

Guidelines for Theory Development using Qualitative Research Approaches

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Abstract: Qualitative research has been criticised for not building a distinctive body of knowledge, leading to fewer publications and citations. In the light of this critique, this paper offers guidance on how qualitative researchers can contribute to developing a distinctive and cumulative body of knowledge, thereby attracting more attention to their research. In pursuit of this aim, there are four objectives addressed in this paper. The first objective is to explain the relevance and value of deductive qualitative approaches to theory building. Secondly, to illustrate how examining the maturation of a concept can help decide the appropriateness of a particular research approach. This paper explains how in their planning, researchers need to confirm their intention to contribute to theory development and to ensure that this is appropriate, given the stage of maturation of the concept to be investigated. The third objective is to offer guidance on the philosophical assumptions of the researcher and how to test research propositions. Therefore, it is advised that data collection and analysis should take place within a post-positivist paradigm, and that the field work should be designed and carried out with research propositions as a point of departure. The final research objective is to explain how the findings of a deductive qualitative study should be handled to demonstrate the contribution of the study to the body of knowledge. Here guidance is offered on the contextualisation and generalisation of research findings.

Keywords: deductive qualitative research, theory development, explanatory case studies, contextualisation

1. Introduction

Compared to those adopting quantitative methods, qualitative research publications in business research are less prevalent (Bryman 2004; Crick 2020; Fischer, Dietz, & Antonakis 2017; Pearse 2019) and receive fewer citations (Antonakis, Bastardo, Liu, & Schriesheim 2014). One of the reasons qualitative research is not well represented in scholarly research has been its failure to build a distinctive body of knowledge. This paper aims to offer guidance on how deductively oriented qualitative research approaches can contribute to developing a distinctive and cumulative body of knowledge, thereby attracting more attention to their research. But first, two critiques of this quest to build a distinctive body of knowledge are discussed.

Firstly, a challenge qualitative researchers face is the low level of theoretical consensus (Pfeffer 1993), which is evident in many of their fields of work. In fact, some qualitative researchers reject the assumption that there is a single research approach or paradigm for a given phenomenon or concept. They, therefore, propose abandoning the accumulation of work on a particular topic in favour of promoting multiple theoretical approaches, ideas and methodologies to identify and capture different facets of organisational reality (Palmer 2006). For example, in their review of leadership studies, Glynn and De Jordy (2010) conclude that leadership is a multi-paradigmatic phenomenon with no dominant approach evident. More recent reviews on leadership suggest this has not changed over the last decade, with a diverse range of theoretical approaches still being applied to the study of leadership (Day 2020). This is not surprising, though, given the range of questions that leadership researchers attempt to address (see, for example, Spisak 2020) and the wide range of approaches to conceptualising leadership. This can be attributed in part to the gap between scholars and practitioners (Banks et al. 2016) and the popularisation of the leadership phenomenon amongst practitioners (Iarocci 2015) and academics (O'Mullane 2011) alike.

A second critique is that qualitative research tends to present results in ways that are not easy to replicate (Antonakis, Bastardo, Liu, & Schriesheim 2014; Bryman 2004), thereby inhibiting the development of a distinctive body of knowledge. In fact, qualitative researchers are often not interested in theory development or the replication of their work. In reviewing the field of organisation studies, Palmer (2006) summarises four objections to theory development, namely: (1) that fundamental changes have made some theories redundant, (2) the nature of some fields are too dynamic to be the object of theorising at this point (or perhaps ever) and will benefit more from descriptive accounts, (3) that a problem-driven approach to research (Davis & Marquis 2005), which draws upon multiple theories rather than advancing one, could be more appropriate, and (4) an obligation to make a theoretical contribution becomes restrictive for researchers who simply want to describe

how things are, or how they have been changing. In essence, many qualitative researchers regard pursuing the objective of theory development as being immaterial or inappropriate.

These two challenges to theory development do not dismiss outright the potential value and contribution of research that is attempting to build on existing theory but rather serve as a caution to researchers to check that their theory-building endeavours are worthwhile. Qualitative researchers, therefore, need to ensure that they are focused on important, relevant, and stable phenomena and that they are mindful of balancing theoretical parsimony with contextual detail. This paper explains how to achieve this.

