

CASE 1

Isabelle's research dilemma¹

Case Study Answers

1. How do you think Isabelle's understanding of theory and method changed in adopting the approach she chose?

Isabelle became increasingly aware of alternative approaches to research other than the more traditional one associated with Positivism. She conceived this alternative approach using a more qualitative method could be just as rigorous and have some practical relevance. She could understand how even the physical sciences which had influenced Positivism were not always as 'scientific' as they assumed. This understanding she conceived from reading the seminal work of Kuhn on Scientific Revolutions. Thus because of this, it was arguably more difficult for researchers to be critical of social scientists merely on the grounds of being less rigorous and indeed systematic. She also argued that research on managers could be more valid and meaningful if she adopted a more qualitative approach.

2. What particular knowledge and skills did she develop in preparing this research?

Isabelle had developed her knowledge and skills in conducting her research.

Researching life-histories requires a knowledge and understanding of in-depth interviews and careful use of secondary data. Before her in-depth interviews with managers on how they coped with pressure at work, she decided to interview some family members using a technique pioneered by Bertaux (1995). These practical family history exercises could sensitise one to the interplay between the individual and the wider social structure in which they are embedded.

The other knowledge and skills developed were ethical concerns. Problems could arise because there are potential dangers with life-history interviews. Given that life-history is an introspective process for the interviewee, this process may not always be a positive experience, it could be negative. This process may then become problematic for the interviewee. Reflecting on one's experiences may be fraught with any number of psychological pitfalls. This requires careful interviewing so that the interviewee feels that the experience has been worthwhile.

Equally, the vulnerability of the participant in this kind of study requires the exercise of informed consent, as well as taking care during the collection of the information she needed to ensure that the closing of the interview is done with sensitivity. This should then make it possible for the interviewee to contact the researcher at a later date. Isabelle realised that conducting such interviews, given the theoretical, methodological and ethical issues involved required a psychological 'maturity' on her part if the process was to be successful.

3. What problems do you think she would have anticipated in conducting research into pressure and coping among managers that her literature review may not have identified?

The problems she would have anticipated include getting access to managers, usually a problem in this type of research. She would have to interview a number of managers. This

¹ Answers provided by Michael Savvas

would require obtaining their consent and expecting a longer interview. This type of qualitative research would arguably take more time than giving out a postal questionnaire.

Secondly, managers may be reluctant to admit that the pressure they are under can lead to problems. Pressure and coping among managers could thus be problematic enough in itself, let alone all the other issues highlighted above.

References

Bertaux, D. (1995) 'Social genealogies commented on and compared: an instrument for observing social mobility in "the Longue Duree"', *Current Sociology*, Vol. 43, No. (2/3), pp. 67–88.

CASE 2

Media climate change reporting and environmental disclosure patterns in the low-cost airline industry in the twenty-first century²

Case Study Answers

1. Why is it important that your research can be related to a relevant theory base, and when during the project does the theoretical framework need to be identified?

In general terms, a theory is used to provide an explanation for your findings in the research project. Without an appropriate theory then the research findings may remain at a descriptive level, without offering any real explanations that lie behind the research findings. Secondly, an appropriate theory should be able to predict future observations. In the case of Emma's project, legitimacy theory would predict that there would be an increase in disclosure following adverse media coverage. By analysing your research findings using an appropriate theory you are adding valuable analysis to your research. This is particularly important in the analysis section of your project, which now goes beyond just a tabulation and description of research findings. You are also showing that you understand your research findings and seek to provide an appropriate explanation for them. This is the unique aspect of your research as you are using an established theory to explain your own research findings. Within the literature review, you are now able to critique both the subject-based literature and also the theory that you will use to explain your findings. For Emma, she can now include the academic literatures relating to environmental reporting and also legitimacy theory.

The question of when the theoretical base is identified relates to your overall research approach. With deductive (positivist) research, the relevant theory is identified at the start of the research process. From this, hypotheses are developed and the theory tested using the research findings. With an inductive approach (interpretivism or action research) the data is collected in the first instance and then an appropriate theory is used to explain the data findings. It is very unlikely in your research project that you will be creating new theories; rather you will be using existing theories to explain your collected data and findings.

In order to provide a framework for new researchers, it is common to try and establish a theory base in the early phase of research. This enables you to get started with your research knowing the importance of identifying and using an appropriate theoretical framework that adds value to your subsequent research findings and analysis.

2. Do you think that Emma is right to restrict her project to only low-cost airlines, rather than the whole industry or a comparison with another sector? Give reasons for your answer.

The selection of the dataset to be used in the research needs to be consistent with, and to be sufficient for, the research question and research objectives. Deciding on the dataset should be done early in the research design alongside the overall research approach to be adopted. The data could relate to a single organisation if an in-depth case study approach was to be

² Answers provided by Richard Slack

undertaken. At the other end of the scale, the dataset could be a very large questionnaire distribution. The choice of the data set will inform the generalisability of your research findings.

For Emma's research, it is appropriate to focus on the low-cost airlines only as she is seeking to test legitimacy theory to that specific part of the airline sector. Emma would not be able to then generalise her results to the sector as a whole nor to any other sectors, as she has not included those within her research. This is consistent with her research question. She could, if she undertook further research, extend the research to include all of the airline industry, or compare the results to media coverage and companies in other sectors to identify if there were differences within the airline sector itself and in comparison with other sectors.

For some research questions, the dataset needs to contain two elements where comparisons are being made, for instance big companies against small companies. In such cases, it is important that the two datasets are then controlled by a size factor, so that all of the companies in each dataset are of a certain defined size by turnover or assets for large and small companies respectively. This control factor should also be applied to research involving companies in different sectors. To ensure that the companies in each sector dataset are comparable, they should have common size characteristics, so that a valid sector comparison can be made.

3. Do you think Emma was correct in her decision not to carry out interviews? Give reasons for your answer. If she were to change her mind, are there any ethical issues that would need to be addressed?(Hint: you may find Section 6.4 helpful in thinking about this question.)

It is common in research projects that all the data used are secondary data. This is the case with Emma's current research. The uniqueness of Emma's project comes from her use of theory to then analyse and explain her data. Emma does not need to carry out primary data collection to answer her research question, and it is sufficient to base her research on secondary data which is easily obtainable and publicly available, from media sources and company annual reports. The advantage of this is that the data can be collected in a timescale set by the researcher and is not dependent on the agreement of a particular organisation or person.

During the research design stage, you should think very carefully about the data that you intend to collect and use. Be careful not to be over ambitious in your data collection ideas, but to think what data is needed to answer your specific research question. Also, you should at that stage refer to the appropriate institutional regulations for your research project that may outline whether or not primary data can or need to be collected.

If Emma did need to carry out interviews to answer her research question, then there are a number of ethical issues that she would need to address. Even though Emma is familiar with the organisation and knows some of the likely interviewees, there are issues that need to be addressed which are designed to protect both the interviewee and the researcher. These ensure that there is clarity over participation and how any primary data will be stored and used. Emma should agree with her supervisor the primary research to be carried out, the organisation involved and the number of interviews to be performed. Appropriate organisational consent should then be obtained to ensure that the organisation is happy that Emma is carrying out primary data interviews with employees. Secondly at an individual level, appropriate informed consent would be obtained so that each interviewee was happy to take part and were fully aware of the research being carried out and the subsequent use of the interview material. Emma would also need to clarify the level of anonymity required at both an organisational and individual level.

