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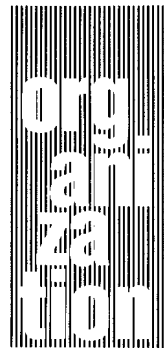
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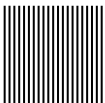
Julie Wolfram Cox

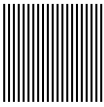
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Abstract. *This paper addresses a traditionally neglected area of management and organizational studies—retrospective research. It identifies, describes and analyses four positions on retrospective research: Controlling the Past, in which attempts are made to maximize accurate recall or to reveal potential sources of error or bias; Interpreting the Past, in which understanding of the present is informed by the construction of past reality; Co-opting the Past, in which causal explanations link the past and the present; and Representing the Past, which involves the problematization of time and research on time. These positions are compared in terms of, for example, method, philosophy, exemplars and potential contribution. Finally, implications are drawn for the practice of retrospective research in management and organization studies. **Key words.** attribution; bias; retrospective research methods; sensemaking; time*





I will have to assume that I had a childhood, but I cannot assume to have had the one I remember. (Jeanette Winterson, *Sexing the Cherry*, 1990: 92)

In their introduction to critical management research, Alvesson and Deetz (2000) argue that much mainstream management research is built on modernist science, which itself is founded on the Enlightenment promise for an 'autonomous subject progressively emancipated by knowledge acquired through scientific methods' (Alvesson and Deetz, 2000: 13). In contrast to a past defined by authority and traditional values, the 18th century Enlightenment represented the rise of reason and a modernist science, which proclaimed a transparent language (freed from the baggage of traditional ideology) and representational truth, a positivity and optimism in acquisition of cumulative understanding which would lead to the progressive enhancement of the quality of life. The Enlightenment's enemies were darkness, tradition, ideology, ignorance, and positional authority (Alvesson and Deetz, 2000: 13; see also Cooper and Burrell, 1988).

Within the associated grand narratives of progress and emancipation (cf. Lyotard, 1984), the past was displaced and 'the traditional was marginalized and placed off in the private realm' (Alvesson and Deetz, 2000: 14). Citing Schaffer (1989), Alvesson and Deetz (2000) even suggest that modern philosophy of science overcompensated for the fear of authority, rhetoric and ideology by producing its own ideology manifested in scientific procedures such as hypothesis testing.

In both its interests and practices, modernism therefore looks to the future rather than to the past, for its emphasis rests on hope, prediction and control for a better future. In contrast to the dignity of the present and hope for such a future, the past is marginalized, romanticized, oversimplified as kitsch, or overcomplicated as pandemonium (cf. Burrell, 1997). Although it is important to distinguish between the periodization and epistemology of modernism (cf. Parker, 1992), and to avoid overly simple polarization, if not its repudiation (Archer, 1998; Lewis and Keleman, 2002; Weiss, 2000), it is perhaps not surprising that social science methods for researching the past receive less attention than methods that assist us in understanding the present or predicting the future.

In an effort to redress this imbalance, our paper analyses the application of *retrospective* methods in management and organizational research. This is achieved notably in the context of the style of research found within the journals of the Academy of Management and the pages of other leading organization studies journals. We are concerned primarily with retrospective research based on interviews and ethnography, as opposed to the methods of documentary historical research on organizations, as presented either in position statements (see Kieser, 1997; Usdiken and Keiser, 2004) or case research (see Hassard and Porter, 1990; Hassard and Rowlinson, 2002; Kieser, 1987; Rowlinson and Hassard 1993). As such, the purview of the paper is to identify various positions on retrospective research and discuss the methodological assumptions of each. From this analysis, representative arguments are illustrated and variants of the positions described. Thereafter, the various positions are summarized and comparisons between them



made in order to provide a classification of methodological similarities and differences. Finally, implications from this comparative analysis are drawn in terms relevant to the practice of retrospective research in management and organization studies.

Positions on Retrospective Research

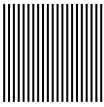
The main body of the paper identifies, describes and analyses four positions on retrospective research—*Controlling the Past*, *Interpreting the Past*, *Co-opting the Past* and *Representing the Past*. In brief, *Controlling the Past* sees attempts made to maximize accurate recall or to reveal potential sources of error or bias. *Interpreting the Past* reflects how our understanding of the present is informed by the construction of past reality. *Co-opting the Past* sees causal explanations link the past and the present. And *Representing the Past* involves the problematization of time and research on time.

