

# PREFACE

*Michael D. Myers*

Both qualitative and quantitative research methods are useful for studying business phenomena. If you are considering which one to use for your own research project, it is wise to look at the pros and cons of each approach. This is where the value of this book comes in. This book should help you to decide whether qualitative research is the best approach for you. The book focuses on a variety of qualitative research methods and illustrates how to conduct qualitative research in various management disciplines. As a general rule, qualitative research is best if you want to study a particular subject in depth (for example, in one or a few organizations). Whether you choose qualitative research or quantitative research (or a combination of the two) will depend on your research topic and your own research interests and expertise.

The individual chapters focus on the building blocks that are needed to complete a qualitative research project. These building blocks include: choosing an appropriate research topic; framing an appropriate research question; positioning your own research project within the existing research literature; conceptualizing your research so that you are able to make a theoretical contribution of some kind; choosing a particular qualitative research method; how to analyze your data; how to make a contribution to a research field; and how to explain the implications of your research findings for researchers and practitioners.

The chapters provide examples of qualitative research projects from a diverse range of business disciplines including accounting, finance, human resource management, information systems, marketing, operations management, and strategy. Additionally, the chapters illustrate a diverse set of qualitative research methods, such as case study research, participant observation and focus groups.

Although most of you will be focused primarily on writing up your research project for your thesis, as part of the requirements for your DBA degree, I would encourage some of you to consider writing up your findings for a conference paper, business magazine or academic journal. Although writing up your thesis is obviously important, if you write up your research work and have it published elsewhere, then potentially hundreds, if not thousands, of people can learn from your research findings. Your research, instead of being just a personal learning experience, enables other people to learn from what you did. Your research becomes a contribution to the research or practitioner literature. This published contribution becomes something which others can learn from. If you have the time and the inclination, I strongly urge you to consider this option. Perhaps the best way to pursue this opportunity is in conjunction with one or more of your professors. I have been a co-author with many of my own students in the past. And even if they get a job in industry, a published paper looks good on their CV!

In summary, there are many challenges if you are intending to use qualitative research. I hope this book will provide those who are interested in this topic with a deeper understanding of these challenges. However, there are many opportunities for contributing to business and society by conducting qualitative research that informs business research and practice. I trust that this book will inspire some of you to pursue these opportunities.

# INTRODUCTION

*Françoise Chevalier, L. Martin Cloutier and Nathalie Mitev*

This book is a continuation of the Doctorate in Business Administration (DBA) Fundamentals series launched in 2015 by the Business Science Institute (BSI) in partnership with Editions EMS. The aim is to produce a series of books to guide the academic work of doctoral candidates in the Business Science Institute's Executive DBA program<sup>1</sup>.

DBA doctoral candidates are managers, unlike in Ph.D. or traditional doctoral programs, and do not set out to make research their profession in its own right. A DBA allows them to acquire specific expertise on a particular topic, and to anchor their thinking and analysis by using proven theoretical and methodological frameworks. DBA doctoral candidates are practitioners who, once they have defended their thesis, become consultants or experts in their companies, or even join, on a part-time basis, the body of educators and teachers who wish to share their experience and practice while being able to take a step back from them.

It is in this context that this book takes root. It is intended for DBA candidates who hold management and leadership po-

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1. Beaulieu, P., & Kalika, M. (dir.). *The DBA Thesis Project in Practice*. Caen, France: Editions EMS.  
Chevalier, F., Cloutier, L.M., & Mitev, N. (dir.). (2019). *Research Methods for the DBA*. Caen, France: Editions EMS.  
Moscarola, J. (2022). *Let Your Data Speak. Quantitative and Qualitative Methods*. Caen, France: Editions EMS.

sitions. The objective is to provide them with examples, in the form of testimonials, of qualitative research conducted in various management science disciplines. On the one hand, it shows that qualitative research can be used in strategy, accounting and control, marketing, information systems, finance, human resources management, operations management, organizational management, etc., and can contribute by providing powerful results to managers and organizations. On the other hand, it seeks to illustrate concretely the use of different methods and tools *in situ* (interviews, case studies, observation, group discussions, critical incidents, action research...).

There are many publications on qualitative research in management. This book is different. Its orientation is deliberately practical. Our objective: to be directly useful to those who engage in qualitative research with a business or an organization with a practical outlook.

In this book, the presentation of the methods is written simply to be easily appropriated and consequently mobilized by the readers. It is important on the one hand to avoid jargon and on the other hand, to respect the methodological rigor associated to scientific fields (terminology; rigorous application of conceptual, theoretical and empirical notions; respect for reliability and validity criteria, etc.). The challenge here is to reconcile editorial accessibility and scientific rigor. This double requirement characterizes the writing of each chapter described in Table 1.