Complexity theory and emergent change³

Case Study Answers

1. Why is it important for your research investigation that you be critical when reviewing the literature?

Your work will be of better quality if you build on others' work. Researching is a complex activity to learn and it is easy to make mistakes which render your claims about your findings unconvincing. On your own, you are unlikely to see and solve all the problems that others have confronted and solved. Building on others' work means, being well-informed about the relevant claims to knowledge made by others in the light of their studies. Suppose you did not review the literature before you carried out your own research, and relied instead just on your own hunches, you would be wasting a great deal of knowledge that could have guided your investigation. You would also risk doing badly what others had already done well.

Building on others' work also means that you have evaluated their claims to knowledge. You make your own judgements about how convincing you find these claims after checking how adequately they are backed by appropriate evidence. You then use your judgements to show how your investigation is informed by what is most reliably known about the topic. You build on what you find most convincing, and place less emphasis on what you find less convincing.

So, a critical evaluation of the literature is closely linked to doing a good study yourself. The literature can show you what is known, what is not known, and how to find out some small aspect of what is not known. But you have to look hard for this aspect, and think about it, because claims you read will often contradict other claims, and they will not always be convincing.

Our book on critical reading is a good source of additional guidance on developing your ability to engage critically with the literature and to write a compelling review of what you have found out. The reference is:

2. What might Sarah's project tutor mean by suggesting that a critical literature review should be 'balanced'?

Sarah discovered rather painfully that being critical in academic study is not about being negative. There is more to it than just finding fault with claims and rejecting them. The word 'critical' can be misleading, because in common usage it tends to entail negativity. However, one can be critical in a positive and constructive sense too, by checking the backing for claims but being open-minded enough to accept them if the backing is sufficient to make them convincing.

When the project tutor asked Sarah to develop a more balanced approach, it was an invitation to be discerning – to weigh up the evidence supporting different claims and make judgements about which to accept and why. The project tutor was guiding Sarah to apply her balanced discernment in the pursuit of a constructive, not destructive, purpose. Sarah's constructive purpose was to emerge from her review of the literature with a clear idea of how to study

³ Answers provided by Mike Wallace and Alison Wray

change in university student clubs. Her over-critical account left her with nothing to go on at all, for none of the claims that had fitted her initial hunch seemed well enough supported to work with. She had lost sight of her constructive purpose. She needed to consider the ways in which complexity theory might still inform her investigation, even though some of the claims about it were not supported by extensive evidence.

Sarah's new balanced approach needs to weigh up the evidence on all sides, and use it to develop a solution to the specific challenges of how she should conduct her own study. The secret of success lies in being discerning. When a claim is not adequately backed up, she needs to ask why she is not satisfied with that backing. How much support is it reasonable to expect authors to provide for particular claims? For example, is it fair to discard a claim made in one research context because it does not provide evidence of applicability to other contexts? Sarah's balanced approach to critical literature reviewing needs to consider questions like these:

- How much evidence is it reasonable to expect, before authors can appropriately make the claim that encouraging self-organisation will be effective for all organisations?
- Have they supplied the evidence necessary to reach that threshold?
- If not, is the evidence at least adequate to support a less generalised claim? For instance, would the author's claim be acceptable if it was only generalised to some kinds of organisation?

3. What does Sarah need to do to develop a literature review which is sufficiently critical, yet also sufficiently balanced?

At the heart of the critical literature review is the simple question *Is there adequate evidence for this claim?*, and most of that judgement is based on what one can see in the text, so you do not need to be an expert to do it. The judgement does also depend on figuring out what counts as adequate evidence, though, and that does take some experience to learn. This is why it is important to read other peoples' critical evaluations of the literature. Such publications provide important pointers about what weight to give different types of evidence.

We can identify three key things that Sarah needs to do, to develop balance in her critical literature review.

a. Take ownership of the literature review

This is Sarah's review, and its constructive purpose is to help her work out what to do in her investigation. So she needs to articulate one or more clear review questions that assist her in that pursuit. Her original review question was a recipe for being under-critical: 'How does complexity theory suggest that organisational change should be managed'? Her second one made it difficult for her to avoid being over-critical: 'What are the weaknesses of using complexity theory to prescribe how change should be managed'? She needs to articulate the question in a way that will produce a balance of good ideas and a measure of caution for her own study, for instance: 'What are the strengths and limitations of using complexity theory to prescribe the management of organisational change'?

b. Think around the issues

Before dismissing a claim, think about what the author might say in defence! In our case study, Sarah is concerned about whether a particularly interesting claim made by an author really applies to university societies. The author implies that it is valid for all types of organisation, but

Sarah sees no evidence that the author has ever studied university societies. These organisations have particular features: no one is paid to take responsibility, there is a very fast turnover of membership, and there are long gaps in activity during the vacations.

Sarah knows that her first impulse, to discard the author's claim entirely, was too radical. After all, the author is an experienced and intelligent researcher, and surely would have a view on this matter. So she tries to imagine what the author would say, if asked 'do you think your general claim extends to university societies, given that they have these characteristics'? She soon assembles a set of possible replies, including, 'yes, I think all groups are the same, irrespective of those characteristics, and here is why'; 'no, you are right, and that is why I was careful to define "organisation" in a particular, narrow way that excludes societies with those characteristics'; and 'yes, you are right – my claim is too general and I should have been more careful'.

Sarah is now in a position to go back to the author's work and look for clues as to which of these answers is most likely. If it is one of the first two, her more careful reading has rescued the validity of the author's claims. If it is the third, she can politely suggest that the author has overgeneralised, by having no evidence to support the extension of the claim to societies like the ones she is studying, and she can conclude that the author's claims, while somewhat valid, must be treated with caution in the present context. In the process, she has identified a possible focus for her own study: she could investigate whether or not university societies *are* different from other organisations with regard to that author's claim.

c. Be methodical

It is important to create a structure for the review and to compare the agreements and disagreements between claims, as well as the evidence base for each claim individually. Sarah working on her review question, 'What are the strengths and limitations of using complexity theory to prescribe the management of organisational change?' therefore, would be well-advised to break it down into some sub-sections, each focused on a narrower question. The first division might be into 'What are the strengths...?' and 'What are the limitations...?' and then, within each of these sub-sections there might be further divisions reflecting aspects of complexity theory, or aspects of the management of organisational change. Rather than discussing everything relating to author A, followed by everything related to author B, is it likely that she will refer to authors more than once, in different sub-sections, as a particular claim or point becomes relevant.

A methodical approach to the organisation of the review is complemented by a methodical approach to the reading and note-taking involved in undertaking the review. If you already know what your review questions and sub-questions are, you can organise your notes accordingly, under the right headings.

Finally, being organised in this way gives a huge bonus: it is much easier to decide when you have read enough. You can tell, because you have gained a clear and balanced answer to the sub-question for each section. A structured approach means that you will soon see, as you write up your review, where you have inadequate evidence for your own claims about the literature, so you know exactly what else to target in your reading.

