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QUALITATIVE RESEARCH METHODS IN MANAGEMENT

1. Intended learning outcomes

The objective of this course is to develop your appreciation for qualitative research methods. The course takes a practical approach to this objective: the emphasis is on doing qualitative research -- that is, reading it, evaluating it, learning the skills involved in conducting it, and applying these skills in the design, conduct, and write-up of a small-scale research study of your choice. Still, the course presents an opportunity to develop a deep understanding of the philosophical assumptions that underlie method choices.

The course is most useful for students in the Social and Behavioral Science Track. Still, other students may benefit from it, regardless of substantive area or methodological orientation. Qualitative methods are used in many management fields by a significant minority of researchers. Whatever your methodological affiliation, you can benefit from the ability to read qualitative research critically and to evaluate its contribution to your subject area of study.

2. Methodology and learning activities

The course is organized according to an idealized research life cycle: study design, data collection, data analysis, write-up, and so forth. Each week, we will devote time in class to (1) discussing the "Theory and practice" assigned readings; (2) evaluating critically one qualitative research article published in refereed management journals, assigned as "Example"; and (3) discussing learnings and problems that occur as you conduct your qualitative research practicum.

More specifically, we will proceed as follows:

(1) <u>"Theory and practice" readings:</u> students will take turns in leading the discussion of the assigned readings. Be ready to discuss both each paper individually and the set of papers as a whole. Please DO NOT repeat the contents of papers – everybody will have read them beforehand. Instead, focus on the 2 or 3 main messages that you want to highlight.

In addition, all students will submit each <u>week a report</u> in relation to these readings. Please refer to the "Written assignments" section below.

(2) <u>"Example" readings</u>: students will take turns in leading a critical discussion of the assigned reading. Please refer also to the "Written assignments" section below.

MRM 2023



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(3) <u>Qualitative Research Practicum</u>: the purpose of this Practicum is – as its name suggests – to practice at a small scale what we learn in class. To make the most out of this exercise, try to relate it to your research interests while bearing in mind that there are time limitations on what you can do. My suggestion is that you try to come up with a research question that is related to your broad interest but realistically limited in scope. Each day, we will time to discussing your work. For additional details please refer to the "Written assignments" section below.

3. Course Requirements and Performance Evaluation

- Introduction to the readings of the week (25%).
- Contribution to class discussions and weekly written reports (25%).
- Evaluation of a qualitative research article (15%).
- Design, execution, and write up of the results of a small-scale qualitative research study on a topic of student's choice (35%).

4. Bibliography

Basic readings:

- Yin, R. K. 2009. Case Study Research: Design And Methods, Thousand Oaks, CA: Sage Publications.
- Miles, M. B. and A. M. Huberman. 1994. Qualitative Data Analysis: An Expanded Sourcebook, Thousand Oaks, CA: Sage Publications. (Referred to as M+H).
- See required readings assigned for each week: (1) theory and practice; (2) examples; and occasionally (3) readings geared to deliverables.

Complementary readings:

• See recommended readings suggested for each week. These are meant as additional resources for you to go deeper as your interests require.

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5. Competences

General competences:

CG6: Use appropriate tools and techniques for problem solving, correction contrasting and decision validation.

Specific competences:

CE1: Understand the concepts of social and human sciences relevant and necessary to carry out research projects of international level in the area of business management.

CE3: Organization, planning and implementation of a research project related to social sciences.

CE5: Ability to understand state-of-the-art research in organization theory published in the top academic journals (*Administrative Science Quarterly, Academy of Management Journal, Organization Science, American Journal of Sociology*, etc.) and compare and contrast the arguments developed in the papers from a logical and empirical point of view.

CE10: Use the acquired knowledge and skills and apply them to a constantly changing business environment as generated by current societies.

CE17: Ability to critically establish, the relevance and significance of the results obtained with respect to the proposed objectives, and prepare conclusions within the framework of current scientific knowledge on the topic in question.

CE18: Develop a scientific / technical report or research work with the objective to inform the scientific community on the contribution of the research conducted, making use of adequate information technology for both acquisition and dissemination of research results.

CE19: Publicly present ideas, procedures or research reports to advise people and organizations.