In addressing the aim of this research, the paper is structured according to some of the phases of the research process, as follows: (1) planning of the research, (2) data collection and analysis, and (3) locating the research findings in the literature. In the section related to research planning, the following objectives are formulated: Firstly, to explain the relevance and value of deductive qualitative approaches to theory building. Secondly, to illustrate how examining the maturation of a concept can help decide the appropriateness of a particular research approach. In explaining how to approach data collection and analysis, a third objective is realised, namely, to offer guidance on the philosophical assumptions of the researcher and the testing of research propositions, including their use in case study research. Finally, in offering guidelines on the location of the research findings, the fourth research objective of the paper is to explain how the findings of a deductive qualitative study should be handled to demonstrate the contribution of the study to the body of knowledge. It does so by discussing the topics of the contextualisation and generalisation of findings.

2. Planning of the research

In conceiving of and planning the research, the researcher needs to confirm that s/he intends to contribute to theory development and then to check that this is appropriate, given the stage of maturation of the concept to be investigated.

2.1 Theory building intention

It is assumed in this paper that one of the primary purposes of conducting research is to contribute to theory development ultimately. Objections and alternatives to this position have been acknowledged earlier. However, the qualitative researcher now needs to confirm that this is their intention, rather than theory generation, problem-driven research, or a descriptive outcome (Palmer 2006). That is, the researcher needs to confirm the relevance and justify the value of theory building.

Consistent with other deductive, theory testing approaches to research, a good review of the literature is required. Theory building is more likely to succeed in areas with a dominant approach evident and greater consensus amongst researchers in the definition of key terms (Pfeffer 1993). Consequently, in reviewing the literature, researchers need to examine the conceptualisation and operationalisation of their key terms and check the levels of agreement in prior research studies. It is essential for researchers to have a good understanding of the nature of the phenomena they are researching. They need to know its historical landscape and context and clarify (and perhaps even defend) their position concerning the potential of their research to contribute to the development of cumulative theoretical knowledge. To reinforce this point, Hunt and Dodge (2000) recognised that leadership was a mature field. They bemoaned the neglect of historical-contextual antecedents, which led to academic amnesia that later promoted a research *déjà vu* amongst researchers and practitioners alike, as they rediscovered known leadership concepts and insights.

A systematic (Snyder 2019) and chronological (Boyne 2009) review of the literature can help to demonstrate the accumulation of a distinctive body of knowledge. Furthermore, the outcome of this literature review phase is likely to be the development of a theoretical or conceptual framework (Grant & Osanloo 2014; Jabareen 2009) and the formulation of research propositions that are to be tested in the research (Miles, Huberman, & Saldaña 2014).

2.2 Theory maturation

The body of knowledge on a topic matures. As it does so, different research approaches and methods become more (or less) valuable. Several authors have found the framework of Reichers and Schneider (1990) helpful in describing and reviewing the evolution of a concept from its inception to maturity (Bono & Vey 2005; Davies 2007; Hunt 1999; Rebelo & Duarte Gomes 2008). According to this framework, the concept

introduction/elaboration stage involves introducing, legitimising, and establishing a new concept (or phenomenon or variable). Once introduced, the concept evaluation/augmentation stage involves testing the robustness of the concept and its operationalisation and reviewing and critiquing the evidence from the findings of early studies. At this stage, the concept is often reconceptualised. Finally, in the concept consolidation/accommodation stage, there is growing consensus on the definition of the concept and its related variables (i.e., antecedents, consequences, moderators, and mediators) as it is integrated into conceptual frameworks and then established as a theoretical model. Subsequently, interest in the concept declines, with fewer research studies and publications being produced.