Controlling the Past

This first position we identify, *Controlling the Past*, assumes that there was an objective truth in the past and that any 'difficulties' in uncovering or capturing such truth lie with the efficacy of present research methods and accounting processes. In terms of epistemology, or 'the relationship between the knower or would-be-knower and what can be known' (Guba and Lincoln, 1994: 108), such assumptions derive from positivism. Both dualist and objectivist, positivism assumes that: (a) 'objective' reality can be captured; (b) the observer can be separated from the observed; (c) observations and generalizations are free from situational and temporal constraints, that is, they are universally generalizable; (d) causality is linear, and there are no causes without effects, no effects without causes; and (e) inquiry is value free (Denzin, 1989: 24; cf. Blaikie, 1993; Brewerton and Millward, 2002; Bryman, 1988; Chia, 1996, 1997; McKelvey, 1997; Williams, 2000).

In qualitative positivist research, problems in accessing the past are typified by 'pitfalls in retrospective accounts' (Golden, 1992: 849). These occur due to faulty memories, oversimplifications and rationalizations, subconscious attempts to maintain self-esteem due to needs for acceptance, achievement and security, and social desirability. In addition, recall problems are caused by inaccessibility and by hindsight bias, which has been defined by Azar (2000) as the way the memory of judgements changes when we learn the outcome of an event (see also Fischhoff, 1975). As March and Sutton (1999: 345) point out:

Performance information itself colors subjective memories, perceptions, and weightings of possible causes of performance. Informants exist in a world in which organizational performance is important ... As a result, retrospective reports of independent variables may be less influenced by memory rather than by a reconstruction that connects standard story lines with contemporaneous awareness of performance results.



Work by Louie et al. (2000), for example, reported that the memory of judgements by MBA students playing a market simulation game was affected by knowledge of team performance. Azar (2000) suggests that we may become more confident of our judgements in retrospect than we were at the time, giving the example of a physician's confidence in a diagnosis being affected by knowledge of the outcome of the case. In addition, if we are told of an outcome and then asked to reconstruct the events that led to that outcome, the reconstruction will be affected by what is known even if we try to ignore the outcome (Azar, 2000). Also, people are concerned with reproducing response patterns that seem appropriate to the accuracy expected for a task (Winman and Juslin, 1999).

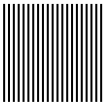
Similarly the methodology used in studies of 'implicit leadership' (see Landy and Trumbo, 1980; Vecchio, 1991) presented subjects with performance information and asked them to describe the likely characteristics of the leader. Subjects often described leaders in the classic terms developed by the Ohio State (Bureau of Business Research) researchers, such as 'consideration' and 'initiating structure' (Fleishman and Harris, 1962; Stogdill, 1948, 1975), suggesting that the correlations found between leader behaviour and performance may actually be artefacts.

Interest here lies not only in understanding the nature and functions of such faults, but also in reducing the potential for epistemological space between the real and the known. For this position, the nature of reality, or ontology, is one of realism, where '[a]n apprehendable reality is assumed to exist, driven by immutable natural laws and mechanisms' (Alvesson and Deetz, 1996: 109; cf. Blaikie, 1991; Marsden, 1993; Tsoukas, 1989; see also Chia, 1997). While the distinctions between positivism and realism have been well articulated by these and other authors, Chia (1996: 51) argues that:

both positivism and epistemological realism are fully committed to the view that theories are serious attempts to accurately mirror and represent the real world as it exists out there. It is this representationalist injunction which unites positivistic and realist science.

Accordingly, particular remedies have been devised in order to control for the impact of judgement processes on accounts of the past. The issue is how not to bias recall and how to minimize the potential for such bias to affect/infect the present and, potentially, the future. In retrospective qualitative organizational studies, efforts to reduce 'errors' (Golden, 1992: 855) include the use of free rather than forced reports, multiple knowledgeable informants per organization, a focus on simple facts and concrete events, avoiding discussions of the distant past, ensuring confidentiality, minimizing inconvenience, and following 'guidelines generally associated with proper retrospective data collection' (Miller et al., 1997: 201).

In an influential paper, Golden (1992), for example, discussed the use of these efforts as part of his concern with the accuracy of chief executive officers' retrospective accounts of past strategy. Such key informants may have difficulty in recalling the past due to 'inappropriate rationalizations,



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oversimplifications, faulty post hoc attributions, and simple lapses of memory' (Miller et al., 1997: 189). In addition, '[k]ey informants may try to present a socially desirable image of themselves or their firms' (Miller et al., 1997: 189–190). While Golden's study 'underscores the value of a healthy dose of scepticism in the study design stage, and ultimately, in the interpretation of retrospective data' (Golden, 1992: 857), Miller et al. (1997) were more optimistic. They suggested that if such guidelines are followed, 'scholars could be truly comfortable with the idea that retrospective reports are not fiction' (Miller et al., 1997: 201). In response, Golden later maintained his call for researchers to be critical of retrospective data but argued that 'if significant efforts are made to minimize retrospective biases and error *and* these data can be validated, retrospective data may well provide unique access to past organizational events' (Golden, 1997: 1251; emphasis in original).