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WRITTEN ASSIGNMENTS

<u>Note</u>: all deliverables are to be sent to the Professor by e-mail **prior** to the corresponding class meeting, unless indicated otherwise. Please **include your last name** in the title of submitted documents.

Assignment 1 — Understanding the theory and practice of Qualitative/Case Research

Deliverable (due weekly before the class meets): Prepare a written report (500-600 words) on your main learning points from the week's readings.

Assignment 2 — Evaluating an Example of Qualitative/Case Research

Deliverable (due on the day when you lead the discussion of an Example reading): Prepare a written report (1,200-1,500 words) evaluating the example of qualitative/case study that you have been assigned. The Example has been selected because it connects particularly well to the topic of the day. Thus, you may want to pay special attention to the <u>method issues we will discuss on that day, in addition to those discussed previously.</u>

As a guideline, the following are aspects you may wish to consider in your evaluation (you need not consider them all, or you may want to add others):

- the purpose of the research study;
- the research design;
- the kinds and quality of evidence presented;
- the way in which evidence is presented (i.e., verbal, tabular);
- the quality of data analysis;
- the role of theory in the study/report;
- the organization of the written report, with special attention to the introduction and the opening paragraph;
- the persuasiveness of the written report.

Assignment 3 — Qualitative Research Practicum

The purpose of this Practicum is - as its name suggest - to practice at a small scale what we learn in class. To make the most out of this exercise, try to relate it to your research interests while bearing in mind that there are time limitations to what you can do. My suggestion is that you try to



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come up with a research question that is related to your broad interest but realistically limited in scope. Each day, we will dedicate time to discussing your work.

• Research question (I)

Deliverable 1 (due on April 12th): Write a research question of your interest that lends itself to the use of qualitative methods. Identify the unit of analysis clearly.

• Research question (II)

Deliverable 2 (due on April 19th): Write (1½ p. approx.) a brief introduction that provides a justification for the interest and relevance of your research question. If needed, you may revise the question according to the feedback received. You may find very useful the reading assigned for this deliverable (please refer to the syllabus).

• Research design

Deliverable 3 (due on April 26th): Revise your previous work according to the feedback received. Write (1½ p. approx.) a proposal that details and justifies your research design.

• Data collection plan

Deliverable 4 (due on May 3rd): Revise your previous work according to the feedback received. Write your plan for data collection: primary and secondary data sources, instrument(s) for data collection (e.g. interview guide, plan for a focus group), etc. Justify your choices.

• Data collection

<u>May 4th to May 9th:</u> Revise your previous work according to the feedback received and collect your data. You may find very useful the video assigned for this deliverable (please refer to the syllabus).

Deliverable 5 (due on May 10th): Video-record of a 7-min. interview. Up-load it on the class computer or come ready to connect your laptop.

• Data analysis

May 10th to 23rd: Analyze your data.

Deliverable 6 (due on May 24th): Revise your previous work according to the feedback received. Report (about 300 words) your analytical method and display your data structure – whether in the form of tables, or first- and second-order codes, or a chronological timeline, etc.

• Findings and conclusion drawing

Deliverable 7 (due on May 31st): Revise your previous work according to the feedback received. Report your findings and discuss them (about 1,000 words).

• Final write-up

Deliverable 8 (due June 14th): Full course paper (about 5,000 words not including references, tables, and figures). Formal in-class presentation of the full project. You may find very useful the reading assigned for this deliverable (please refer to the syllabus).



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| DATE | DESCRIPTION | READINGS/ACTIVITIES |
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| Week 1 April 12 th | Introduction This week, we have an overview of epistemological stands and we consider the underlying principles of qualitative research methods. | Theory and practice readings Durand, R. and E. Vaara. 2009. "Causation, counterfactuals, and competitive advantage," <i>Strategic Management Journal</i>, 30: 1245-1264. Note: we will focus the class discussion on pp. 1245-1249 (other sections of this paper will be discussed on May 31st). Piore, M. J. 1979. "Qualitative research techniques in Economics," <i>Administrative Science Quarterly</i>, 24(4): 560-569. Coase, R. 2012. "Saving Economics from the Economists," <i>Harvard Business Review</i>, December, p.2. Mintzberg, H. 1979 "An emerging strategy of "direct" research," <i>Administrative Science Quarterly</i> 24(4): 582-589. |
| | | Example Isabella, L. 1990. "Evolving interpretation as a change unfolds: How managers construe key organizational events", Academy of Management Journal, 33: 7–41. Research Practicum Deliverable 1 Recommended readings M&H, chapter 1: "Introduction" Van Maanen, J. 1979. "Reclaiming qualitative methods for organizational research: A preface," Administrative Science Quarterly 24(4): 520-526. Morgan, G. and L. Smircich. 1980. "The case for qualitative research," Academy of Management Review, 5(4): 491-500. |



