

Three Responses to the Methodological Challenges of Studying Strategizing*

Julia Balogun, Anne Sigismund Huff and Phyl Johnson

*Cranfield School of Management, Cranfield University;
Graduate School of Business, University of Strathclyde*

ABSTRACT Empirical studies of strategizing face contradictory pressures. Ethnographic approaches are attractive, and typically expected since we need to collect data on strategists and their practices within context. We argue, however, that today's large, multinational, and highly diversified organizational settings require complimentary methods providing more breadth and flexibility. This paper discusses three particularly promising approaches (interactive discussion groups, self-reports, and practitioner-led research) that fit the increasingly disparate research paradigms now being used to understand strategizing and other management issues. Each of these approaches is based on the idea that strategizing research cannot advance significantly without reconceptualizing frequently taken-for-granted assumptions about the way to do research and the way we engage with organizational participants. The paper focuses in particular on the importance of working with organizational members as research partners rather than passive informants.

INTRODUCTION

Several indicators point to the need to understand how everyday behaviour in organizations creates strategic choices and consequences. The resource-based theory of the firm is one important impetus, because it leads to the conclusion that strategic advantage is most often found in embedded, idiosyncratic routines and behaviours (Ambrosini and Bowman, 2001; Barney, 1995). Another reason to look at the everyday comes from recent empirical work on organizational innovation and situated practice, which suggests that many people are able to describe

Address for reprints: Julia Balogun, Cranfield School of Management, Cranfield University, Bedford, MK43 0AL, UK (j.balogun@cranfield.ac.uk).

and theorize about what they do in detail only when they are in the context of their work (Johnson and Huff, 1998; Lave and Wenger, 1991; Nonaka and Takeuchi, 1995; Seely Brown and Duguid, 2001; Suchman, 1987). Unfortunately, a review of journal articles in the 1990s by Johnson and Bowman (1999) shows that most strategic management research is concerned with macro levels of analysis that do not provide the detail needed to understand strategising practices.

We agree with the authors just cited, and others, that 'deep' data gathering around the unique characteristics of organizations, rather than their generic attributes, is needed. At the same time, however, there is a need for research designs that give priority to breadth. In a globalizing world, strategizing research must reflect large-scale company activities in many different places simultaneously. Breadth is also required to capture the subtleties of new and more ephemeral organizational forms (Lewin and Koza, 1999), as well as provide relevance to today's conditions.

The growing need for researchers to be close to the phenomena of study, to concentrate on context and detail, and simultaneously to be broad in their scope of study, attending to many parts of the organization, clearly creates conflict. This dilemma is exacerbated by a third consideration – the growing number of theoretic alternatives and methodological choices for studying organizations and the increasingly blurred ontological and epistemological boundaries of this work (Denzin and Lincoln, 2000; Locke, 2001). Fuzzy boundaries provide less clear directions on how data should be collected and interpreted. On the positive side, however, increasing pluralism means that methods can be used in different ways and similar methods may facilitate conversations across theoretic perspectives. These opportunities need more exploration.

The purpose of this paper is to acknowledge the challenge presented by economic and structural changes for strategizing research and to survey possible solutions to the depth/breadth/diversity dilemma this creates. At one level the solution appears to be about innovation of methods, but if we pursue to its logical conclusion the argument that issues of depth, breadth, relevance and diversity are inter-linked, then it becomes apparent that we actually need to re-conceive the way we conduct research. In the first part of the paper we argue that traditional approaches to providing data on micro-processes, primarily through case studies and ethnography, can only go part way to generating the data needed. We therefore develop five criteria for assessing the suitability of other research approaches. In the second part of the paper we describe three clusters of work that appear to meet these criteria: interactive discussion groups, self-reports and practitioner research. Gathering data in these ways is not new; these methods have been used in other fields, but are rarely used by strategy researchers. After describing work in each area, we acknowledge that all three approaches (like all methods) have weaknesses, but urge their further development.

BUILDING DATA DEPTH, BREADTH AND VARIETY

A Definition of Strategizing and its Data Requirements

This special issue is concerned with the 'myriad, micro activities that make up strategy and strategizing in practice'. The new focus is on individuals and their interactions within groups with a concern for activities and routine processes (Johnson and Bowman, 1999). A substantial part of the strategizing agenda is about understanding tacit, deeply embedded, and therefore hard to get at phenomena (Whittington, 2001). In other words, most strategy research has been about 'know what', whereas strategizing research looks for 'know how', 'know when' and 'know where' (Garud, 1997; Nicholls-Nixon, 1997). Critically, as we have already mentioned, these kinds of knowledge are hard to understand away from practice itself.

A strategizing agenda also urges researchers to consider whose know how (when and where) we should try to collect and understand. As the strategy conversation moves beyond intended, formal, macro level processes to consider more micro organizational processes, interaction between top-level interventions and organizational responses from other players becomes important. Strategizing implies engagement with lower level managers and non-managerial staff (Floyd and Wooldridge, 1994). We need to understand not just how senior management plans and actions are created, but also how these plans are consumed and influenced by those lower down in organizations, and translated into the day-to-day practices that create strategy and change. Strategy is ultimately about what is done and what is not done. At the micro level this is what we are trying to track. We need to know the detail, such as which meetings have been held, and who has talked to whom. From that we can build an understanding of the intentions behind the things that are done and not done. Over time we can understand more about the nature of events as different groups/individuals see them, and how that perception changes.

To date, research that encompasses micro, multifaceted phenomena and builds on the experience of those in the setting studied has been complex and time-consuming (Dawson, 1997). Most empirical studies follow a common 'recipe'.^[1] It is widely accepted, for example, that organizational processes cannot be understood in an acontextual, cross-sectional manner (Bowman, 1988; Chakravarthy and Doz, 1992; Dawson, 1997; Lyles, 1990; Mintzberg, 1988; Pettigrew, 1992; Van de Ven, 1992). The case study is the typical approach of processual research (Hinings, 1997), while other studies of practice tend to favour the ethnographic approach of anthropology (Whittington, 2001). Data are usually collected through interviews, observation, and documentation. Reports emphasize detailed scene-setting justified by quotes from participants, with a small number moving from description to more abstract theorizing by the researcher (Locke, 2001, p. 117). Only on very rare occasions (see especially Pettigrew et al., 1992) are these multi-site and/or multi-organizational.

There has been little debate about the appropriateness of the traditional approaches used in case and ethnographic studies for strategizing research. We believe the common recipe needs a critical look. Whilst case studies and ethnographies can provide needed insight, their well-known drawback when using traditional means of data collection is their great cost in researcher time. In large complicated organizations the requirements of ethnography, in particular, are very daunting. In addition, and more importantly, strategizing is about studying practitioners and their practices within the context of their work. Sharing practice is about sharing know how, but know how is potentially hard to share in any way other than through practice itself (Lave and Wenger, 1991; Seely Brown and Duguid, 2001; Suchman, 1987). This suggests the need for a more active involvement of practitioners in the research, which in turn requires us to investigate alternative means of data collection that sit outside the taken-for-granted approaches such as interviewing and observation. Traditional case and ethnographic studies typically position the researcher as the interpreter. We need new mechanisms, not just to make the research more manageable as the scale, scope, speed and complexity of organizational operations grow, but also to enable researchers to encourage greater self-reflection from respondents.

Criteria for Selecting Methods for Strategizing Research

Even though our own work has tended to fall within an interpretive tradition, we believe that it is possible to identify new methods that accommodate multiple ontological and epistemological positions. We have looked for data gathering tools that can maximize the use of researcher time, but still yield adequate, contextually grounded data. More specifically, we have been interested in finding methods that simultaneously meet the following, potentially contradictory, criteria:

- (1) *Provides evidence/data that is both broad and deep because it is*
 - contextual
 - longitudinal
 - facilitates comparison across sites
 - can be collected at multiple organizational levels.
- (2) *Elicits full and willing commitment from informants because it is*
 - interesting enough to engage organizational commitment
 - enjoyable enough to sustain commitment over time.
- (3) *Makes the most effective use of researcher time because it*
 - collects
 - organizes
 - analyses, large and varied amounts of evidence.

We believe that willing commitment from research participants is a key, but often neglected, means for achieving these aims. Individual participants need to feel

some personal benefit before they are likely to commit time and thought to a research project, particularly since the data depth requirement of strategizing research places a heavy burden on them. Individuals are unlikely to be involved if the research is not sanctioned and supported by the top of the organization (Perlow, 1997; Van de Ven, 1992). All corporate gatekeepers need to see a tangible organizational benefit resulting from the research if participation is to be sustained. This is particularly true if the research is to examine something of great sensitivity, such as processes of change, which have a notoriously bad success rate. As Pettigrew observes, 'social scientists have no god given right to expect other people's organizations to be their laboratories' (1997, p. 343).