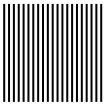
Measurement issues are also important in retrospective quantitative research designs. For example, in experimental studies, a retrospective pretest–posttest control group design has been developed for the assessment of training interventions through self-report measures (Sprangers, 1988). This design controls for the effect of a response shift that occurs when training affects participants' understanding or internal standard of measurement for the dimension under consideration. If training affects this understanding, the self-report data will otherwise be confounded by the response shift and trainers may fail to document the benefits of their training (Sprangers, 1988; see also Sprangers, 1989).

Similar concerns have been noted with respect to collective learning. Busby (1999) for example investigated postdesign reviews as a mechanism for learning from collective experience and reviewed the argument that retrospective reviews can promote double loop learning. In addition to problems with hindsight bias, Busby pointed out that there are limits to the extent to which retrospective reviews can examine judgements that have not been made with conscious attention or access behaviour that is 'instinctive, automated and unavailable to conscious processes' (Busby, 1999: 110). With reference to March et al. (1991) Busby (1999: 111) argues that:

[p]eople's recall tends to exaggerate the consistency of experience with their prior conceptions; they often fail to notice incorrect predictions (or interpret them as measurement errors) and remember as being real data that are consistent with mental models that are in fact missing.

In the neighbouring field of historical research there are similar concerns with accuracy of access to the past. With respect to the work of Frederick Taylor, for example, historians Wrege and Hodgetts (2000: 1290) have expressed concern that 'what the typical management reader "knows" about what happened at Bethlehem Iron a century ago is more fiction than fact'. They caution against the acceptance of published sources, commenting that:

The reason for the continued acceptance of Taylor's observations largely lies in the persistent reliance of management scholars on published sources



(usually those appearing in management publications) rather than on original documents prepared at the time of the actual events Taylor described. Unfortunately, for the majority of the readers of management publications, the printed word has an aura of authenticity that is seldom questioned, and original documents are neglected. (Wrege and Hodgetts, 2000: 1283; see also DiMaggio, 1995 for a similar argument with respect to the reading of management theory)

As historians, Wrege and Hodgetts hope that such neglect will not continue, arguing that 'in the new millennium, managers will have to increasingly focus on data collection and analysis and fight the tendency to accept anecdotes and hearsay as accurate' (2000: 1290). Thus, accuracy is paramount, and the task of both the researcher and reader is to maintain a critical stance so as not to be duped into receiving a less-than-objective view of the world.

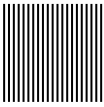
From the position of *Controlling the Past*, therefore, retrospective research is potentially flawed research that is at best avoided and at worst controlled through careful attention to method and measures, depending on the nature of the research design. The various forms of control, such as experimental control in quantitative designs, or limitation to recent, concrete events, and use of multiple informants in qualitative interview surveys are employed to improve the validity and reliability of the research and to reduce the many sources of potential interference that affect the potential of the research to mirror (or at least access) a past reality. Under such assumptions, retrospective research is only employed on a qualified and even apologetic basis. In their study of changes in employee perceptions of psychological contracts, De Meuse et al. (2001: 113–114) wrote, for example:

To track employee perceptions of the psychological contract over 50 years in a truly longitudinal fashion would have been virtually impossible. Consequently, a retrospective methodology was utilized in this study. The authors recognize that there are problems associated with this approach ... Despite justifiable concerns about the accuracy of retrospective designs, this study supports the contention of researchers who assert that these designs can be useful in identifying patterns indicative of dynamic processes.

Such qualification can be contrasted with the greater affirmation of retrospective research that occurs from the other three positions, which are now examined.

Interpreting the Past

Under *Interpreting the Past* the emphasis is not so much on obtaining a clear picture of a past reality, but on the present interpretation of past reality. Whether or not that interpretation has ties to any *actual* past is immaterial from this position, which is sympathetic to the idea that present reality is socially constructed (Berger and Luckmann, 1966) and that the consequences of such construction can have material effects



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(Thomas, 1937). With reference to ethnomethodology, for example, Weick argued that '[t]o talk about sensemaking is to talk about reality as an ongoing accomplishment that takes form when people make retrospective sense of the situations in which they find themselves and their creations' (Weick, 1995a: 15). Initially, such sensemaking is an equivocal process due to elapsed experience making 'many different kinds of sense' (Weick, 1995a: 27), and it only becomes less tentative at a later stage of interpretation. Weick's interest lies in the firming up of this sensemaking, and he suggests that such firming up has a particular functionality:

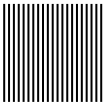
If people want to complete their projects, if effort and motivation make a difference in completing those projects, and if the environment is malleable, then a reading of past indeterminacy that favors order and oversimplifies causality ... may make for more effective action, even if it is lousy history. (Weick, 1995a: 28–29)

It is here that Weick distinguishes his emphasis from work on hindsight bias, arguing that discussions of this bias 'tend to emphasize how much the backward glance leaves out and the problems that this can create' (Weick, 1995a: 28). Based on the relatively short time between act and reflection and an argument that 'people are mindful only of a handful of projects at a time' (Weick, 1995a: 29), Weick argues that distortions due to hindsight bias are unlikely to be substantial in everyday life. However, his interest is more in how making sense of the past is important for present action and future decision making, and he comments that 'students of sensemaking find forecasting, contingency planning, strategic planning and other magical probes into the future wasteful and misleading if they are decoupled from reflective action and history' (Weick, 1995a: 30). It is not that such activities are uninteresting, but that they need to be more broadly conceived:

Strategists take credit for their foresight when they are actually trading on their hindsight. A well-developed capability for hindsight is neither a dramatic accomplishment, nor especially rare, which is probably why strategists shun that depiction of their contribution. (Weick, 1995a: 78)

Weick's retrospection is, therefore, a pragmatic, normative retrospection rather than one that is purely interpretive (cf. Allard-Poesi, 2005; Burrell and Morgan, 1979; Deetz, 1996). It is one centred more in the present than in the past, and his critique is not of inadequate access to the past but of inadequate representation of the present. His calls for greater appreciation of the past (see, for example, Weick, 2001: 462) aim to improve the accuracy of that representation and it is in this emphasis on accuracy that Weick's position can be seen as not all that different from the position of *Controlling the Past* discussed above. Both emphasize accuracy, but while the first position is concerned with an accurate past, this second is concerned with an accurate (and more humble) present in which 'people know what they have done only after they do it' (Weick, 2001: 462; cf Schutz 1967).

There are also several variants of this second position. As noted above, more interpretive studies may be, arguably, distinguishable from the



functionalism of Weick's argument and focus solely on the interpretation of a past situation or event (see, for example, Isabella, 1990; Wolfram Cox, 1997). More social constructionist positions are concerned not with individual constructions of the past but with how those constructions develop in interaction with and generative potential for new futures (see, for example, Cooperrider and Srivastva, 1987; Gergen, 2001; Gergen and Thatchenkery, 1996, 2004). As Mir and Watson (2001) argue, constructivism itself 'traverses a spectrum of epistemological positions' between realism and epistemological relativism (see also Kwan and Tsang, 2001).

More critical retrospective studies may draw attention to or disrupt prevailing discourses of the past or historicize and politicize present order, pointing to potential for future action, emancipation, or transformative redefinition (see, for example, Alvesson and Deetz, 2000; Deetz, 1996; Newton, 1996). Much critical management work for example is informed by Habermas' emancipatory interest, 'which aims at stimulating self-reflection in personal and social life in order to free man from the restrictions and repressions of the established order and its ideologies' (Alvesson, 1991: 216). Here the past informs the present and research assumes an historical realism, where a once plastic reality has become inappropriately shaped and reified over time (Guba and Lincoln, 1994). Thus, in critical studies the fuller picture that emerges is more disturbing than 'accurate', directing attention to issues such as mystification and colonization (see Alvesson and Willmott, 1996), and highlighting material or psychic disadvantage or defense (cf. Brown and Starkey, 2000; Casey, 1999).

As Reed (2001: 216) has argued, critical realist explanation:

is necessarily structural and historical to the extent that it must attempt to account for the complex interplay between 'structure' and 'agency' as it works its way through reproducing and/or transforming the institutional arrangements that temporally preceded them and the dialectical relation between them.

In critical realist studies informed by the works of Bhaskar (1978, 1986, 1989), an explanation of structural impediments to human development may also facilitate emancipation (Houston, 2001). While Bhaskar held a 'conviction' that reality is independent of our thoughts or impressions (cf. Mir and Watson, 2001), he also argues that open systems in the natural world mean that simple cause-effect prediction and determination is not possible (Houston, 2001: 850). Within the social world, this includes the need 'not only to uncover psychological and structural mechanisms, but to challenge their existence where they lead to human oppression' (Houston, 2001: 851; see also Reed, 2001). Houston sees such challenging and exposure as a nonlinear, retroductive process, arguing that more linear hypothesis testing is unsuited to a transitive view where the known is constrained by psychology and ideology and where a positivist correspondence between the real and the known cannot be assumed. Hypothesis testing is instead a more tentative process, with an emphasis on the role of replication as



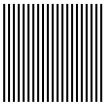
verification and falsification are never conclusive (Mir and Watson, 2001; Kwan and Tsang, 2001).

