EDEN DOCTORAL SEMINAR IN CASE STUDIES IN BUSINESS AND MANAGEMENT RESEARCH

HELSINKI, 7-11 DECEMBER 2015

Professors Rebecca Piekkari and Catherine Welch (team teaching)
Total contact hours: 30 h

Day 1   Monday 7 December 13.00 – 17.00
What are qualitative methods and what is a case study?

Key themes:

- various definitions of the case study: when does a study qualify as a case study?
- changing views on the case study since the early 20th century, including recent developments
- disciplinary conventions regarding the case study and why they are important
- the importance of the case study to qualitative research

Learning outcomes:

- be able to identify a case study
- be able to take a position in a debate about what qualifies as a case study
- be able to recognize and appreciate difference disciplinary conventions in management
- understand how the case study is related to other qualitative methods and approaches

Background reading:

R.K. Yin (2014), *Case Study Research: Design and Methods*, 5th edn, Thousand Oaks: Sage.

Core readings:

R. Piekkari, C. Welch and E. Paavilainen (2009), 'The Case Study as Disciplinary Convention: Evidence from International Business', *Organizational Research Methods*, 12, 3, pp. 567-589.
J. Platt (1992), '"Case Study" in American Methodological Thought', *Current Sociology*, 40, 1, pp. 14-48.

Example to be discussed in class: M.R. Testa, S.L. Mueller and A.S. Thomas (2003), 'Cultural Fit and Job Satisfaction in a Global Service Environment', *Management International Review*, 43, 2, pp. 129-148.

Day 2   Tuesday, 8 December 09.00 – 16.00
1) Positivist and alternative approaches to case studies and the quality of case research

Key themes:

- the role that philosophical assumptions play in shaping how the case study is conducted and evaluated
- the debate between 'positivist' and alternative positions on the case study
- the relationship between a researcher's/reader's philosophical assumptions and the quality criteria they apply to the case study
- the debate on case studies and generalisability

Learning outcomes:

- understand the meaning of 'qualitative positivism'
- be able to differentiate between a positivist and an alternative case study
- be able to follow good research practices and procedures that improve the quality of the case study
- understand that quality criteria for assessing case research are not value free

Core readings:

W.G. Dyer and A.L. Wilkins (1991), 'Better Stories, Not Better Constructs, To Generate Better Theory: A Rejoinder to Eisenhardt', *Academy of Management Review*, 16, 3, pp. 613-619.

K.M. Eisenhardt (1989), 'Building Theories from Case Study Research', *Academy of Management Review*, 14, 4, pp. 532-550.

D. Wynn and C.K. Williams (2012), 'Principles for conducting critical realist case study research in information systems', *MIS Quarterly*, 36, 3, pp. 787-810.

Example to be discussed in class: 1) C.G. Gilbert (2005), 'Unbundling the Structure of Inertia: Resource Versus Routine Rigidity', *Academy of Management Journal*, 48, 5, pp. 741-763. 2) E.K. Yakura (2002), 'Charting Time: Timelines as Temporal Boundary Objects', *Academy of Management Journal*, 45, 5, pp. 956-970. 3) W. Ng and C. de Cock (2002), 'Battle in the Boardroom: A Discursive Perspective', *Journal of Management Studies*, 39, 1, 23-49. 4) O. Volkoff and D.M. Strong (2013), 'Critical Realism and Affordances: Theorizing IT-associated Organizational Change Processes, *MIS Quarterly*, 37, 3, 819-834. 5) B. Leca and D. Naccache (2006), 'A Critical Realist Approach to Institutional Entrepreneurship', *Organization*, 13, 5, pp. 627-651.

