THE CRAFT OF CASE-BASED QUALITATIVE RESEARCH

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Introduction

For many years qualitative research in the business studies field remained a minor tradition. It is only relatively recently that the whole debate about whether qualitative methods in general, and the case method in particular, are legitimate 'scientific' approaches to the generation of conceptual insights has begun to abate. It is little more than a decade ago that Van Maanen (1979) and his co-contributors to a special issue of the *Administrative Science Quarterly* still felt the need to "reclaim" qualitative methods for the social sciences generally and that Yin (1981, p 58) sought anxiously to "reaffirm the role of the case study as a systematic research tool" and to "show that an acceptable craft had already emerged". In the intervening period some of the most influential research in the business studies area in general, and in the strategy field in particular, has been primarily qualitative and case-based in approach. Porter's (1980, 1985, 1990) work on competition, Burgleman's (1983) study of internal corporate venturing, the research of Kanter (1983) and Pettigrew (1985a) on the management of strategic change, the Bradford studies (Hickson et al 1986) on strategic decision processes, and Hamel's (1991) work on strategic alliances are among the more prominent examples.

Case-based qualitative research in the 1990s now has a strongly established pedigree in the business field. It has shown itself to be both flexible and inventive in the study of strategy and other processes of interest to business researchers (Leavy 1992a). In particular it offers great potential to students of Irish business, where the scope for large-scale extensive cross-sectional research designs is often limited by the relatively small pool of Irish business organizations of any reasonable size and complexity. The purpose of this article is to share with other Irish researchers, particularly those who might be setting out on their first major piece of independent research, the practical reflections of a "working student" of the type that Mills (1970, p 215) points out can often be more valuable and interesting to other practitioners than "a dozen codifications of procedures" by methodological specialists. The rest of the paper begins by taking a closer look at the question of what qualitative research is and the variety of approaches that the category covers. It then moves on to consider the questions of why choose a case-based qualitative approach and how does such an approach go about making a value-added contribution to the field of interest. The paper ends with some discussion of the skills involved and the difficulties presented in this type of research. The author

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draws on his own experience with the case-based qualitative approach (Leavy 1991a, 1991b, 1992b, 1993; Leavy and Wilson, 1994) and on his exposure, sometimes directly but more often through the literature, to some of the best known exponents of the genre.

What is Qualitative Research?

The label qualitative research has "no precise meaning" and is "at best an umbrella term covering an array of interpretive techniques" in the social sciences (Van Maanen 1979, p 520). The term therefore applies to a whole spectrum of possibilities. By way of illustration let us look at the contrast between the Bradford (Hickson et al 1986) study of strategic decision processes and the Pettigrew (1985a) research on strategic change, two fairly recent high profile examples from the strategy field. These two studies can be compared and contrasted in terms of research description, world view (ontology) and beliefs about how knowledge is generated (epistemology), as illustrated in Table 1.

As can be readily seen from the Table these two case-based qualitative studies represent quite a contrast in research design and philosophical outlook. However, a common characteristic of both was the primary role played by descriptive data. "Doing description" is the "fundamental act of data collection in a qualitative study" (Van Maanen 1979, p 520). The Bradford study, with its large sample of 150 discrete decision processes, did use some descriptive statistics to give an added and insightful quantitative dimension to the overall analysis. The Pettigrew approach was primarily historical and ethnographic. Neither study used the techniques of statistical inference to test hypotheses or try to establish causality and both were more concerned with theory generation than with proving, falsifying or extending established theories.

Table 1: The Bradford and Pettigrew Studies Compared

	Hickson et al (1986)	**Pettigrew (1985)**
Research description:	150 discrete strategic decisions across 30 organizations – 6 studied intensively	4 intensive case histories of strategic change in 4 divisions of Imperial Chemical Industries (ICI)
World View:	Functional positivist – reality as a concrete structure	Ethnographic/social actionist – reality as a social construction
Knowledge:	The patterns/relationships of interest are timeless aspects of the objective nature of social reality	The patterns of interest are patterns of culture and history, patterns resulting from particular confluences of human will and material circumstances

This short comparison of the Hickson and Pettigrew studies gives some indication of the

range of approaches that tend to be subsumed under the loose umbrella of qualitative techniques. The reader is referred to the special issue of the *Administrative Science Quarterly* (Van Maanen 1979) on qualitative techniques, and to other sources (Morgan and Smircich 1980; Van Maanen et al, 1982; Harrigan 1983; Yin 1984; Van Maanen 1988) for further illustrations of the variety involved. According to Van Maanen (1982, p 15) the common "guiding procedural principle" for this disparate collection of techniques is one that "calls for first-hand inspection of ongoing organizational life" through close-in data gathering activities.