Therefore, it is argued that as concepts develop from an *Introduction and Elaboration* stage, to *Evaluation and Augmentation* and then to *Consolidation and Accommodation* (Reichers & Schneider 1990), different research approaches and methods are appropriate. By implication, qualitative and quantitative methods and inductive and deductive approaches can be complementary, rather than competing, with each having a distinct role to play at different stages in the maturation cycle of a concept (Parkhe 1993). What also becomes evident when examining these stages is that different types of publications and article genres (Montesi & Mackenzie Owen 2008) are more (or less) relevant at the various stages. This is illustrated in Table 1, which can guide researchers in ascertaining the stage of maturity of a concept. The author guidelines of some journals offer further guidance on the nature of different types of articles that they publish, which can be helpful to researchers to make explicit the kind of contribution that they trying to make and the appropriate publication type or genre to use. In other words, in assembling the literature to review chronologically, researchers should also be attuned to changes in the type of research publications and research methods being employed over time, and not only focus on the development of the concept itself.

Table 1: Types of publications associated with concept introduction/elaboration and evaluation/augmentation

Concept Introduction/Elaboration	Concept Evaluation/Augmentation
Books	Applied research articles
Theoretical articles	Qualitative research articles [e.g. Case studies]
Conceptual Articles	Quantitative/empirical research articles [e.g. Surveys]
Comment and opinion articles	Methodological articles
	Monographs
	Reviews [e.g. Literature Reviews, Meta-analysis, Citation Analysis]
	Practice-oriented articles

Source: Author's construction

Bibliographic and citation analysis tools such as those that are available on Web of Science or Scopus are also helpful in determining the maturity of a concept and the type of research and publication genre required. See Vogel, Reichard, Batistič and Černe (2020) for an overview of bibliometric techniques. As an illustration of the use of these citation analysis tools, a search was carried out on Web of Science for the search term “servant leadership” in all fields, which generated 957 publication results. The citation report showed that since the first publication in 1978, there has been an exponential increase in the number of times the concept has been cited in publications. Some 34 years later, in 2012, the milestone of more than 300 citations for the year was reached. Two years later, in 2014, there were over 600 citations, with this number doubling approximately every two years. By 2020 there were over 4700 citations in the year and a cumulative total of almost 20 000 citations. The top ten cited publications are presented in Table 2 below, arranged by year of publication. Of these, three are reviews of the leadership literature, and the remaining articles all adopt a quantitative design, some of which offer competing measurements of servant leadership. The highest-ranked publication that adopted a qualitative approach was Eisenbeiss (2012), who ranked 26th with 144 citations. However, the paper provided illustrative cases of ethical leadership in practice, rather than focusing exclusively on servant leadership. This brief analysis demonstrates that more than 50 years after Robert K. Greenleaf's seminal work on servant leadership (Greenleaf 1970), it is now a mature phenomenon, as indicated by the number of publications and citations. Quantitative approaches dominate the evaluation stage of the concept's maturation, while qualitative research approaches are largely ignored.

Table 2: Top 10 citations on “servant leadership” on Web of Science

Publication Authors	Citation ranking	Total citations ¹	Year of publication	Type of publication
Ehrhart (2004)	4	562	2004	Quantitative, survey
Barbuto & Wheeler (2006)	9	335	2006	Quantitative, scale development
Liden, Wayne, Zhao, & Henderson (2008)	3	607	2008	Quantitative, scale development
Neubert et al. (2008)	8	371	2008	Quantitative, survey
Avolio, Walumbwa, & Weber (2009)	1	1008	2009	Review article, general leadership theories
Walumbwa, Hartnell, & Oke (2010)	6	381	2010	Quantitative, survey
Schaubroeck, Lam, & Peng (2011)	7	379	2011	Quantitative, survey
van Dierendonck (2011)	2	611	2011	Review article, servant leadership
Dinh et al. (2014)	5	490	2014	Review article, general leadership theories
Hoch, Bommer, Dulebohn, & Wu (2018)	10	296	2018	Quantitative, meta-analysis
¹ Data collected 29 October 2021				

Source: Author’s construction

3. Data collection and analysis

Within the framework of the maturation process of theory development as described above, it is argued that even though they have not received much attention, qualitative approaches have a role in theory building and refinement, particularly at the evaluation and augmentation stage. When collecting and analysing data, the researcher should be cognisant of the research paradigm adopted. In addition, data should be collected and analysed with the intention of testing the research propositions.