Co-opting the Past

Our third position, *Co-opting the Past*, is in some ways like the first in that it assumes that the past and the present are discrete. Rather than attempting to gain access to the past from the present, or to understand how constructions of the past affect the future, the emphasis here is on why particular causal links are made between the past and the present, or why the past is co-opted, and on individual cognitive processes in making causal explanations. In the case of retrospective research it is attribution theories that provide the clearest exemplars of this position, and some of the major works from this tradition are now discussed.

Martinko and Thompson (1998) reviewed Kelley's (1973) attributional cause model that describes how different types of information affect social attribution processes. Under this well-known model, it is suggested that the cause of behaviour can be judged to come from an internal/person, external/situation or stimulus source depending on the information available about the event. Three information variables that determine the attribution of causality are consensus (whether or not the same behaviour is exhibited by others in the same situation), consistency (whether the behaviour is usual or unusual for this person in this situation), and distinctiveness (whether or not this person also exhibits this behaviour in other situations). Martinko and Thomson (1998) extend this analysis through synthesis of Kelley's model with Weiner and colleagues' (1971) achievement-motivation model in terms of the locus of causality (internal or external), stability (whether or not the cause of the outcome changes over time), and global or specific attributions (the degree to which the cause of an outcome is generalizable across situations).

In contrast to such complicating of causality (see also Blount and Janicik, 2001; Brown and Jones, 1998), Hewstone and Augoustinos (1998) have instead extended the unit of analysis for attribution theory. They argue that '[a]ttribution theory is predominantly a North American theoretical perspective which seeks to understand the processes by which people attribute causes to their own behaviour and to the behaviour of others' (Hewstone and Augoustinos, 1998: 60). Hewstone and Augoustinos reviewed major works on attribution theory and drew attention to Weiner's (1985) examination of whether 'the extent and nature of attributional activity that the research suggests is an artefact of the reactive methodologies used in attribution research' (Hewstone and Augoustinos, 1998: 62). As there have been few attribution studies in natural contexts, such as conversation or in the print media, Hewstone and Augoustinos (1998) suggest that in such settings it is important to examine the social and collective nature of explanations. As they argue, their aim is 'to make clear that attributions or lay explanations are not only the outcome of individual cognitive processes

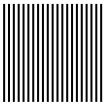


but are also linked to social and cultural representations' (Hewstone and Augoustinos, 1998: 76). They draw on social representation theory as a relevant basis for this extension of attribution theory in an effort to 'reveal pre-existing knowledge structures and expectations which people use to filter and process incoming information' (Hewstone and Augoustinos, 1998: 63). In workplace settings, such structures and expectations may lead managers to enhance their identities and undertake impression management through engaging in what McHugh (1997) has termed *attributional labour*, or the regulation and ascription of intent and commitment. As a result of such regulation, attributions about the causes of organizational problems will therefore tend to be an effect of the nature of the labour process (McHugh, 1997), internal/dispositional and external/environmental attributions varying in accordance with managerial interests rather than cognitive processes.

In general, issues of whether or not causal explanations are 'accurate' and how they alter future understanding are neither as central nor as interesting to researchers taking this position as why the explanations are formed in the first place. However, as in the previous cases, there are variants of this third position and these variants overlap with the two previous ones. For example, Bell-Dolan and Anderson (1999) examine the consequences of inaccurate attributions, distinguishing between proximal consequences (thoughts, emotions, behaviours) and distal consequences (academic achievement, depression, anxiety, relationship satisfaction, and aggression). They also examine implications for clinical intervention, concluding that '[a]lthough wildly inaccurate attributions (and attributional styles) are certainly maladaptive in the long run, it is less clear that this positive relation between accuracy and adaptiveness holds true at less extreme levels of inaccuracy' (Bell-Dolan and Anderson, 1999: 58). Similarly, Cannon (1999) was concerned with the current implications of attributions for past experiences, examining memories of failure experiences and finding that these memories triggered strong emotion reactions that affected sense-making and distorted current reasoning.

In contrast, Harvey and Weary (1981: 6) suggested that by using attribution processes to understand workplace violence, participants attempt to find an 'inference about why [violence] occurred'. Thus, knowledge of attribution processes may assist both in understanding a particularly difficult past and in functioning in the present. Similarly, storytelling work examines not only causal attributions for the past events but narratives of how the past is told. For example, telling retrospective accounts of organizational atrocities attributed to others may provide the storyteller with additional time and experience to 'reconstruct a story' (Charmaz, 1999: 372). While such stories may be anxiety provoking and hard to hear (Frank, 1995), their telling may allow the expression of a mix of emotions in an effort to deal with a process of change (Bromley et al., 1979).