There is also a strong theoretic argument for more closely coordinating managers' agendas and those of management researchers. Knowledge is produced in organizations, not just in universities (Huff, 2000; Tranfield and Starkey, 1998), and it must be studied there. A 'Mode 1' (Gibbons et al., 1994) research agenda that grows solely out of conversations with other academics is unlikely to reflect contemporary organizational realities. An agenda that is set with and by managers is more likely to be relevant to the organization, and thus more likely to develop researcher understanding of micro activities.

The very nature of longitudinal, micro-level research with large amounts of rich, complex data puts researchers in a position to offer on-going research-based feedback, and then build the response into the research project (Balogun and Johnson, 1998). Another option may be to run workshops, not just on the research findings, but on other topics of interest to the organization and more general concepts of strategizing. These activities are best seen not just as reciprocity for access during the research, but as a way of more deeply understanding the work of the organization. Ultimately, our research agenda requires that our research processes become more reflective, and that we explore links between our 'theorizing' processes and the 'strategizing' processes that interest us. We must find ways to build knowledge reciprocally (Pettigrew, 1990, 1997). Useful strategizing research cannot be based on just a one-way commitment to feedback as a means of improving the likelihood of organizational access.

In short, two additional guidelines seem necessary to assure engagement:

- (4) *Anchors the majority of questions being asked in organizational realities because it*
 - is sensitive to multiple definitions of critical issues
 - addresses problems of interest and relevance
 - involves organizationally based collaborators.
- (5) *Goes beyond research based feedback to*
 - contribute to organizational needs
 - provide informants with personally useful insights
 - inform the content of further collaboration.

Is Action Research the Answer?

The use of collaboration to strengthen research access, promote data quality, provide something useful to an organization, and help the research agenda evolve is not new; these principles are particularly central to action research, which encourages intervention in the research context. There are, however, several schools of action research (Eden and Huxham, 1996) and each varies in its ability to provide the kind of data needed in strategizing research. Some see action research as a form of learning and development for the individual undertaking the research project and for them alone (Reason, 1988, 1994). In this form of research, there is no requirement to frame the research in terms of a wider practical audience. A second approach is to see action research as a form of organizational development. The underlying assumption of this kind of work is that less empowered groups in organizations can become more empowered via researcher intervention (e.g. Chisholm and Elden, 1993). A third possibility, which has more utility in terms of the research we are discussing here, is to view action research as a method without prescriptive motivations (Eden and Huxham, 1996). Just as case study via in-depth interview is a method, data gathered on the back of organizational activity can also be a method.

Almost everyone interested in strategizing research knows it is likely to be time-intensive, but action research experience suggests the possibility of simultaneously engaging with a wide range of participants in more than one part of the organization. The researcher can take on different roles when engaging with and perhaps helping to intervene in an organization, varying from facilitator to interested bystander (Eden and Huxham, 1996; Huxham and Vangen, 2000). The further insight from this tradition concerns the benefits of collaboration. Collaboration with those inside the organization can meet many of our five guidelines for strategizing research at a stroke since by their nature, collaborative projects are contextual, and once an insider is engaged, the relationship is often longitudinal. We have come to believe this is essential to moving the strategizing agenda forward.

Yet greater, real-time involvement is not a panacea in itself. Many action research projects are disengaged before general conclusions can be reached. Others last for considerable periods of time and become as time consuming as more passive ethnographic studies, if not even more demanding. Reducing the role of the researcher to a facilitator/bystander, or replacing the outsider with insiders for many research tasks (Bartunek and Louis, 1996), can greatly reduce researcher time and enable collection of data across sites and levels. However, the more distant the researcher, the harder it can be to interpret what we have already described as the key methodological issue: the ability to recognize and draw out embedded tacit knowledge across multiple contexts in response to the depth/breath/diversity methodological gap.

NEW METHODS FOR STRATEGIZING RESEARCH

It is important to re-emphasize that collaboration with informants is attractive primarily because of the nature of the data required for strategizing research. The dilemma we are wrestling with is that, on the one hand, micro processes are context sensitive and embedded in practice, thus difficult for the researcher with little experience in a given context to understand. On the other hand, it is not possible to rely only on conventional ethnographic methods to improve understanding, given the breadth, complexity, and rapid transformation of many organizational environments. Wrestling with this dilemma led us to elevate less frequently used tools of data gathering to get closer to practitioners and their practice. On the basis of our experience, this paper recommends three kinds of data collection methods. Each approach is widely used in other social sciences and professions, but is relatively unfamiliar in strategy-based research. We believe they are particularly applicable to strategizing research if they are used as part of a broader research design that uses multiple methods (Huff, 1981).

The appeal of the methods we discuss lies in their ability to address issues of depth, breadth and diversity, and, importantly, in their potential to give us more insight into the detail of what individuals engaged in strategizing activities actually do, from their own perspective. Their strength lies in the way they enable us to encourage practitioners to reflect on their own practice, either by positioning the point of data collection closer to the context and practice of practitioners, or by engaging practitioners collectively to query themselves and each other more directly. They also enable a deepening of dialogue between the researcher and the researched. The possibility of getting at the type of tacit, embedded practitioner knowledge we want is increased, whilst simultaneously enabling us to gather data in ways that are more economic of researcher time and replicable in different places. Although the search for additional methods must continue, the ones we discuss seem a good start.

Interactive Discussion Groups

Strategizing often takes place in 'communities of practice' whose activity and knowledge is better seen as a property of the group and its interactions than as individual phenomena (Langfield-Smith, 1992). While there has been a useful broadening of focus from the individual leader to the top management team in strategy research, relatively little is done to collect detail at this level of analysis (for one exception see Ambrosini and Bowman, 2002). Even less has been done to understand collectively shared knowledge beyond the top management team.

The term 'interactive discussion group' covers a broad spectrum of dialogue-based group level data gathering techniques that might be helpful in this regard. Those using group-based data collecting methods typically draw together indi-

viduals whose opinions, values, attitudes, beliefs, and memories are likely to be rich in relation to the phenomenon of research interest. The careful selection of participants is meant to lead to sophisticated queries from within the group. The academic perspective remains important, but interaction within the group will hopefully lead to participant-generated queries and insights that exceed what the academic can achieve alone.

Discussion methods can be placed along a continuum according to the depth at which the researcher wishes to explore informant understanding of a research question. At one extreme is the *group interview*. Here, individual opinions are sought in a group environment to speed data collection, but also so that shared insider reflections can serve as memory triggers. The emphasis is on collecting and codifying dispersed knowledge. At the other end of the continuum, groups can be designed in an *encounter group* format. In this highly experiential format individuals are encouraged to construct or re-construct cognitions (attitudes, beliefs, values, emotions) that are typically repressed. While insight at this depth is highly desirable, issues of expert facilitation put techniques such as encounter groups out of the reach of most management researchers. Consequently, our recommendations focus on engaging with groups more at the interview-based end of the spectrum, though we do describe an interview method explicitly designed to uncover knowledge and emotion that participants may find difficult to express directly.

The great attraction of the group format is that it is a less time demanding approach to data collection than observation and/or individual interviews (Morgan, 1988). The researcher can collect data from informants at multiple sites without having highly detailed local knowledge, because the participants bring that knowledge. Critically, the researcher creates the space and possibility for informed insiders to ask questions of each other. Some worry that discussion groups cannot elicit the depth of information from individual respondents that can be achieved with one-to-one interviews, but it has also been argued that more detailed data may emerge (Edwards and Talbot, 1999). Even if the data are not as rich, the compensating advantage of discussion groups is that 'inherent group dynamics tend to yield insights that ordinarily are not obtainable from individual interviews' (Schiffman and Kanuk, 1991, p. 52).

In discussion groups, interaction within the group is used to generate data as opposed to interaction between researcher and participant. Group discussion enables participants to explore what *they* think is pertinent and generate insights grounded in *their*, not the researchers', understanding (Alexander, 2000). The interviewer is typically a moderator, and there is often less structure than with individual interviews, because structure can impede group dynamics (Crabtree et al., 1993). Ideally, individuals spark off each other during much of the data gathering process, rather than responding to a pre-determined set of questions (Blackburn and Stokes, 2000).

Individual verbalizations within a group tend to act as memory triggers for other group members (Hinsz, 1990; Larson and Christensen, 1993), which broadens the scope of information (both tacit and conscious) elicited (Edwards and Middleton, 1986; Edwards et al., 1992). Often, there is also a catalytic effect within groups in terms of memory recall – a snowball effect (Stewart and Shamdasani, 1990). Group members ideally challenge one another's contributions; they notice inconsistencies that an interviewer working one-to-one with an interviewee is less likely to notice.

