Templates and Turns in Qualitative Studies of Strategy and Management

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TEMPLATES AND TURNS IN QUALITATIVE STUDIES OF STRATEGY AND MANAGEMENT

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ABSTRACT

Purpose – *This chapter presents four different approaches to doing and writing qualitative research in strategy and management based on different epistemological foundations. It describes two well-established "templates" for doing such work, and introduces two more recent "turns" that merit greater attention.*

Design/Methodology/Approach – *The chapter draws on methodological texts and a detailed analysis of successful empirical exemplars from the strategy and organization literature to show how qualitative research on strategy processes can be effectively carried out and written up.*

Findings – *The two "templates" are based on different logics and modes of writing. The first is based on a positivist epistemology and aims to develop nomothetic theoretical propositions, while the second is interpretive and more concerned to capture and gain insight from the meanings given to organizational phenomena. The two "turns" (the practice turn and the discursive turn) are not as well defined but are generating innovative contributions based on new ways of considering the social world.*

Originality/Value – The chapter should be helpful to researchers considering qualitative methods for the study of strategy processes. It contributes by comparing different approaches and by recognizing that part of the challenge of doing qualitative research lies in writing it up to communicate its insights in a credible way. Thus while describing the different methods, the chapter also draws attention to effective forms of writing. In addition, it introduces and assesses two more recent "turns" that offer promising routes to novel insight as well as having particular ontological and epistemological affinities with qualitative research methods.

This chapter discusses a range of ways in which qualitative methods may be used to study and theorize about strategy processes, that is, to examine the *how* questions of strategic management that deal with phenomena such as decision making, learning, strategizing, planning, innovating, and changing (Van de Ven, 1992). Qualitative data have particular strengths for understanding processes because of their capacity to capture temporally evolving phenomena in rich detail, something that is hard to do with methodologies based on quantitative surveys or archival databases that are coarse-grained and tend to "skim the surface of processes rather than plunging into them directly" (Langley, 1999, p. 705).

Our focus will thus be on the study of strategy processes taken as an empirical phenomenon drawing on qualitative data that examines these processes over time, that is, using what has been called "process data" (Langley, 1999). Process data tend to incorporate a mix of in vivo observations (meetings, conversations, events, shadowing, etc.), memories and interpretations (real time or retrospective interviews, focus groups, questionnaires, diaries, etc.) and artifacts (minutes, plans, reports, archival records, etc.). However, the key challenge of doing qualitative research on organizational processes lies not so much in collecting these data but in making sense of them to generate a valuable theoretical contribution. The data tend to be complex, messy, eclectic, and with varying degrees of temporal embeddedness. In a previous paper, the first author proposed seven strategies for addressing this challenge include composing case narratives, quantification of incidents, using alternate theoretical templates, grounded theorizing, visual mapping, temporal decomposition, and case comparisons (Langley, 1999).

In this chapter, while building on previous work, we take a somewhat different perspective on the mobilization of qualitative data to analyze strategy processes. First, the chapter recognizes that qualitative methods are associated with a range of different epistemological assumptions and that these may have important implications for the way in which data are interpreted as well as for the theoretical products generated by the analysis. Second, the chapter also recognizes that part of the challenge of doing qualitative research lies in writing it up to communicate its insights in a credible way. Thus while describing methods, we also draw attention to effective forms of writing. Third, we focus the chapter around two rather well-established "templates" for doing qualitative studies of strategy processes and contrast these with two more recent "turns" that offer promising routes to novel insight as well as having particular ontological and epistemological affinities with qualitative research methods.

We begin by describing the two "templates" that have each given rise to a body of work where it seems that the norms of presentation and methodological process have become to a degree standardized and institutionalized among a set of scholars. These templates are far from exhaustive of approaches for qualitative research on strategy processes. However, we believe that they are particularly instructive. Then we consider the implications of two nascent "turns" (the practice turn and the discursive turn) in qualitative analysis of strategy processes that we argue merit greater attention.

TWO TEMPLATES

One of the common complaints (but for some of us, the rather attractive qualities) about qualitative research is that unlike quantitative studies, the rules, formats, and norms for doing, writing, and publishing it are not uniform or well-established. It is not for nothing that Michael Pratt titled a recent editorial in *Academy of Management Journal* about writing qualitative research for the journal "For the lack of a boilerplate" (Pratt, 2009). We do however see the emergence of at least two templates for qualitative studies that have achieved some penetration in the North American management journals, that are each based on different epistemological assumptions, and that are sometimes being used as yardsticks by others. In honor of their originators, we label these the Eisenhardt method and the Gioia method. Both of these have given rise to some highly influential contributions to strategy process research.

As mentioned earlier, in describing these approaches, we focus not only on the *logical* structure of the method itself but also on the *rhetorical* structure that is used to support it in published articles. These two dimensions seem to us to be inextricably linked and indeed contribute to constituting the template. Since Golden-Biddle and Locke (2006, 1993) drew our attention to the way in which skillful writers of qualitative research convince their readers, there is increasing realization that writing and rhetoric matter. Thus, the two approaches each have their own internal logics and rhetorical power that we describe below and summarize in Table 1. Note that our accounts of these approaches are based for the most part on a close reading of published papers by key authors, but include also ideas gleaned from conference presentations and in the second case from personal communication.[1]

The Eisenhardt Template: Credibly Novel Nomothetic Theory from Case Comparisons

Kathleen Eisenhardt's (1989a) article on "Building theories from case study research" is now a classic methodological reference both within the field of management and beyond (Ravenswood, forthcoming), with over 11,000 citations on Google scholar at time of writing. Even more impressive perhaps, Eisenhardt and her colleagues have published a continuous stream of exemplars of the approach that while innovating in their substantive topic foci, replicate both the logic of the method and the rhetoric underpinning its first empirical applications (Eisenhardt & Bourgeois, 1988; Eisenhardt, 1989b). For example, papers coauthored by Eisenhardt or her students and collaborators have examined factors associated with fast decision making (Eisenhardt, 1989b), successful approaches to continuous innovation (Brown & Eisenhardt, 1997), charter changes in multi-divisional businesses (Galunic, 2001; Galunic & Eisenhardt, 1996), how entrepreneurs successfully shape organizational boundaries and markets in their favor (Santos & Eisenhardt, 2009), networking strategies associated with successful industry positioning (Ozcan & Eisenhardt, 2009), the role of seller perspectives and trust in acquisitions (Graebner & Eisenhardt, 2004; Graebner, 2004, 2009), patterns of planning and improvisation in successful internationalization (Bingham, 2009), the origins of success in cross-business collaboration (Martin & Eisenhardt, 2010), and the strategies used by entrepreneurs to build relationships with venture capitalists (Hallen & Eisenhardt, 2009).

Table 1. Two Templates for Qualitative Studies of Strategy and Management.

