

The Essence of Research Methodology

Jan Jonker • Bartjan Pennink

The Essence of Research Methodology

A Concise Guide for Master and PhD Students
in Management Science

Dr. Jan Jonker
Nijmegen School of Management (NSM)
Radboud University Nijmegen (RU)
PO BOX 9108
6500 HK Nijmegen
The Netherlands
janjonkermail@gmail.com
janjonker@wxs.nl

Dr. Bartjan W. Pennink
Faculty of Economics and Business
University of Groningen
Department of International Business
and Management
Landleven 5
9700AV Groningen
The Netherlands
b.j.w.pennink@rug.nl

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Preface

Methodology is the field which is indisputably complex. In the academic world, it is often said to be important, yet in everyday academic practice, it is not always treated accordingly. In teaching, methodology is often a mandatory course. Usually, it consists of learning how to adopt several common approaches when doing research, and how to conceive a *research design* (often leading to a survey). This usually leads to collecting data on a modest scale and – when the opportunity arises – analysing the data with the help of some statistics. Ask the students of their opinion at the end of such a course and they tend to heave a deep sigh of relief and say, “I have got through it.” Then their real courses start again, in which methodology often does not play a role at all.

We are of the opinion that writing-off methodology in this way is a real pity. It ignores the valuable role that methodology should play in academic teaching as a whole. Here, methodology is presented as a form of *thinking and acting* that, while obviously entailing research work, can also include the design and change of organisations. This broad approach has been purposefully chosen, as it is almost obvious from research and graduation projects that the students do not really have a clue what methodology involves and, therefore, wasting their time by producing work that has a little quality. The successful Dutch edition of this book demonstrated the need to provide a brief yet concise introduction to the field of methodology. We sincerely hope that this revised and elaborated English edition can meet similar needs.

This book has not been written for fellow academic methodologists. It is mainly aimed at teachers and lecturers who want to pay attention to methodology in their courses. This may involve working on research assignments, explaining certain methodological aspects of specialised knowledge, as well as supervising Master’s and, sometimes, PhD projects. Above all, this book is aimed at students who work in the field of management sciences and to those who are specifically involved in the studies that concern the functioning, structuring, diagnosing, or changing of organisations. The goal is to offer them a preliminary guide to define and carry out various forms of research. Our overall objective here is to provide the student with

a clear understanding of methodology and its value for their academic work. Hopefully, it will also encourage specialised lecturers to actually assign methodology a more important place in their teaching.

As it is common in a preface, we express our thanks to all those persons, authors, and colleagues, who have contributed to this book. We are grateful for using their texts, ideas, and critical remarks. In particular, we are grateful to all (Master's and PhD) students who have had to struggle with various preliminary versions of the manuscript, as well as with the many ideas and notions "under construction."

Special acknowledgement is due to the former Nederlandse Organisatie voor Bedrijfskundig- en Economisch Onderzoek (NOBEM), a Dutch graduate network of universities that provided academic teaching to PhD students in particular with respect to research methodology. Over the years, this network offered us a systemic opportunity for cooperation in bringing a fine result in the Dutch edition of this book. We recognise the valuable support of Louwe Dijkema and Jacqueline Koppelman (both at that moment employed at Royal Van Gorcum Publishers in Assen – The Netherlands) who supported that first edition. This English edition is revised and rewritten on the basis of teaching experience gained since the first release of this book. We express our gratitude to Frau Dr. Martina Bihn at Springer Verlag for being so patient and supportive. We feel honoured to be guided by her.

We thank Anneliene Jonker who has spent countless hours working on the figures, references, and glossary. We are also indebted to Sarah Trenker who helped turn our original text into proper English. Special thanks also go to Jacques Igalens, professor at the IAE of the University of Toulouse 1 (France) who provided time, space, and company for editing the final version of this manuscript. Finally we acknowledge our academic employers. They have allowed us – admittedly sometimes under duress – to give courses outside the regular teaching schedule for more than a decade. Without this valuable support, little would have come of what initially started as an idea to make methodology more accessible to a broad group of students during their studies.

Jan Jonker and Bartjan Pennink

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Please note: Everywhere in the book where "he" is used, "she" can also be read. It goes without saying that this also applies for the term "researcher," which obviously includes both male and female researchers. The choice for the grammatical "male" form is not based on any form of discrimination whatsoever, but purely aimed on achieving a more readable text.

Summary

This publication is designed to provide (Master's and PhD) students with a concise introduction to research, especially, in organisations. The aim is to familiarise them with the knowledge they need to make well-reasoned methodological choices when preparing an (applied) approach and provide them with the tools they need to develop what is referred to in this book as a *research design*. What methodology actually entails is explained by means of the *Research Pyramid*, which consists of the paradigms, methodologies, methods, and instruments used to collect, classify, and analyse data. Special attention is given to the process of constructing conceptual models. The guiding principle here is the distinction between open and closed questions. The notion of methodology is explored by looking at research methodology and intervention methodology. Both forms are examined in order to demonstrate the range of assumptions and choices underpinning a carefully crafted research design. This leads to the methodological *Box of Bricks* providing a schematic overview of the choices one can make while designing a research. Two interludes, respectively, between Chaps. 3 and 4 and Chaps. 5 and 6 provide some critique on assumptions regarding methodology in general and outline a multi-method approach.