Our recommendations for writing a balanced review are intrinsically tied up with developing a balanced approach to research, in which one has a clear purpose, a focused method, and just the right amount of confidence in what one is doing. Gaining that confidence is achieved naturally, because a balanced review will lead to a balanced evaluation of the existing evidence, and thereby an approach to one's own study that can be justified explicitly by pointing to the existing literature.

In addition to the tools for engaging critically with literature and structuring a review in the book by Wallace and Wray, the following chapter from another book offers a complementary resource for tutors and students. It is a critical review of the application of complexity theory to public service change, and it was structured according to the advice from Wallace and Wray.

References

Wallace, M. and Fertig, M. (2007) 'Applying complexity theory to public service change: creating chaos out of order?', in M. Wallace, M. Fertig, and E. Schneller (eds) *Managing Change in the Public Services*. Oxford: Blackwell. pp. 36–56.

Wallace, M. and Wray, A. (2006) *Critical Reading and Writing for Postgraduates*. London: Sage.

CASE 4

Consultancy research for a not-for-profit organisation⁴

Case Study Answers

1. How does pragmatism differ from post-positivism and interpretivism, and are there some shared beliefs?

Researchers who subscribe to these three paradigms share certain fundamental beliefs: that our understanding of reality is constructed; that research is influenced by the values of the investigators; and that research is influenced by the theories or hypotheses or conceptual frameworks used by investigators (Tashakkori and Teddlie, 1998, p. 8).

Important differences exist, however, in the claims made about generalisations and causal linkages:

- Interpretivist researchers assert that it is impossible to make time-free and context-free generalisations, and that the complexities of reality make it impossible to distinguish causes from effects.
- Post-positivists believe that there are some lawful and reasonably stable causal linkages between variables which can be understood imperfectly, but with greater accuracy over time as a result of further research. Similarly, there is a view that some generalisations can be made.
- The pragmatist view is subtly different: that while there may be a causal relationship between certain variables, we will never be able to completely pin them down. This belief leads pragmatist researchers to avoid what they see as an ultimately fruitless search for 'truth' if that truth is a set of deterministic laws about causal linkages. Instead, their interest is in identifying relationships between variables which – though not 100 per cent stable – are insightful and relevant for decision-making by individuals and groups. Pragmatists therefore value the utility of research over claims for its correspondence to an ultimate truth (Howe, 1988).

2. How can Thomas respond if Jennifer insists on a 'pure' qualitative method?

Thomas can argue that the needs of the client should drive the research design and choice of methods. In this case, the most appropriate research design is a mixed model design, which uses both qualitative and quantitative data, and qualitative and quantitative collection / analysis techniques. By using multiple mixed methods in a careful and rigorous manner, the research project is likely to produce findings and recommendations which are useful for the client.

⁴ Answers provided by Karen Handley

3. If pragmatism argues that the research questions should drive the choice of research methods, how can Thomas be sure of the quality of the research?

The *quality* of research is not determined by the underpinning research philosophy. For example, there is no guarantee that research completed under the label of interpretivism is any 'better' than research which follows the principles of post-positivism or pragmatism.

Quality in research terms is a product of many aspects of the research process. A good researcher should: identify a research design which is appropriate for the research question; use suitable sampling techniques; be as explicit as possible about his or her underlying assumptions; and be transparent about the process of research including the ways in which data is collected and analysed.

In the case of Thomas's project – where the research question indicated the need for a mixed model design – the research process should be carried out with skill and integrity, based on knowledgeable experience of each research technique.

Managing the acquisition from the middle⁵

Case Study Answers

1. How can Kevin's management project be his research project?

While traditional research demands researchers to be outsiders, detached and neutral observers, insider action research conceives of them as immersed actors in the process and who are committed to making change happen. The insider's role is therefore a central element of Kevin's project. In terms of Coghlan and Brannick's (2005) framework of insider action research, Kevin has to be explicit about i) his *pre-understanding* (i.e. his insider knowledge of the organisation, his insider role, how he is close to people and issues and how he tries to stand back and achieve some sort of psychological distance), ii) how he manages emerging ambiguities and conflicts between his managerial role and his researcher role (*role duality*) and iii) how he manages *organisational politics* and ensures the success of the project and his career.

2. How can Kevin contribute to both his company's successful implementation of the acquisition and to understanding mergers and acquisitions?

Action research seeks to contribute both to effective action and to knowledge. So, the intended outcome of his project is actionable knowledge, that is knowledge that is useful to the world of practice (in this case the management world of mergers and acquisitions) and to robust theory (in this case knowledge about processes of mergers and acquisitions). How Kevin contributes to both is grounded in his methods, particularly his enactment of action research cycles of action and reflection. He needs to constantly articulate what he is trying to do, what happens at the various meetings he holds and attends, how he reflects on the process and outcomes of these meetings and how he decides what he does next. If he provides documentary evidence of meetings, memos, management directives as well as reflections from his own journal, he can demonstrate an evidence-based path through his project and show on what his conclusions are based.

3. Are Kevin's political concerns a distraction from his research or are they integral to it?

The political dynamics of Kevin's project are integral to his action research. Organisational politics are part of actionable knowledge and all research is political. As Coghlan and Brannick (2005) discuss, Kevin needs to act as a 'political entrepreneur' whereby he *performs* to have the IT system implemented and working in his section and he engages in *backstaging* by working in the informal system through networking, making deals and heading off conflicts. These kinds of issues are integral to the role of change agent, which Kevin is as section head, and so he needs to reflect on how he managed them and articulate his learning from the experience. They also contribute to knowledge about mergers and acquisitions which needs to include how the politics of mergers and acquisitions were managed and how collaboration among the different stakeholders and actors in the project (his manager, the other section heads, his team) was undertaken and managed.

⁵ Answers provided by David Coghlan

Gaining access to business angels networks⁶

Case Study Answers

1. Which factors helped Stephanie getting access to these highly sought-after organisations?

- Have a topic that is interesting to the people you are approaching.
- Show that you are credible:
 - get informed as much as possible about the people you speak to and about the company you are dealing with;
 - try to be in a room by yourself, which makes it sound less like a call centre;
 - maybe displaying logo of your university on letters or emails;
 - explain properly what you are doing and that it is a big deal (makes more people respond if it is a PhD/DBA instead of BA or MA);
 - offer anonymity.
- Show that you are professional and
- Be a perfectionist:
 - Include your complete contact details at the end of every email.
 - Make sure that you address the right people, especially if you copy the email to several people.
 - On the phone, have a list of what you need to say so that you do not stutter or forget half of it.
 - Make notes about everything so that the next time you call, you do not mix up anything or forget what you have spoken about or who you have spoken to.
 - When you promise to send something, send it right away.
 - Check for spelling mistakes.
 - Be polite and wait for them to offer to be addressed by first name.
- Emphasise the benefits for them / Provide incentives:
 - collect comments from people in the area;
 - offer a report;
 - offer to mention the name of the organisation in publications (if possible concerning anonymity etc.);
 - offer to mention the name in the published final thesis.