	The "Eisenhardt Method"	The "Gioia Method"
Key methodological reference	Eisenhardt (1989a)	None, but see Gioia (2004) for personal reflections on research philosophy
Exemplar empirical articles	Eisenhardt (1989b), Brown and Eisenhardt (1997), Martin and Eisenhardt (2010)	Gioia and Chittipeddi (1991), Corley and Gioia (2004), Gioia et al. (2010)
Central methodological inspirations	Yin (2009) on case study research, but see also Miles and Huberman (1994)	Glaser and Strauss (1967); Strauss and Corbin (1990) on grounded theory
Epistemological foundations and purposes	– Post-positivist assumptions – Purpose: developing theory in the form of testable propositions – Search for facts (e.g., emphasis on court-room style interviewing) – Product: nomothetic theory	– Interpretive assumptions – Purpose: capturing and modeling of informant meanings – Search for informants' understandings of organizational events. – Product: process model/ novel concept
Logic of the method	*Design to maximize credible novelty* – Multiple cases (4–10) chosen to be sharply distinct on one key dimension (e.g., performance) while similar on others – Interview data with diverse informants – Identify elements that distinguish high and low performing cases building on cross-case comparison – Validity and reliability from multiple researchers, triangulation of data	*Design for revelation, richness and trustworthiness* – Single case chosen for its revelatory potential and richness of data – Real-time interviews and observation – Build "data structure" by progressive abstraction starting with informant first-order codes and building to second-order themes and aggregate dimensions – Trustworthiness from insider-outsider roles, member checks, triangulation
Rhetoric of the writing	*Establishing novelty*: Contrasting findings with previous research; *Providing evidence*: Data presentation in two steps: (a) data tables; (b) narrative examples of high and low cases	*Establishing the gap*: Show how this study fills a major gap *Distilling the essence*: Present the data structure emphasizing second-order themes and overarching dimensions

Table 1. (*Continued*)

	The "Eisenhardt Method"	The "Gioia Method"
	Offering explanation: Ask why for every proposition. Reasons offered building on data and literature; *Integrating contribution:* Link separate propositions together to build theory	*Elaborating the story*: Elaborate the model in two ways; (a) present the narrative; (b) additional quotes in tables *Reaffirm contribution:* Return to opening gap to show novel insight.
Examples of other authors using similar approaches	Zott and Huy (2007), Gilbert (2005), Maitlis (2005)	Maguire and Phillips (2008), Anand, Gardner, and Morris (2007), Anand et al. (2007), Rindova et al. (2011)

In another sign of the influence of this approach, in the late 1990s, the first author received a review on a submission to a journal in which the reviewer used Eisenhardt's (1989a) eight-step method as a framework to guide the review. Every one of the eight steps was analyzed in detail and the submission was matched up against its standards. For better or worse, the method had already acquired something of the character of a template.

Epistemological Foundations and Purposes: Toward Testable Propositions
Eisenhardt (1989a, p. 546) establishes her method as positivist in orientation, aimed at "the development of testable hypotheses and theory which are generalizable across settings." The method is oriented toward induction, that is, generating sets of formal propositions from case study evidence, and is presented as suitable for situations where little is known about a phenomenon or where current perspectives are conflicting or confusing, and where case study evidence can therefore be seen to contribute novel insight. At the same time, the method draws inspiration from Yin's (2009 [1984]) discussion of case study research, emphasizing a logic of replication in which different cases are considered (much like different experiments) as occasions for verifying and elaborating theoretical relationships developed from previous cases. Overall, after reading many of the articles produced with this approach, its power seems to lie in its ability to generate findings that are claimed as novel-even "surprising," and yet at the same time to render these findings highly credible, something that appears

paradoxical at first sight. The need for both defamiliarization and plausibility in qualitative research is probably universal and has been noted before (e.g., Golden-Biddle & Locke, 1993). However, it seems to be a particularly strong leitmotiv underlying this particular approach, and both the logic of the method and the rhetoric of the writing in empirical articles seem designed to achieve it.

Logic of the Method: Designing to Maximize the Chances of Credible Novelty
The replication logic proposed by Eisenhardt requires a substantial number of comparative units of analysis or cases [Eisenhardt (1989a) suggests from four to ten] because the objective is to abstract from these cases common constructs that can then be used to describe and compare generic process components across all the cases (usually in terms of categorical or ordinal scales), and ultimately to relate these to outcome constructs representing some kind of performance. Although the specifics of individual cases contribute importantly to the nature of the constructs induced from the data, it is their common dimensions across cases and not their idiosyncratic features that are emphasized. Thus, the processes examined using this approach are taken as wholes synthesized into a limited number of descriptive dimensions (constructs), rather than being elaborated idiographically.

However, to make this logic work, and to optimize the chances of credible but novel insight, the cases cannot be and are not chosen arbitrarily. Key elements of design include choosing and gaining access to promising phenomena where new knowledge is likely to emerge, setting up comparisons to maximize differences on one dimension while controlling for differences on others, and ensuring coverage of perspectives within each case.

Planning for novel insight of course begins with the research questions and empirical phenomena studied. Thus, Eisenhardt and her colleagues have studied phenomena that have often been subject to quantitative research previously (e.g., acquisitions, alliances, new technology ventures), but where prior *process-oriented* research has been limited, and particularly so in the dynamic fast-paced technological settings they have favored. Additionally, recent studies demonstrate an impressive level of access to complex situations that few have been able to obtain previously, enhancing the probability of novel findings. For example, Ozcan and Eisenhardt (2009) accessed six new entrants to the wireless video-gaming industry (of which two turned out to be the top players) conducting three waves of interviews with multiple organization members over time as well as interviews with their main partner firms as they constructed their alliance portfolios. One might speculate that the potential for such good access to novel situations

might be enhanced by previous successful research that has had practical impact (as evidenced in this case by several *Harvard Business Review* articles).

While controlling for secondary sources of variation (such as size, industry, etc.), cases are also carefully selected to represent what Pettigrew (1990) labeled "polar types," thus emphasizing comparisons between extremes so that, for example, the distinguishing features of high-performing and low-performing cases have the strongest possible chance of emerging clearly. As Eisenhardt and Graebner (2007, p. 27) explain, "Although such an approach can surprise reviewers because the resulting theory is so consistently supported by the empirical evidence, this sampling leads to very clear pattern recognition of the central constructs, relationships, and logic of the focal phenomenon." Sometimes, the authors have collected data on more cases than they actually used in the analysis to preserve the sharpness of the contrast (e.g., Brown & Eisenhardt, 1997). One might ask what is missing from our understanding by removing consideration of average run-of-the-mill firms. However, the sharpness in contrast is clearly helpful in enhancing the clarity of insights.

The credibility of those insights is further enhanced by sampling multiple perspectives within each case. For example, Graebner (2004, 2009) interviewed both buyers and sellers in her study of acquisitions, Martin and Eisenhardt (2010) interviewed managers at corporate and business unit levels in their study of cross-divisional collaboration. While interviews tend to be the main source of information with all their inherent limitations, strong emphasis is also placed on collecting several kinds of data (e.g., quantitative scales embedded in interview protocols to triangulate responses; archival sources), as well as on obtaining factual accounts through techniques such as "courtroom style questioning" (mentioned in the methods sections of most published articles). Finally, tandem interviewing, electronic recording, and rapid transcription are cited as further means of enhancing validity and reliability.

A good research question, a strong design and excellent data are clearly helpful for developing novel and credible insight, but it is in the analysis that this all comes together. Eisenhardt and her colleagues describe data analysis as essentially a two-stage process, beginning first with the construction of complete within-case narratives and followed by iterative processes of case comparison that continues until a set of constructs that might explain similarities and differences in outcomes begins to emerge (Eisenhardt,

1989a). The fashioning of these constructs is a creative moment of the method because it involves bringing together pieces of case evidence to refine emerging measures of constructs by tabulating data, as well as elaborating understanding of how and why emerging relationships might make sense. Clearly without being there, it is hard to experience the process of analysis itself. However, its products can be appreciated more easily, which brings us to the rhetorical dimension of the template.