Why Choose a Case-Based Qualitative Method?

The purist answer to this is that it is the most appropriate methodology for the research question that the researcher has chosen to address. In other words the research question, and the current state of the field, should determine the method rather than the method determine the question. As Mills (1970, p 135) so aptly expressed it "for the classic social scientist, neither method nor theory is an autonomous domain; methods are methods for some range of problems and theories are theories for some range of phenomena". Michael Porter's (1991, p 99) recent reflections on his own choice of the case-based approach in his studies of competition provide the following interesting illustration:

> In my own research, I pursued cross-sectional econometric studies in the 1970s but ultimately gave up as the complexity of the frameworks I was developing ran ahead of the available cross-sectional data. I was forced to turn to large numbers of in-depth case studies to identify significant variables, explore the relationships among them, and cope with industry and firm specificity in strategy choices.

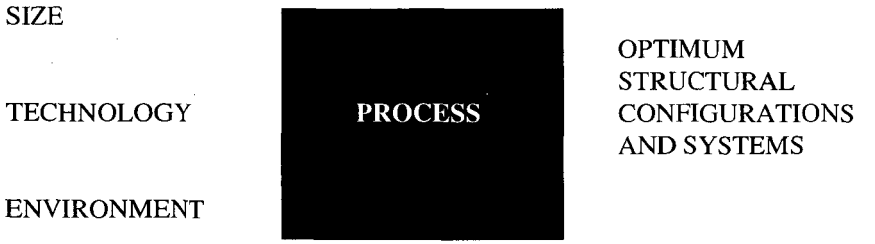
However, while the nature of the problem and the state of the field often drives some researchers like Porter towards qualitative approaches there are many for whom the reverse is also true. Researchers like Mintzberg (1979) and Pettigrew (1990) prefer to work with qualitative approaches because they find this style of working more interesting. Mintzberg (1979, p 584), for example, clearly signals his preference for working through close-in exploratory inductive approaches when saying that "it is discovery that attracts me to this business, not the checking out of what we think we already know". These researchers expressly prefer not to work with data collection methods that rely on surrogate measures of organizational phenomena collected at a distance, however, elegant the techniques. In short they choose their personal research agendas to suit their preferred style of empirical study and their bias for the close-in examination of social phenomena.

The question of "what is a legitimate, value-added contribution to theory development" is one that is neither easy to explicate nor evaluate, as journal editors like Whetten (1989, p 492) will readily testify, particularly since very few researchers will be involved in the generation of substantial theory from scratch. Theoretical contributions

are often easier to discern in quantitative research that follows a well-defined deductive hypothesis-testing route, though many qualitative researchers like Mintzberg (1979) and Van Maanen (1982) feel that relevance and impact are often sacrificed for rigour in many such studies.

Qualitative research is essentially an inductive approach to theory generation. The focus for study tends to be on processes rather than on structures and on dynamic rather than static phenomena. The emphasis tends to be on description and explanation rather than on prescription and prediction. The contrast in focus from most quantitative approaches can perhaps be best illustrated using an example from the field of organizational analysis. One of the dominant paradigms in this field is contingency theory. Built on pioneering work by Woodward (1965, 1970), Lawrence and Lorsch (1967) and the Aston group (Pugh et al 1968) contingency theorists predict that optimum organizational structural configurations and systems vary with size, technology and the complexity/uncertainty of the environment.

Figure 1
Structure and Process



Contingency theorists show relatively little interest in organizational processes. They tend to concentrate on prescriptive-deductive modes of analysis to generate theoretical connections between antecedent contingencies and organizational outcomes. These connections are then 'proven' by carrying out cross-sectional studies using the techniques of statistical inference. The underlying world view is that the key contingencies determine the optimum organizational outcomes whatever the process. To them the process is a black box, the outcome of which is predictable regardless of how it comes about. Process theorists, like Pettigrew and Mintzberg, tend to be most interested in exploring what happens inside the black box. They do not accept the determinism of the contingency theorists. They tend to believe that organizational outcomes are not just the result of some sharply defined and timeless imperatives (whether environmental or technological) but the rich, messy and often inconclusive products of the interaction of economic, political and cultural forces linking context, process and outcome in an iterative, dynamic and interactive way (Mintzberg et al 1976; Pettigrew 1985a; Leavy 1991a).