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| | | Gephart, R. 2004. "Qualitative research and the Academy of Management Journal," Academy of Management Journal, 47(4): 454-462. Cunliffe, A. L. 2011. "Crafting qualitative research: Morgan and Smircich 30 years on," Organizational Research Methods, 14(4): 647-673. Langley, A, C. Smallman, H. Tsoukas and A. Van de Ven 2013. "Process studies of change in organization and management: Unveiling temporality, activity, and flow", Academy of Management Journal, 56(1): 1-13Locke, K. 2011. "Field research practice in management and organization studies. Locke, K. 2011. "Field research practice in management and organization of discovery," Academy of Management Annals, 5(1): 613-652 |
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| | | Management Annals, 5(1): 613-652. Bansal, P., W. K. Smith, and E. Vaara. 2018. "New ways of seeing through qualitative research," Academy of Management Journal, 61(4): 1189-1195. |
| DATE | DESCRIPTION | READINGS/ACTIVITIES |
| Week 2 April 19 th | Different purposes, different styles We examine various approaches to qualitative research. We also examine the role of qualitative methods in mixed- method research designs. | <u>Theory and practice readings</u> Suddaby, R. 2006. "What grounded theory is not," <i>Academy of Management Journal</i>, 49(4): 633-642. O'Reilly, K., D. Paper and S. Marx. 2012. "Demystifying grounded theory for business research," <i>Organizational Research Methods</i>, 15(2): 247-262. Locke, K. 2010. "Abduction," in Mills, A. J., G. Durepos, and E. Wiebe, eds. <i>Encyclopedia of Case</i> <i>Study Research</i> (Sage, Thousand Oaks, CA), 46–53. |



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| Timmermans, S. and I. Tavory. 2012. "Theory construction in qualitative research: From grounded theory to abductive analysis," <i>Sociological Theory</i>, 30(3): 167-186. Turner, S. F., L. B. Cardinal, and R. M. Burton. 2017. "Research design for mixed methods: A triangulation-based framework and roadmap," <i>Organizational Research Methods</i>, 20(2): 243-267. |
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| Evampla |
| Example Pollack et al. 2020. "Pursuing B Corp certification: Exploring firms' entrepreneurial orientation and prosocial motivation," Academy of Management Discoveries, 7(2): 294-316. |
| Research Practicum |
| <u>Reading:</u> Grant, A. M., and T. G. Pollock. 2011. "Publishing in AMJ—Part 3: Setting the hook," <i>Academy of Management Journal</i>, 54(5): 873-879. Deliverable 2 |
| Decommended readings |
| <u>Recommended readings</u> Sætre, A. S. and A. Van de Ven. 2021. "Generating theory by abduction," <i>Academy of Management Review</i>, 46(4): 684-701. Molina-Azorin, J. F., D. D. Bergh, K. G. Corley, and D. J. Ketchen. 2017. "Mixed methods in the organizational sciences," <i>Organizational Research Methods</i>, 20(2): 179-192. Jick, T. D. 1979. "Qualitative and quantitative methods. Triangulation in action," <i>Administrative Science Quarterly</i>, 24(4): 602-611. Flick, U. 2004. "Triangulation in qualitative research," in Flick, U., E. von Kardorff and I. Steinke (Eds.), A Companion to Qualitative Research, London: Sage Publications: 178-183. |
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| DATE | DESCRIPTION | Glaser, B. G. and A. L. Strauss. 1967. The Discovery of Grounded Theory: Strategies for Qualitative Research, Chicago, IL: Aldine. Strauss, A. L. 1998. Basics of Qualitative Research: Techniques and Procedures for Developing Grounded Theory, Thousand Oaks, CA: Sage Publications. Fendt, J. and W. Sachs. 2008. "Grounded theory method in management research. Users' perspective," Organizational Research Methods, 11(3): 430-455. Bitektine, A. 2008. "Prospective case study design: Qualitative method for deductive theory testing," Organizational Research Methods, 11(1): 160-180. |
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| DATE Week 3 April 26 th | Study design In this session, we consider single- and multiple-case design, and how each of these may be holistic or embedded. We also examine how to ensure rigor of a research design. | READINGS/ACTIVITIES <u>Theory and practice readings</u> Yin, chapter 1: "Introduction." Yin, chapter 2: "Designing case studies." Eisenhardt, K. 1989. "Building theories from case study research," Academy of Management Review, 14(4): 532-550. Ozcan, P., S. Han, and M. Graebner. 2017. "Single cases. The what, why, and how," in R. Mir and S. Jain (Eds.) The Routledge Companion to Qualitative Research in Organization Studies. Routledge, pp. 114-134. Siggelkow, N. 2007. "Persuasion with case studies," Academy of Management Journal, 50(1): 20-24. Example Ariño, A, P. S. Ring. 2010. "The role of fairness in alliance formation" Strategic Management Journal 31(10): 1054-1087. <u>Complementary reading:</u> Gibbert, M., W. Ruigrok, and B. Wicki. 2008. "What passes as a rigorous case |