Rhetoric of the Writing: Establishing Novelty, Providing Evidence, and Offering Explanation

In addition to a methodological approach that maximizes the chances of offering a novel but credible contribution, Eisenhardt and her colleagues have perfected a distinct mode of writing case study articles that establishes this value. We will use Eisenhardt's (1989b) article on the speed of organizational decision making and a more recent study by Martin and Eisenhardt (2010) to illustrate the approach. The most interesting rhetorical feature concerns how each individual finding or proposition is argued in three key moves.

The first move involves establishing novelty. Here, for each finding, a contrast is explicitly drawn between what previous literature and theory would lead one to expect and the current finding. For example, Eisenhardt (1989b) uses expressions such as, "The data from this research indicate a different view" (p. 549), "In contrast," (pp. 555, 559, 562). Martin and Eisenhardt (2010) use expressions such as "unexpectedly" (p. 271) and "However we observed the opposite" (p. 283). The sharply constructed contrast serves to introduce an unexpected or novel finding but also sets up a tension that then has to be resolved – if this is so surprising, can we believe it?

The resolution begins with the second move involving the presentation of the evidence. In most of this stream of work, this occurs in two steps. The first step involves presenting an overall semi-quantitative portrait of the evidence supporting the proposed relationship in a table in which cases are ordered vertically from more to less high performing. The columns of the table draw together evidence from various sources. For example, Martin and Eisenhardt (2010) argued that engaging in deliberate learning activities contributes to successful cross-divisional collaboration and tabulated evidence on this that included both counts of the number of activities

engaged in and two or three quotes from different sources in each firm. As is typical, their chapter includes one table for each proposition (five in this case; with from four to seven columns) plus an additional table documenting evidence of performance (including multiple columns for different quantitative assessments as well as quotes). Some writers might stop the presentation of the data here, since the tabulations generally provide unambiguous support for the propositions and extracts from the data on all the cases.[2] However, the authors generally elaborate on the findings by offering more qualitative narrative examples of typically two high-performing and two low-performing units that add depth to the information provided in tables.

Eisenhardt and colleagues then always engage in an important final move before closing the presentation of their propositions. This is to ask themselves *why* the observed relationships might hold, that is, offering not just evidence but explanation. Usually two or three reasons are offered for each proposition. To present these, the authors draw on both the data themselves and on prior theory and research in an attempt to deepen understanding, and thus further enhance the credibility of the relationships discovered. This may also be an occasion to reconcile the findings of the research with prior literature (see, e.g., Eisenhardt, 1989b). The importance of offering explanation is sometimes forgotten in qualitative research, but it is particularly important, because it is here that a mere observed empirical regularity is transformed into the beginnings of a *theoretical* contribution.

Extending this theme, a theory-building multiple case study will offer a strong contribution to knowledge if its atomistic propositions can further be integrated together into a coherent theoretical story that reaches beyond the individual components. This final step is also important and can be quite challenging because the need for novelty and credibility must also be maintained. For example, after presenting a series of propositions about factors that seemed associated with successful continuous innovation, it is at this stage that Brown and Eisenhardt (1997) began to draw on complexity theory as a metaphor to tie their findings together, noting that a persistent theme in their work was the simultaneous need for structure but also for flexibility.

Assessing the Template: Limitations and Variations
Overall, the ''Eisenhardt method'' has emerged as a very successful approach to strategy process research as shown by the multiple publications

of the author and her collaborators. Although its logical and rhetorical structure have not been quite so sharply replicated by other authors, many have drawn inspiration from it while adapting it to their distinctive research problems and contexts and mobilizing other sources of methodological inspiration. For example, Zott and Huy (2007) used a comparative case method with similar features to examine how more or less successful entrepreneurial startups used symbolic management approaches, including a focus on extreme cases to sharpen insights. In a prize-winning paper, Gilbert (2005) used a similar method to explore patterns of inertia and modes of overcoming them in the newspaper industry. Others have used multiple case study methods that although not necessarily directly inspired by Eisenhardt's work share methodological and rhetorical elements. For example, Maitlis (2005) used multiple cases to generate a model of different forms of leader and stakeholder sensemaking and their relationships with outcomes using extensive tabulated data to add credibility to the relationships she identified.

The template has however its boundary conditions and limitations. First, while empirical processes are analyzed and interesting new process "constructs" emerge from these studies, the approach often tends to lead to "variance" rather than "process" theorizations, that is, the emphasis in most applications is on explaining variation in outcomes rather than on understanding patterns of evolution over time (Mohr, 1982; Langley, 1999, 2009). Variance models have their own value but they compress time, limit attention to temporal ordering, and assume that there *is* such a thing as a final outcome, something that can be questionable in many cases. For example, firm performance evolves over time – it is not fixed once and for all. Performance "outcomes" are just way-stations in ongoing processes. Indeed, they might sometimes better be seen as inputs to ongoing processes since evaluations and interpretations of performance can have important effects on subsequent actions (Langley, 2007).

There is however actually no inherent reason why multiple case analyses cannot be used to develop process models and elements of ordering do appear in a few studies (e.g., Bingham, 2009; Galunic & Eisenhardt, 1996). Yet, when this is the objective, the logic is different from the dominant pattern described above. Rather than seeking *explanations for differences between cases*, a process theoretical analysis requires looking for *regularities in temporal patterns across cases*. One study that does this rather well using multiple cases is Ambos and Birkinshaw's (2010) recent paper on the developmental patterns and transitions of new science-based ventures. This

study indeed demonstrates how the outcomes of one phase of development become stimuli for change for the next. Nevertheless, the retrospective interview methodology used in multiple case studies often limits the depth of evolutionary process detail that can be captured in these studies.

A second issue concerns the degree to which the findings emerging from such studies are indeed as theoretically novel and surprising as often claimed. However interesting the studies are, the subsequent capacity of the authors to explain their results drawing on other literature suggests that the rhetoric of surprise might sometimes be overemphasized. Several authors have mitigated such claims while still legitimating their research efforts and methods by referring to them as "theory elaboration" rather than "theory development" (Lee, Mitchell, & Sablynski, 1999). In most cases, this would seem to be a more realistic and yet valuable research enterprise, because it involves explicitly building on previous work while developing it in new directions.

Finally, as we noted at the beginning of this section, the Eisenhardt multiple case method is positivist in orientation [or more precisely, what Guba and Lincoln (1994) would label post-positivist]. It attempts to access "factual" data about what happened in a sample of relevant processes, and it aims to develop generalizable nomothetic causal laws about objectively observable phenomena in the real world. There are other ways of conceiving the research enterprise with qualitative research, one of which we shall consider in the next section.

The Gioia Method: Interpretive Modeling of Informant Understandings over Time

Ever since Kathleen Eisenhardt published her first papers using the distinctive comparative case method described above, the approach has been both a source of admiration and emulation for many, yet a source of some discomfort to certain other qualitative researchers who have seen in it a distortion of the principles of the traditional interpretive case method that emphasizes depth of understanding of unique situations (Dyer & Wilkins, 1991; Ahrens & Dent, 1998). Yet, cross-case comparative studies and single case analyses have very different objectives and make different kinds of theoretical contributions, valued for different reasons (Langley, 1999).