The situated practice literature (Lave and Wenger, 1991; Seely Brown and Duguid, 2001; Suchman, 1987) suggests that participants are likely to find it hard to explain what they do outside of practice, thus direct questions may not work. Interacting with other practitioners may be the next best thing. Facilitators often rely on techniques such as storytelling and critical incident analysis to get participants into discussions that elicit desired data. The story telling tradition in particular has been strongly associated with the exploration of practice-based tacit knowledge (Cook and Yanow, 1993; Lave and Wenger, 1991; Orr, 1996).

It must be recognized that discussion groups can also suppress individual contributions. Although we discuss method weaknesses in more detail later in the paper, it is important to note that researchers/moderators must establish strong ground rules that discourage domination by the few. Blackburn and Stokes (2000) suggest that the level of openness achieved in focus groups may be due to a shift in power between the researched and the researcher – participants are among their peers and the researcher is reduced to a minority. By implication, and well supported by experience, the utility of discussion groups ultimately depends on the development of group norms supporting openness and the substantive objectives of the inquiry process.

Given moderator/group control, and good will on the part of participants, groups can become an important means of data collection. They are most helpful in a longitudinal research design, where the confidence of individual contributors can grow as they become accustomed to the other members of the group and the discussion group format. The participants themselves are then more likely to shape the direction of the enquiry. Hartley et al. (1997) provide a good example of such longitudinal work in their investigation into the role of internal change agents. Questions from within the group probed issues such as the challenges faced in the formulation and implementation of change, what facilitated and obstructed the work, solutions tried, outcomes achieved, and so on.

Finally, informant commitment to the research process can be increased by this method of data-gathering, especially if discussion moves in directions determined by participants. Whilst there are obviously problems in ensuring continuity of group membership, busy practitioners who benefit from the opportunity to examine and improve their own practice tend to commit their time to this form of data gathering (Ely, 2001).

Types of interactive discussion groups. A simple, relatively structured form of facilitated discussion is the *nominal group technique* (Delbecq et al., 1975). Whilst typically a problem solving method, nominal groups can be used to focus on research purposes as well. The rules of participation are designed to maximize the inputs of individuals, and limit potential problems of group discussion (including deferral to high status members, domination by the most opinionated, and collapse into tangential subtopics). Data gathering focuses on a specific question, posed at the outset. Contributions are collected in round-robin fashion, followed by anonymous voting. Tabulation suggests areas of agreement. Clarification or elaboration can be achieved in successive rounds of discussion and voting.

A better-known form of facilitated discussion is the less structured *focus group*, which is often used to unearth personal views and experiences (Blackburn and Stokes, 2000). There are many books written about this data collection method (see, for example, Bloor et al., 2000; Greenbaum, 2000; Morgan, 1993, 1997a, 1997b; Stewart and Shamdasani, 1990). It is very popular in market research, but also recommended in social science research (Blumer, 1969), and in professional areas such as nursing and other medical specialities (Kennelly and Bowling, 2001; Meuser and Marwit, 2001; Thompson et al., 2001; Villarruel et al., 2001). For example, Ely (2001) explored pain management practices among paediatric nurses with nurses attending from one to six focus groups over a ten week period. She not only gathered data for her research, but also enabled participants to collectively consider how they could improve their practices, an important motivation from those who attended. In the public policy arena, Alexander (2000) similarly used longitudinal focus groups to investigate adaptive strategies of non-profit human service organizations. Attendees included executive directors, associate directors and programme staff.

Focus groups have been used in managerial research to collect data in several one-off interventions (see Heneman et al., 2000; Vyakarnam et al., 1997; Whittington, 2001). In addition, Blackburn and Stokes (2000) conducted focus groups with SME business owners every six months to examine their experiences and issues. The design was intended to build rapport between participants and researchers through time, leading to a freer discussion.

As with the nominal group technique, focus groups are particularly useful for collecting conscious knowledge, and Morgan and Krueger claim that 'the interaction in focus groups often creates a cueing phenomenon that has the potential for extracting more information than other methods' (1993, p. 17). The transcripts of focus groups can be analysed for thematic content, perhaps using computer programs like Atlas and NUD*IST.

Mapping groups provide a third example of group-based discussion, one that is more widely used in strategy research. In these groups, discussion is structured using one of several different cognitive mapping techniques (Ambrosini and Bowman, 2001, 2002; Eden and Ackermann, 1998; Huff and Jenkins, 2002;

Laukkanen, 1998). Individual's ideas, opinions and beliefs are represented as discrete items, often using post-it notes on a wall chart, or data boxes in a mapping software such as Decision Explorer or Group Explorer (Eden and Ackermann, 1998). The memory jogging advantages noted for focus groups apply, but the added advantage of a mapping group is the possibility of moving from individual maps to aggregate ones, capturing more complex data in the process. For example, many mapping methods represent causality. Portions of a map can be isolated for additional, more specific debate and elaboration.

Visual representation of an individual's thinking allows participants to make explicit to themselves connections that may have been tacit and taken for granted (Huff and Jenkins, 2002). In one example, Ambrosini and Bowman (2002) report on a one-day mapping session with senior managers to gain insights into the tacit routines that the managers felt underpinned their success. Ambrosini and Bowman (2001) reports that some managers were genuinely surprised about some of the factors they mapped, suggesting that the discussion led to details unlikely to be found through straightforward interview, or perhaps even observation.

Mapping groups thus can be an interventionist tool to aid the strategizing process (see also Eden and Ackermann, 1998), a research tool (Langfield-Smith, 1992), and sometimes both. Johnson and Johnson (2002) describe work done with senior management teams as part of a consulting assignment across sub-divisions of a major multi-national organization. The managers were asked to reflect upon micro, everyday competencies that in their view delivered success. The data were used to discuss differences and similarities in the sub-divisions at the corporate level. However, Johnson and Johnson point to the need for skilled facilitation of such groups, if it is to be possible to arrive at reliable conclusions about the resources of an organization.

Other techniques can also be used to help elicit, structure and record informant's knowledge in a discussion group format. For example, researchers may use artefacts as memory prompts (similar to a market researcher using product logos to gather opinion) or projective techniques (for example, colours and shapes to represent feelings towards organizational phenomenon) or brainstorming to aid verbalization. A particularly interesting example by Doyle and Sims (2002), which they call '*cognitive sculpting*,' encourages participants to use and arrange purposefully collected objects to create new representations of the phenomenon of research interest.

Self-Report Methods

The second family of data collection mechanisms we suggest for strategizing research allows informants to provide data without the presence of a researcher. These collection mechanisms can be placed on a continuum from *structured questionnaires* to *unstructured diaries* in which respondents choose their own feedback

topics. A well-known example of the former is Louis's (1980) longitudinal study of the organizational entry experiences of new managers, which relied on periodic reports via semi-structured questionnaires. Managers in the study found the subject so important that continued involvement was quite high, which suggests that straightforward data designs are sometimes effective.

At the other end of the continuum, we are particularly interested in diaries, which might be thought of as highly unstructured questionnaires. However, data gathering via diaries tends to be different in intent. Diaries are more personal (Burgess, 1984; Denzin, 1989). They are documents that potentially enable the researcher to 'gain an intimate view of organizations, relationships, and events, from the perspective of one who has experienced them him- or herself' (Bogdan and Taylor, 1975, p. 7). As such, they are more likely to reveal theory in use as opposed to espoused theory (Argyris and Schön, 1978). In medicine, for example, patients have been asked to record information at specific times of day, or after an illness episode. Self-reports also tend to be less time consuming for the researcher in terms of data collection, since this occurs in the researcher's absence (see Perlow, 1999), though the effort required to co-ordinate, manage and follow-up on a large number of respondents should not be underestimated. Participants record events, thoughts, incidents and so on that appear important to them (Allport, 1942), close to the time they happen, but at convenient times (Denzin, 1989). This is highly attractive for strategizing research where we want to understand what our practitioners are doing and gather their reflections on their own practices.

Diaries also have occasionally been used in management research. For example, Buchanan and Boddy (1992) used a simple description of the type of information they required to elicit free-format audio diaries over a two-week period that produced a detailed account of change managers' experiences of managing change. Schilit (1987) used diaries to get middle managers to record the frequency, nature and outcome of interactions with their supervisors on strategic decisions for two months. Balogun and Johnson (1998) used written, semi-structured diaries based on five questions to track the progress of change implementation for nine months from the perspective of middle managers. Weiss et al. (1999) asked managerial workers to maintain diaries to capture their mood state at specific time intervals during the day. The data were compared with measures of job satisfaction, beliefs about the job, measures of dispositional happiness, and affect intensity.