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| | | 1465–1474. Research Practicum Deliverable 3 Recommended readings M&H, chapter 2: "Focusing and bounding the collection of data: The substantive start." Dyer, W.G. and A.L. Wilkins. 1991. "Better stories, not better constructs, to generate better theory: A rejoinder to Eisenhardt," Academy of Management Review, 16(3): 613-619. Eisenhardt, K. 1991. "Better stories and better constructs: The case of rigor and comparative logic," Academy of Management Review, 16(3): 620-627. Eisenhardt, K. M. and M. E. Graebner. 2007. "Theory building from cases: Opportunities and challenges," Academy of Management Journal, 50(1): 25-32. Easterby-Smith, M., K. Golden-Biddle, and K. Locke. 2008 "Working with pluralism: Determining quality in qualitative research," Organizational Research Methods, 11(3): 419-429. |
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| DATE | DESCRIPTION | READINGS/ACTIVITIES |
| Week 4 May 3 rd | Data collection In this session, we consider various methods to collect data, and the theoretical and practical issues that they entail. | <u>Theory and practice readings</u> Yin, chapter 3: "Preparing to collect case study evidence." Yin, chapter 4: "Collecting case study evidence." Solarino, A. M. and H. Aguinis. 2021. "Challenges and best-practice recommendations for designing and conducting interviews with elite informants," <i>Journal of Management Studies</i>, 58(3): 649-672. |



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| | McGrath, C., P. J. Palmgren, and M. Liljedahl. 2019. "Twelve tips for conducting qualitative research interviews," <i>Medical Teacher</i>, 41(9): 1002-1006. Morgan, D. L. and M. T. Spanish. 1984. "Focus groups: A new tool for qualitative research," <i>Qualitative Sociology</i>, 7(3): 253-270. |
| | Example Caprar, D. V. 2011. "Foreign locals: A cautionary tale on the culture of MNC local employees," Journal of International Business Studies, 42: 608-628. |
| | <u>Research Practicum</u> Deliverable 4 |
| | <u>Recommended readings</u> M&H, chapter 3: "Focusing and bounding the collection of data: Further design issues." Webb, E., and K. E. Weick. 1979. "Unobtrusive measures in organizational theory: A reminder," <i>Administrative Science Quarterly</i>, 24(4): 650-659. Bouchard, T. J. 1976. "Unobtrusive measures: An Inventory of Uses," <i>Sociological Methods & Research</i>, 4(3): 267-300. Huber, G. P. and D. J. Power. 1985. "Retrospective reports of strategic-level managers: Guidelines for increasing their accuracy," <i>Strategic Management Journal</i>, 6: 171-180. Edmondson, A. C. and S. E. McManus. 2007. "Methodological fit in management field research," <i>Academy of Management Review</i>, 32(4): 1155-1179. Michailova, S. et al. 2014. "Breaking the silence |
| | about exiting fieldwork: A relational approach and |