In its pure form the inductive theory in qualitative research should emerge from the data. The classic 'manual' on the generation of "grounded theory" is the Glaser and Strauss (1967) book (see also Strauss 1987) though ideas and approaches to the building of theory from case study research are developing all the time in quite inventive ways, as recent reviews by Eisenhardt (1989) and Leavy (1992a), among others, have shown. In the inductive mode of theory generation the researcher is ideally supposed to go into the field with few or no theoretical preconceptions. While this condition can never be fully realised in practice qualitative researchers are encouraged to try to avoid any premature categorization and to let the key themes and factors upon which subsequent theory will be built emerge from the data.

This type of descriptive-inductive research can be used to generate theory in a number of ways (see also Eisenhardt 1989):

(i) *By almost pure induction.* To use a favourite aphorism of Andrew Pettigrew and others the researcher is encouraged to "let the data speak for themselves". Burgleman's (1983) study of internal corporate venturing and Hamel's (1991) research on alliances provide excellent recent examples of theory generation by almost pure induction.

(ii) *By bringing two or more disparate literatures together to generate a synthesis.* This is probably one of the most powerful ways to make a value-added contribution. The Caves (1980) and Porter (1980, 1981) cross-fertilization of the Industry Organization and Business Policy perspectives on firm strategy is one of the classic examples of this approach.

(iii) *By showing the inadequacies of existing theory and generating replacement theory.* The Bower (1970) study of resource allocation and the Mintzberg (1973) study of the nature of managerial work are two outstanding examples.

(iv) *Some combination of the above.* Allison's (1971) study of the decision process in the case of the Cuban Missile Crisis and the Bradford (Hickson et al 1986) research on strategic decision making processes are excellent examples of the application of multiple perspectives and approaches to the analysis of descriptive data in the generation of fresh insight.

What are the Essential Craft Skills Involved?

What are the essential skills involved in case-based qualitative research? Can anyone who is reasonably literate "do description" and analyse qualitative data at a level capable of making a substantial contribution? Is this an easier route for those not numerately strong enough to use more technically elaborate and precisely defined quantitative approaches with confidence? How do the better known exponents of case-based qualitative research characterise their approaches in everyday language?

In the first place many of them converge on the notion of a *craft* process to describe what they do (Mills 1970; Van Maanen 1982; Pettigrew 1985b; Porter 1991).

According to Mills (1970, p 134), for example, the classic social analyst has typically "sought to develop and use in his work the sociological imagination" in the "way of the intellectual craftsman" who has "not been inhibited by method and technique". We find Pettigrew (1985b, p 223) confirming this general picture of "a craft process and not merely the application of a formal set of techniques and rules" while we also see Porter (1991, p 116) referring to the "important challenge of crafting empirical research" to make further progress towards the development of a dynamic theory of strategy. Van Maanen (1982, pp 15–19) echoes these views by arguing that "technique-independent definitions of qualitative research" are "unlikely to encompass the diversity of uses" or adequately reflect "the artistry, the craft, (and) the workmanship" involved. "Contrary to the way the practice of research is often taught and written up, the activity is clearly a social and not merely a rationally contrived act" and has "its artistic and subjective sides", as Pettigrew (1985b, p 222) has emphasised.

Mintzberg (1979, pp 584–5) sees "two essential steps" in his 'direct' strategy of inductive research, "detective work" or "the tracking down of patterns (and/or) consistencies" and "the creative leap". His own experience suggests that these "creative leaps seem to come from our subconscious mental processes, our intuition". This intuition "apparently requires the 'sense' of things" that tends to develop from being "on site" long enough to "understand what is going on" in real organizational terms, close to the source of the data. For Pettigrew (as outlined to me at a meeting with him in 1985):

> The critical skills are (i) real conceptual ability in order to be able to abstract from very rich descriptive data, (ii) kaleidoscopic reading in order to broaden the base from which concepts and insights might spring which could be brought to bear on this data and (iii) the ability to apply these skills to qualitative data... many people who are quantitative or numerate in approach might not be very comfortable with the qualitative approach".