In this analysis of *Co-opting the Past* attention to attributional processes has thus been extended from the individual to the social arena, and from



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accounts of particular events to full sequential narratives. Elsewhere, in the field of organizational history, Pettigrew's (1985) well-known study of 'continuity and change' at Imperial Chemical Industries, *The Awakening Giant*, in which he documented the way the company responded to the changing social, political, business and economic developments from the early 1960s, employed a kindred pluralist methodological form of 'retrospective and real-time analysis' (1985: 40), specifically through a mixture of personal interviews and archival material. Pettigrew, however, is keen to acknowledge some of potential 'disadvantages and threats to reliability and validity' (1985: 40) associated with his form longitudinal retrospective interviewing, such methodological problems being discussed in greater depth in his earlier associated work on the 'craft skills' of historical research on organizational culture and change (see Pettigrew, 1973, 1979), a discussion addressed similarly by Martin et al. (1985) in their 'collecting histories' study of founder/employees culture creation, which drew upon Pettigrew's (1979) methodology.

Also in organizational research, narrative methods have gained increasing prominence (Boje, 2001; cf. Czarniawska, 1998), demonstrating not only the importance of different narrative genres for accounting for the past (e.g. Barry and Elmes, 1997; Collins and Rainwater, 2005; Doolin, 2003; Jeffcutt, 1994) but also the variety of narrative methods now available to researchers. It is important to note that the growth of interest in such methods extends not only from attempts to create a fuller understanding of attribution processes but also from a questioning of the very nature of research and of the configuration of temporal relations in the first place. Such questioning informs the fourth position identified in our paper, for this concerns *representing, or re-presenting*, the past.

Representing the Past

Our first three positions attempt to recall the past more accurately, to make sense of it, or to examine causal links between the past and the present. In all three, the present exists independently of the past. At issue are the nature of temporal recall, understanding and evaluation. In contrast, our fourth position, *Representing the Past*, does not assume that the present is ontologically independent of the past, or that there is schematic time. Under such assumptions, time is often presented as one-dimensional, and it has been argued that 'the notion of a single, unitary form of time which is objective, absolute, homogeneous, linear, evenly flowing, measurable, readily divisible and independent of events' is 'massively inhibiting' (Clark, 1990: 143; see also Hassard, 2002). For Burrell (1992), such linearity is associated with notions of progress, where what is contemporary and fashionable is claimed to represent a 'higher' level of development (as well as a newer one) than that which has preceded it. This assumption of linear progress rests heavily on an optimistic view of the Enlightenment and a belief that rationalistic management of change is possible (Burrell, 1992: 168).



In contrast, and with reference to organizational contexts, Clark (1990: 141) for example calls for recognition that 'all corporations require and possess a plurality of chronological codes', some focusing on time as unfolding and regular, others holding more heterogeneous conceptions of time where interpretations of pace and duration are socially constructed and affected by events of local cultural importance (see also Ancona et al., 2001; Hassard, 1989, 2001, 2005). Further, and from a contextualist stance, there are not merely different chronological codes but an interpenetration of the past and the future, for '[a]n event is never what is immediately available but also includes its contiguous past and present' (Tsoukas, 1994: 767).

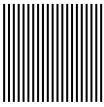
It is this stance that informs *Representing the Past*, for when the very definition of past-present-future is problematized, facts themselves may vary over time (Gergen, 1973) as there is no stable knowledge outside of the representation of that knowledge (see Calás and Smircich, 1999; Thrift, 2004). This argument differs from that of Weick presented above, whose concerns are epistemological rather than ontological. Weick argues that our knowing of the present is affected by our knowing of the past, but does not go so far as to suggest that the past, present and future are other than discrete, real phenomena.

Importantly, when the semblance of realism is no longer attainable or valued, retrospective research shifts from the status of poor science or poor history to art, craft or fiction. The researcher is no longer a 'disinterested scientist' (Guba and Lincoln, 1994), analytical excavator or historian, but writer, storyteller and editor 'embedded in a social context and in relation to others' (Calás and Smircich, 1999: 653). For example, in their discussion of strategy as fiction, Barry and Elmes (1997) argued that strategy is created or made up rather than something that is 'fake'. Thus, their interest is not in the distinction between the fake and the real, but in the construction of the real or at least the taken-for-granted (cf. Latour, 1987). As noted above, narrative methods are not 'just stories' but legitimate means for representing, accounting for and constituting the past, present, and play of their characters, events, interconnections and fragmentations (see Boje, 1995, 2001).