One group of scholars who appear to have perfected an approach for both doing and successfully publishing single in-depth interpretive case studies is Dennis Gioia and his colleagues and students. Their qualitative work has a

distinctive flavor that has given rise to numerous empirical studies, beginning with a series on strategic sensemaking and sensegiving in the 1990s (Gioia & Chittipeddi, 1991; Gioia, Thomas, Clark, & Chittipeddi, 1994; Gioia & Thomas, 1996) and following up with another impressive series of papers on organizational identity change in different settings with or by colleagues and students (e.g., Corley & Gioia, 2004; Corley, 2004; Nag, Corley, & Gioia, 2007; Clark, Gioia, Ketchen, & Thomas, 2010; Gioia, Price, Hamilton, & Thomas, 2010). The paper by Corley and Gioia (2004) dealing with identity ambiguity during a spinoff (based on Kevin Corley's Ph.D. thesis) received the *ASQ* Scholarly Contribution Award for the most significant paper published five years earlier and has been frequently cited not only as a strong contribution to organizational identity theory but also as a methodological exemplar by other authors (e.g., Pratt, 2009; Rindova, Dalpiaz, & Ravasi, 2011; Maguire & Phillips, 2008). From our personal observations, it is frequently mentioned by reviewers. There is evidence that we have here the elements of another emergent template.

Epistemological Foundations and Purposes: Toward Interpretive Understanding
Unlike Kathleen Eisenhardt, Dennis Gioia has never published a paper explicitly describing step by step his methodology. However, in a reflexive piece about his career as an organizational scholar, he noted:

> In my research life, I am a grounded theorist. I pick people's brains for a living, trying to figure out how they make sense of their organizational experience. I then write descriptive, analytical narratives that try to capture what I think they know. Those narratives are usually written around salient themes that represent their experience to other interested readers. (Gioia, 2004, p. 101)

This quotation neatly sums up the interpretive philosophy driving the approach described here. The data Gioia and his colleagues are interested in concern how people understand the changes they are both instigating and dealing with, and how those meanings evolve. The key methodological references the authors build on are the original grounded theorists (Glaser & Strauss, 1967; Strauss & Corbin, 1990). The theoretical products they generate are narratives that attempt at the same time to provide closeness to so-called ''first order'' participant perspectives, and yet to add the authors' ''second-order'' interpretations of these perspectives distilled into a set of inter-related overarching categories or themes that resonate with both participants and readers, and yet communicate new insight. Of course, as in the previous case, there remains a certain tension between novelty and

plausibility. We now briefly summarize the logic of the method and the rhetoric of the writing that contribute to achieve both.

The Logic of the Method: Designing for Revelation, Richness, and Trustworthiness
When studying one case at a time in the hope of offering distinctive insights, it would seem important to choose the right site. Yin (2009) suggests that three different logics can be used to select sites for holistic case studies: choose "critical" cases for the "test" of a particular theory, choose "extreme" cases where something exceptional seems to be occurring, or choose "revelatory" cases that offer high potential for developing new insight into an understudied phenomenon. Gioia and colleagues' recent contributions seem to have been designed to build successively on a developing body of cognitively oriented theories of sensemaking and identity change, each study adding new identity-critical situations in a kind of sequential *revelatory* case logic. For example, while Corley and Gioia (2004) examined the dynamics of identity change during a spinoff, Nag et al. (2007) looked at identity change in the context of the addition of new forms of knowledge, Clark et al. (2010) focused on evolving identity dynamics during a merger, and Gioia et al.'s (2010) study investigated the emergence of identity in a new organization. The timing of these studies has been such that although others have worked in the area organizational identity, each individual study was able to lay claim to a novel context and related set of insights and the whole series of studies takes on a programmatic character.

Beyond the technical criterion of selecting cases for their revelatory potential, in-depth ethnographic studies of change require organizations that provide good access to ensure data richness. Thus, Gioia and colleagues have not hesitated to study organizations close to home: "No organization is more salient or more important to me than my own organization, so that helps to explain why I sometimes study my own university" (Gioia, 2004, p. 102). For several articles, Gioia and colleagues have also developed a rather innovative insider-outsider perspective that truly optimizes access to richness, in which one member of the research team has been an active participant in the events studied (e.g., Gioia et al., 1994, 2010; Gioia & Chittipeddi, 1991). The authors argue that the combination of insider and outsider perspectives both enriches the research and can contribute to its trustworthiness as long as precautions are taken to ensure confidentiality and independence (Gioia et al., 2010). In terms of data collection more generally, the researchers have made extensive use of interviews, often carried out in multiple rounds and at multiple levels and positions, but also

of observational data (Clark et al., 2010; Gioia & Chittipeddi, 1991; Corley & Gioia, 2004).

Following Strauss and Corbin (1990), the methods sections of these articles generally describe a highly disciplined coding and analysis process whose central artifact, a hierarchical ''data structure'' is presented as a key output of the research, usually in the form of a horizontal tree-shaped figure (see, e.g., Corley & Gioia, 2004, p. 184). To arrive at this, the authors first develop in vivo codes through ''open coding'' of data extracts using the words of participants, and then group these into ''first order'' (participant-based) concepts through ''constant comparison'' (Strauss & Corbin, 1990) between different extracts. Linkages between first-order concepts are then sought through ''axial coding'' leading to so-called second-order themes situated at a higher level of abstraction. Through further comparisons of the data, the researchers generally arrive at a limited number of ''aggregate dimensions'' or ''core categories'' that serve to summarize the elements of an emerging theoretical model. For example, the ideas of ''sensemaking'' and ''sensegiving'' emerged as the key explanatory concepts from the study of the initiation of strategic change in a university (Gioia & Chittipeddi, 1991); the notion of ''identity ambiguity'' along with its triggers and consequences emerged as central in the study of identity change following a corporate spinoff (Corley & Gioia, 2004). Each of these concepts is linked to others and underpinned by the first-order and second-order themes that successively and in tree-like fashion gave rise to it. All this takes place iteratively, with constant moving back and forth between codes and data, and with emerging ideas leading to additional data collection to fill out the framework as the research progresses. Instead of terms like validity and reliability, the authors use Lincoln and Guba's (1985) set of criteria for naturalistic inquiry to assess the quality of their research method. In particular, their claims for the ''trustworthiness'' of their data are supported by the involvement of multiple researchers and by member-checking (i.e., gaining feedback from insiders on emerging interpretations).

Again, the simple description of the design and procedures does not do justice to the uncertainties involved in generating these outputs. Finding the twist that will pull all the ideas together is of course necessarily a creative act. As Suddaby (2006) has noted, grounded theory is not easy, although when examining its products, it sometimes looks easy, since at least in the case of these researchers, the emerging models tend to be neatly parsimonious despite the mass of data that generated them. This brings us to the question of rhetoric.

Rhetoric of the Writing: Establishing the Gap, "Distilling the Essence," Elaborating the Story

> My awareness of my cognitive limitations helps me empathize with the poor reader trying to understand the point(s) I am trying to make in a given article. For that reason, I work hard at trying to distil findings to their essences and to communicate them in simple compelling ways. Although I once disdained it, I have developed a great appreciation for "sound-bite" research reporting. (…) A well-constructed sound-bite has a certain memorability about it-what I like to call a "cognitive stickiness" that allows readers to remember the most important points you are trying to make. (Gioia, 2004)

The rhetorical structure of the articles by Gioia and colleagues that we have reviewed here is perhaps not as uniform as that described above for Eisenhardt and colleagues' work. However, there are some very instructive commonalities that are worthy of note. First, the positioning of the contribution is more often in the nature of establishing a gap in understanding of important processes than of establishing a contradiction with previous research as we saw above.

However, perhaps the most striking and powerful rhetorical pattern lies in the presentation of the findings. This begins with the overall "data structure" diagram we described in the previous section. For example, Corley and Gioia's (2004) data structure diagram has 24 "first-order" concepts grouped into 9 "second order themes," which are in turn grouped again into three "aggregate dimensions" that form the core of the theoretical contribution. Gioia et al.'s (2010) study of the creation of a new identity in a university department has 16 "first order categories" grouped into 8 "second order themes." In both these papers and others, another figure that shows how the second order themes are related with each other over time is also provided. These figures, accompanied by a short verbal description, provide an upfront distillation of the paper's central message (see Gioia's remarks at the beginning of this section).