3.1 The use of the post-positivist paradigm

Qualitative research adopts a wide range of research orientations. However, when testing theory deductive qualitative research approaches usually adopt a post-positivist research orientation or paradigm. This paradigm “aims to produce objective and generalizable knowledge about social patterns, seeking to affirm the presence of universal properties/laws in relationships amongst pre-defined variables” (Taylor & Medina 2013 p.3). A realist ontology underpins the post-positivist approach and is concerned with “multiple perceptions about a single, mind-independent reality ... value cognizant; conscious of the values of human systems and of researchers” (Krauss 2005 p.761). Both quantitative and qualitative research approaches and methods can be utilised in post-positivist research, as the research topic dictates what is appropriate (Krauss 2005). It is typically associated with deductive approaches to qualitative research and when investigating social phenomena.

In meeting these assumptions of reality, the realist ontology of the post-positivist research paradigm provides the necessary conditions for utilising qualitative data to verify research propositions. That is, the nature of the phenomenon is stable and not temporal or time-bound and does not assume multiple realities, but a singular one that can be “apprehended”. Also, the data is objective and not in the form of unverified subjective opinions. By implication, researchers are gathering data in the form of either verifiable observations over time or accounts of the observations of the research participants, which can be triangulated to enhance the credibility of the research and produce a “comprehensive, stable picture of ‘reality’” (Varpio et al. 2017 p.44). Qualitative researchers following a deductive approach, therefore, need to ensure that their ontological assumptions are consistent with that of the post-positivist research paradigm and that they collect and analyse their data in a manner coherent with this approach, looking for the commonalities from multiple perspectives and sources. This investigative process can be likened to a judge in a court of law, weighing up the evidence presented from many witnesses and sources to determine what is most likely to have happened before pronouncing a judgment.

3.2 Testing research propositions

Deductive research approaches make use of the extant literature and theory as a point of departure through the generation of research propositions that can be tested (Pearse 2019). Theoretical propositions are derived from a literature review and then used to guide the collection and analysis of data (Boyatzis 1998; Fereday & Muir-Cochrane 2006; Hyde 2000). Developing and using a codebook and a code memorandum is helpful when adopting this approach (Boyatzis 1998; Crabtree & Miller 1999; Fereday & Muir-Cochrane 2006).

Furthermore, deductively oriented case studies can explore and refine theory and confirm or infirm (i.e., call into question) the plausibility of a theory (Kaarbo & Beasley 1999). In considering the manner of using case studies to test a theory, Yin (1981, p. 108) argues that even “data from a single case can be used to test a theory (i.e., a pattern), as long as contrary theories are also compared”. Yin (2003, p. 118) argues that these rival explanations should consist of a set of mutually exclusive independent variables. However, it is also possible to triangulate different theories that complement one another, thereby providing a fuller explanation of a phenomenon (Hopper & Hoque 2006). In selecting a single case, Yin (1981) notes that this is based on the occurrence of a phenomenon in its real-life context since case study research recognises that the occurrence of a phenomenon cannot be divorced from its dynamic context. Moving beyond single case designs, comparative case studies provide a focused and structured way to select comparable or diverse cases to confirm or extend theory from an original case (Kaarbo & Beasley 1999). By implication, researchers need to clearly identify the theory or theories they are interested in developing, develop and extract research propositions from a review of the literature related to this theory, and then carefully select suitable cases to analyse.

4. Locating the research findings in the literature

As stated earlier, this paper aims to give guidance on how deductively oriented qualitative research can contribute to developing a distinctive and cumulative body of knowledge. The aim was broken down into four objectives. So far, the first three objectives have been addressed, which cover the planning and data collection and analysis phases of the research. In locating the research findings in the literature, the focus now shifts to the fourth objective, which is to explain how the findings of a deductive qualitative study should be discussed to demonstrate the study's contribution to the body of knowledge. Therefore, this fourth objective guides researchers as to what claims they can make with their research, how they go about doing so, and what the limitations of these claims are. This highlights the importance of the Discussion chapter or section of a research study. Research conducted adopting a genre analysis of articles and dissertations (Hopkins & Dudley-Evans 1988) provides general guidance in structuring and writing the Discussion. These guidelines include commenting on whether the results obtained were expected or not, by comparing the study's results to those obtained in other studies. The researcher then explains results that run counter to those of other studies, providing examples to back up the explanation. Alternatively, prior research is cited in support of the results. Comparing the study's results to those of other studies leads to making recommendations for future research and providing justification for such recommendations (Hopkins & Dudley-Evans 1988). By explicitly referring to other studies in this way, researchers are deliberately considering the contribution of their study, thereby ensuring that they are building a distinctive body of knowledge.