Authors	Field	Data collection methods	Themes	Fields/Contexts	Theories
Christophe Torset	Strategy	Semi-structured interviews with multi-level contacts in 25 companies, stakeholders' experience, quantitative data	Strategic thinking and hierarchies, stakeholder involvement	SBF 120 (Société des Bourses Françaises, French stock market index, in English)	Decentralization/centralization of strategic planning, usual degree of formalization, internal communication, leadership attitude
Damien Mourey	Management accounting and control	Participant observation, meetings, accounting documents, minutes of meetings	Interorganizational performance evaluation	Mass merchandizing and sixteen international suppliers of consumer products (France)	Dramaturgy, interactionism, staging, reflexivity, face-to-face behavior
Kiane Goudarzi	Marketing	Two case studies: group interviews, critical incidents, floating observation, travelogues	Role of co-clients, immediate satisfaction, service delivery	Train trips, fitness class (France)	Social client-client interactions, servitisation service experience, role typology
Jessie Pallud, Christophe Elie-Dit-Cosaque	Information systems	Case study: meetings, observations, semi-structured interviews, field notes	Digital transformation, collaborative applications, Google Apps	Mutual insurance group (France)	Bricolage, improvisation, affect; adoption/appropriation/adaptation; information technology acceptance

Authors	Field	Data collection methods	Themes	Fields/Contexts	Theories
G�rard Hirigoyen, M�d�ss� C. F. Gand�gnon	Finance	Seven case studies: semi-structured interviews, expert interviews	Financing decision, small business execu- tives	Seven small compa- nies (family-owned, entrepreneurial, managerial) in various industries (France)	Behavioral finance, de- cision-making process
Anne Janand	Human resources manage- ment	Critical incidents, three case studies, semi-structured inter- views	Internal mobility, talent management, career, individualization	Global personal care product group, banking group, public sector organization (France)	Human resources ma- nagement ideal-types, contradiction manage- ment
Fr�d�ric Ponsi- gnon	Operations manage- ment	Focus groups (9) assisted by interactive software, exploratory	Digital transformation, continuous improve- ment	Experienced quality managers (France)	Operational perfor- mance, process impro- vement
Yvon Pesqueux, Nancy Saliba	Organizati- onal behavior manage- ment	Participant observa- tion	Waste management, entrepreneurship	Beirut, Lebanon	Actor-network theory, interessement process, sociology of translation
Jean Moscarola, Aur�lie Dud�zert, Chantal Fuhrer, Florence Laval, Michel Kalika, Olivier Lavastre	Interdis- ciplinary research	Questionnaires, inter- views, focus groups, press articles	Multidisciplinary qualitative research, The CO-DATA-LAB project	Changes in the work environment related to COVID-19 (France)	Multiple theoretical lenses according to the researchers

In chapter 1, the book's coordinators, Françoise Chevalier, L. Martin Cloutier and Nathalie Mitev, provide a historical account of the evolution of qualitative approaches in the academic world. The purpose of this chapter is to relate the tensions between qualitative and quantitative research. This concerns the distinct contributions these tensions can make to the production of knowledge. Although the publication of academic work using qualitative approaches has made significant progress in terms of its dissemination in major journals, its relevance in context and applied to field realities, such as those carried out by managers working on a doctorate and in the process of producing a DBA thesis, undeniably constitutes a future productive and innovative way toward the development of these approaches.

In chapter 2, Christophe Torset focuses on the role of individuals in collective strategic processes by focusing on actors who are not identified as strategists in their organization. This work is based on 83 semi-structured interviews conducted in 25 large companies that supported two phases of research: one allowing the identification of regularities in order to categorize and identify configurational patterns of processes, and the other, allowing for a deeper analysis of the identified configurations by analyzing the actors' rationality and contextual determinants. The results support managerial recommendations concerning the differentiated roles of managers, middle managers and operational managers; the main modes of decentralization in large companies; and finally, the determinants of decentralization.

The social uses of numbers and accounting management tools in interorganizational interaction situations are the subject of a qualitative research illustration in management control presented in chapter 3 by Damien Mourey. Using an involving form of engaged participant observation, this chapter shows how it is possible to methodologically establish the stages of investigation of a complex fieldwork carried out by a category management approach between a retailer and 16 international suppliers. The concept of the "chameleonic researcher" becomes fundamental to understand the main workings of the research process in the field as well as the positioning of the reflective researcher. The managerial recommendations revolve around the ability to maintain dialogue among field actors to ensure the quality of mana-

gerial practice and the importance of dramaturgical skills to try to influence the often animated course of discussions.