All that remains then is to elaborate on each of the main themes. This is done in two ways that together provide compelling support for the emerging model. First each of the themes is elaborated as part of a narrative account in the body of the paper, with multiple references to specific incidents and quotations from informants or documents. Second, additional quotations for each theme are displayed in a large accompanying table (with very little overlap in content with the textual narrative). This data presentation strategy, very obvious in the Corley and Gioia (2004) paper and followed through in subsequent writings, builds strong credibility around the findings. In a recent *Academy of Management Journal* editorial, Pratt (2009) noted the value of this approach, suggesting that writers might keep

their most striking "power quotes" (Gioia's sound-bites?) for the narrative, but place additional "proof quotes" in tables to solidify their arguments. Finally, after the presentation of the findings, the authors return to a description of the overall model, and elaborate on the contribution of the paper, often though not always in a series of propositions.

Assessing the Template: Limitations and Variations
Again, the "Gioia method" has been very successful on its own terms in generating knowledge about strategic and identity change in various situations. Several of its elements have also been taken up by others, especially but not only by researchers in the area of organizational identity. Specifically, the authors' approach to summarizing the derivation of their emergent grounded conceptual framework in the form of a data structure diagram has become increasingly common. For example, Maguire and Phillips (2008) used this device in a study of identity change at Citigroup, Anand et al. (2007) used it for a study of the development of new practices in consulting firms, and Rindova et al. (2011) used it in their study of Alessi's incorporation of new cultural resources into their strategy.

This template has limitations too. One potential limitation that seems, however, not to have hindered these researchers concerns the challenge of convincing readers about the transferability and relevance of the findings given the propensity to study single cases. In interpretive research, it is argued that it is the depth of contextual detail in a case study that provides the understanding necessary for a reader to judge whether the theoretical elements might apply to their own situation. Also, one might expect that cases (of for example mergers) might have certain generic qualities that could make some types of findings relevant almost anywhere. And yet, working with a single idiographic case considered holistically is, in our own experience, often more challenging than working with some form of comparative design where similarities and differences more naturally stimulate theorization (Langley, 1999). With a single case, it is easy to fall into the trap of having nothing but a boring sequential narrative to tell, with no insightful plot or any hope of catching readers' minds and imaginations with the "cognitive stickiness" that Gioia (2004) was referring to. The ability to generate theoretical insights that have obvious value beyond the specific context of their development is a crucial skill for this type of research.

Finally, although the Gioia method does lead to process models of how people make sense over time, these models sometimes seem to describe phenomena at rather a high level of aggregation (as described in the second-order themes) so that a complete understanding of how and why things

occur in the everyday from one moment to the next is to a degree glossed over. This may be partly a consequence of the grounded theory methodology where the coding and categorizing process may generate a certain decontextualization; to achieve generality, the chaining and interplay of particular events may sometimes become lost in this process. In addition, despite their interpretive roots, these studies usually produce singular narratives where differences in perspective are subsumed as ''tensions'' but are not elaborated in depth (Buchanan & Dawson, 2007). As we shall see in the next section, there may be other ways of approaching strategy processes that get closer to everyday strategic practices and the way in which they are reproduced and adapted and that take into account multiple perspectives.

TWO TURNS

The two approaches to qualitative analysis of strategy process phenomena described above are not of course the only ones. However, we chose to present them because they are not only powerful and useful but also representative of the most common sets of epistemological assumptions, methodological toolkits, and rhetorical frames supporting qualitative research in this field. In the second part of this chapter, we move toward some more recent and less traditional approaches to qualitative studies in strategy and management. These approaches are broader and less codified than the templates described above, so our mode of presentation will be somewhat different. However, they are currently generating a great deal of interest. Each has different epistemological assumptions, suggests different methodologies, and may involve different styles of writing. We begin by focusing on the ''practice turn'' and then move on to the ''discursive turn'' drawing on selected methodological texts and empirical exemplars in each case (for a summary of this discussion, see Table 2).

The Practice Turn: Studying Strategy as a Social Practice

Epistemological Foundations and Empirical Exemplars
The practice turn in strategy research, or the ''strategy as practice'' perspective (Whittington, 2006; Jarzabkowski, 2005; Johnson, Langley, Melin, & Whittington, 2007) has developed considerable momentum in recent years building on an interest in practice-based studies that has spread from philosophy and sociology (Schatzki, Knorr Cetina, & Von Savigny, 2001; Reckwitz, 2002;

Table 2. Two "Turns" in Qualitative Research on Strategy
and Management.

	"Strategy as Practice"	"Strategy as Discourse"
Empirical focus	*The "doing" of strategy:* Activities of strategy practitioners and regularities emerging from or underlying them	*Language and strategy:* How discourses are shaped and shape understandings of strategy and organizational direction
Foundational references	Whittington (2006, 2007), Jarzabkowski (2004), Johnson et al. (2007), Rasche and Chia (2009), Feldman and Orlikowski (forthcoming)	Phillips et al. (2008), Vaara (2010), Phillips and Hardy (2002), Vaara and Tienari (2004)
Epistemological foundations and key theoretical elements	*Practices as constitutive of social world; diverse theoretical roots but some key common elements:* – Knowledge as embedded in practices – Socio-material nature of practice – Recursivity of practices	*Social world created and maintained through discourse; Key elements:* – Hermeneutic: focus on meaning – Critical: revealing politics and power – Interdiscursive: focus on interplay among discourses at multiple levels
Empirical exemplars	Rouleau (2005), Kaplan 2011, Jarzabkowski (2008)	Heracleous and Barrett (2001), Vaara and Monin (2010)
Methodological and rhetorical elements	– Ethnographic observation to detect elements of practice (e.g., implicit knowledge; sociomateriality) not usually consciously perceived – Need for in-depth longitudinal studies to capture recursivity of practices – Writing around detailed vignettes to *reveal* underlying dynamics – Use of temporal bracketing to structure recursive analysis	– Detailed analyses of content of *texts* (e.g., themes, structure, etc.) – Need for ethnographic or process data on *context* (writers, readers, intentions, events, practices surrounding text) – Longitudinal data to capture temporality – Writing including both detailed analysis of text and as well as data on how texts are used in context

Giddens, 1984; Bourdieu, 1977) into various subfields of organization theory and management including strategy (Feldman & Orlikowski, forthcoming; Miettinen, Samra-Fredericks & Yanow, 2009; Corradi, Gherardi, & Verzelloni, 2010). Specifically, scholars of strategy as practice argue that rather than being seen as something that organizations *have*, strategy should

be viewed as "something *people* do" (Whittington, 2006; Jarzabkowski, Balogun, & Seidl, 2007). Practice thinking thus begins with an empirical focus on activity, and in this case with the concrete micro-level activities that strategy practitioners, broadly defined, engage in, and with the regularities constituted and reproduced by these activities.