Pettigrew's inclusion of 'kaleidoscopic reading' as the way to increase the probability for creative or imaginative insight has a sound basis in the literature on innovation. More and more we are coming to realise that frame-breaking ideas and innovations are a "numbers game", which can be enhanced by variety in approach, the cross-fertilization of ideas and by thinking that is deliberately discouraged from converging too prematurely (Quinn 1986; Peters 1992). For Mills (1970, p 221) "imagination" is often "invited" or "loosen(ed) up" by this type of "putting together of hitherto isolated items" and "by finding unexpected connexions". Among my own attempts at kaleidoscopic reading in this regard I found that I was drawn with increasing fascination towards trying to understand how historians, novelists and social scientists differ in their approaches to the exploration and understanding of social phenomena.

Some of the Difficulties and Challenges in the Case-Based Approach?

Finally we turn to consider some of the more specific practical difficulties and challenges associated with case-based qualitative research. Four in particular will be briefly discussed, generating theory from cases, negotiating and maintaining access to

case sites, data sources and collection, and the analysis of the data (including the elusive but essential 'creative leap').

Generating Theory from Cases

Though we discussed earlier the different broad approaches through which case-based qualitative research often makes a value-added contribution we return in this section to consider the issue again from a more pragmatic and operational standpoint. Qualitative research makes its contribution in a different way to the more widely used quantitative techniques of large-scale statistical inference. Qualitative research is often used for exploratory studies at a very early stage of theory development where the key dimensions, or core categories, have yet to be empirically isolated. Hamel's (1991) approach to identifying intent, receptivity and transparency as the core categories for a theory of inter-partner learning in strategic alliances provides a good example. Furthermore Porter (1991, p 97) suggests that research at the early stage of a field's development is probably best focused on the building of integrative frameworks rather than a wide range of disparate "situation-specific but rigorous models of limited complexity". As long as the building of such frameworks "is based on in-depth empirical research, it has the potential to not only inform practice but to push the development of more rigorous theory" (Porter 1991: 98). In short, theory development using case-based approaches can often be a front-end strategy for the development of conceptual frameworks within which to subsequently carry out more precise theory testing and extension using quantitative methodologies.

One very practical issue that arises early in case-based qualitative research is the question of how many cases to study. This question is related to what many quantitative researchers see as the main Achilles heel of case-based research, the issue of the generalizability of the insights. Qualitative researchers feel a lot less defensive about this issue than they use to. As Mintzberg (1979, p 583) has boldly demanded "what is wrong with a sample of one?" and "why should researchers have to apologize for them?". In biology, for example, scholars making an intensive study of a single digestive system would not feel in any way defensive about the scientific nature of their inquiry or about the generic value of the insights to be gained from the project. As long as the case is clearly an example of a generic class of process or phenomenon then the question of generalizability tends to become less of an issue (Leavy 1991a). Pettigrew (1985, p 242) supports the view that "even single case studies are capable of developing and refining generalizable concepts and frames of reference" while Mohr (1992, p 79) has recently shown how even the single case can be used with confidence to establish causality by making the stimulating distinction between "physical causal reasoning" (through cases) and "logical causal reasoning" (through statistical inference).

The key practical consideration is that theory generation is difficult without some form of comparative analysis. The researcher, relying on a single case should ensure that it contains sufficient within-case variation to facilitate comparative analysis,

as might be found in different episodes or phases in the history of the process or organization of interest (Leavy 1991a, 1993). Depth versus breadth is the trade-off. Notwithstanding the comments by Mintzberg and Pettigrew quoted earlier cross-case comparisons are a less risky approach to theory development particularly for the inexperienced researcher. Hamel (1991) provides a good example of a two-stage research design in which eleven cases were first used to facilitate the empirical isolation of the main categories and then two of the cases were studied more intensively to gain more detailed insight into the process concerned.

Negotiating and Maintaining Access

A high level of access is usually needed in order to be able to develop the kind of rich description which is the primary requirement for any case-based inductive mode of research. Getting this level of cooperation from a case site can be difficult. Maintaining it can be even more difficult. The case-based qualitative researcher typically needs to have good social skills and a high degree of awareness of the effect that his/her presence can have on the organization under study. The very presence of the researcher on-site asking certain types of questions can have unintended consequences within the organization.