Prepared by Kiane Goudarzi, chapter 4 shows how interactions with clients who are initially unknown but present during the service experience, or “co-clients”, influence consumers' immediate satisfaction with the service delivered. This research uses a triangulated approach to data collection, with group interviews, critical incidents, floating observation and travel diaries. Two situations are examined, a train travel situation, and a fitness class in a sports club. The analysis of the results proposes a typology of co-client roles.

Chapter 5 written by Jessie Pallud and Christophe Elie-Dit-Cosaque documents an exploratory case study in a mutual insurance group focused on the actors' responses to a newly implemented collaborative application. It is rooted in theories on the appropriation of information technologies, in particular the processes of bricolage and their influence on the adoption of these technologies in the workplace. The authors highlight three profiles of tinkerers with distinct emotional processes and technology utilization.

Research in finance mostly uses hypothetico-deductive methodologies, but Gérard Hirigoyen and Médéssè C. F. Gandégnon propose in chapter 6 to use a qualitative research approach to document recent developments in the field. This chapter illustrates research involving seven case studies conducted through semi-structured interviews with leaders and experts of small family-owned, entrepreneurial, and managerial businesses to study the decision-making processes related to financing. The authors illustrate how work in finance that integrates institutional and behavioral dimensions, and even the human dimension, can bring it closer to other social sciences.

Anne Janand, in chapter 7, challenges us about a qualitative research conducted in human resources management, and more specifically about the potential of internal mobility to develop the talent of employees. The author describes how the role of four critical incidents supported the problematization process of the study. The methodological approach is based on 37 semi-structured interviews, the contents of which were analyzed accord-



ing to approaches centered on “variables”, on the one hand, and “cases” of three large corporate groups, on the other hand. This is helpful to help distinguish the field phase from the data analysis phase of the research process, thus highlighting the distinct nature of the knowledge produced by each approach used. On the one hand, the approach by variable makes it possible to highlight learning and motivation variables, cited as the main issues of mobility. On the other hand, the case approach highlights different practices and meanings of internal mobility across organizational contexts. The managerial recommendations resulting from this work are thus enriched and take into account the complexity of individual and organizational issues.

The themes found in operations management, such as the management of operational stress in companies and in complex supply chains, cannot be simply described by empirical regularities. Thus, in chapter 8, Frédéric Ponsignon, invites us to explore how the quality management function can play a role in supporting a company’s digitalization process. The data was collected by conducting nine focus groups, in two phases, with 63 experienced quality managers. This approach shows how it is now possible to use technology when conducting focus groups to deepen the contents collected, especially through the organization of ideas organized with affinity diagrams. The results, obtained through grounded theory, highlight the development and possession of a unique set of structural and contextual skills required, and proposes a roadmap of key steps and activities to be integrated into the process in support of digital transformation from a continuous improvement perspective.

Using the actor-network theory as a theory, methodology and method, Yvon Pesqueux and Nancy Saliba describe in chapter 9 an action research on sustainable development and entrepreneurship. The authors explain how their research problem, research questions and research approach were structured after several iterative steps back and forth between the theory and the field. The data collection was based on observations of four waste management start-up initiatives. Based on an inductive approach, this action research shows how the management of waste is a generator of entrepreneurial dynamics and of a learn-

ing organization, taking into account specific social, political and economic issues.

A reflection on the plurality of data sources in qualitative research is offered by Sébastien Liarte in chapter 10. This essay emphasizes that qualitative research offers a range of possibilities in terms of the nature of the data that can be mobilized in the analysis process. In addition, this chapter serves to broaden the horizons of DBA candidates as research managers regarding the usefulness of multiple data sources that can express the discourse of organizations under study. This can include visuals (posters, advertising, logos, icons, etc.), videos, etc. Indeed, the actors' discourses in organizations can be expressed in a variety of ways, including the materiality of artifacts used to communicate about organizations. The reflections offered by Sébastien Liarte could be useful in the production of innovative DBA theses!

Chapter 11 is authored by the collective that includes Jean Moscarola, Aurélie Dudézert, Chantal Fuhrer, Florence Laval, Michel Kalika, and Olivier Lavastre, and presents the CO-DATA-LAB project and tells the story of the realization of a multidisciplinary collaborative research on the impact of COVID-19 on management. It consists of a series of qualitative surveys conducted online, with several questionnaires and focus groups. Through a shared computing platform, the same data are analyzed by researchers from many disciplines through the prism of significantly different research questions, focused on the identification of paradoxes arising from the transformation of work due to telework.

In creating this collection of chapters to highlight the diverse potential of qualitative research, the authors wanted to demonstrate their enthusiasm and inspire DBA candidates to ground their thinking in rigorous and proven qualitative methodological approaches.