



University of  
Zurich<sup>UZH</sup>

### Distinguished Scholars Seminar Series

## **MOVING BEYOND TEMPLATES IN QUALITATIVE DATA ANALYSIS: Novel and Practical Approaches to Analyze Qualitative Data, with a Particular Focus on Process Data Analysis**

Prof. Anne Smith  
University of Tennessee Knoxville

**Course code:** DOEC1049

**Time:** October 24-26, 2022; 9-16h

**Location:** PLM 103/104 (Plattenstrasse 14, Zurich)

**Contact:** violetta.splitter@uzh.ch

### **Course overview**

An essential characteristic of qualitative research is its methodological plurality and bricolage during the research process (Bansal, Smith, & Vaara, 2018; Denzin & Lincoln, 2017; Gephart, 2004). Yet, pressures to standardize and simplify qualitative methods have augmented the use of a handful methodological templates (e.g., Alvesson & Gabriel, 2013; Koehler, Smith, & Bhakoo, 2022; Langley & Abdallah, 2011). Köhler, Smith, and Bhakoo (2022) define methodological templates as “systematic, simplified, and repeatable approaches to data collection, analysis, and interpretation that have become standardized and legitimized through enactment (i.e., repeated publication especially in top ranked journals) and normative pressures from key gatekeepers (e.g., reviewers, editors, instructors, or co-authors) to align with dominant epistemological and ontological trends.” In a ORM Special Feature issue (April 2022), authors and co-editors of this issue address the emergence of this trend and offer practical ways for qualitative researchers to demonstrate the detail and rigor of their work to enhance the transparency and trustworthiness of their project.

This seminar builds on the novel and practical insights from authors in this special feature and her own research. **The focus of this seminar is analysis of qualitative data using innovative and novel approaches that demonstrate a rigorous and trustworthy analysis process.** The seminar will provide actionable steps to analyze data, especially process data, building on novel, pragmatic, and recent insights.

The course will provide a hands-on approach to process data analysis by highlighting different analytic moves to interrogate qualitative data to move a study forward (Pratt, Sonenshein, & Feldman, 2022) leading to theoretical insights. Examples will be provided from published papers and transcripts. No particular Computer Aided/Assisted Qualitative Data Analysis

Software (CAQDAS) is needed. Please bring your qualitative projects to discuss during the seminar. Time will be built in for master-class style and some individual consulting during the three-day seminar.

#### References

- Alvesson, M., & Gabriel, Y. (2013). Beyond formulaic research: In praise of greater diversity in organizational research and publications. *Academy of Management Learning & Education*, 12(2), 245-263.
- Bansal, P., Smith, W. K., Vaara, E. (2018). New ways of seeing through qualitative research. *Academy of Management Journal*, 61(4), 1189–1195.
- Denzin, N.K., & Lincoln, Y.S. (2017). *The SAGE Handbook of Qualitative Research* (5th ed.). Thousand Oaks, CA: Sage Publications.
- Gephart Jr, R. P. (2004). Qualitative research and the Academy of Management Journal. *Academy of Management Journal*, 47(4), 454-462.
- Köhler, T., Smith, A., & Bhakoo, V. (2022). Templates in qualitative research methods: Origins, limitations, and new directions. *Organizational Research Methods*, 25(2), 183-210. doi: 10.1177/10944281211060710.
- Langley, A., & Abdallah, C. (2011). Templates and turns in qualitative studies of strategy and management. In D. Bergh & D. J. Ketchen (Eds.), *Research Methodology in Strategy and Management* (Vol. 6, pp. 201-235). Bingley, UK: Emerald Publishing.
- Pratt, M. G., Sonenshein, S., & Feldman, M. S. (2022). Moving beyond templates: A bricolage approach to conducting trustworthy qualitative research. *Organizational Research Methods*, 1-28. doi: 10.1177/1094428120927466

#### Instructor Bio

Anne Smith (B.S., University of Virginia; MBA & Ph.D., University of North Carolina Chapel Hill) is Professor and Head of the Management & Entrepreneurship Department, Haslam College of Business, UT Knoxville. Anne served as Associate Editor at *Organizational Research Methods* (ORM) for five years and is currently an ORM editorial board member. She co-edited the 2022 ORM Special Feature on Templates in Qualitative Research. She co-edited the series *Research Methodology in Strategy and Management* (Volumes 11-13). Anne is a fellow in the Consortium for the Advancement in Research Methods (CARMA).

