbin, 1990, 1994; Charmaz, 2000; Locke, 2001, 2002).

Theoretical sampling involves collecting, coding, and analyzing data and then deciding what data or examples to find next and where to locate them. The next slices of data or incidents are selected because of their important similarities and differences with key categories being studied. For example, in a study of the development of a graduate-student organization (Gephart, 1975, 1978), the researcher observed a series of confrontations and meetings between the leader and critics, where the critics attempted to limit the powers of the leader and, on occasion, threatened to remove him. Later, during a contentious meeting, the leader was removed by the council to which he reported. This was conceptualized as forced removal of the leader and an aspect of leader succession. Past data were reviewed, and a theoretically driven sample of past, partial removal attempts was then noted. Thus, the researcher collected data, developed an initial premise about features of the data, and then used this premise to search through past data and to focus future data collection on features of forced removal. An unfolding process of succession was uncovered that began with criticisms and incomplete attempts to remove the leader, evolved into the successful removal of the leader, and included post-removal meetings. Thus, once the phenomenon of forced removal was identified, it drove theoretical sampling to review past data and search for new data that provided examples of aspects and properties of leadership removal.

In theoretical sampling, selection of incidents or data ceases when no new data are emerging to develop properties of the concepts of interest—a practice called theoretical saturation.

The second key practice is the use of the constant comparative method of analysis (Glaser & Strauss, 1967). In this practice, the researcher compares a given category and its properties with other categories. This is done continuously over the course of research to elaborate properties of categories and anticipate or locate new properties. As described by Locke (2002, p. 25), constant comparison involves (1) naming and comparing data fragments, (2) comparing data fragments with concepts and then comparing concepts with each other, and (3) comparing conceptualizations with each other and with general theoretical perspectives. This process is intended to produce many categories, properties, and hypotheses from data.

The constant comparative method of grounded theory was fundamental to the Gephart studies because it established the existence of forced removal as a distinct form of succession and showed that it involved status degradation of the leader (Gephart, 1978). This important process and interpretation of the process may have been missed without the use of grounded-theory practices. For example, detailed open coding (a grounded-theory technique) of extensive field notes on interactions at the graduate center produced the domain of status-related interactions with the leader. Second, the domain seemed to contain a number of distinct forms of status-related interactions with the leader, including preliminary challenges to the leader's status, more significant removal attempts that took the form of criticisms and calls for resignation, incomplete removal attempts that included at least one formal meeting where forced removal was considered but a decision was never made, and a meeting where the leader was formally removed. Through theoretical sampling, data were reviewed, and new data were collected to develop insights into the different status challenges to the leader. By using the constant comparative method, and reviewing data in an iterative manner, the features of each form of challenge were compared with one another, and a more refined sense of status challenges was developed. When the concept of status degradation was uncovered from reading the sociological literature, it was apparent that the features of leader removal in the present case reflected features of status degradation. Thus, detailed observations of settings, theoretical sampling, constant comparative analysis, and induction—all features of grounded

theory—were used to uncover the finding that forced removal of a leader involves status degradation.

A quantitative study would have found it difficult to observe and uncover processes of forced removal in a real setting, to produce comparative data to uncover unique dimensions of forced removal as a form of succession, or to inductively develop hypotheses for future research from case data, as was done in this study. Thus, this approach is data driven and produces substantive theories that address specific contexts (Locke & Golden-Biddle, 2004). Other examples of grounded theory in organizational research include Gephart and Pitter's study of industrial accidents (1993), Sutton's study of emotion expression norms (1991), Kahn's study of organizational caregiving (1993), and Perlow, Okhuysen, and Repenning's study of decision-making and temporal context (2002).

DISCUSSION

Qualitative research has tremendous potential to contribute to I/O psychology. Qualitative methods can be used to explore naturally occurring settings, collect data that are not readily encountered and/or that are difficult to analyze with other methods, and provide insights into real-life settings and the meanings social actors produce and use in these settings. Qualitative methods can be used to study a very wide range of topics in I/O psychology, and they can be used for theory development, theory elaboration, and theory testing. Qualitative methods can also be used in conjunction with quantitative methods to provide broader information and data on phenomena and to overcome the limits of quantitative data.

The chapter has sought to review qualitative research and methods that can be used in I/O psychology. However, it is also useful to point out how qualitative research could be used in the future in the field. First, many, and perhaps most, "qualitative" studies in the I/O psychology literature used mixed qualitative and quantitative methods (e.g. Rynes et al., 1991; Shaffer & Harrison, 2001; Behfar, Peterson, Mannix, & Trochin, 2008), but few use purely qualitative methods. Qualitative methods can continue to be used, hopefully with greater frequency, to complement quantitative methods and data and to answer questions that require rich descriptive information. It is thus recommended that scholars continue to use

qualitative and quantitative methods in tandem with one another, and to do so in ways where each type or form of method is used in a manner consistent with its particular research assumptions.