Within narrative, the past may affect the present to varying degrees depending on genre (see also Jeffcutt, 1994). Roemer (1995) for example pays particular attention to the deterministic role of the past in tragic narratives and argues that here the plot embodies the past:

Since plot preexists the action, we can think of it as embodying the past. Like time and process, the past constitutes necessity, for we can neither escape nor undo it. We *are* the past In story, the plot is the past and our attempt to escape it is the action. Paradoxically, though the figures cannot escape it, their effort to do so is mandated *by* the past. (Roemer, 1995: 53, emphasis in original)

Overall, where there is no assumption of transcendent truth, the variability among research genres becomes more than an array of different methods



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for data capture in the positivist sense. Retrospective research methods do not merely assist in the investigation of a past reality but constitute the very nature of that reality from the position of the researcher. As an objective stance is no longer possible, questions of interest concern not error, construction or attribution but reflexivity in the sense of 'the ability to be critical or suspicious of our own intellectual assumptions' (Hassard, 1993: 12, with reference to Lawson, 1985).

Method is thus not primarily a matter of 'data management' or the mechanics and logistics of data production/processing, but is a reflexive activity where empirical material calls for careful interpretation—a process in which the theoretical, political and ethical issues are central. (Alvesson and Deetz, 2000: 5)

Macbeth (2001) for example has argued that reflexivity has become a central topic in contemporary discussions of qualitative research and that positional reflexivity involves the researcher in efforts to examine how pace, biography, and delineations of self and other combine to shape the nature of the research endeavor. The extent to which this reflexivity takes place is dependent more upon the researcher than the method. Hall and Callery (2001) for example discuss various interpretations of grounded theory method, arguing that while some claim that grounded theory incorporates reflexivity, others treat interview and participant observation data as if they mirror informants' realities. For others, even the extent to which reflexivity is possible is under question if one recognizes that there can be no unmediated truth and that '[n]o privileged position exists from which analysis might arbitrate' (Hardy and Clegg, 1997: S5; cf. Lewis and Keleman, 2002).

Thus there is also variety within this fourth position on retrospective research, and like each of the other three, it deserves fuller explication. In an effort to assist such endeavours, a short summary of each position is now presented to allow comparison of their similarities and differences.

Comparative Analysis

In Table 1 each of our four positions on retrospective research is described and compared in terms of its method, ontology, epistemology, exemplars, variants, and potential contribution. While *Controlling the Past*, *Interpreting the Past* and *Co-opting the Past* all exhibit realist ontologies, *Representing the Past* differs in that it takes an anti-realist stance, one that, in Houston's (2001: 847) terms, may emphasize either the role of 'human agency' in constituting the social world (after, to varying degrees, Giddens, 1991; Mead, 1962) or the discursive shaping of the social world, and, indeed, human subjectivity, by knowledge and power (Foucault, 1972). It also adopts a constructionist epistemology that differs from the social constructionism of the second position, *Interpreting the Past*. As noted above, there is a distinct difference between the two, for *Interpreting the Past* is based on the

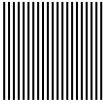
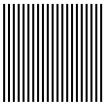


Table 1. Comparison of Positions on Retrospective Research

Position	Method	Ontology	Epistemology	Exemplars	Variants	Potential contribution of retrospective research
1. Controlling the Past	Attempts to maximize accurate recall or to reveal potential sources of error or bias	Realist	Positivist	Studies of hindsight bias (e.g. Fischhoff, 1975)	Degree of control of emphasis on design, measures and methods to improve validity and reliability	Marginal; research Best avoided
2. Interpreting the Past	Understanding of the present is informed by the construction of past reality	Historical realism	Mixed: Interpretive; Retroductive	Sensemaking (e.g. Weick, 1995)	Interpretive; Social constructionist; Critical realist	Necessary; Valued for better futures
3. Co-opting the Past	Causal explanations linking past and present	Realist	Mixed: Positivist; Interpretive	Attribution theory (e.g. Kelley, 1973)	Social representations; Narrative accounts; Some overlap with Positions 1 and 2	Necessary; Valued for a more manageable present
4. Representing the past	Problematicization of time and research on time	Anti-realist	Constructionist	Fragmented narrative methodologies (e.g. Boje, 2001)	Possibility and nature of reflexivity	Of interest for illustration of questioning of the taken-for-granted



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assumption that constructions of the past inform a fuller understanding of the present, and that such understanding can be of assistance in determining a better future. The past may well exist as real, even though its construction may vary depending on interpretive, retroductive or sensemaking processes. In contrast, the fourth position, *Representing the Past*, is anti-realist in both its ontology and epistemology, and has no progressive intent. Unlike the first position, its proponents would not view retrospective research as something to be avoided, but as primarily of local interest for questioning the taken-for-granted in research methods.