Whilst diaries are an established means of collecting data with a proven track record (see, for example, Burgess, 1984); there is little written guidance for their use, in contrast to the many publications devoted to different kinds of discussion groups. The examples above suggest that diaries are potentially useful in real-time research when there is need to track events through time from the perspective of the practitioner, such as during change implementation, or when there is a need to repeatedly capture data on a particular type of activity. A higher frequency of

data collection is possible than with interviews or group discussions, which reduces the likelihood of forgotten events or experiences (Denzin, 1989). Although the level of data required from diarists can vary, experience has shown that diarists can record required data speedily, at their own convenience. Of course, the very act of writing is time consuming and conscious editing of the written word can lead to a clipped and sanitized account of the phenomena of interest. Dictation into a hand held recording device is an alternative. It is often easier to dictate comments immediately after a relevant event occurs, between other responsibilities, when something is remembered, or when an insight occurs. The audio format is likely to encourage more openness, directness and self-expression, and perhaps allow for more emotive observations than written records. Furthermore, voice recognition software is now available that facilitates translation of direct dictation. Though currently expensive for widespread use, its accessibility will undoubtedly improve. An e-mail option also tends to be more informal, and greatly decreases data transcription time and expense for the researcher.

From the researcher's point of view, the main strength of diaries lies in their ability to collect large amounts of real-time information from a wide group of respondents through time – particularly when it is necessary to capture reflections and perceptions either frequently or after unpredictably occurring events. Some participants will find self-reflection so useful that dairies are self-sustaining (Edwards and Talbot, 1999), but many others are unlikely to continue recording without evidence that the information they provide is being put to good use. To sustain commitment, data gathering via self-report also may need to be combined with other methods, such as discussion groups or interviews.

Types of diaries. Diaries can take different forms. Denzin (1989) talks of *life-history* data collection as a diary technique. These diaries can be intimate journals that capture an individual's reflections about life and experiences and how he or she feels about the things they perceive and do, or have done. *Memoirs* suggest a more objective account of a subject's life. They tend to be more impersonal, and can be useful for recording observations of others. A *log* is a very depersonalized record of events, which can be highly formatted. The intimate journal is suitable for tracking research participants' perceptions of their organization and events. A log is useful for understanding things like contact networks, and even a desk diary or calendar can be a useful source of data.

It would be wrong to suppose that an intimate journal in management research needs to be as comprehensive as an individual's personal diary, since research-oriented diarists are likely to be prompted to record impressions of only certain types of events or issues, as the examples given above show. Diaries also can be used to capture more quantitative data. Clark et al. (1988) collected daily quantitative information for four weeks on work tasks. Schilit (1987) trained his diarists to code diary data into 14 categories and 44 types of strategic decisions. Perlow

(1997 and 1999) was not specifically conducting strategizing research (she was looking at how people use their time at work), but she got a group of software engineers to track their activities for a few days by asking them to wear a digital watch that beeped on the hour. They then wrote down everything they had done since the last prompt.

Practitioner Research

The third family of data gathering techniques we recommend involves data gathering by informants who research their own practices. They define the problems of interest, and actively collect data from their own practice, rather than just observing or reflecting on practice. This activity may be facilitated by an outside researcher, or carried out by practitioners independently. Empirical research on the learning organization (Easterby-Smith et al., 1999) suggests various methodologies for encouraging practitioner driven research projects. The approach is particularly attractive as a vehicle for strategizing research among reflective practitioners.

Research by practitioners can be placed on a continuum from relatively *informal learning* by individuals or groups with no formal outputs to *focused individual and group projects* reported in formal publication. Knowledge development is supported through the production process itself, and through comparison with other participants' issues and learning (Hartley et al., 1997). These outcomes can provide an incentive for organization members to engage in research, although it is almost inevitably more time consuming than the other two approaches we have discussed. Practitioner research is also of potential interest to practitioners because it can lead to organisational change (Preskill and Torres, 1999).

The mechanisms used to collect practitioner generated data include those we have already discussed. Logs, diaries and other records are often found useful for individual self-reflection. Group meetings can be used to explore and share individual insights. The advantages of these methods will not be repeated here. However, practitioner based research has used these mechanisms in interesting and unique ways. Teacher-researchers for example, often observe each other at work. Individuals bring pieces of their work to group meetings, or show examples of how they work in situ via tape recordings (Reason, 1999a). Facilitated self-reflection also is used routinely in counselling or psychotherapy, where counsellors bring tapes of their own work to one-on-one or group supervision sessions (see Mearns and Thorne, 2001). Research into the practices of internal change agents carried out by Hartley et al. (1997) used whole day learning laboratories, supplemented by individually maintained diaries. Reflections between group meetings also can be carried out by e-mail (Dubetz and Turley, 2001) or in on-line discussion groups. Quantitative techniques are also useful, and may not require sophisticated analysis. Charts summarizing numerical data, chi square tests, regression and other

statistical tools can be informative, and are used by an increasingly broad group of practitioners.

Types of practitioner research. A range of practitioner research has been published. Dixon (1999) reports on a series of forums she helped co-ordinate for six museums. An initial two-day 'planning forum' brought representatives from each museum together to plan a subsequent three-day 'learning forum'. This target event 'brought together teams from each participating museum for three days to learn from and with each other. The insights acquired at the Learning Forum were to be taken back to participating organizations and applied. Following the Learning Forum, interaction among participants was facilitated by a variety of means including electronic conferencing and exchange visits' (1999, p. 116). At least one member of each team then met in a two day 'reflection forum' that considered the lessons learned in the preceding months within their organization.

Preskill and Torres (1999) sponsor a more specific, and potentially more critical, form of participant research. *Evaluative inquiry*, as they describe it, moves evaluation from a product orientation to a more holistic, integrative assessment of an individual, group or organization. In their consulting work, the authors support 'systemic enquiry' into questions like: 'Should this programme be continued?' or 'Should more or less resources be allocated to this product's development?'. These questions are answered using enquiry processes such as asking questions, reflection, challenging values, beliefs and assumptions, dialogue, analysis of data and action planning (1999, p. 95). They then feed into ongoing programme planning.

Individual research projects involve similar activities, often around more specific questions. We single them out as a separate form of inquiry of interest to researchers on organizational micro processes of strategizing because they can generate published, publicly available research reports. Although we are not aware of publication forums for practitioner research in management, they are well established in areas such as teaching and various medical specialities such as nursing. Because this work is so individual, it is impossible to summarize. Some examples from the teaching profession can be found in the electronic journal *Networks*.

DISCUSSION

The beginning of this paper suggests five criteria for judging data gathering methods that might bridge the depth/breadth/diversity research gap. In aggregate, the three collaborative research approaches outlined appear to meet these criteria. Furthermore, they do not assume that the academic researcher is the expert, or even the interpretive conduit; they instead ask organizational members to be more active shapers of the research endeavour and more reflective about their own strategizing practices. These data gathering methods are not without

weaknesses, however, and they raise questions about the type of knowledge developed in collaborative research. In this final section of the paper we consider these issues in more detail.

The Nature of Knowledge

As we have already discussed, a collaborative research agenda inevitably contains some incommensurate goals, and puts the academic researcher under pressure to pursue what interests practitioners at the potential expense of the research agenda. Ultimately, both parties are responsible for ensuring that the development of knowledge remains the focal point. Eden and Huxham (1996) detail a series of issues academic researchers need to address to ensure that collaborative research still delivers robust research data. These issues include an intent to inform other contexts with theory development as an explicit concern, a focus on theory building, a clear audit trail of data exploration *and* cycles of reflection, and a concern for issues of external validity. In short, collaboration does not excuse a lack of attention to validity in research design.

The methods we have described are just the beginning of a set of tools that need to be developed and tested. For one thing, researchers will still be working with relatively small numbers of organizations and participants using the data gathering methods we have discussed. Nonetheless, the move toward larger numbers means that issues of generalization have to be dealt with. Here we are more likely to be concerned with what Mitchell (1987) terms 'analytical induction', based on the validity of data analysis rather than the question of data representativeness. The aim is to find what he calls 'theoretical defensible regularities'. Yin (1994) similarly talks of 'analytic generalization' when attempting to generalize the findings of qualitative research.

Methodological Issues

It is important that we recognize that the tools we discuss here, as all others, have their strengths and weaknesses. Overall, practitioner involvement requires academic researchers and organizational participants to be very open. The focus at the micro level is likely to require an individual to acknowledge their strengths and inadequacies in front of others, and also to examine others' strengths and weaknesses. Ethical as well as practical issues are raised by these activities, that also affect the nature of the data gathered. Confidentiality guidelines and ethical guidelines need to be agreed, but this is still difficult territory. Table I highlights some of the issues involved in a summary description of the three methods we are proposing for strategizing research, and details some of the specific weaknesses associated with each. To address these weaknesses it is necessary to consider some of the design issues associated our proposed methods in more detail.