| In this session, we examine how qualitative researchers analyze their data as they collect it. Also, we open a window to look at visual data analysis. M&H, chapter 4: "Early steps in analysis." Note: pay special attention to Sections B to E. You may skim the illustrations. Mees-Buss, J., C. Welch, R. Piekkari. 2022. "From templates to heuristics: How and why to move beyond the Gioia methodology," Organizational Research Methods, 25(2): 405-429. | | | its implications for theorizing," Academy of Management Review, 39(2): 138-161. Cunliffe, A. L. and R. Alcadipani. 2016. "The politics of access in fieldwork: Immersion, backstage dramas, and deception," Organizational Research Methods, 19(4): 535-561. |
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| categorization in theory building," Academy of Management Review, 46(3): 591-612. <u>Example</u> Clark, K. G., D. A. Gioia, D. Ketchen Jr., J. B. Thomas. 2010 "Transitional identity as a facilita of organizational identity change during a merger," Administrative Science Quarterly, 55: 397-438. <u>Research Practicum</u> | Week 5 | Early analysis during data collection In qualitative methods, the researcher is a research instrument. In this session, we examine how qualitative researchers analyze their data as they collect it. Also, we open a window to look at visual data | <u>Theory and practice readings</u> Van Maanen, J. 1979. "The fact of fiction in organizational ethnography," <i>Administrative Science Quarterly</i>, 24(4): 539-550. Gioia, D. A., K. G. Corley, A. L. Hamilton. 2012. "Seeking qualitative rigor in inductive research. Notes on the Gioia methodology," <i>Organizational Research Methods</i>, 16(1): 15-31. M&H, chapter 4: "Early steps in analysis." Note: pay special attention to Sections B to E. You may skim the illustrations. Mees-Buss, J., C. Welch, R. Piekkari. 2022. "From templates to heuristics: How and why to move beyond the Gioia methodology," <i>Organizational Research Methods</i>, 25(2): 405-429. Grodal, S., M. Anteby, A. L. Holm. 2021. "Achieving rigor in qualitative analysis: The role of active categorization in theory building," <i>Academy of Management Review</i>, 46(3): 591-612. <u>Example</u> Clark, K. G., D. A. Gioia, D. Ketchen Jr., J. B. Thomas. 2010 "Transitional identity as a facilitator of organizational identity change during a merger," <i>Administrative Science Quarterly</i>, 55: 397-438. |



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| | | <u>Video clip:</u> "Top ten tips for a successful interview" <u>https://methods-sagepub-</u> <u>com.ieselib.idm.oclc.org/video/top-ten-tips-for-a-</u> <u>successful-interview?fromsearch=true</u> Deliverable 5 <u>Recommended readings</u> Holstein, James A. 1995. The Active interview, Thousand Oaks, CA: Sage Publications. |
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| DATE | DESCRIPTION | READINGS/ACTIVITIES |
| Week 6 May 15 th and 17 th | Data analysis: Atlas.ti program This week we will become familiar with the Atlas.ti program, one of the most commonly used software packages for data analysis. Further instructions will be provided as we go along. | <u>Note:</u> there is no report due this week. <u>Recommended readings</u> Weitzman, E. A. 2000. "Software and qualitative research," in Denzin, N. K. and Y. S. Lincoln (Eds.) <i>Handbook of Qualitative Research</i>. Thousand Oaks, CA: Sage Publications, pp. 803-820. |
| DATE | DESCRIPTION | READINGS/ACTIVITIES |
| Week 7 May 24 th | Within case analysis. Longitudinal, single- case analysis. | <u>Theory and practice readings</u> Miles, M. B. 1979. "Qualitative data as an attractive nuisance: The problem of analysis," <i>Administrative Science Quarterly</i> 24(4): 590-601. Yin, chapter 5: "Analyzing case study evidence." Langley, A. 1999. "Strategies for theorizing from process data," <i>Academy of Management Review</i>, 24(4): 691-710. Langley, A., C. Smallman, H. Tsoukas, and A. Van.de.Ven. 2013. "Process studies of change in organization and management: Unveiling |