It is the second and third positions, *Interpreting the Past* and *Co-opting the Past*, in which retrospective research is not only of interest but also of central importance. In both, this importance derives from the value of interpretations and explanations of the past. In *Co-opting the Past*, such interpretations have instrumental value for managing the present, while in *Interpreting the Past* that value relates to the future and may be emancipatory or even generative (cf. Gergen and Thatchenkery, 1996). While the more interpretive variants of the second position are informed by what Habermas called a 'practical interest', 'concerned with the understanding of the historical and traditional context of human life' (Alvesson, 1991: 216), the emphasis on management across most of the second and third positions adopts instead a 'technical interest', 'which aims to find laws or law-like relationships, through which processes can be manipulated and controlled' (Alvesson, 1991: 216).

Conclusions

This paper has examined an area of management and organizational research generally considered of marginal relevance to mainstream professional practice—retrospective research. Such research receives relatively little attention in either the professional research journals or methodology textbooks. The paper has attempted to fill the void by developing a taxonomic classification of the use of retrospective research methods. The aim has been to provide a focus for the future employment of retrospective methods in organizational analysis.

In so doing, we have identified, described and analysed four positions on retrospective research: *Controlling the Past*, in which attempts are made to maximize accurate recall or to reveal potential sources of error or bias; *Interpreting the Past*, in which understanding of the present is informed by the construction of past reality; *Co-opting the Past*, in which causal explanations link the past and the present; and *Representing the Past*, which involves the problematization of time and research on time. These positions have been compared in terms of method, ontology, epistemology, exemplars, variants and potential contribution. This comparative analysis has attempted to draw out some the main methodological implications for the practice of retrospective research in organizational analysis.



Of course, there are many limitations to this analysis. First, and as with any typology or list of classifications, this one includes 'tacit messages' such as that positions not on this list are less critical than those on it (cf. Weick, 1995b: 388). It is largely dependent for example on a review of qualitative research and may thus exclude or fudge the subtlety of positions within or outside what has been termed *Controlling the Past*. Second, it is informed largely by studies within the traditions of organizational behaviour, organization theory and social psychology and will undoubtedly gain from the inclusion of work from other disciplines. Third, and with reference to its inclusions rather than exclusions, each of the four positions incorporates several variants. As such, the classificatory system used here is, of necessity, tentative rather than exhaustive.

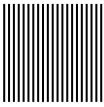
Within these limits, however, we feel the paper makes several contributions. It takes seriously an area of research methods that tends to be marginalized and regarded as relatively unimportant by mainstream management researchers. This is done with the aim of stimulating others to take an interest in retrospective research, and to adopt and develop retrospective research practices in line with their particular ontological and epistemological assumptions. For those who already do retrospective research, the paper provides a point of departure for the debate and refinement of the categories proposed here. For example, it identifies some unlikely paradigmatic bedfellows within the second category of *Interpreting the Past*, grouping interpretive, social constructionist and critical retrospective studies in terms of a common interest in the creation of better futures (cf. Alvesson and Deetz, 2000). No doubt, many will find this alignment unusual, if not provocative. In addition, the separation of generative postmodern work (e.g. Cooperrider and Srivastva, 1987; Gergen, 2001; Gergen and Thatchenkery, 1996) into this second category and away from the fourth classification, *Representing the Past*, may also invoke further discussion. The distinction has been made due to the normative intent of such work, which is distinct from the problematization emphasis of the fourth category.

More generally, it is hoped that the paper will encourage further interest in the micropractices of other research methods that occupy a marginal or at least non-traditional place in management and organization studies. While narrative methods have been gaining ground (e.g. Boje, 2001; Czarniawska, 1998), and discursive and rhetorical studies have attracted considerable attention (e.g. Abrahamson, 1997; Grant et al., 1998, 2004; Jackson, 1999; Kieser, 1997; Wolfram Cox, 2004), aesthetic endeavours are perhaps still borderline (e.g. Gagliardi, 1996; Linstead and Höpfl, 2000; Strati, 1999; Wolfram Cox and Minahan, 2002, 2005) and worthy of further review and development. The challenge is for research methods that occupy such a marginal, liminal or non-traditional place in management and organization studies to be developed with care.

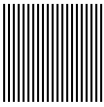


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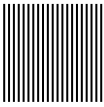
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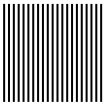
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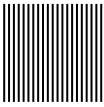
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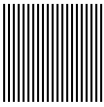


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