⁶ Answers provided by Stephanie Macht

- Conversations:
 - Do not give up right away: if they promise to call back but do not, call again → remember, these people are busy and might not have the time to deal with it immediately.
 - Nevertheless, figure out when to stop: if they NEVER call back etc., at some point I stopped because I thought they really are not interested.
- 2. **What problems did Stephanie face in the access negotiation stage of her project? How did she overcome these?**
 - High dependence on others/Need for support from Business Angel Network managers
 - Make sure you address these others appropriately.
 - Be professional.
 - Be a perfectionist.
 - Be fully prepared when you contact them.
 - Be persistent, but polite.
 - Emphasise benefits for them.
 - Remember: You often only get one chance and make sure that you get it right!
 - Explain in a very detailed and exact way what they have to do for your research (e.g. when the questionnaire has to be sent out, who should be the recipients of it, any other requirements you have).
 - Need for a total change in research strategy if access negotiations fail
 - Make sure that you are getting it right the first time.
 - Since there are 20 Business Angel Networks, it would still be possible to continue doing the research even if a few drop out.
 - Emphasise the benefits to them and make sure they understand how much they can gain from the study.
 - Design the study in a way that it allows you to provide them with sufficient benefits.
 - Ask for reasons why they are not willing to participate so that you can incorporate that into the next conversation with someone else.
 - Need to access two levels of people
 - Be professional on both levels.
 - Be aware of the time and cost implications of having to access two levels – incorporate it into your planning
 - Approach them in different ways – tailor your approach to the group you are talking to.
 - Need to access a vast amount of different people
 - Keep a detailed record of all points of contact.
 - Be organised.
 - Prepare properly and thoroughly for each participant.

- Tailor your approaches to the different people.
- Incorporate the time implications into your research design and planning.
- Networks are interlinked, so if one network talks bad about you as the researcher, you will find it difficult to access others.
 - This interlinked nature makes the need for a professional and perfect approach and appearance even more pressing.
 - Allocate an equal amount of preparation effort and time to each network.
 - Do not underestimate the power of credibility and reputation.
 - Be equally professional with each manager.
- Anonymous participants
 - Find ways of accessing them anyway.
 - Find intermediaries or gatekeepers who can facilitate contact to these participants.
 - Attend meetings (e.g. investment meetings) and networking events to identify possible participants for potential snowballing and to meet gatekeepers.
 - Talk to as many people in the area as possible to identify ways around the anonymity.

3. What access negotiation techniques has Stephanie applied in her project?

- Telephone
- Email summaries
- Organise account of communications
- Networking meetings
- Usage of positive endorsements and quotes.

4. What are the downsides of these access negotiation techniques?

- time consuming;
- only works if there is a sufficient backing from important organisations;
- ethical issues with regard to asking for permission to use quotes (need to make sure you have permission to do so!);
- there is a need to be disciplined and keep the record and spreadsheets updated – otherwise, you will confuse people and organisations and that would make you look stupid and lose credibility;
- credibility is difficult to build, but EASY to lose.

Implementing strategic change initiatives⁷

Case Study Answers

1. Outline the advantages and disadvantages of Mo Cheng's decision to pilot her questionnaire with her friends.

A pilot study is a 'trial run' of the main survey and is useful for many reasons. In the main, feedback from participants informs students on the clarity and logic of the survey questions/statements and can help students improve the structure and format of the questionnaire (content or face validity). A properly designed and conducted pilot study may also be used to calculate the sample size required for the main study. For Mo Cheng, she had pilot tested her questionnaire in the early phase of her project without thinking about using it for sample size calculation, so this is not applicable in this instance.

There are definite advantages to pilot a questionnaire ahead of final distribution:

- Early indication of the content or face validity of the proposed instrument (see above).
- Feedback on the ease and time taken by a respondent to complete the questionnaire.
- Identifying sensitive questions or sections that respondents find difficult to answer truthfully.
- Highlighting omissions which respondents feel are important for the project.
- Feedback on whether the questionnaire instructions are clear and easily understood by respondents.
- Reliability of the constructs in the questionnaire may be conducted if the pilot data set is large enough.

However, Mo Cheng had pilot tested her instrument with her friends without reference to the literature or thought about the relevance of the pilot group. As the pilot participants and the final respondents were not from the same population, the advantages highlighted above are compromised. For example, Mo Cheng's friends' responses to the clarity and structure of the questionnaire, individual sensitivity, or indeed, the time taken to complete the questionnaire cannot be assumed to be similar with the study's actual target respondents. As such, reliability testing of the questionnaire using her current pilot data is inappropriate. It is unlikely that answers by middle-ranking officers will be consistent with that provided by her friends.

It is advisable therefore that Mo Cheng conduct another pilot study using participants from the same officer population who are likely to share similar attributes and attitudes as the final study respondents.

⁷ Answers provided by Liz Lee-Kelley

2. Critically review Mo Cheng's approach to sampling and her subsequent data collection strategy. Can Mo Cheng meet her stated objective?

Researchers are faced with the challenge of representativeness and generalisability when deciding their sampling design and technique. Mo Cheng was no different. She followed a classical sampling strategy of first defining her target population as all middle-ranking army officers in her country before determining her sampling frame as the officers in post in her city. However, the total number of officers was only an estimation by her father and she was unable to provide a definitive list from her sampling frame. Her rationale of an army-wide protocol for recruitment and promotion did try to address the question of whether her sampling frame is a true representation of the target population. Although unable to fully account for the homogeneity of the population, she had unwittingly adjusted for possible sampling error by taking only 50 per cent of the estimated total, thus reducing the likelihood of including elements of the sample which might not belong.

But Mo Cheng was so keen to collect 125 eligible responses, she did not really think about her sampling technique. Although her estimated minimum sample was derived using a formula from her text book, she had relied on her father to distribute and collect the questionnaires on her behalf. No effort was made to screen the respondents in the data collection phase (such as level of seniority and/or demographical characteristics) to eliminate inappropriate elements or to prevent inadvertent omissions. In doing so, she had ignored traditional probability sampling principles of equal chance selection. In effect, the actual sampling technique was a non-probabilistic 'judgement sampling' which, although a valid method, does have its limitations especially in terms of the ability to project the findings to the population.

It may be argued therefore that her sampling strategy is haphazard, inaccurate and simplistic. Her effort to redefine the population based on the available sampling frame of local officers may be biased, limiting the generalisability of her research findings.

Probability sampling is costly and requires a statistically skilled researcher. Given Mo Cheng's relative inexperience in the research process and her attitude-based study of possible learning from change project failures and successes is more exploratory than conclusive, non-sampling error is not the key concern. Judgemental sampling is low cost and not time consuming and can be more effective for greater directional or focused access. As interest is centred on the sample subjects' expressed views or attitudes, Mo Cheng can still achieve her objective, even when using a non-probability sampling technique. What she should avoid is to make claims that the study results can be generalised to a wider population.

3. What advice would you give as Mo Cheng's project tutor to improve the quality of her study data? Give reasons for your answer.

The case notes indicate that tutor and student met only once to discuss the proposal. Although Dr Smith felt that the research topic was feasible and interesting, he had asked Mo Cheng to go away and improve her research design and methodology. Time would have elapsed between the first and second meeting. When considering options to help Mo Cheng, Dr Smith should start by checking the time left to final submission.

Before embarking on their actual fieldwork, students should ensure that their project is properly supported by:

- a. A clearly stated research problem and an explanation of its significance for theory and practice.
- b. An appropriate theoretical framework drawn from the relevant literatures to underpin the research and from which the questionnaire may be developed.