Facilitated discussion groups. There are two major issues concerning the use of groups to gather data that need particular attention – facilitation skills and the dynamics of group settings. We believe that discussion groups often require skilled facilitation for rigorous and responsible data collecting. Facilitation is an art in itself (Johnson and Johnson, 2002). When working with groups, researchers may be required to make multiple process interventions. If they do not know how to handle emerging group dynamics, data gathering may not fulfil the initial intent. This may not be a bad thing, as we have already discussed, but it is important to note that just as the group environment can release information, it can also bound and obscure it. The many dysfunctional aspects of group interaction include polarization (Moscovici and Zavalloni, 1969), loafing (Williams et al., 1979), and groupthink (Janis, 1982). Other widely recognized problems include hierarchical dominance, ego dominance, self-congratulation, and concern about counter actions and retribution (from other group members or from those outside the group who hear second hand reports).

A particularly important issue in group-based research is the selection of appropriate and willing participants. Selecting participants from different parts of the organization can make groupthink less likely, and reduce concerns about retribution, spreading harmful gossip or contagion. Selecting participants in lateral relationships can also reduce hierarchy effects, though perhaps raising other competitive issues. Making clear the purpose of the group and making no promises that cannot be kept should help reduce disappointments about outcomes of a research project. Another problem with discussion groups is that without skilled facilitation it can be hard to get participants to move beyond the obvious and access the more tacit, contextually specific information of interest to strategizing researchers. Mapping techniques may be helpful in this regard, though they are rarely used to capture more emotional aspects of understanding. Software programs simplify data collection and analysis. Some programs, such as Decision Explorer and Group Explorer, also enable mapping in real time, which can help strategizing research be much more dynamic. The use of physical artefacts may help participants to explore connections, and relate to the understanding of others. The results of this technique can be recreated and used to expand on the same themes at later sessions or used to communicate with others.

Distinguishing ‘fact’ from ‘fiction’ is especially hard to resolve in group-based methods. Not only is one person’s fact often perceived by others as fiction; individuals themselves often change their minds about the boundaries they perceive. On the one hand, different interpretations of fact have to be accepted as an inevitable part of organizing and assessing the ‘honesty’ and accuracy of what is recorded is an issue that ultimately must be resolved with reference to the ontological position taken by researchers. On the other hand, deliberate misrepresentation is a long-standing issue in qualitative research, and interesting data in itself. Ideally, group members provide balance and are better than an outsider at spot-

Table I. Comparison of data collection methods

	<i>Interactive discussion groups</i>	<i>Self report</i>	<i>Practitioner research</i>
Uses	Can be used for tracking events and incidents, but better for examining individual and common meaning systems and perspectives. Also good for probing common issues in more depth, especially if multiple meetings are scheduled. Can be used, for example, to explore particular types of strategic practices and why things are done the way they are, how organizational members think about strategy and change, and the practices contributing to organizational advantage at different organizational levels. Less strong than diaries at tracking issues requiring flexible/frequent data capture.	Useful for tracking events and incidents in real time. Better than groups at capturing interactions, stories, gossip and the individual impact of organizational phenomena. Can be used, for example, to track formulation activities, or the progress of change implementation from the perspective of different groups. Also to track what people do and do not do on a daily basis – which meetings they are going to, who they are they talking to, etc. Exploration of reported differences between individuals in terms of what is done and what is not done requires alternative methods such as focus groups.	Useful for surfacing topics that practitioners feel affect practice, and identifying data that practitioners will find useful. Reveals practitioner understanding of their own working patterns, processes, methods, reactions, interactions, successes, failures, etc. Since practitioner research can use many different data capture mechanisms, can be adapted to examine many different micro processes and aspects of practice.
Types of data provided	More varied than diaries. Meetings can be voice or video recorded. Group interactions can be analysed. Diagrams, flipcharts, notes and any other material from group sessions can be captured as data sources. Specialized software programs can capture causal maps and more generally analyse verbal data.	Qualitative observations of events, including experiential data (feelings, observations, reactions, emotions) can be captured manually or electronically. Informants can code data, and supply supplementary data, including statistical data.	Highly varied. Both qualitative and quantitative data can be collected. Research reports are published as a method of communicating with other practitioners in a variety of media.
Frequency and type of data collected	Much lower frequency than diaries, but more frequent than most practitioner studies. In most settings, groups can only meet periodically, perhaps once a week, more	Flexible – can be specified by researcher or left to choice of informant. There are trade-offs. If frequency of reporting is low (for example, once a month), diaries	Flexible, but determined primarily by perceived need of informants. Individual logs may include not just written reports but also diagrams,

<p>likely once a month or less in longitudinal projects. Group meetings can be supplemented by one-off groups to take soundings in other parts of the organization. The length of group sessions can vary, from a period of less than an hour to a multi-day off site session on topics highly related to organizational interests. In addition to interest, data collected depends on (1) the complexity of issues studied, (2) the availability of group members, (3) whether the group is a one-off or an ongoing collective, and (4) the skill of the facilitator to access information quickly and maintain interest.</p>	<p>may forget things or post-rationalize more. A very high frequency, such as daily, is likely to be too time consuming. An alternative is to set certain time periods at which diary entries must be forwarded to the researcher, but it is up to the diarists to decide whether to take notes daily; as and when things occur; all at once, or any combination of the options. Reports can be prompted in response to certain events, at specified time intervals during the day, etc. E-mail increases the utility of this method.</p>	<p>tapes or videos of events involving the informants, correspondence, and so on. Qualitative studies are also likely.</p>
<p>Weaknesses</p> <p>Need for strong facilitation skills if open contribution and genuine depth of data from all participants is to be achieved, and participants are to move beyond the obvious. Issues connected with group dynamics such as status, fears of retribution power and dominance must be addressed. Complex data produced can be difficult to analyse. Individual versus overlapping opinions can be hard to identify. Hard to transcribe multi-voice settings. Poor recall of participants about events between focus groups is likely, though recall can be enhanced by use of between session logs or pre-session reports.</p>	<p>Depth and detail may be lacking. Informants may not be open and honest. Informants may be uncomfortable with their role as diarists. Inadequate participant briefing may lead to inadequate data. Need for intermittent contact or discussion groups between informants may be required to maintain interest. Can get vast amounts of non-relevant data. Self observation can affect how the past is remembered, and how future actions overtake.</p>	<p>Issues raised for discussion groups and diaries also apply to practitioner research. In addition: practitioner research requires capacity for <i>critical self reflection</i> on part of informants. If a group project, participants need to like working together and to trust each other. Time is required for training in research methods and to carry out research. Ethical concerns need to be raised and agreed.</p>

ting deliberate distortion, withholding of information, and other behaviour. Multiple meetings also can be helpful. It is difficult to deliberately maintain fictions over time in a group setting.

Self report methods. The nature of data collected via self report raises similar issues of facilitation and assessment. 'Diary interviews' (Burgess, 1984) and focus group meetings can be used to clarify the content of diaries (see Perlow 1997, 1999). They may be face-to-face, but short telephone interviews are often sufficient. Focus groups may be more time efficient, and may be more productive if diarists collectively reflect on the data they have provided. As described under interactive discussion groups, a forum for collective analysis may also maintain diarists' interest in the research.

For particularly long pieces of research, individual interviews shortly after the start of the research are likely to be useful to understand each participant's background and context. They are a good way for the researcher to establish contact and build a relationship with diarists, while subsequent interviews help spot changes in this baseline picture. Individual researcher contact and facilitation may also be necessary to identify those who are uncomfortable with their role, or reluctant to give full information.

If data collected from individuals are to be seen in some form by more senior managers within the organization, then guarantees of anonymity are typically given to encourage frankness. Even so, the potential distortion of hierarchical relations has to be considered. Efforts should be made to separate attempts at advocacy, or attempts to distort data to serve a participant's own self-interests, from the inevitable limitations of data generated from any specific standpoint. Again, interviews may help, and careful selection of diarists to get overlapping data inputs is important. Diarists who do not discuss events that other diarists from similar parts of the organization mention should be noted. Those who consistently present events in a unique way also warrant attention. Non-overlapping data provide clues as to the need to dig deeper, but it is interesting to reflect on problem solving research that suggests an outlier can be a particularly insightful source of knowledge (Brown et al., 1968).