For some, practice thinking ends where it begins: the "doing of strategy" is an interesting empirical phenomenon that can be and indeed has been studied in a variety of different ways using methods that are often not all that different from those we described earlier. Indeed, the studies of Eisenhardt (1989b) on fast decision making and Gioia and Chittipeddi (1991) on sensemaking and sensegiving in strategic change can be seen as studies of strategy as practice in that sense (Johnson et al., 2007). This empirically driven notion of practice has renewed interest in the human and practical elements of strategy making, giving rise to some innovative and interesting studies [e.g., Johnson, Prashantham, Floyd, and Bourque's (2010) multiple case studies of success and failure in strategy workshops drawing on ritual theory; Maitlis and Lawrence's (2003) single case study of strategy failure; Balogun and Johnson's (2004) interpretive study of the role of middle-manager sensemaking in strategic change using diaries and focus groups].

However, the notion of strategy as practice can become deeper and more distinctive if the notion of practice is taken to refer not just to an empirical interest in the doing of strategy but to include a commitment to theories of social practice, and eventually to a practice-based ontology in which "practices are understood to be the primary building blocks of social reality" (Feldman & Orlikowski, forthcoming, p. 3; Schatzki et al., 2001). This point has been argued in different ways by both proponents (Whittington, 2007; Rasche & Chia, 2009) and critics (Chia & MacKay, 2007; Carter, Clegg, & Kornberger, 2008; Corradi et al., 2010) of the strategy as practice perspective. However, what exactly this means is obscured by the fact that, as Miettinen et al. (2009, p. 1312) note, "social practice theory is not a unified theory, but rather a collection of authors and approaches interested in studying or theorizing practice, each of whom has his or her own distinctive vocabulary" (see also Corradi et al., 2010). Nevertheless, some common features of practice theorizing can be identified (Miettinen et al., 2009; Rasche & Chia, 2009; Feldman & Orlikowski, forthcoming) and we will draw on three of these to illustrate the implications for empirical research, using exemplars for each.

First, practice theorizing emphasizes the way in which knowledge is embedded in and regenerated through practical activity (Cook & Brown, 1999; Gherardi, 2006). Thus when individuals engage in practices, they draw on unconscious tacit understandings of how to "go on" in specific situations that have been learned over time and that are enacted collectively (Rasche & Chia, 2009). From this perspective, the knowledge of how strategy or indeed any practical activity is accomplished may not be easily available only from asking questions in interviews, the dominant methodology in qualitative studies of strategy and management. Rather, it is implicit in what people do in specific situations. To appreciate and to a degree capture this form of knowledge requires close ethnographic observation, and sensitivity not just to surface activity but to the skills and competencies that underlie it (Rasche & Chia, 2009). Rouleau's (2005) study of everyday sensemaking and sensegiving practices illustrates this focus. Specifically, through a fine-grained analysis of incidents and conversations observed among middle managers and clients in a clothing firm, Rouleau (2005) shows how enacting a new strategy in the everyday involves adjusting stories to the people addressed ("translating the new orientation"), drawing on broad cultural repertoires associated with gender and ethnic origin ("overcoding the strategy"), mobilizing space, the body and displayed emotions to channel attention ("disciplining the client") and framing legitimate reasons for strategic change ("justifying the change"). All these micro-practices and their embedded skills appear to be enacted subtly, smoothly, and naturally with little readily apparent conscious reflection.

A second common tenet of practice theory is that material objects ranging from sophisticated technologies to the everyday tools of living are deeply intertwined in everyday practices, mediating how and what is accomplished (Latour, 2005). Practices are thus often qualified as "socio-material" to encompass the notion of the inseparability of human and nonhuman agency (Feldman & Orlikowski, forthcoming). This too has implications for research, again suggesting a need for fine-grained attention to how material elements intervene within the context of practice. An interesting recent ethnographic study by Kaplan (2011) reveals how PowerPoint technology is deeply implicated in the ways in which strategic decisions are constructed. Through the fine analysis of strategy making negotiations, Kaplan shows how the materiality, mutability, modularity and digitality of PowerPoint slides contributes to enabling both collaboration among people holding different perspectives (through information sharing and idea generation),

but also to what she calls "cartography" – the political effort to pin down and "draw boundaries around the scope of the strategy" (Kaplan, 2011, p. 21) by selective inclusion of information and actors manifested materially in the slides themselves and in the way in which they are diffused and presented.

Finally, a third important notion in practice theory is the idea that practices are recursive (Feldman & Orlikowski, forthcoming; Jarzabkowski, 2004). Ongoing activity leads to the stabilization and reification of social orders or social structures that become resources for subsequent activity. For example, in Giddens' (1984) theory of structuration, social structures constituted through practice include power dependencies ("structures of domination"), shared meanings or interpretive schemes ("structures of signification"), and norms ("structures of legitimation"). Ongoing activities are constrained and enabled by these social structures, but they are simultaneously the means by which they are produced and reproduced over time. The mutually constitutive nature of structure and agency implicit in these theories of practice can be hard to pin down in empirical research and detailed ethnographic observation again seems desirable. In addition however, the ability to capture the recursive nature of practices requires fairly long time frames. For example, in a seven-year study of university strategy making, Jarzabkowski (2008) used a structuration theory framework to examine how strategizing iteratively involved ad hoc decisions about specific strategies (interactive strategizing), the enactment of embedded routines and structures that generated decisions while reproducing those routines (procedural strategizing), and activity that creating new routines and structures that would serve to embed later decisions (integrative strategizing).

Doing and Writing Research from the Practice Turn
As we have suggested above, studying strategy from the perspective of the practice turn often requires deeper and closer contact with the doing of strategy than is often seen in other approaches. Thus, ethnography has been a favored research method because it enables researchers to capture what participants themselves are unable to articulate, at least not as well (Rouleau, 2005; Rasche & Chia, 2009) and to physically see how material objects, the body, space, and time are mobilized within practices (Rouleau, 2005; Kaplan, 2011). For example, strategy as practice scholars have begun to use video ethnography and photographs to capture systematically what is happening beyond the merely verbal component of strategic practices (Molloy & Whittington, 2005; Liu & Maitlis, 2010). In addition, longitudinal observations over long time periods are

required to capture the recursive nature of practices as in Jarzabkowski's (2008) seven-year study.

Clearly however, such work generates immense databases of disparate kinds of information, and the researcher is faced with another complex task in communicating it in the context of journal articles. Without suggesting that these are the only ways of analyzing and communicating insight about practice, we observe two interesting ways in which authors reveal their findings that are somewhat different from those described earlier. The first is particularly evident in the Rouleau (2005) and Kaplan (2011) articles and involves the detailed elaboration and unfurling of highly specific but powerfully illustrative vignettes. For example, Rouleau's (2005) ethnographic study took place over six months with four days per week of presence on the site. However, she uses six small vignettes (three routines and three conversations) to build her in-depth analysis of the practices. She draws an interesting analogy between her own approach and that of the natural scientist when she says, "Just as using a microscope helps understanding of the whole through its tiny parts, routines and conversations offer an interesting insight to examine strategic change" (p. 1419). As each of the microscopic samples reveals similar underlying phenomena whose workings are finely traced out, cumulative understanding becomes increasingly layered and credible. Similarly, Kaplan undertook an 18-month ethnography. However, her analysis draws intensively on two sequences of PowerPoint-based negotiations with detailed illustrations and a complex table in which modifications over time are illustrated. The explicit *showing* of how the practices she is describing are manifested in every element of these concrete sequences adds to the credibility of her theoretical insights.