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| | | temporality, activity, and flow," Academy of Management Journal, 56(1): 1-13. Example Ariño A. and J. de la Torre. 1998. "Learning from failure: Towards an evolutionary model of collaborative ventures" Organization Science, 9(3): 306-325 Research Practicum Deliverable 6 Recommended readings M&H, chapter 5: "Within-case displays: Exploring and describing" M&H, chapter 6: "Within-case displays: Exploring and predicting" Pentland, B. 1999. "Building process theory with narrative: From description to explanation," Academy of Management Review, 24(4): 711-724. |
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| DATE Week 8 May 31 st | DESCRIPTION Cross-case analysis. Conclusion drawing. | <u>Theory and practice readings</u> Durand, R. and E. Vaara. 2009. "Causation, counterfactuals, and competitive advantage," <i>Strategic Management Journal</i>, 30: 1245-1264. <u>Note:</u> we will focus the class discussion on pp. 1249-1255 (section "A counterfactual approach to causation up to the sub-section on "Causal modeling"). As a reminder, we discussed a part of this paper on April 12th. Klag, M. and A. Langley. 2013. "Approaching the conceptual leap in qualitative research," <i>International Journal of Management Reviews</i>, 15: 149-166.Folger, R. and C. Stein. 2017. "Abduction 101: Reasoning processes to aid discovery," |



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| | | Human Resource Management Review, 27: 306- 315. M&H, chapter 10: "Making good sense: Drawing and verifying conclusions." <u>Note:</u> focus on pp. 262-277 ("Section B. Tactincs for testing or confirming findings"). <u>Example</u> Davis, J. P. and K. M. Eisenhardt. 2011. "Rotating leadership and collaborative innovation. Recombination in symbiotic relationships," <i>Administrative Science Quarterly</i>, 56(2): 159–201. <u>Research Practicum</u> Deliverable 7 <u>Recommended readings</u> M&H, chapter 7: "Cross-case displays: Exploring and describing" M&H, chapter 8: "Cross-case displays: Ordering and explaining" |
|---------------------------------|---|--|
| DATE | DESCRIPTION | READINGS/ACTIVITIES |
| Week 9 June 14 th | Writing and publishing qualitative research | <u>Theory and practice readings</u> Pratt, M. G. 2008. "Fitting oval pegs into round holes: Tensions in evaluating and publishing qualitative research in top-tier North American journals," <i>Organizational Research Methods</i>, 11(3): 481-509. Aguinis, H. and A. M. Solarino. 2019. "Transparency and replicability in qualitative research: The case of interviews with elite informants." Stratogic Management Journal. |
| | | informants," Strategic Management Journal, 40:1291–1315. Example |



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| Keller, A., F. Lumineau, T. Mellewigt and A. Ariño. 2021. "Alliance governance mechanisms in the face of disruption," <i>Organization Science</i>, 32(6): 1542-1570. Note: We will discuss the materials related to the review process of this article, which will be distributed via e-mail by the professor. <u>Complementary reading:</u> Shaw, J. D. 2012. "From the editors. Responding to reviewers," Academy of Management Journal, 55(6): 1261-1263. |
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| <u>Research Practicum</u> <u>Reading:</u> Bansal, P., and K. Corley. 2012. "Publishing in AMJ - Part 7: What's different about qualitative research?" <i>Academy of Management Journal</i>, 55(3): 509-513. Deliverable 8 <u>Recommended readings</u> Yin, chapter 6: "Reporting case studies: How and what to compose" M&H, chapter 9: "Matrix displays: Some rules of thumb" M&H, chapter 12: "Producing reports" Wolcott, H. F. 2001. <i>Writing up qualitative research</i>, Thousand Oaks, CA: Sage Publications. Pratt, M. G. 2009. "From the editors. For the lack of a boilerplate: Tips on writing up (and reviewing) qualitative research," <i>Academy of Management Journal</i>, 52(5): 856-862. Jonsen, K., J. Fendt, and S. Point. 2018. "Convincing qualitative research. What constitutes persuasive writing," <i>Organizational Research Methods</i>, 21(1): 30-67. |