Another issue relates to the quality and relevance of data provided. Diaries, like other data collection methods are subject to the GIGO phenomenon – garbage in, garbage out. Just as the needed researcher skill with discussion groups is facilitation, the research skill especially needed for collecting data from diaries lies with preparing participants. Existing research suggests that diarists can be trained to provide a variety of data inputs, as shown by Schilit (1987) and Weiss et al. (1999), both discussed above. However, even if the researcher does not wish to specify categories in this manner, some guidance often must be given to reduce anxiety. In strategizing research, with its emphasis on dynamics, the brief given to diarists also is likely to be refined as the research progresses.

Practitioner research. Since practitioner research relies heavily on self-reflection, and often uses interactive discussion groups, all the comments previously made apply equally here. The research skills required to facilitate discussion groups as part of practitioner research are demanding but fruitful (Reason and Heron, 1995; Reason, 1999b). Potential problems include the need for participants to develop critical self-reflection, and the possibility that some may find examining what they do uncomfortable and emotionally distressing.

There also are significant issues of training involved. Academic researchers take many courses that help them identify tractable problems, design research, analyse initial results and carry out additional projects. They typically serve an apprenticeship with a more senior scholar before carrying out projects of their own. This process has to be streamlined for practitioner researchers, and adapted to their purposes, but it cannot be ignored if creditable work is to be done, whatever the ontological and epistemic position of the research project.

It is also important to highlight ethical issues. University research provides initial guidelines in this regard, based on considerable experience. Methods that were once adopted with enthusiasm are sometimes rejected later. (As an extreme case, consider the electric shocks administered by participants to each other in psychology labs not so long ago.) In fact, a wide range of issues, not only ethical but social, political and economic, must be considered by researchers. These implications of research have new twists when insiders and outsiders collaborate.

Re-conceiving Research

Table II summarizes some assumptions of traditional research that we believe are challenged by research on strategizing carried out in the way we have just described. One of the key changes we have been arguing for is collaboration with organizational members. This collaboration is an alliance in which the benefits, contribution, and level of participation of each side needs to be agreed upon. Some organizational collaborators may be sponsors of the research rather than direct participants (see, for example, Gratton et al., 1999), but these sponsors still need to provide access to suitable research informants who are willing and able to actively participate in the project itself. Importantly, sponsors also need to be involved in later interpretation and agenda setting if strategizing research is to move forward in the way we believe it must.

If we are to work with people in organizations as equal research partners, we also need to take seriously the admonitions that no research approach is inherently inferior or superior (Denzin and Lincoln, 2000), and different ontological assumptions are likely to be appropriate for different stages of inquiry (Weick, 1995, pp. 35–6). In our experience, these are difficult ideas to remember in the course of research, and they require reconsidering taken-for-granted assumptions. For example, when writing about insider/outsider team research, Bartunek and

Table II. Re-conceiving strategizing research

	<i>Traditional assumptions</i>	<i>New assumptions</i>
Who sets research question	Researcher	Researcher with organizational collaborators who have similar, or parallel but compatible, agendas.
Relationship with site organization	Typically arms length and contractual	Alliance or consortium.
Data collection principles	Best cases first	Best cases last to exploit learning curve.
How data collected	Participant observation, interviews and secondary sources	Self report and self directed methods dominate, supported by more traditional ethnography, and unobtrusive methods.
Who collects and owns data	Outside researcher	Insiders become more central to data collection than outsiders and start to gain equal ownership rights.
Relationship with participants	Often distant and detached	Informants as collaborators in data collection, analysis and report. Important role for outside researcher as coach to encourage and develop self-reflection. Insiders are coaches to encourage more subtle observation and understanding by researchers.
Who analyses data	Researcher	Joint effort, although many different forms are possible. For example, each group may analyse data separately and compare findings, or one group may analyse and interpret data and the other critique.
Skills level	Researcher as hero – traditional research skills	Multiple skills required. Traditional research training augmented by facilitation skills, team development skills, consultancy skills (e.g. interpersonal, political). Client facing skills important.
Use of IT	Focused on analysis	Integral to data gathering as well as analysis, and enabling analysis in progress.
Writing	Researcher	Co-authorship.
Feedback	Often minimal, typically at end of study	Often significant, of varying forms, and often provided in progress. Aim is to offer an organization something in return for access in addition to research feedback.

Louis (1996) point out that there are particular up front stages that require attention if a mixed research team is to function well. These include building the research team by selecting and negotiating the involvement of appropriate organizational participants, and developing a working relationship among the team.

Like any team, on-going development activities may be required, such as periodic reviews about the way the team is working together and how individual members feel about their contributions. This creates management overhead for all participants. It also raises the issue of the types of skills required for research.

Table II also notes that collaborative relationships involve potentially complex issues about ownership of data. Researchers tend to expect ownership of data – for a start, some or most data typically is held in the academic researcher's database to which the organization hosting the research rarely has access. Normally there is also a contract that allows a researcher to publish findings, although there may be imposed time frames, or the identity of the organization may need to be concealed, or there may be a restriction on sensitive information. But when collaborative knowledge creation is the agenda, the organization and individual participants will have as many rights as the researcher. Co-ownership may restrict freedom of data use.

Another issue involves outputs. Academics will want a scholarly contribution as an outcome, but strategizing research may require working on outputs that are of less interest to academics. Organizational collaborators are likely to be more interested in a practical series of outcomes or actions, and possibly dissemination in practitioner journals. Beyond individual outcomes, organizations are likely to want some more general practical recommendations from collaborative research.

Researchers have typically assumed they have a duty to publish and disseminate their findings. The essence of academic work is to engage in scholarly debate with other academics. Co-ownership may strike at the heart of what researchers see as their fundamental freedom to interpret and disseminate data in a way they see fit. It gives organizational participants more say in the entire course of research. Can researchers adopt any interpretation they find valid? To what extent can collaborators block particular inferences they disagree with, dislike, or want to suppress because they feel it presents them in a bad light? Do organizational participants understand the publishing game and its importance to the researcher? These are all uncomfortable questions that should not be hidden in an overly simplistic notion of co-authorship and contractual relationships.

Collaboration should not remove researcher integrity. As researchers, we may need to refuse to work collaboratively with organizations that are not prepared to give us some degree of latitude. However, we must also accept that organizations may not be prepared to work with us collaboratively if we don't respect the rights this affords them. Researchers have a responsibility to collaborators. If individuals have been prepared to reveal politically sensitive information, their identity must be concealed in publications. Off the record conversations and data should be respected. What researchers must not be prepared to do is to distort the findings published to keep their organizational collaborators happy. (Organizational collaborators should not allow researchers to distort the findings for their ends either.) Obviously this still leaves scope for disagreement.

With appropriate assurances in place, organizational collaborators may be happy to allow their academic partners to publish as they see fit – they may not even want joint publication rights. Another solution may be to agree a limited number of joint publications with all collaborators, and then leave individual collaborators, academic and organizational, free to publish as they like, but within negotiated limits. This assigns equal rights to everyone to publish their interpretations.

CONCLUSION

The study of micro processes is an important outgrowth of evolving theories about organizations and their management. This paper explores what we see as inevitable – a similar evolution in research methodology. In the past few decades, the number of academic research projects focused on organizational activity has increased dramatically, while the time pressures on organizations, and the performance standards they are expected to meet, have also radically increased. As a result of both trends, research populations are less and less willing to be involved with managerial research on the basis of altruism alone, while researchers are less and less confident in the insights gained via more superficial research methods. The broader implication of the observation that know how is embedded in context and practice (Lave and Wenger, 1991) is the need for new research tools. But if we are to move beyond archival data and limited questionnaires to gather the kind of in-depth information on strategizing discussed in this paper, we must ask much more of ourselves and our colleagues in organizations.

The standards of traditional case studies and ethnographies have been useful, but the tools we rely on for data gathering have to be extended and reconceived to fit a changing world. By re-conception we do not mean sacrificing rigour. Rather, we mean adopting new expectations and assumptions. The academic's outsider perspective cannot provide adequate insight into strategizing as a fluid, ongoing, micro level activity. If we want to move management research into the fast paced, competitive arena of the twenty-first century, we have to generate more research topics from within the organization. The complications of our research sites mean that individual researchers, even groups of researchers, cannot count on gaining an insider's perspective on their own. In order to do excellent and insightful research, researchers need to be project managers, skilled negotiators, trainers, co-workers and collaborators as well as writers, methodologists, analysts and theorists. Our argument, in sum, is that the logic of strategizing requires that we re-conceive our basic identities as researchers.

NOTES

*We would like to thank the editors of this special edition, Gerry Johnson, Leif Melin and Richard Whittington, and two anonymous reviewers for their help in developing this paper.