A second analytical and rhetorical device that has been useful in practice-based studies draws on Barley's (1986, p. 82) sawtooth representation of the recursive nature of actions and institutions (or structures) where the realm of action and institution are shown as horizontal parallel lines that interact (see also Barley & Tolbert, 1997). In this representation, institutions are shown as directly influencing the practices carried out in the action realm. Each iteration of a practice implies its recursive reproduction or adaptation. Over time, ad hoc adaptations progressively cumulate and eventually result in sharper shifts in the institutional frame itself. This classic sawtooth model is used by Jarzabkowski (2008) in her study of strategizing in universities, by Howard-Grenville (2007) in her study of shifts in issue-selling practices in a chip-making company, and by Rerup and Feldman (2011) in their study of evolution in interpretive schemes in a research unit. The framework provides a heuristic for breaking down analysis into successive temporal brackets

(Langley, 1999, p. 703) to explicitly examine how iterative actions taken during one period lead over time to changes in the context that will affect action in subsequent periods.

Assessing the Turn: Limitations and Variations
The practice turn offers potential to understand the doing of strategy and management rather differently, throwing light on its implicit, sociomaterial and recursive nature, something that is largely absent in the two templates we presented earlier. The practice turn also has a natural affinity for qualitative and ethnographic research methods because of its empirical focus on the situated and particular. As Feldman and Orlikowski (forthcoming) note, however, this does not mean that practice theorizing has no generality. Rather, strong practice-based studies like those mentioned above generate new concepts and understandings that have much broader relevance. In a striking example of this potential, Feldman's ethnographic study of practices in a university housing department generated broadly applicable theories of the performative and ostensive aspects of routines (Feldman, 2000) as well as the development of the notion of ''resourcing'' (Feldman, 2004). Both these ideas have many interesting applications far beyond the original context of their production, and more particularly in the area of strategy.

The key limitation of the practice turn in strategy may be that as some critics have suggested (Chia & MacKay, 2007; Carter et al., 2008), it is not quite yet a ''turn'' in the epistemological sense. ''Strategy as practice'' is more in the nature of an ''umbrella'' concept (Corradi et al., 2010) that enables the grouping together of a community of people interested in similar empirical phenomena and drawing on a loose collection of theoretical lenses that have something to do with practice. So far, this seems to be leading to a renewal and enrichment of qualitative methodology in strategy and management, a positive trend it seems to us. As the perspective develops through its own empirical research practice, its theoretical reach will no doubt recursively shift and hopefully deepen. The emphasis on practice has also in many ways fed into the second turn we examine here.

The Discursive Turn: Studying Strategy as Discourse

Epistemological Foundations and Empirical Exemplars
As the result of a more general ''linguistic turn'' in organization studies (Alvesson & Karreman, 2000), and building on the progression of

socioconstructivist epistemologies inspired by Berger and Luckmann (1967), discursive approaches have become increasingly prevalent in organization and management research (Phillips, Sewell, & Jaynes, 2008; Vaara, 2010). In particular, a wide variety of linguistic approaches to strategy have been proposed varying from critical discourse analysis (CDA) (Phillips et al., 2008) to narrative analysis (Barry & Elmes, 1997) to conversation analysis (Samra-Fredericks, 2003). In this section, we will focus more particularly on exemplars of discursive approaches used to study multi-level strategy processes over time.

One of the most widely shared definitions of discourse was offered by Parker (1992) for whom discourse does not refer simply to text, but is a set of texts *and* of the practices related to their production, dissemination, and reception. Texts can take on different forms: written, spoken, images, symbols, and other artifacts (Grant, Keenoy, & Oswick, 1998). Discourse analysis involves examining how discourses shape understandings of social reality, and how they are in turn shaped through discursive practices including the production, distribution, transformation, movement, and interpretation of texts. It aims to understand how social phenomena are produced or constructed and maintained through time (Phillips & Hardy, 2002). Thus, there are clear links between this approach and the practice-based approach described in the previous section. Paralleling the traditional themes of strategy research, discourse studies in strategy "all share an interest in exploring how organizations, industries and their environment are created and maintained through discourse" (Phillips et al., 2008, p. 770).

As in the case of practice studies, there is no strong coherence among discursive approaches, but three main concerns are featured in this type of research that we identify as hermeneutic, critical and interdiscursive. The hermeneutic dimension is related to the need to understand how certain meanings are discursively constructed and interpreted and how they evolve over time (Heracleous & Barrett, 2001). Discourse studies also share a critical concern that calls for a multidimensional or intertextual analysis of discourse to bridge micro, meso, and meta levels of analysis and to critically examine the shaping of various organizational processes (Phillips et al., 2008; Vaara, 2010). Finally, while some discourse analyses tend to be static focusing on specific documents or narratives, as noted by Vaara (2010), the greatest potential of discursive approaches for strategy comes from analyses of the interplay of discourses over time and across multiple levels, what he labels "interdiscursivity." This could involve for example looking at how macro-level discourses about the nature of strategy are taken up in specific organizations (Mantere & Vaara, 2008), how multiple discourses interact

and conflict (Heracleous & Barrett, 2001), or how dominant discourses come to emerge or are contested over time (Ezzamel & Willmott, 2008). Discursive approaches can therefore offer a new way of introducing complexity into the study of strategic processes by examining their nonlinearity, their linguistic nature, and the various forms of their internal dynamics (Vaara, 2010).

The two exemplars of discourse studies we chose to present in this chapter represent two very different ways of studying strategy processes from a discursive standpoint. The first by Heracleous and Barrett (2001) uses discourse analysis with a primarily hermeneutic concern. It examines organizational change from a discursive perspective through an exploration of the implementation process of a risk-placing support system in the London Insurance Market over a five-year period. The paper, one of the first of its nature to be published in the *Academy of Management Journal*, makes a strong case for a structurationist conceptualization of discourse as made up of both deep meaning structures and surface communicative actions and defends this conceptualization as a means of reconciling the social dualisms of structure and action (Giddens, 1984). Again the linkage with the previous perspective is clear, although the emphasis here is clearly on communicative actions and their underlying meaning, rather than on practices.

The paper is a longitudinal (five-year) investigation of how a change process (the implementation of a new IT system) is shaped by the discourses of different stakeholders over time. It is both an inquiry into the nature of the discourse employed by various stakeholders and an inquiry into its role in shaping the change process. Interestingly, a combined discourse analysis method, termed ''Rhetorical-Hermeneutic'' by the authors, was used and constitutes an original way of bridging between multiple levels of analysis: the deep discursive structure level, the surface communicative action level and the contextual level through interpretive schemes that are used as modalities that mediate between the two discursive levels. This methodological bridging apparatus generated a systematic processual analysis that tracks shifts and transformations in the change process over time. The study shows how the deep structures of discourse act as stable patterns that shape action in various ways for different stakeholders through contextual elements of interpretation. Its approach is ''interdiscursive'' in that it examines the struggles among alternate meanings inherent in stakeholder's communicative actions.

The second article by Vaara and Monin (2010) is a study of a process of discursive legitimation in a post-merger situation using a multimethod

critical approach. The paper also shows the recursivity of discourse and action in that the discursive legitimation process unfolds by simultaneously shaping and being shaped by organizational action. The interesting aspect of the process as described in the paper is how a key discursive "device" of justification, termed "theranostics" (a combination of the two strategic resources of the merging entities, respectively "therapy" and "diagnostics") was taken up and echoed in media discourse, creating enthusiasm around this concept not only in the business press but by ricochet within the firm itself as its members came increasingly to believe it, and indeed attempted to enact it despite its origin as a useful "story" developed to legitimate a merger that had been promulgated for other reasons. The study illustrates the potentially performative nature of discourse (producing that of which it speaks) and its role in the merger outcome. It shows the process of transformation of *theranostics* from a discursive resource of legitimation into a source of unrealistic expectations, as the ideas underlying it ultimately proved to be illusory.