- c. A research design that has the proper structure and procedure for collecting data. This should include decision on how the data is to be obtained (e.g. survey, interviews, focus group etc.), strong sampling rationale and method, clearly identified variables and how they are to be measured, and how the data is to be coded, hypotheses tested and results analysed and interpreted.

In Mo Cheng's case, none of the above preconditions is met, so time permitting, Dr Smith should insist on agreeing a chapter submission timetable for each of the above, while leaving sufficient time for data collection, analysis and write-up.

As access is not an issue, Dr Smith could insist that Mo Cheng disregard her original pilot data and conduct another pilot using army officers from her city. This will ensure that the pilot respondents are similar in characteristics and attitudes with those who will be included in the final survey. The purpose of the new pilot should be made explicit. At the least, Mo Cheng should check for content, sequence, form, layout, question difficulty and instruction clarity. It is also advisable that she tests for reliability as her questionnaire is not a pre-validated instrument. For that, she should aim to get at least 30 completed pilot responses. The final questionnaire should not be issued until both project tutor and student are satisfied that the problems identified by the pilot are corrected and the internal consistency of the questionnaire constructs are acceptable (check your set text for more information on reliability testing).

Taking on board the unknowns already highlighted in Answer 2, Mo Cheng can still use non-probability sampling but Dr Smith should encourage Mo Cheng to improve the rigour of her data collection by providing a sampling procedure for execution clearly defining the sampling units (i.e. who are middle-ranking officers). Non-response is unlikely to be an issue in this study, but as Mo Cheng's research interest includes a question on age or gender effects, respondents could be screened by reference to their rank attributes and demographic characteristics to ensure eligibility. Although her chosen sampling approach does not allow assessment of sampling error, it does cater for the location of the desired characteristics. So, every attempt should be made to encourage her father or nominated agent to collect data only from officers falling within the relevant control characteristics.

CASE 8

Patent grants and the implications for business⁸

Case Study Answers

1. Why does the supervisor advise that Chris do a project using secondary data rather than collecting primary data?

- Time Constraints: He has only three months, including writing up to do the project.
- There were some reliable secondary data available to conduct secondary data research.
- Chris is statistically good and can technically make the best use of his skill to conduct a statistical analysis.
- Primary data collection will incur difficulties in data access, time limitation, and costs.

2. What sources of information has Chris discovered through his search?

- Library database
- References within the three papers
- Statistics from WIPO website

3. Do you find Chris's justification for his research project convincing? Give reasons for your answer?

Yes, the justification is convincing because of contribution to knowledge through his work:

- He points out that the empirical studies in this field were limited.
- His research would make empirical contributions by examining Eastern European countries:
 - revealing the changes of Western European countries in comparison to previous studies
 - comparing and contrasting Western and Eastern European countries providing policy makers and business practitioners with implications.

⁸ Answers provided by Deli Yang

- 4. Despite obtaining a distinction for the project, the supervisor commented that Chris should have discussed the limitations of his data sources more thoroughly. Visit the WIPO's website [<http://www.wipo.org>] and make a note of precisely how the data Chris used were compiled. Based upon this, how would you suggest that Chris present more thorough a discussion?**

WIPO compiles IP data according to information provided by national IP offices via annual statistical questionnaires. It categorises the data into patents, utility models, trademarks, industrial designs, plant varieties and micro-organisms. Under each category, applications and grants are broken down by domestic and foreign applications and grants. WIPO has compiled the data in a simple, systematic and unified manner so that statistic comparisons globally can take place. The data are direct indicators of overall technological activities across the world with their systematic availability and the most extensive applications by researchers.

Nonetheless, WIPO statistics have their weaknesses that should be borne in mind when using the data. They are aggregate, and do not identify technology fields (Kotabe, 1992). This indicates that researchers have to seek for other data sources if they intend to conduct specific industrial analysis. Moreover, WIPO incorporates IP statistics based on questionnaire responses by national IP offices. Given the nation-based nature of IP systems across countries, questionnaire responses may vary distinctly. For example, 75 countries (e.g. Japan, Germany and China) in the world have adopted a utility model granting system (Suthersanen, 2006). This means that they clearly differentiate petty patents and invention patents in their statistical stock. However, other countries that do not adopt a utility model system (e.g. UK) would categorically grant minor inventions as patents. Due to various ways of compiling data across nations, it may be difficult for WIPO to follow a standardised approach to incorporate these data into WIPO statistical stock.

Online images of tourist destinations⁹

Case Study Answers

1. Do you consider the Internet message boards that Anjali wishes to use to be public or private? How would you justify your answer?

The debate on whether messages posted on internet are in the public or private domain gained momentum with the publication of King's Guidelines (1996) for researching internet communities, yet even today it still seems inconclusive (Kozinets, 2006). Both sides to the debate have persuasive arguments. One way to look at it is that a message posted in cyberspace is public because it can be picked up by search engines and read by anyone who comes across it. Also, if an internet message board is free, that is, if it does not require registration and has a large membership base, it can be likened to a published source, for example, a newspaper (Langer and Beckman, 2005). Others (Kozinets, 2006; Reed, 1996) suggest caution, saying that, as a first step, a researcher should try to understand how members of the message board perceive their space.

In this spirit, both the Thorn Tree and Indiamike message boards have mixed characteristics. They have a large membership base and the material posted on them is picked up prominently by search engines (as would be from any established message board) but both require registration before one could post on them. So they exhibit features of both. In such a case, Anjali should proceed with caution and obtain permission before she uses the data for her research project.

2. Do you consider informed consent necessary for Anjali's research project? If informed consent were necessary, how should she go about obtaining it?

Yes, since the message boards Anjali wishes to use do not fall clearly in the public domain, it is better to seek permission at the very outset. Kozinets's (2002) guidelines can be helpful in charting out a course. A mail to the moderators/owners stating the purpose of research and asking for permission could be a starting point. For example, when one of the case authors requested the moderator of the Thorn Tree message board for permission to use data for a paper, he immediately said 'yes'. He added, however a word of caution, that for verbatim quotes individual authors had to be approached as they owned the copyright jointly.

Making a post to the community and stating the purpose of the research is also a good idea. There are arguments that since not all the community members might see that particular post (King, 1996), is a simple post to the community just enough? But when coupled with seeking permission from owners/moderators and asking permission for direct quotes, this seems to be reasonable and comprehensive.

3. What do you think should be Anjali's policy regarding the use of direct quotations?

Direct quotes lend authority and credibility to a narrative and also add colour to it, so they are an indispensable ingredient of any qualitative research. Whether the message board is public or private, taking informed consent seems imperative for two reasons:

⁹ Answers provided by Mridula Dwivedi and Anil Yadav

1. search engines can easily identify the source of any verbatim quotes along with the user profile on the original site which may be detrimental for the person, more so in case of sensitive research topics as illustrated in the Eysenbach and Till (2001) study.
2. even if a person has posted data on a more public forum s/he may still object to being quoted. Therefore, Anjali should contact the individual community members and seek their permission (Kozinets, 2002) for using their quotes in her research.

There are, of course, many users who stay active on a message board for a while and then never come back to check their private messages or respond to e-mails. Such transient members may not even be aware of Anjali's request. In such a scenario, it will be advisable for Anjali to not to use their quotes.