[1] J.-C. Spender's (1989) insightful term for patterns found across similar firms.

REFERENCES

- Alexander, J. (2000). 'Adaptive strategies of nonprofit human service organizations in an era of devolution and new public management'. *Nonprofit Management and Leadership*, **10**, 3, 287–303.
- Allport, G. W. (1942). *The Use of Personal Documents in Psychological Research*. New York: Social Science Research Council.
- Ambrosini, V. and Bowman, C. (2001). 'Tacit knowledge: some suggestions for operationalization'. *Journal of Management Studies*, **38**, 6, 811–29.
- Ambrosini, V. and Bowman, C. (2002). 'Mapping successful organizational routines'. In Huff, A. S. and Jenkins, M. (Eds), *Mapping Strategic Knowledge*. London: Sage Publications.
- Argyris, C. and Schön, D. A. (1978). *Organizational Learning: a Theory of Action Perspective*. Reading, MA: Addison-Wesley.
- Balogun, J. and G. Johnson (1998). 'Bridging the gap between intended and unintended change: the role of managerial sensemaking'. In Hitt, M. A., Ricart I Costa, J. E. and Nixon, R. D. (Eds), *New Managerial Mindsets*. New York: John Wiley.
- Barney, J. B. (1995). 'Looking inside for competitive advantage'. *Academy of Management Executive*, **9**, 4, 49–61.
- Bartunek, J. M. and Louis, M. R. (1996). *Insider/Outsider Team Research*. London: Sage.
- Blackburn, R. and Stokes, D. (2000). 'Breaking down the barriers: using focus groups to research small and medium-sized enterprises'. *International Small Business Journal*, **19**, 1, 44–67.
- Bloor, M., Frankland, J., Thomas, M. and Robson, K. (2000). *Focus Groups in Social Research*. London: Sage.
- Blumer, H. (1969). *Symbolic Interactionism: Perspective and Method*. Englewood Cliffs, NJ: Prentice-Hall.
- Bogdan, R. and Taylor, S. J. (1975). *Introduction to Qualitative Research Methods: A Phenomenological Approach to the Social Sciences*. New York: John Wiley & Sons.
- Bowman, E. H. (1988). 'Strategy changes'. In Fredrickson, J. W. (Ed.), *Perspectives on Strategic Management*. New York: Ballinger.
- Brown, B., Cochran, S. and Dalkey, N. (1968). *The Delphi Method II: Structure of Experiments*. Santa Monica, CA: Rand Corporation.
- Buchanan, D. and Boddy, D. (1992). *The Expertise of the Change Agent: Public Performance and Backstage Activity*. Englewood Cliffs, NJ: Prentice-Hall.
- Burgess, R. G. (1984). *In the Field: An Introduction to Field Research*. London: George Allen and Unwin.
- Chakravarty, B. S. and Doz, Y. (1992). 'Strategy Process Research: Focusing on Corporate Renewal'. *Strategic Management Journal*, **13**, Summer Special Issue, 5–14.
- Chisholm, R. R. and Elden, M. (1993). 'Features of emerging action research'. *Human Relations*, **46**, 2, 275–98.
- Clark, J., McLoughlin, I., Rose, H. and King, R. (1988). *The Process of Technological Change: New Technology and Social Choice in the Workplace*. Cambridge: Cambridge University Press.
- Cook, S. D. N. and Yanow, D. (1993). 'Culture and organizational learning'. *Journal of Management Inquiry*, **2**, 4.
- Crabtree, B. F., Yanoshik, M. K., Miller, W. L. and O'Connor, P. J. (1993). 'Selecting individual or group interviews'. In Morgan, D. L. (Ed.), *Successful Focus Groups*. CN: Sage.
- Dawson, P. (1997). 'In at the deep end: conducting processual research on organisational change'. *Scandinavian Journal of Management*, **13**, 4, 389–405.
- Delbecq, A. L., Van de Ven, A. H. and Gustafson, D. H. (1975). *Group Techniques for Program Planning: A Guide to Normal Group and Delphi Processes*. Glenview, IL: Scott, Foresman.
- Denzin, N. (1989). *The Research Act: A Theoretical Introduction to Sociological Methods*. Englewood Cliffs, NJ: Prentice-Hall.
- Denzin, N. K. and Lincoln, Y. S. (2000). *Handbook of Qualitative Analysis*, 2nd edition. London: Sage Publications.
- Dixon, N. (1999). 'Learning across organizational boundaries: a case study of Canadian museums'. In Easterby-Smith, M., Araujo, L. and Burgoyne, J. (Eds), *Organizational Learning and the Learning Organization*. London: Sage.
- Doyle, J. R. and Sims, D. (2002). 'Enabling strategic metaphor in conversation: a technique of cognitive sculpting'. In Huff, A. S. and Jenkins, M. (Eds), *Mapping Strategic Knowledge*. London: Sage.
- Dubetz, N. and Turley, S. (2001). 'Mentoring in higher education: a self study of faculty socialization'. *Networks*, **4**, 1.

- Easterby-Smith, M., Araujo, L. and Burgoyne, J. (1999) (Eds). *Organizational Learning and the Learning Organization*. London: Sage.
- Eden, C. and Ackerman, F. (1998). *Making Strategy. The Journey of Strategic Management*. London: Sage Publications.
- Eden, C. and Huxham, C. (1996). 'Action research for the study of organizations'. In Clegg, S. R., Hardy, C. and Nord, W. R. (Eds), *Handbook of Organization Studies*. London: Sage Publications.
- Edwards, D. and Middleton, D. (1986). 'Joint remembering: constructing an account of shared experience through conversational discourse'. *Discourse Processes*, **9**, 423–59.
- Edwards, A. and Talbot, R. (1999). *The Hard-pressed Researcher*, 2nd edition, Harrow: Pearson Education.
- Edwards, D., Potter, J. and Middleton, D. (1992). 'Toward a discursive psychology of remembering'. *The Psychologist: Bulletin of the British Psychological*, **5**, 441–5.
- Elden, M. and Chisholm, R. F. (1993). 'Emerging varieties of action research: introduction to the special issue'. *Human Relations*, **46**, 2, 121–42.
- Ely, B. (2001). 'Paediatric nurses' pain management practice: barriers to change'. *Paediatric Nursing*, **27**, 5, 473–80.
- Floyd, S. W. and Wooldridge, B. (1994). 'Dinosaurs or dynamos? Recognizing middle management's strategic role'. *Academy of Management Executive*, **8**, 4, 47–57.
- Garud, R. (1997). 'On the distinction between know-how, know-why, and know-what'. In Walsh, J. P. and Huff, A. S. (Eds), *Advances in Strategic Management*, Vol. 14, 81–101.
- Gibbons, M., Limoges, C., Nowotny, H., Schwartzman, S., Scott, P. and Trow, M. (1994). *The New Production of Knowledge: The Dynamics of Science and Research in Contemporary Societies*. London: Sage.
- Gratton, L., Hope Hailey, V., Stiles, P. and Truss, C. (1999). *Strategic Human Resource Management*. Oxford: Oxford University Press.
- Greenbaum, T. L. (2000). *Moderating Focus Groups: A Practical Guide for Group Facilitation*. London: Sage.
- Hartley, J., Bennington, J. and Binns, P. (1997). 'Researching the roles of internal-change agents in the management of organizational change'. *British Journal of Management*, **8**, 61–73.
- Heneman, R. L., Tansky, J. W. and Camp, M. S. (2000). 'Human resource management practices in small and medium-sized enterprises: unanswered questions and future research perspectives'. *Entrepreneurship Theory and Practice*, **25**, 1, 11–26.
- Hinings, C. R. (1997). 'Reflections on processual research'. *Scandinavian Journal of Management*, **13**, 4, 493–503.
- Hinsz, V. B. (1990). 'Cognitive and consensus processes in group recognition memory performance'. *Journal of Personality and Social Psychology*, **59**, 4, 705–18.
- Huff, A. S. (1981). 'Multilectic methods of inquiry'. *Human Systems Management*, **2**, 83–94.
- Huff, A. S. (2000). 'Changes in organizational knowledge production'. *Academy of Management Review*, **25**, 2, 288–93.
- Huff, A. S. and Jenkins, M. (2002). *Mapping Strategic Knowledge*. London: Sage.
- Huxham, C. and Vangen, S. (2000). 'Ambiguity, complexity and dynamics in the membership of collaboration'. *Human Relations*, **53**, 6.
- Janis, I. L. (1982). *Groupthink: Psychological Studies of Policy Decisions and Fiascos*. Boston: Houghton Mifflin.
- Johnson, C. and Bowman, C. (1999). 'Strategy and Everyday Reality: The Case for the Study of "Micro-strategy"'. EGOS Conference, Warwick.
- Johnson, G. and Huff, A. (1998). 'Everyday innovation/everyday strategy'. In Hamel, G., Prahalad, C. K., Thomas, H. and O'Neal, D. (Eds), *Strategic Flexibility: Managing in a Turbulent Environment*. New York: John Wiley & Sons.
- Johnson, P. and Johnson, G. (2002). 'Facilitating group cognitive mapping of core competencies'. In Huff, A. S. and Jenkins, M. (Eds), *Mapping Strategic Knowledge*. London: Sage Publications.
- Kennelly, C. and Bowling, A. (2001). 'Suffering in deference: a focus group study of older cardiac patients' preferences for treatment and perceptions of risk'. *Quality in Health Care*, 10 (Supplement: Engaging Patients in Decisions: A Challenge to Health . . .), 123–8.
- Langfield-Smith, K. (1992). 'Exploring the need for a shared cognitive map'. *Journal of Management Studies*, **29**, 349–68.
- Larson, J. R. and Christensen, C. (1993). 'Groups as problem-solving units: toward a new meaning of social cognition'. *British Journal of Social Psychology*, **32**, 5–30.