In my own research I have found it useful to begin negotiating access informally through my personal network, if at all possible, by arranging for some exploratory discussions with a middle ranking executive either through personal contact or through a mutual friend, colleague or associate. Such an approach, where feasible, allows the researcher to engage in some valuable front-end diplomacy by checking such issues as (i) is the case-site likely to be as appropriate and relevant to the project as was hoped? (ii) is the kind of access to personnel and archives that will be needed to fulfil the research objectives likely to be forthcoming? and (iii) how best should the formal approach be made when that time comes? The formal approach is usually best made through the chief executive but it can help if by that stage the approach is informally already expected. Senior officers will typically require a front-end meeting to establish the ground rules and mutual expectations. They will also want to be comfortable with the aims of the research, the amount of involvement needed from the organization, the confidentiality of the process and the plans for the dissemination of the results.

It is difficult in case-based qualitative research to be precise in advance about exactly how much data you will want to collect. There is always some risk therefore that the organization may withdraw your access before you are ready to leave the site. This is not an uncommon experience. For example, in one case Wilson (1982, p 122) found that his continued presence had become a "political embarrassment" to the organization's leadership because of the sensitivity of the issues that his research was probing. In another case my own access was unexpectedly withdrawn when an incoming leader no longer felt bound by commitments to the project given by his predecessor (Leavy 1993).

Sometimes you can anticipate such an eventuality, sometimes not. The impact associated with the risk of access withdrawal can be mitigated by choosing a multi-case design and this is probably one of the strongest pragmatic reasons for doing so.

Data Sources and Quantity

The main data sources in most qualitative research are typically personal interviews and company archives. For most research designs based on case studies the researcher needs to be able to interview a wide cross-section of personnel, down and across the organization, using semi-structured or unstructured in-depth interviewing techniques. The data collection involved in my own comparative study of strategy formation and strategic leadership (Leavy 1991a, 1991b, 1992b; Leavy and Wilson 1994) in four Irish organizations involved a total of over 70 personal interviews with nearly 40 respondents each lasting on average around two hours. The archival data studied included over 105 annual reports, 200 press cuttings and numerous in-house company documents and contemporary historical articles and books. The collection of the interview and archival data was interleaved and these data complemented each other in a number of valuable ways. Data collection in this type of research often tends to resemble detective work as Mintzberg (1979) has characterised it. Interview data sometimes led to the unearthing of more archival data, which in turn often led to fresh lines of inquiry to be pursued in further interviews. Archival data helped to establish proper chronologies where recollections were doubtful. Interview data provided valuable interpretive insight into key events and episodes, and what they meant to the participants involved, that could not have been gleaned from any other source.

Personal interviewing is the most intrusive on organizational time and resources and the schedule of interviews needs to be carefully thought out in advance. The most a researcher can reasonably expect is two interviews with any one respondent. Even this may be modified in the case of the most senior executives. My own approach has been to try to become as fully informed as possible about the episode or process of interest through the most accessible data sources first and to reserve those rarer data collection opportunities, like interviews with the most senior personnel, for data which is likely to be unique because of the particular position or perspective of the interviewee. The second interview with any respondent, where it can be secured, can often prove to be the most valuable from a data standpoint because much of the first interview is usually taken up with establishing credibility and rapport, and most interviewees are slow to open up until that has been achieved. Finally it is worth pointing out how fate can sometimes intervene to deprive the qualitative researcher of the most unique interviewing opportunities. Shortly after I began my fieldwork into Comhlucht Siuicre Eireann Teoranta I discovered that General Michael J. Costello, one of the towering figures in the history of the company had only months before passed away. On the other hand I was fortunate to have been able to have interviewed Dr Tom Walsh of An Foras

Taluntais, Captain David Barry of Golden Vale and Michael Foy of Comhlucht Siuicre Eireann a short time before they died.

In addition to personal interviewing the case-based qualitative researcher typically needs access to a wide array of company documents, files and published data. It is usually not possible to specify everything that you would like to get access to in advance of the data collection process. The researcher typically needs a 'good nose' to be able to unearth what might be useful as s/he goes along and the social skill to be able to persuade the organization to let him or her have access to it.