2) Research design: selecting cases and casing

Key themes:

- The 'traditional' (positivist) view of research design: Yin (2009)
  - key design tasks
  - role of theory in the design phase
  - case selection (number, sampling)
- The alternative view of research design
  - rethinking the concept of research design
  - process of casing (boundaries, unit of analysis, iteration between ideas/evidence)

Learning outcomes:

- understand the difference between 'design' and 'emergent' logics in case research
- appreciate the value of the 'casing' process
- appreciate the range of different case study designs
- appreciate the importance of consistency in your design choices

Core readings:

N. Emmel (2013). *Sampling and Choosing Cases in Qualitative Research: A Realist Approach*. London: Sage (excerpts).

J.E. Lervik (2011), 'The Single MNC as a Research Site', in R. Piekkari and C. Welch (eds), *Rethinking the Case Study in International Business and Management Research*, Cheltenham: Edward Elgar, pp. 229-250.

C.C. Ragin (1992), '"Casing" and the Process of Social Inquiry', in C.C. Ragin and H.S. Becker (eds), *What is a Case? Exploring the Foundations of Social Inquiry*, Cambridge, New York: Cambridge University Press, pp. 217-226.

Examples to be discussed in class: 1) D. Leonard-Barton (1990), 'A Dual Methodology for Case Studies: Synergistic Use of a Longitudinal Single Site with Replicated Multiple Sites', *Organization Science*, 1, 3, pp. 248-266; 2) G. Fisher (2012), 'Effectuation, Causation, and Bricolage: A Behavioral Comparison of Emerging Theories in Entrepreneurship Research', *Entrepreneurship Theory and Practice*, 36, 5, 1019-1051. 3) D. A. Buchanan, R. Addicott, L. Fitzgerald, E. Ferlie and J. I. Baeza (2007), 'Nobody in Charge: Distributed Change Agency in Healthcare', *Human Relations*, 60, 7, pp. 1065-1090.

Day 3   Wednesday, 9 December 09.00 – 16.00

Data sources and analysis for case research

Key themes:

- 'all is data': contrasting non-interview data, particularly observation and archives, with interview data
- opportunities and challenges of triangulating sources and 'mixing' methods
- the analytical challenges faced by case researchers: coding and beyond
- reporting on your analytical journey

Learning outcomes:

- appreciate the value of non-interview data
- be able to evaluate the strengths and weaknesses of different data sources
- understand different options for mixing qualitative and quantitative data and analysis
- understand the strengths and limitations of coding and other analytical strategies (including computer-aided qualitative data analysis)
- to be able to ensure greater transparency in explaining and reporting on the process of data analysis

Core readings:

M.Y. Brannen (1996), 'Ethnographic International Management Research', in B.J. Punnett and O. Shenkar (eds), *Handbook for International Management Research*, Cambridge: Blackwell, pp. 115-143.
L. Hurmerinta and N. Nummela (2011), 'Mixed-Method Case Studies in International Business Research', in R. Marschan and C. Welch (eds), *Rethinking the Case Study in International Business and Management Research*, Cheltenham: Edward Elgar, pp. 210‑228.
A.D. Smith (2002), 'From Process Data to Publication: A Personal Sensemaking', *Journal of Management Inquiry*, 11, 4, pp. 383-406.

Example to be discussed in class: 1) D. Landau, I. Dori and S. Terjesen (2014), Multiple Legitimacy Narratives and Planned Organizational Change', *Human Relations*, 67, 11, 1321-1345. 2) S.R. Barley, D.E. Meyerson and S. Grodal (2011), 'E-mail as a Source and Symbol of Stress', *Organization Science*, 22, 4, pp. 887-906. 3) M. Anteby and V. Molnar (2012), 'Collective Memory Meets Organizational Identity: Remembering to Forget in a Firm's Rhetorical History', *Academy of Management Journal*, 55, 3, pp. 515-540. 4) M. Floris, D. Grant and L. Cutcher (2013), 'Mining the Discourse: Strategizing during BHP Billiton's Attempted Acquisition of Rio Tinto', *Journal of Management Studies*, 50, 7, 1185-1215.