4. What could be the advantages of using online observation for Anjali? Are there any disadvantages that she should be aware of?

Online observation would give Anjali an access to naturally occurring conversations among consumers (Kozinets, 2002) and their opinion of India as a travel destination. The members posting questions on the message boards are usually looking for specific information related to their travel plans and they hope to benefit from the experience of other tourists. It may provide an excellent insight into India's destination image, as the conversation is driven by actual consumer needs and is not occurring in response to any pre-determined research questions.

Online observation could also be less time consuming, less costly, and more unobtrusive, as compared to face-to-face observations. As the data is in the text form, no recording or transcribing would be required. However, this would also mean that non-verbal or social cues are almost completely absent. Also, a message board may predominantly cater to a particular segment (Kozinets, 2002), for example, independent travellers, so the results cannot be generalised in such an instance to the wider population. Online message boards would also reflect the opinion of only those who have an access to the internet further limiting the generalisation of the findings.

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Students' and former students' debt problems¹⁰

Case Study Answers

1. What advice would you give Michelle about the ethical issues involved in her project?

In choosing her respondents, Michelle is acting retrospectively on information that she had acquired during her time of acting in a capacity where her role was simply to provide advice. Both her employers of that time – namely the students union – and their members, the students affected, anticipated that Michelle would use any information gathered simply for the purpose of helping the students sort out their debt problems. At the very least, Michelle should have approached the students union and sought their permission to contact the students. It would be unwise for the students union to accede to such a request. A preferable option would be for Michelle to ask the students union to contact the individuals on her behalf and to ask anybody who might be interested in participating in a focus group with other students with debt problems to contact Michelle directly. Alternatively, Michelle could have advertised for respondents who would be prepared to participate in a focus group with other students with debt problems.

Michelle's research involves human subjects. Most, if not all, academic institutions have clearly defined ethical guidelines that generally require any researcher – student or staff – to obtain ethical consent from a relevant individual or committee before embarking on research that involves collecting primary data from human subjects. Such guidelines can help researchers think about what safeguards to put in place in case somebody finds a research environment upsetting. Seeking and obtaining ethical consent and following the procedures agreed at that time also provides the researcher with a degree of protection should the research lead to subsequent complaints to the institution, or create subsequent adverse publicity for the institution. There is no indication that Michelle has sought ethical consent before embarking on her research.

Michelle had invited people along to focus groups, but because of the way in which she had approached her respondents, she had not obtained their prior consent to participate in a focus group with other people with debt problems. Anybody who attended the focus groups would simultaneously have the issue of their debts revealed to everyone else who attended. By involving the people in focus groups, Michelle had breached confidentiality.

It may be that Michelle had violated other parts of her university's ethical code or guidance, but as she did not seek ethical consent, she is not aware of this. An example of such violation may be that she failed to obtain any clear record – either written or as part of an audio-recording – that the respondents had agreed to participate freely in the research for academic purposes.

2. What advice would you give to Michelle about her selection of participants for her focus groups?

Leaving aside the ethical issues associated with her selection of methods, it may be questioned whether Michelle had selected the students who were most able to help her with the issue of debts. It may be that many students had experienced money problems, but had not contacted the students union about those problems, instead had sought advice about problems like being

¹⁰ Answers provided by Bill Lee

threatened with exclusion from the university for non-attendance, or because they had failed their exams, simply because their time was being taken up working either part-time or full-time in paid work to support their studies. If Michelle used the issue of whether the student had contacted the students union over debt to select her respondents, she may have missed some of the population who were experiencing problems arising from debt, but had not reported debt as being the primary problem. Equally, Michelle appears to have failed to discriminate between students who had short-term debt problems that arose from – for example – a parental contribution being paid late because the parent was out of the country so the debt was cleared quickly when the parent returned, and those who were weighed down with longer-term debt problems and worries that could affect their studies. At the very least, Michelle should draw attention to these limitations when writing up her project.

The issue of seeking to include past students at all may be questioned. Although these people may have views on funding of higher education and their memory of experiencing problems of debt while they were students is relatively recent, their knowledge of student debt is based on their recollections. If this was the part of Michelle's research question on which she wanted to put most weight, it may have been more sensible for Michelle to use only current students who are more likely to be experiencing problems with debt as students. There is also the issue of whether Michelle had designed the research in a way that made it easy for people who had left university to participate in her research. Many of these respondents did not turn up, although this could have been related to Michelle using out-of-date addresses – rather than asking for their most recent addresses when she telephoned them – it may also relate to her organising her focus groups to take place at the university when many may have got jobs away from the area.

It may be questioned whether Michelle should have attempted to use pre-formed groups, rather than seeking to form new ones for the purpose of her research. Although it is to be expected that all of the students may have some opinions on funding regimes for higher education and the difficulties that students in debt experience, a university has quite a large population of students and there is no guarantee that any group of students from such a population will necessarily have shared memories or experiences of debt, or its impact on their ability to follow a particular type of degree course. One or two people in a new focus group may know each other, but not trust one another. It may have been sensible for Michelle to find a way of seeking out pre-formed groups so that she could feel more confident that the respondents trusted each other and had some shared experiences that might be revealed by her research.

3. What advice would you give Michelle about whether she should attempt to organise another focus group of students who were in the final year of their studies last year to make her research more representative?

A simple argument may be that as Michelle has not studied people who were in the final year of their degree, she has not drawn her respondents from the entire population and this could affect her findings. A logical corollary of this is that Michelle should organise another focus group of students who were in their final year last year, to make her research more representative.

An alternative view would be to acknowledge that there is neither a perfect research design, nor a guaranteed way of ensuring that a research strategy is executed exactly how intended to produce the outcomes anticipated. Qualitative research of any kind always leads to problems that are not necessarily intended, but which may have outcomes that are useful and beneficial. Michelle's selection of respondents was always purposeful in terms of how she selected people who incurred debt problems while a student. The research is no less purposeful; it may be argued that the research is now more focused as it includes only existing students who have incurred debt problems as a consequence of being students and who are still students. Having a lesser number of focus groups could make the analysis of the data easier.

Of course, there could be additional benefits of conducting an extra focus group, but whether it is sensible to do so will also be influenced by other concerns including how much time Michelle has before her final deadline.

Downsizing in the middle east¹¹

Case Study Answers

1. What are the possible disadvantages for the way that Zaid used to contact respondent?

This way has several disadvantages including the following. First, there is a possibility that some of the respondents do not have a telephone at all. Second, they may have a telephone but it is not listed. Third, they may have a telephone that is listed but with another family member's name.

2. Outline the possible disadvantages of using a parallel translation technique?

Apparently, the researcher used this translation technique relying on being an Arabic native. Nonetheless, although using parallel translation technique can ensure rendering the specific meanings in the Arabic version, it cannot ensure that both versions Arabic and English are identical. Consequently, this would minimise the ability to use the Arabic version by non-Arabic natives in other research. This can also minimise the ability to compare the result of this study with other studies that were conducted in English or any other language.

3. You have been asked to comment on the covering letter that Zaid prepared. What are your suggestions to improve this covering letter?

To give a clearer picture of his project, he could add his research aims. This addition can enhance respondent willing to participate. This can also be achieved by adding the expected time to complete the questionnaire. As some respondents may not prefer to contact the researcher by phone, it may be prudent to add his postal contact details.