In their paper, Vaara and Monin (2010) interestingly also echo themes like sensemaking, sensegiving, or sensehiding often examined by others through the "Gioia method," but they analyse them using a discursive approach that is based on a multidimensional conception of discourse as made up of texts but also of a set of material actions that transform or are transformed by it.

Doing and Writing Research from the Discursive Turn

Aside from the two examples of published research from a discursive perspective described above, it is important to note that a large number of studies have been using this perspective in recent management research. In their recent review of and call for applying CDA to strategy research, Phillips et al. (2008) show the increase in the number of published papers including CDA since 1995, reaching around 140 in 2005. Although a wide range of methodologies can be found under the discourse analysis umbrella, three main elements structure the discursive approach methodologically in relation to studying processes: the multiple forms of text(s), the crucial role of context, and the temporality of discourse.

First, the textual dimension of discourse analysis is of course fundamental since it is mainly through texts in their various forms that any discursive work can be done. The juxtaposition of written, spoken and other symbolic textual devices characterizes the aim of discursive approaches to accentuate in more depth the internal circumvolutions of process and its interdiscursive nature. The studies we describe each contain

specific ways of systematically analyzing the content of texts, for example, looking at "ethymeme components" or rhetorical structures in the texts for Heracleous and Barrett (2001) and looking at legitimation strategies inherent in the texts for Vaara and Monin (2010). Other kinds of textual analysis methods such as conversation analysis or narrative analysis would be possible. However, it is not only the text as a micro analytical device that is of interest here but texts as multiple forms of discursive manifestations embodied in their practices of production, dissemination and consumption that are at the heart of this relatively new methodological approach.

It is important to note here the differences in the way textual data (interviews, documents, and other materials) are treated in this perspective as compared with the approaches we presented in the first half of this chapter. The Eisenhardt method involves analyzing such data to establish facts while the Gioia method would treat the same data as interpretations. In the discursive approach, texts are discourses that are analyzed not only for what they say but for what they *do*: for example, the meanings they construct, reproduce, contest or maintain, the effects they have and the precise means by which these effects are achieved (Vaara, 2010). These effects may include the propagation of managerial concepts (e.g., "theranostics"; strategy itself), the transformation of institutional fields (Suddaby & Greenwood, 2005) or the reproduction of power relations (Knights & Morgan, 1991; Ezzamel & Willmott, 2008), with critical researchers being particularly concerned with revealing the latter.

Second, in almost all the studies that use a discursive approach to understand organizational processes, the notion of *context* is presented as the stepping stone upon which a strong analysis should be built. No "thick description" is possible without it and no sense of unfolding or of temporality can be conveyed if context is not addressed. For example, in Heracleous and Barrett's study (2001), context is taken into account through the collection of ethnographic data that is used in conjunction with the textual data in the analysis of the change process. In a constant hermeneutic interplay between texts and discourses defined as "constituted of the totality of single texts" (p. 762), the analysis illustrates the importance of their "texts-in-context" approach (interviews, written texts, ethnographic data) to understand the temporal unfolding of the process. Similarly, in recent research by Vaara and his colleagues, (e.g., Vaara, Kleymann, & Seristö, 2004; Vaara & Monin, 2010; Mantere & Vaara, 2008), context is always given a preponderant role in explaining the dynamics of the processes under examination. Elements of context are drawn from data

collected during lengthy contact with the studied organizations and are included in the narrative constructions around the unfolding of the examined processes. Generally, context gives the necessary depth and grounding to studies that move from the meso to the micro levels of analysis.

Finally, temporality is one of the main issues in studying processes and it seems that recent discursive approaches with their multidimensional and multilevel methodological choices are tackling the temporality issue in an interestingly relevant manner. Echoing the methodological opening-up to multiple dimensions, the conceptualization of temporality is broader here than in the more traditional process research studies. The temporality revealed in these studies is not simply a linear progression through time but a dynamic interdiscursive process that evolves in sinuous, nonlinear ways. For example, in the Heracleous and Barrett (2001) study, temporality is crucial and is shown through the description of the evolution of both levels of discourse and their mutual structuring broken down into distinct phases of evolution. In their description of the legitimation process of a merger, Vaara and Monin (2010)'s conception of temporality is anchored within the particular interpretive context of individuals in the two merging organizations. Temporality becomes a relative notion that might have to be taken into account in a different way in different contexts and for different organizational actors.

Assessing the Turn: Limitations and Variations
Like its main proponents (Phillips et al., 2008; Vaara, 2010), we believe that the discursive turn offers potential to open up research on strategy processes, through a more performative conception of discourse, to a multidimensional examination of organizational processes. In its critical manifestation, the discursive turn also draws attention to the ways in which realities that favor certain groups over others are socially constructed but also to how those relations might be thought of differently (Ezzamel & Willmott, 2008; Mantere & Vaara, 2008).

Nevertheless, we see several ways in which discursive studies might be developed and improved. First, some of the earlier difficulties associated with publishing discourse-based studies in major journals were perhaps associated with the relatively opaque nature of some of their analyses. Recent work including the studies by Heracleous and Barrett (2001) (see also Heracleous, 2006), by Vaara and colleagues (see also Vaara & Tienari, 2004; Mantere & Vaara, 2008) and by Phillips and Hardy (2002) have begun to render the methods more accessible, providing more methodological

detail and worked examples to build confidence in and understanding of findings that this type of analysis can generate.

Second, greater emphasis could be placed on the pragmatic aspects of discourse studies in strategy research to enable them to reach a wider audience. An understanding of the way in which discursive practices contribute to defining the realities organizations live with ought to have serious practical implications, but these have not necessarily been strongly emphasized. As with any academic enterprise, there is a risk of becoming too self-referential (Luhmann, 1995), and this arises particularly with approaches that build on their own specialized methodological language. Put differently, the knowledge generated by the more traditional templates has perhaps in the past been a little easier to consume.

CONCLUSIONS

This chapter has considered four different ways in which qualitative research can contribute to developing valuable knowledge about strategy processes. By describing two somewhat institutionalized approaches to conceptualizing qualitative research and of writing qualitative articles (the two "templates"), we illustrate some ways in which positivist and interpretive conceptions of reality and knowledge development have been successfully mobilized to generate insight. We have also shown how these approaches achieve their persuasive effects by examining not only the logic behind the methods used, but also by revealing the related rhetorical moves underlying their presentation and argumentation.

Second, we attempted to move beyond the positivist and interpretive frames reflected in the two more traditional templates to consider alternative ways in which qualitative data might be used to throw light on strategic management processes. Drawing on a number of illustrative exemplars, we showed the potential for the practice and discursive turns in strategy research to offer important and original ways of seeing these processes. From these perspectives, qualitative data is not simply something that can be valuable in the "early stages" of research as is often assumed in the positivist paradigm, but something that is inherent to the ability to uncover certain types of knowledge about organizational phenomena, for example, knowledge that is embedded in strategic practices or that is itself constructed through language.

We hope that the ideas presented in this chapter will encourage researchers interested in using qualitative research methods to examine the approaches presented here for themselves, perhaps by delving into some of

the exemplars we identified. We also hope that through their own reading and research, they might discover, articulate and/or invent others. There is, fortunately, still ample room for innovation and creativity in the area of qualitative research on strategy and management.

NOTES

1. We thank Dennis Gioia for an instructive telephone conversation about his approach to qualitative research.
2. Note that while Eisenhardt (1989a) indicated that the data do not have to perfectly fit the proposed model, in most published papers, it is hard to observe any lack of fit in the tabulated evidence that almost always exhibits perfect correlation.

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