#### Sample publications

- Lerman, M.P., Mmbaga, N., & **Smith, A.D.** (2021, *alphabet authorship*). Tracing ideas from Langley (1999): Exemplars, adaptations, considerations, and overlooked. *Organizational Research Methods*, 25(2), 285-307. <https://doi.org/10.1177/1094428120915510>.
- Alexander, B., & **Smith, A.** (2019), Organizational access in qualitative research, *Qualitative Research in Organizations and Management*, 14(2): 172-193. <https://doi.org/10.1108/QROM-10-2017-1574>
- Mathias, B., & **Smith, A.D.** (2016). Autobiographies in organizational research. *Organizational Research Methods*, 19(2), 204-230.
- Pieper, T.M., **Smith, A.D.**, Kudlats, J., & Astrachan, J.H. (2015). The persistence of multifamily firms: Founder imprinting, simple rules, and monitoring processes. *Entrepreneurship: Theory & Practice*, 39(6), 1313-1337.
- Smith, A.D.** (2015). Introduction: Grounded theory. *Organizational Research Methods*, 18(4), 578-580.
- Ray, J. and **Smith, A.D.** (2012). Using photographs to research organizations: evidence, considerations, and application in a field study. *Organizational Research Methods*, 15(2), 288-315.
- Plowman, D. and **Smith, A.D.** (2011). Too hot to handle, still. *Qualitative Research in Organizations and Management*, 6(1), 100-105

- Plowman, D. and **Smith, A.D.** (2011). The gendering of organizational research methods: evidence of gender patterns in qualitative research. *Qualitative Research in Organizations and Management*, 6(1), 64-82. [Per Digital Commons Nebraska-Lincoln, has been downloaded 1648 times]
- Smith, A.D.**, Plowman, D., and Duchon, D. (2010). Every day sense giving: a closer look at successful plant managers. *Journal of Applied Behavioral Science*, 46 (2), 220-244.
- Smith, A.D.**, Plowman, D., and Duchon, D. (2009). A qualitative study of high-reputation middle managers: political skills and successful outcomes. *Journal of Operations Management*, 27(5), 428-443.
- Smith, A.D.** (2002). From process data to publication: a personal making sense. *Journal of Management Inquiry*, 11 (4), 383-406.
- Pitcher, P. and **Smith, A.D.** (2001). Top management team heterogeneity: personality, power, and proxies. *Organization Science*, 1-18.
- Smith, A.D.** and Zeithaml, C. (1999). The intervening hand: contemporary international expansion processes of the regional bell operating companies. *Journal of Management Inquiry*, 34-64.
- Smith, A.D.** and Zeithaml, C. (1996) Garbage cans and advancing hypercompetition: the creation and exploitation of new capabilities and strategic flexibility to two regional bell operating companies. *Organization Science*, 7 (4), 388-390.

## ***Schedule & Reading***

The following might be revised and adapted as we proceed with the course, and depending on participants needs. The following should convey a general idea of the course content.

### **Day 1 – October 24**

- A. Admin, warm-up exercise, discussion of your projects or project ideas.
- B. The logic of different data analysis approaches (Please read in advance: Koehler, Smith, & Bhakoo, 2022; Langley & Abdullah, 2011; Pratt, et al., 2000; Langley, 1999; Gephart, 2004; Grodal, et al., 2021).
- C. Exemplar Paper assignment. There are seven papers that I have identified as exemplary (see folder). I will assign one paper to each student; there may be several students reading the same paper. In Day 1, I will describe the papers and ask for student preferences.

### **Day 2 – October 25**

- A. Debrief paper assignment – What did you learn? What can we take away?
- B. Deeper dive into coding (Locke, Feldman, & Golden-Biddle, 2022; O’Kane, Smith, & Lerman, 2022;) covering: analytical artifacts, coding approaches, and categorization connections
- C. Return to assigned paper – overt or inferred coding approaches;
- D. In-class coding exercise.

### **Day 3 – October 26**

- A. Debrief coding exercise; utilization of approaches discussed, next steps in analysis
- B. Presentation of Results in exemplar papers
- C. Non-Conforming Data & Unsilencing Silences in Interview-based research
- D. Master Class with projects – If you would like to discuss your project for professor/class input, please bring 2 slides related to your project to this session: one

slide which describes your project and another slide of issues and questions that you would like discussion with the professor and input from student participants in class.

- All slides will be provided (complete slide deck at the end of the day or overall course).
- All participants are urged to bring their projects into the discussion. Time will be allocated on Day 3 for master-class discussions of projects (so all can learn from them) and/or individual discussion.