The text as a whole is intended as an introduction to help students to understand what structuring research implies. The general assumption is that the students reading this text are engaged in organisation-oriented research – be it in a business or a not-for-profit organisation. It is structured around a number of succinct chapters and 15 figures. There is a summary provided at the end of each chapter. Each chapter also contains a compact overview of references to other textbooks and/or websites specialising in specific themes such as designing a questionnaire, applying grounded theory, or developing a conceptual model.

The book contains more than 50 practical examples, exercises, discussions, and short case studies. These are aimed at showing the student how to apply methodology in a specific context. Short footnotes draw attention to more fundamental theoretical, ontological, or epistemological issues. Criteria are listed that make it possible to judge the quality of the (research) results. At the end of the book, various

checklists are provided to help students structure their research activities and reflect on key issues and choices to be made. A special feature of this book is an extensive glossary that provides the terms and notions used in this book.

This text is appropriate for courses on Research Methodology for Master and PhD students and can also be used as a part of the regular curriculum, e.g., Human Resource Management, Organisational Design or Change Management, International Management, Philosophy of Science. Extensive experience can be acquired by using it as a basic textbook for courses focusing on the preparation of a thesis or dissertation. It will also be helpful for people who want to refresh their knowledge about methods and techniques.

Suggested Reading

This is a textbook on the essence of research methodology. It was developed over a number of years while providing courses and workshops to PhD students, in particular. Many – if not all – of these students were engaged in a variety of research projects in the area of management sciences. What we have discovered during this long period is that many of these projects are almost by definition of a qualitative nature. A rather qualitative approach is also used for this text, which aims to offer a comprehensive grounding in what methodology is all about. Originally, we set out to write a slim and accessible text offering an overview of the key ideas and notions concerning methodology. The success of the Dutch edition has demonstrated that we might have succeeded in achieving this aim. This English edition should also be read as an introduction to the field. There are plenty of fine and sophisticated texts available as additional reading in this fascinating field. This text is just a means of offering students access to the subject; no more nor less.

If you are a novice in the field (e.g. a Master's or PhD student), take some time and try to read the text as a whole. You will no doubt encounter many terms (and subsequent definitions) that you might perceive to be grotesque if not outrageous. Whatever happens, do not worry: that is what an introduction to a new field is all about. Do not let yourself be fooled by the deliberately simple language we have chosen to use; it is already difficult enough to grasp the meaning of methodology without getting buried under the avalanche of words and terms that seem to come with it.

If you do not have much time but just want an overview of what methodology is all about please read at least Chaps.1 and 2; we think that it is mandatory for any reader. Elaboration on conceptual models is provided in Chap. 3. We have introduced the idea of an Interlude (there are two) to help give our journey a specific if not personalised direction. Chapters 4 and 5 can be read separately depending on the nature of the research you have in mind; they provide a brief introduction to quantitative and qualitative research. Please do not skip the second Interlude since it will offer you a short introduction to a multi-method design. Two chapters deserve

special attention. Chapter 6 provides an overview of the different criteria the various stakeholders engaged in your research project might use. It essentially shows that it is practically impossible to live up to all expectations. Do not feel frustrated; handling these different requirements in a proper and justifiable way is what good research is all about. Be clear and specific about what you are trying to achieve. Chapter 7 provides a more theoretical discussion on the relationship between methodology and acting. In doing so it establishes a broader perspective of the role of methodology in organisations. We are aware of the fact that this chapter does not treat methodology in the sense of doing research. Still we consider it essential that anyone doing research in organisations should be aware of the more fundamental issues with respect to methodology.

It might come in handy to know that there is a final Chap. 8 enabling you to assess your work using a number of checklists. There is also an extensive Glossary helping you to clarify terms and definitions you might already be using in your present work. We like to stress once more that this book was originally conceptualised with a qualitative approach in mind. The research practice of students shows time and again that most business-oriented projects adopt this approach. However, we certainly do not deny the value of a more quantitative approach – as is demonstrated in several chapters and in one of the Interludes. In the end, sound research, no matter what kind of research it is, starts with clear-cut thinking and (conceptual) sense making. It is only then that an answer to the underlying question can be sought.

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About the Authors

Dr. J. Jonker is an associate professor and research fellow at the Nijmegen School of Management of the Radboud University Nijmegen (Holland). His main research interest focuses on organisational change, corporate social responsibility (CSR) and business strategy. He is a visiting professor at the University of Nottingham (UK), the Business Schools of Nancy and Toulouse (France) and Barcelona (Spain). He has written many books and numerous articles. He combines his academic work with business consulting, thus staying in touch with different problems, discourses and realities.

Dr. B.J.W. Pennink is an assistant professor at the Faculty of Economics and Business of the University Groningen (Holland) where he mainly teaches courses in research methodology and International Management to undergraduates and graduates in different Masters programmes. He lectures at several universities in Indonesia (Jakarta, Bandung). In addition he was a visiting lecturer at the University of Ouagadougou in Burkina Faso between 1991 and 2005. Since 2006 he is project manager of collaboration project around Capacity Building of the IFM (Institute Finance Management) in Dar Es Salaam.

They both have been lecturers in Qualitative Methodology for the Dutch Organisation for Business Research (NOBEM) between 1989 and 2004. NOBEM was a fruitful network organisation between universities across The Netherlands providing methodology courses for PhD students in the field of business studies. This book is based on precious and pleasurable experience gained teaching together for more then a decade. A concise edition of this book appeared in Dutch under the title “De Kern van Methodologie” (2000 (first edititon) and 2004 (second edition)) published by Royal Van Gorcum Publishers (Assen).