A second opportunity is to combine use of the new technique of systematic self-observation (SSO) concurrently with use of quantitative measures, to capture the naturally occurring meanings of phenomena that are associated with measures. This will allow organizational psychologists to gain a better understanding of the meanings that measures hold for subjects. SSO (Rodriguez & Ryave, 2002) involves training informants to observe and record a selected feature of their everyday experience, for example, feeling job satisfaction or dissatisfaction. Informants are asked to immediately record their experience in a field report as soon as possible after the phenomenon occurs, and they are trained to give a detailed description of actions and speech, to provide background information, thoughts, feelings, and emotion that are associated with the phenomenon, and to describe the situation and the people involved (Rodriguez & Ryave, 2002, p.2). SSO is particularly promising for psychology, as it "gives access to covert, elusive, and/or personal experiences like cognitive processes, emotions, motives, concealed actions, omitted actions, and socially restricted activities" (Rodriguez & Ryave, 2002, p. 3). It is thus most applicable with single, focused phenomena that are natural to a setting, noticeable, intermittent, bounded, and of short duration (Rodriguez & Ryave, 2002, p. 5). Generally, relatively large samples of SSO reports are used.

To illustrate how this might be used, one could have subjects provide an SSO report and also complete a short questionnaire (one or two items) that measure their job satisfaction. Thus, the actual context, statements made, and feelings that emerge when one is satisfied could be systematically linked to the measured levels of job satisfaction. One would know what subjects refer to when they rate their job satisfaction as 4 out of 5; that is, one would know what job satisfaction means, as well as how it is enumerated and measured. This would allow scholars to undertake the difficult task of associating values in psychological scales with naturally occurring meanings in real contexts.

A third opportunity is to use grounded theory for the discovery and validation of new constructs. Grounded-theory techniques can be used to surface new constructs from data in studies conducted in specific settings where constructs of potential interest were likely to be evident (Gephart,

2003). By undertaking grounded-theory development of a construct in a manner somewhat removed from use of prior concepts from the literature, one could investigate if constructs similar to those in the literature naturally emerge from, or are discovered by, the grounded-theory analysis. That is, one can conduct a grounded-theory study from appropriate settings identified by theoretical or other modes of sampling, and examine whether or not the constructs or categories and properties surfaced in the study correspond with existing constructs. As the patterns observed in data are induced from data by grounded theorizing, they will reflect patterns in the actual settings examined, not hypothesized patterns. This process can potentially surface new constructs that can be compared with existing constructs to confirm or contradict prior constructs and dimensions. The value added by using grounded theory is, thus, to uncover true patterns of action or behavior from settings that would not be recovered by deductive, quantitative research.

CONCLUSION

An important issue often raised in discussing qualitative research is how does one assess or evaluate the quality of qualitative studies, such as those addressed above? A variety of criteria have been formulated for assessing qualitative research, including credibility and authenticity (Silverman, 2006). These criteria include fairness, ontological authenticity, educative authenticity, catalytic authenticity, and tactical authenticity and are used to assess the validity of constructionist, critical, and postmodern work (Guba & Lincoln, 2005, p. 207). The view in this chapter is that there are many criteria that are applicable to qualitative research, and no single way to best assess such research (Van Maanen, 1998). Criteria address outcomes of research rather than providing bases for research, and the accounts of researchers can be tailored to emphasize or suggest such qualities, even where they are not internalized into research practices. Thus, this chapter follows Silverman (2006, p. 276) and recommends use of practical criteria that reflect the content of well-conducted research and that allow for flexibility in research activities. Practical issues to emphasize include the appropriateness of the methods to the questions being asked, showing connections to an existing knowledge, clear explanation of criteria used

to select cases, and other practical criteria noted earlier in the paper. Second, data should be given in a local context, such as the statements made by an informant before or after. Third, some attempt should be made to show how data extracts represent the entire corpus of data. These criteria are likely as appropriate for quantitative research as for qualitative research, and they thus show that there is no particular reason to prefer any given form of data.

To conclude, there are many good reasons to use qualitative methods in I/O-psychology research. Whether the focus is using qualitative methods as stand-alone methodologies and/or as new tools to complement quantitative methods, I/O psychology can benefit from doing research using words. The intended contribution of this chapter is to describe how to use these methods and to inspire I/O psychologists to use them.

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