Day 4   Thursday, 10 December 09.00 – 16.00
Theorising with cases

Key themes:

- a pluralist approach to theorizing from case studies
- the expanded role for case studies in theorizing process (theory generation, development, testing – and beyond)
- 'contextualised explanation': showing how case studies can produce meaningful explanations
- to provide a pluralist approach to theorizing from case studies

Learning outcome:

- appreciate the relationship between the case study as a research strategy and the theoretical purpose of the study
- understand the positivist circle of theorizing
- understand alternative, theorizing purposes for the case study beyond that of theory building
- appreciate that 'context' is an essential component of, not hindrance to, theorizing

Core readings:

A. Dubois and L.-E. Gadde (2002), 'Systematic Combining: An Abductive Approach to Case Research', *Journal of Business Research*, 55, pp. 553-560. (See also: Dubois, A. and L.-E. Gadde (2014), 'Systematic Combining: A Decade Later', *Journal of Business Research*, 67, 1277-1284.)
A. Marx, B. Rihoux and C. Ragin (2014), 'The Origins, Development, and Application of Qualitative Comparative Analysis: The First 25 Years', *European Political Science Review*, 6, 1 February 2014, 115 - 142
CC. Ragin (1997), 'Turning the Tables: How Case-Oriented Research Challenges Variable-Oriented Research', *Comparative Social Research*, 16, pp. 27-42.

Please also be prepared to discuss the following examples from Day 2: Gilbert (2005) and Ng and de Cock (2002).

Examples to be discussed in class: 1) G. Szulanski and R.J. Jensen (2006), 'Presumptive Adaptation and the Effectiveness of Knowledge Transfer', *Strategic Management Journal*, 27, pp. 937-957. (See also: G. Szulanski and R.J. Jensen (2011), 'Sumantra's Challenge: Publish a Theory-testing Case Study in a Top Journal', in R. Marschan and C. Welch (eds), *Rethinking the Case Study in International Business and Management Research*,

Cheltenham: Edward Elgar, pp. 107-123.) 2) M. J. Mol and J. Birkinshaw (2014), 'The Role of External Involvement in the Creation of Management Innovations', *Organization Studies*, 35, 9, 1287–1312.

Day 5 Friday, 11 December 10.00 – 15.00
Reporting and publishing case studies

Key themes:

- the role of writing up in the research process (both for PhD and journal articles)
- common dilemmas when writing up case data and how to resolve them
- to present various reporting strategies – including alternatives to a traditional approach.

Learning outcomes:

- understand how the researcher's philosophical position may be reflected in the write up of the study
- appreciate the options available when writing up your case study
- anticipate potential problems when writing up a case-based project
- be able to write up your methodology chapter with greater confidence

Core readings:

J. Cornelissen, Hanna Gajewska-de Mattos, R. Piekkari and C. Welch (2012), 'Writing up as a Legitimacy-seeking Process: Alternative Publishing Recipes for Qualitative Research', in G. Symon and C. Cassell (eds), The Practice of Qualitative Organizational Research, Sage, pp. 185-203.
R.E. Stake (1995), *The Art of Case Study Research*, Thousand Oaks; Sage, ch. 8.
H. Xian (2008), 'Lost in Translation? Language, Culture and the Roles of Translator in Cross-Cultural Management Research', *Qualitative Research in Organizations and Management*, 3, 3, pp. 231-245.

Writing up your methodology chapter:
- D. Silverman (2013), *Doing Qualitative Research*, 4th edn, London: Sage, ch. 20.
- T. Zalan and G. Lewis (2004) 'Writing About Methods in Qualitative Research: Towards a More Transparent Approach', in R. Marschan-Piekkari and C. Welch (eds), *Handbook of Qualitative Research Methods for International Business*, Cheltenham: Edward Elgar, pp. 507-528.

Examples to be discussed in class: 1) J. Dahlgren and J. Söderlund (2001), 'Managing Inter-Firm Industrial Projects — On Pacing and Matching Hierarchies', *International Business Review*, 10, 3, 305-322. 2) P.L.-K. Wong and P. Ellis (2002), 'Social Ties and Partner Identification in Sino-Hong Kong International Joint Ventures', *Journal of International Business Studies,* 33, 2, 267-89. 3) D. A. Buchanan (1999), The Logic of Political Action: An Experiment with the Epistemology of the Particular, *British Journal of Management*, 10, pp. S73-S88.

Methodology chapters of case-based PhD thesis which have been successfully defended.