**READINGS (It would be helpful if you read these papers before class)**

Köhler, T., Smith, A., & Bhakoo, V. (2022). Templates in Qualitative Research Methods: Origins, Limitations, and New Directions. *Organizational Research Methods*, 25(2), 183–210. <https://doi.org/10.1177/10944281211060710>

Pratt, M. G., Sonenshein, S., & Feldman, M. S. (2022). Moving Beyond Templates: A Bricolage Approach to Conducting Trustworthy Qualitative Research. *Organizational Research Methods*, 25(2), 211–238. <https://doi.org/10.1177/1094428120927466>

Gephart Jr., R. P. (2004). Qualitative Research and the Academy of Management Journal. *Academy of Management Journal*, 47(4), 454–462. <https://doi.org/10.5465/AMJ.2004.14438580>

Langley, A. (1999). Strategies for Theorizing from Process Data. *Academy of Management Review*, 24(4), 691–710. <https://doi.org/10.5465/AMR.1999.2553248>

Langley, A., & Abdallah, C. (2011). Templates and turns in qualitative studies of strategy and management. In D. Bergh & D. J. Ketchen (Eds.), *Research Methodology in Strategy and Management* (Vol. 6, pp. 201-235). Bingley, UK: Emerald Publishing.

GRODAL, S., ANTEBY, M., & HOLM, A. L. (2021). Achieving Rigor in Qualitative Analysis: The Role of Active Categorization in Theory Building. *Academy of Management Review*, 46(3), 591–612. <https://doi.org/10.5465/amr.2018.0482>

Locke, K., Feldman, M., & Golden-Biddle, K. (2022). Coding Practices and Iterativity: Beyond Templates for Analyzing Qualitative Data. *Organizational Research Methods*, 25(2), 262–284. <https://doi.org/10.1177/1094428120948600>

O’Kane, P., Smith, A., & Lerman, M. P. (2021). Building Transparency and Trustworthiness in Inductive Research Through Computer-Aided Qualitative Data Analysis Software. *Organizational Research Methods*, 24(1), 104–139. <https://doi.org/10.1177/1094428119865016>

**Papers to choose from to in-depth analysis of methods, analytical moves and presentation of results (I will assign but feel free to skim/read before class; need at last one student per paper):**

Chiles, T.H., Meyer, A.D., & Hench, T.J. (2004) Organizational Emergence: The origin and transformation of Branson, Missouri’s musical theatres. *Organization Science*, 15(5), 499-519.

Dutton, J. E., & Dukerich, J. M. (1991). Keeping an Eye on the Mirror: Image and Identity in Organizational Adaptation. *Academy of Management Journal*, 34(3), 517–554. <https://doi.org/10.2307/256405>

- HOWARD-GRENVILLE, J., METZGER, M. L., & MEYER, A. D. (2013). Rekindling the Flame: Processes of Identity Resurrection. *Academy of Management Journal*, 56(1), 113–136. <https://doi.org/10.5465/amj.2010.0778>
- Kaplan, S., & Orlikowski, W. J. (2013). Temporal Work in Strategy Making. *Organization Science*, 24(4), 965–995. <https://doi.org/10.1287/orsc.1120.0792>
- PLOWMAN, D. A., BAKER, L. T., BECK, T. E., KULKARNI, M., SOLANSKY, S. T., & TRAVIS, D. V. (2007). Radical Change Accidentally: The Emergence and Amplification of Small Change. *Academy of Management Journal*, 50(3), 515–543. <https://doi.org/10.5465/AMJ.2007.25525647>
- Jarzabkowski, P., Lê, J., & Balogun, J. (2019). The Social Practice of Coevolving Strategy and Structure to Realize Mandated Radical Change. *Academy of Management Journal*, 62(3), 850–882. <https://doi.org/10.5465/amj.2016.0689>
- Lifshitz-Assaf, H. (2018). Dismantling Knowledge Boundaries at NASA: The Critical Role of Professional Identity in Open Innovation. *Administrative Science Quarterly*, 63(4), 746–782. <https://doi.org/10.1177/0001839217747876>

### **Course Requirements for ECTS**

If you require ECTS for this seminar, we ask you to submit either (1) a synthesis of the course content or (2) a reflection on how the notions discussed in class help advance your own research project (10-pages, 1.5 line spacing, Times New Roman). Deadline for submission of the essay is **December 31st, 2023**, to be sent to Violetta Splitter ([violetta.splitter@uzh.ch](mailto:violetta.splitter@uzh.ch)).