As a way of showing gratefulness, he could offer to provide a summary of the results. This should be upon the respondent's request. As all respondents are anonymous, he should ensure that in such cases, respondents name will not be associated with data.

¹¹ Answers provided by Mohammad Al Kilani

The covering letter



**Anytown
Business
School**

University of Anytown
Anytown

date

Mr Respondent

Address of respondent

Dear Mr respondent,

Participating in a survey

I am a student in the UK. The topic I am researching is the attitudes of civil servants who were awarded ESTEDA'A. I enclose a questionnaire, which asks for your views about the topic. This study aims to:

- Explore employee attitudes to, and perceptions of, ESTEDA'A.
- Compare and contrast the attitudes and perceptions of employees who have been downsized by the method of ESTEDA'A.

Consider the effectiveness of ESTEDA'A as a method of downsizing in reducing negative attitudes towards downsizing.

You are one of a sample of 843 civil servants who were awarded ESTEDA'A. You were selected randomly from a list of all the civil servants' names who were awarded ESTEDA'A. This list was obtained from the Civil Service Bureau.

The questionnaire forms a major part of my research, and I would value it highly if you would agree to participate by filling it in. It should take no more than 15 minutes of your precious time to complete the questionnaire. In giving your views, you will also help to further my understanding about the downsizing process. I must emphasise that your participation is entirely voluntary, and it is up to you to decide whether or not you wish to take part.

Let me assure you that all the information that you provide will be dealt with anonymously and confidentially, and will only be used for purpose of this study. I will ensure that the data collected from you and others are stored electronically at the university and are password protected. It will be kept for a minimum of five years.

Please complete the questionnaire and return it in the enclosed stamped, addressed envelope by [a date, give them about a week or 10 days].

Should you have any query, please contact me by post at P.O. Box 1976, Amman 11118, Jordan, or by phone on my mobile 0712 345 678 910, or the daytime landline 0987 654 321 000.

This research has been reviewed by the University Research Ethics Committee at the University of Anytown. If you have any concerns about the conduct of this research, please contact the Chair of the committee on ethics@anytown.ac.uk or telephone the secretary to the committee on 012345555555.

Please note that some persons may find some questions distressing or may raise some personal issues. Please, if you faced any of the above difficulties, do not hesitate to contact your local Labour Office for free advice and support.

I am grateful for your kindness, and thank you for your generous help in completing this questionnaire to help me with my postgraduate research.

If you would like to have a summary of the results, you will need to provide your name and address on a separate sheet of paper, because all respondents are anonymous, so I do not know who you are in order to send you the results. If that is the case, as the researcher I will ensure that your name will not be associated with the data.

Yours faithfully

Mohammad Zaid Kilani

Mohammad Zaid Kilani

Student at the University of Anytown

Small business owner managers' skill sets

Case Study Answers

- 1. Ishmael appears uncertain regarding his choice of statistics (the mean and standard deviation) in the first table to describe the responses to Questions 3 and 4.**

a. How would you advise him?

Looking at the actual questions, it is clear that both are collecting categorical data (Figure 12.1). These data are ranked (ordinal) from very confident (coded as 5) to not at all confident (coded as 1). It is also worth noting that although the questions distinguish between confidence and importance, the response headings in the extract only refer to confidence. In subsequent analyses Ishmael has amended this; something you may wish to discuss further with students.

Given the data are ranked, statistics such as the mean and the standard deviation should not be used as they require numerical data. The descriptive statistics that are appropriate for ranked data are the mode (as a measure of central tendency). This states the value that occurs most often. Strictly speaking, it is not possible to measure the dispersion for ordinal data (Table 12.4).

b. What diagrams would you suggest Ishmael uses to present the data from these questions?

The data Ishmael has collected are ranked (ordinal) from very confident/important (coded as 5) to not at all confident/important (coded as 1). Given the data are ranked, the diagrams Ishmael could use depend on what he wishes to show. They are (Table 12.2):

- To show the frequency of occurrences of categories in either but not both of the questions so that the highest and lowest are clear: bar chart or pictogram
- To show the proportion of occurrences of categories for either but not both of the questions: pie chart
- To compare the frequency of occurrences of categories between both the questions so that the highest and lowest are clear: multiple bar chart
- To compare the proportions of occurrences of categories between both the questions: comparative pie chart or percentage component bar chart
- To compare the frequency of occurrences of categories between both the questions so that their totals are clear: stacked bar chart
- To compare the proportions and totals of occurrences of categories between both the questions: comparative proportional pie chart.

- 2. Examine the remaining two extracts reporting correlation coefficients and chi square tests. Should Ishmael use either the Pearson's product moment correlation coefficients or the chi square tests as reported in these extracts?**

The data Ishmael has collected are ranked (ordinal) from very important/confident (coded as 5) to not at all important/confident (coded as 1). Given the data are ranked the statistic that he

should use to examine relationships is (Table 12.5) the Chi square test. This tests whether the answers to the two questions are associated. He should not use Pearson's product moment correlation coefficient as this requires quantifiable data.

- 3. Ishmael has decided to undertake further statistical analyses to see if there is any relationship between his respondents' perceived confidence in their own skills and their perceived importance for the same set of skills. Outline the analysis process you would recommend including, if necessary, any further work that might be needed to satisfy your chosen test's assumptions.**

The data Ishmael has collected are ranked (ordinal) from very important/confident (coded as 5) to not at all important/confident (coded as 1). Given the data are ranked he should create a series of contingency tables and calculate a Chi square test on the data in each table. These are outlined below:

- Importance of skills – in marketing and sales x Confidence of own skills in marketing and sales
- Importance of skills – interpersonal x Confidence of own skills in interpersonal
- Importance of skills – financial/accounts x Confidence of own skills in financial/accounts
- Importance of skills – managerial x Confidence of own skills in managerial
- Importance of skills – business planning x Confidence of own skills in business planning
- Importance of skills – IT x Confidence of own skills in IT
- Importance of skills – technical x Confidence of own skills in technical
- Importance of skills – time management x Confidence of own skills in time management.

In using the Chi square test, he would need to ensure that the assumptions of the test and the categories used in the contingency table are mutually exclusive and no more than 25 per cent of the cells in the table having expected values of less than 5, are satisfied. Where this was not the case, he could combine rows and columns providing this still produced meaningful data. Possible combinations will depend upon the distribution of the responses and the precise nature of the analysis, but could include:

- Codes 5 and 4 representing 'confident'
- Codes 2 and 1 representing 'not confident'
- Codes 5, 4 and 3 representing 'confident, at least to some extent'
- Codes 3, 2 and 1 representing 'not confident, at least to some extent'.

The influence of film on tourist decision-making¹²

Case Study Answers

1. In order for her to get the data she needs, people will have to make comments on Sarah's film-tourism blog. How will Sarah ensure that people know about and find her blog so that they can keep posting comments and ensure such comments will keep steadily coming through?