- Laukkanen, M. (1998). 'Conducting causal mapping research: opportunities and challenges'. In Eden, C. and Spender, J.-C. (Eds), *Managerial and Organizational Cognition*. London: Sage Publications.
- Lave, J. and Wenger, E. (1991). *Legitimate Peripheral Participation*. New York: Cambridge University Press.
- Lewin, A. and Koza, M. P. (1999). 'How to manage in times of disorder'. *Financial Times*, 22 November.
- Locke, K. (2001). *Grounded Theory in Management Research*. London: Sage.
- Louis, M. (1980). 'Surprise and sensemaking: what newcomers experience in entering unfamiliar organizational settings'. *Administrative Science Quarterly*, **25**, 226–51.
- Lyles, A. M. (1990). 'A research agenda for strategic management in the 1990s'. *Journal of Management Studies*, **27**, 4, 363–75.
- Mearns, D. and Thorne, B. (2001). *Person Centered Therapy Today: New Frontiers in Theory and Practice*. London: Sage.
- Meuser, T. M. and Marwit, S. J. (2001). 'A comprehensive, stage-sensitive model of grief in demential caregiving'. *The Gerontologist*, **41**, 5, 658–71.
- Mintzberg, H. (1988). 'Strategy Content Research in Perspective'. McGill University, Working Paper.
- Mitchell, J. C. (1987). *Cities, Society, and Social Perception*. Oxford: Clarendon Press.
- Morgan, D. L. (1988). *Focus Groups as Qualitative Research*. CN: Sage.
- Morgan, D. L. (1993). *Successful Focus Groups: Advancing the State of the Art*. CN: Sage.
- Morgan, D. L. (1997a). *Planning Focus Groups*. CN: Sage.
- Morgan, D. L. (1997b). *Focus Groups as Qualitative Research*, 2nd edition. CN: Sage.
- Morgan, D. L. and Krueger, R. A. (1993). 'When to use focus groups and why'. In Morgan, D. L. (Ed.), *Successful Focus Groups*. CN: Sage.
- Moscovici, S. and Zavalloni, M. (1969). 'The group as a polariser of attitudes'. *Journal of Personality and Social Psychology*, **12**, 2, 125–35.
- Networks (1998–2001). An on-line journal for Teacher Research.
www.oise.utoronto.ca/~ctd/networks/journal.
- Nicholls-Nixon, C. (1997). 'Commentary: The importance of know-where and know-when'. In Walsh, J. P. and Huff, A. S. (Eds), *Advances in Strategic Management*, **14**, 103–9.
- Nonaka, I. and Takeuchi, H. (1995). *The Knowledge-creating Company*. New York: Oxford University Press.
- Orr, J. (1996). *Talking about Machines: An Ethnography of a Modern Job*. Ithaca, NY: IRL Press.
- Perlow, L. A. (1997). *Finding Time: How Corporations, Individuals, and Families can Benefit from New Work Practices*. Ithaca, N.Y.: Cornell University Press.
- Perlow, L. A. (1999). 'The time famine: toward a sociology of work time'. *Administrative Science Quarterly*, **44**, 1, 57–81.
- Pettigrew, A. M. (1990). 'Longitudinal field research on change theory and practice'. *Organization Science*, **1**, 3, 267–92.
- Pettigrew, A. (1992). 'The character and significance of strategy process research'. *Strategic Management Journal*, **13**, 5–16.
- Pettigrew, A. (1997). 'What is a processual analysis?'. *Scandinavian Journal of Management*, **13**, 4, 337–48.
- Pettigrew, A. M., Ferlie, E. and McKee, L. (1992). *Shaping Strategic Change*. London: Sage.
- Preskill, H. and Torres, R. S. (1999). 'The role of evaluative enquiry in creating learning organizations'. In Easterby-Smith, M., Araujo, L. and Burgoyne, J. (Eds), *Organizational Learning and the Learning Organization*. London: Sage, 92–114.
- Reason, P. (1988). *Human Inquiry in Action*. London: Sage.
- Reason, P. (1994). 'Three approaches to participative inquiry'. In Denzin, N. K. and Lincoln, Y. S. (Eds), *Handbook of Qualitative Research*. London: Sage, 324–39.
- Reason, P. (1999a). 'General medical and complementary practitioners working together: the epistemological demands of collaboration'. *Journal of Applied Behavioral Science*, **35**, 1, 71–86.
- Reason, P. (1999b). 'Integrating action and reflection through co-operative inquiry'. *Management Learning*, **30**, 2, 207–26.
- Reason, P. and Heron, J. (1995). 'Co-operative inquiry'. In Smith, A., Harré, R. and Van Langenhove, L. (Eds), *Rethinking Methods in Psychology*. London: Sage, 122–42.
- Schilit, W. K. (1987). 'An examination of the influence of middle-level managers in formulating and implementing strategic decisions'. *Journal of Management Studies*, **24**, 3, 271–93.
- Schiffman, L. W. and Kanuk, L. L. (1991). *Consumer Behavior*. Englewood Cliffs, NJ: Prentice Hall.

- Seely Brown, J. and Duguid, P. (2001). 'Knowledge and organization: a social-practice perspective'. *Organization Science*, **12**, 2, 198–213.
- Spender, J.-C. (1989). *Industry Recipes*. New York: Basil Blackwell.
- Stewart, D. W. and Shamdasani, P. N. (1990). *Focus Groups: Theory and Practice*. London: Sage.
- Suchman, L. A. (1987). *Plans and Situated Actions*. Cambridge: Cambridge University Press.
- Susman, G. I. and Evered, R. D. (1978). 'An assessment of the scientific merit of action research'. *Administrative Science Quarterly*, **23**, 582–603.
- Thompson, W. T., Cupples, M. E., Sibbett, C. H., Skan, D. I. and Bradley, T. (2001). 'Challenge of culture, conscience, and contract to general practitioners' care of their own health: qualitative study'. *British Medical Journal, International Edition*, **323**, 7315, 728–31.
- Tranfield, D. and Starkey, K. (1998). 'The nature, social organization and promotion of management research: towards policy'. *British Journal of Management*, **9**, 341–53.
- Van de Ven, A. H. (1992). 'Suggestions for studying strategy process: a research note'. *Strategic Management Journal*, **13**, 169–88.
- Villarruel, A. M., Canales, M. and Torres, S. (2001). 'Bridges and barriers: educational mobility of Hispanic nurses'. *Journal of Nursing Education*, **40**, 6, 245–51.
- Vyakarnam, S., Bailey, A., Myers, A. and Burnett, D. (1997). 'Towards an understanding of ethical behaviour in small firms'. *Journal of Business Ethics*, **16**, 15, 1625–36.
- Weick, K. E. (1995). *Sensemaking in Organizations*. Thousand Oaks, CA: Sage Publications Inc.
- Weiss, H. M., Nicholas, J. P. and Daus, C. S. (1999). 'An examination of the joint effects of affective experiences and job beliefs on job satisfaction and variations in affective experiences over time'. *Organizational Behavior and Human Decision Processes*, **78**, 1, 1–24.
- Whittington, R. (2001). *Learning to Strategise: Problems of Practice*. Lyon: EGOS Colloquium.
- Williams, K., Harkins, S. G. and Latane, B. (1979). 'Many hands make light the work: the cause and consequences of social loafing'. *Journal of Personality and Social Psychology*, **37**, 822–32.
- Yin, R. K. (1994). *Case Study Research: Designs and Methods*, 2nd edition. London: Sage.