Data collection in case-based qualitative research is usually a long, serial and labour-intensive process. As Yin (1984, p 56) points out "a well-trained and experienced investigator is needed to conduct a high quality case study because of the continuous interaction between the theoretical issues being studied and the data being collected", and "there is little room for the traditional research assistant" to share the data collection burden. Furthermore parallel data collection by an experienced team of researchers, while not impossible, poses its own difficulties. Team-based research in which the personal interview plays a pivotal role must be carefully designed to try to ensure the highest possible consistency of approach across the team members using "common research protocols" for data collection and analysis (Leonard-Barton 1992, p 125). A further problem with qualitative research is the question of when the data collection should stop. The general practical guideline for this is when the researcher has reached the point of diminishing returns where "additional data no longer add to the refinement of the concepts" (Burgleman 1983, p 225) or where "saturation of the core categories" has been achieved (Hamel 1991, p 86).

Analyzing the Data and the 'Creative Leap'

The analysis of rich qualitative data poses its own set of challenges as Miles's (1979, p 590) characterization of such data as "an attractive nuisance" so aptly conveys. Firstly data retrieval is a real problem as you constantly wonder where your most apposite anecdotes and examples are when you need them. They are usually buried deep in the interview and archival files. Many research manuals give practical advice on cross-indexing techniques. I have tried some of these approaches but my own experience is that there is simply no substitute for knowing your data intimately, whatever technique you decide to adopt. This is one of the primary benefits that arises from collecting all of the data, particularly the interview data, personally and one of the main reasons why team-based qualitative research can be so difficult to execute effectively. Furthermore much of the value of anecdotal data comes from being able to use direct quotes from organizational respondents to add life to your description and analysis. It is important to record the data in the first place with this requirement in mind.

The analysis begins with the case narrative. Case writing is an art in itself and no matter how descriptively you try to keep it in the first instance the selectivity and

structuring that is involved in the transformation of raw interview or archival data into a coherent case narrative represents some degree of front-end analytical processing. This more 'refined' data then typically forms the base for the main comparative analysis and synthesis from which the real conceptual contribution is expected to emerge. In case-based qualitative research much of the real creativity and contribution actually happens during the writing process. This is far from the mechanical exercise often conveyed by the "only has to write it up" expression, which in my experience is rarely used by researchers themselves. As David Wilson, one of the Bradford team (Hickson et al 1986) has pointed out (in conversation with the author) in qualitative research "your themes emerge quite late in the process". In fact it is often through trying to find the most interesting way or ways in which to present, compare and analyse the data that the core categories emerge and the real contribution is made.

Like all research case-based qualitative studies consist of 95% perspiration and 5% inspiration. However, that 5% element is particularly critical in qualitative research and is the product of a somewhat mysterious process of the imagination. It can often be coaxed but rarely commanded (Weick 1989). The inspiration to make the creative leap cannot be guaranteed through the careful following of any particular procedures or techniques, however elegant or sophisticated. As William Hazlitt (1826) has said about this mysterious process in the context of art and literature it is often the case that "the happiness of the result bears no relation to the difficulties overcome or the pains taken". Attempting to abstract imaginatively from rich descriptive data is not for everyone. Case-based qualitative research can be a high risk option. In fact Yin (1984, p 56) argues that the demands of the case-based qualitative approach "on a person's intellect, ego and emotions are far greater than for any other research strategy". Furthermore the researcher typically lives with a high degree of uncertainty about the potential quality of the contribution right through to the very last stages of the project, as the Bradford group's (Hickson et al 1986, p xii) references to "exhausting days closeted in discussion" and to "wet and windy moorland walks searching for inspiration" so graphically attest.

No research is quite the logical linear process that is represented in its ultimately written form whether in books, monographs, papers or dissertations. This is particularly true of qualitative research. Literature and data are interleaved and the researcher continually interacts with both in ongoing inner dialogue throughout the duration of the project. The conceptual framework is usually developed through the first major phase of the literature review in interaction with the early stages of the fieldwork. The ultimate contribution tends to come from the more specific development and refinement of the conceptual categories as literature and fieldwork continue to interact in the later stages. One indispensable technique for the case-based qualitative researcher is the keeping of a journal (Mills 1970) and the continual writing into it of research memoranda (Glaser and Strauss 1967; Strauss 1987) to capture this inner dialogue in chronological sequence as the project develops. The journal acts as a repository for all kinds of stray ideas that

enter this inner dialogue, day or night, as the relentless search for insight continues. Over time what tends to become evident is the recurrence of some central themes and conceptual obsessions around which the researcher's intellectual curiosity begins to converge in the ongoing attempt to draw some insight out of the data and make some holistic sense of it. It is from this process that the somewhat elusive but always essential 5% inspiration is most likely to emerge and through which it can be most systematically encouraged.

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