Sarah will have to 'advertise' her blog in a sense, in this case through other online communities to encourage contributions. She should begin to post comments and to periodically post details of her dedicated film-tourism blog on a variety of other online forums to ensure a steady stream of people become aware of it and can find and have access to it. As people begin to visit the blog and to post comments on the films that influence their travel decisions and reasons or motivating factors that were enticing them to do so, it should produce exactly the kind of data Sarah needs for her research. Due to the fact that the blog will be available globally to anyone with internet access, there is the strong possibility that comments will come in from a diverse range of nationalities, genders and indeed age groups across the world. Again, something which will strengthen the usefulness and credibility of the data gathered.

2. Sarah has begun to analyse the data that she is getting through her blog. How should she continue this process? Some sample data is shown in the blog screenshot opposite as well as the sample analysis grid, and further selected quotes listed below:

Desert Rose said...

For me it is very much the scenery that grabs me. Fiji looked so fabulous in the Blue Lagoon that I just had to go there... and Ko Samui is still very much on my list after seeing *The Beach*. I also want to visit Prague and I think part of that is that I have been exposed to many scenes of the city in lots of recent movies. So whether it is natural or man-made, it is the scenery that gets me.

Kerry said...

The different films which influenced me to visit Japan brought different factors into play I feel. With *The Last Samurai* and to some degree *Memoirs of a Geisha*, it was the natural scenery that took my breath away. With *Lost in Translation* in particular and also *Memoirs*, it was the urban scene and modern culture that influenced me strongly. As a result, I visited both urban and natural settings during my trip to experience the different scenery and culture the country had to offer.

¹² Answers provided by Peter Bolan

Sun Burst said...

Factors for me – mainly the story and to some extent the characters as part of that. A good story that hits home, something that really gets to me in some way and makes a lasting impact or impression. You then leave the cinema thinking about the film and maybe the seeds have then been planted to visit the place – to go there and experience or feel part of the story.

As Sarah will have a collection of qualitative data in the form of people's thoughts, feelings and opinions from the blog, some form of content analysis will be required. Unlike some forms of qualitative data which have to be transcribed (converted to written/word-processed text) the blog data will already be in written electronic form (a key strength of using an online mechanism such as a blog). She will then need to classify her data into meaningful categories (using coding) to enable her to group the data. This will facilitate Sarah to organise and analyse her qualitative data further. Although Sarah has already begun this manually, she could consider using CAQDAS to assist her in performing many of these aspects including looking for patterns and emergent themes in her blog data. A package such as NVivo (QSR version 7) would be appropriate as discussed by Pan *et al.* (2007) in their work on travel blogs and destination marketing. Sarah needs to link key aspects of what respondents say to categories she has created, for example, motivating factors from a film. She can then analyse further still to see if there are any correlations between for example, gender and motivating factor or between nationality and motivating factor etc. looking for additional patterns that may be relevant to her overall study.

3. What methods could Sarah employ to take her initial blog research further, disaggregate comments more and delve into the topic in even greater depth?

To add further depth to her research, Sarah could pursue a number of strategies. Some blogs require the user to register and create a small profile before posting their comments. While this may curtail the number of contributors to the blog, it provides a richer source of usable data in that the researcher will have information such as age, gender, location, occupation and email contact details. Sarah could follow up her blog work by either emailing a set of further questions to bloggers or setting up a series of online focus groups to explore emergent issues in more depth. Again the bloggers could either be emailed or simply asked on the original blog if they would be willing to participate. This additional qualitative data should provide Sarah with some very rich data for her study and truly get to the heart of what motivates people to choose travel destinations because of what they have seen on film.

James' consultancy report on managers' financial information needs¹³

Case Study Answers

- 1. Draft an outline structure of headings that would be broadly suitable for the main body of a consultancy report for James' client (including James' report) and explain the purpose of such a report.**

Below is a suitable outline structure for the main body of content for James' consultancy report to the EMEA Financial Management Board:

SECTION I SCOPE OF ENGAGEMENT

SECTION II BACKGROUND INFORMATION

SECTION III FINDINGS/DISCUSSION

SECTION IV CONCLUSIONS AND RECOMMENDATIONS

APPENDICES

Adapted from Garratt, S. (1991:p72) and Markham, C. (1997:p131) Figure 6.1.

Essentially, the purpose of a consultancy report should represent a concise and accessible résumé of the terms of reference, findings, conclusions and recommendations related to the client's brief.

- 2. Outline the content you would expect James to include under each of the 'main headings' you have proposed for the report.**

SECTION I SCOPE OF ENGAGEMENT

This section should include the 'terms of reference' (and timescale) agreed with the Regional VP. This emanates from the VP's stated goal '*...to improve the financial decision-making at the hotel property level*'. The objectives required to achieve the goal flow directly from the VP's brief, *namely* assessing 'best (accounting) practice' and determining current accounting reporting practices on the EMEA region.

¹³ Answers provided by Peter Harris

SECTION II BACKGROUND INFORMATION

In the case of James' brief, this section should comprise a concise assessment of state-of-the-art financial reporting practices; drawn mainly from empirical research and practitioner sources, such as industry surveys, trade association studies, published consulting reports and professional accounting/hospitality journals. This is about obtaining evidence of the latest practical developments rather than a review of theoretical boundaries for example, Graham and Harris (1999); *USALI* (2006).

This section would include details of the approach to the interviews with financial controllers and department managers in the hotel properties on the EMEA region. This about gaining concrete facts as to the current 'match' between financial reports with managers' decision-making needs.

SECTION III FINDINGS/DISCUSSION

This section should comprise an assessment of the findings from the field interviews at the hotels and the state-of-the-art financial reporting practices search; and take the form of a '...discussion, analysis and argument which, in turn, will lead to conclusions the issues that have been identified' (Garratt, 1991:p73). In the case of James' brief, this will result in identifying the key issues relating to matching financial reports with decision-making requirements (using marginal accounting techniques) and subsequently the appropriate training and development requirements of hotel management teams.

SECTION IV CONCLUSIONS AND RECOMMENDATIONS

This final section should serve to summarise the points from the overall findings of the investigation and provide a final opinion. In the case of James' brief, it is a statement as to the effectiveness and practicability of implementing marginal accounting techniques to improve decision-making at the hotel property level.

Recommendations suggest what should take place to implement the findings and conclusions of a report; they should be clear, unambiguous 'actionable' points required to fulfil the purpose of the report. In the case of James' brief, this will not only include the matching of financial information for decision-making and the relevance of marginal accounting techniques, but the extent of the training and development programme necessary to prepare hotel financial and management teams for implementing and applying marginal analysis techniques in their routine decisions.

APPENDICES

Appendices should provide additional evidence to support or justify issues under discussion in the main body of a report. They are an important supplementary source of information at the back of a report that avoids excessive detail within the main body. In the case of James' brief, they may contain summaries of interview analyses, current and proposed financial reporting formats and a detailed schedule of proposed training and development for the hotel management teams.

3. Outline the purpose and content of an 'executive summary' in a consultancy report.

An executive summary '...is a summary of the findings of a consulting project. But it must be more than *just* a summary [it] is the gateway to the report' (Wickham and Wickham, 2008:p268).

The executive summary should comprise a brief overview of the purpose, key findings and conclusions raised in the report. The reader should be able to grasp the essence of the investigation by a fairly rapid read of the summary. In terms of layout, an executive summary should normally be presented in bullet point format and written after the main body of contents is completed. In addition, the text should be brief and to the point. Key findings and conclusions should be clearly listed and cross-referenced to recommendations.

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