While the analysis by Hopkins and Dudley-Evans (1988) provides a general pattern for formulating a discussion, unique features of qualitative research findings complicate their comparison to those of other studies. This is reflected in the interrelated topics of contextualising and generalising the research findings. In considering these topics, the role of the case study research method is examined in the development of theory.

4.1 Contextualisation of research findings

The critical characteristic of a theory is that it offers explanations for why a phenomenon occurs or provides an explanation for the causal link or mechanism between variables (Davis & Marquis 2005; Sutton & Staw 1995). Quantitative research procedures cannot identify an underlying explanatory mechanism through the techniques and analyses applied, and therefore has to draw from existing theory to do so (Dyer & Wilkins 1991; Emmel 2021). These explanatory mechanisms can only be identified through qualitative research procedures, particularly when a realist ontology is adopted (Emmel 2021). While inductive approaches may assist with theory generation, qualitative deductive approaches can facilitate a deeper exploration and validation of a theory, seeking a balance between theoretical generalisation and contextual specificity.

Qualitative research, therefore, has the advantage of fleshing out the details of the phenomenon in the real world prior to using quantitative methods with large samples that attempt to generalise the theory in a more universalistic manner (Crick 2020). This is not to say that only quantitative methods are able to assist with the generalisation of research findings, but it is one alternative that is available to researchers. As another alternative, it has been argued that certain qualitative methods can be used to generalise findings. That is, qualitative deductive approaches can be used to confirm or falsify the appropriateness of a theory (Barratt, Choi, & Li 2011; Yin 2014). Explanatory case studies focus on addressing questions of causality or offering explanations for identifying the generative mechanisms underlying events or processes (Wynn & Williams 2012; Yin 2014).

This may involve the investigation of single or numerous cases. Yin (1981) has argued that even a single case can provide a valid test of a theory, and the depth and contextual insights from single case studies have proven to be helpful in the past for building theory (Dyer & Wilkins 1991).

Compared to quantitative approaches, the value of qualitative research approaches lies in the level of detail with which the findings can be presented on each case for which data is collected, allowing for a higher degree of contextualisation (Crick 2020; Hyde 2000). Indeed, many qualitative researchers believe that there may be greater value in theory building from detailed, contextual studies that are comprehensive and contribute to substantive theories (Glaser & Strauss 1967). However, this process of generalisation will inevitably require simplifying the findings by removing some of the idiosyncrasies of the case to produce a more parsimonious theory (George 2018). Therefore, researchers will need to identify the more critical features of their findings and present these in a manner that other researchers can build upon them. This means separating the conceptual from the contextual to some degree, while recognising that these are inextricably intertwined in qualitative and case study research (Yin 2014).

4.2 Generalisation of qualitative findings

Much of qualitative research is located within a constructivist or interpretivist research paradigm and adopts a form of naturalistic generalisation (Stake 1978) or transferability as a qualitative equivalent to external validity in quantitative research. With transferability, the reader is provided with a rich and thick account of the findings to facilitate the transfer of any insights by the reader to a new setting (Hellström 2008). However, deductive qualitative approaches are located in a post-positivist research tradition rather than a constructivist or interpretivist one, and so the transferability concept is irrelevant, and instead, generalisation is of interest. Researchers often recommend employing quantitative research methods to generalise research findings. The hypothetico-deductive approach characterising quantitative research is well established. It is assumed that large data samples can be collected to represent a broader population and that generalisation of the results occurs by drawing inferences from sample statistics to population parameters through the application of statistical techniques. For qualitative researchers, this approach to generalisation is problematic in several respects.

Firstly, in contrast to the data used in quantitative research, qualitative research accounts consist of multiple data points collected within small samples or a limited number of cases (Yin 2014). Indeed, the number of variables represented by the data points often exceeds the study's sample size. Qualitative researchers see this as necessary to fully capture the unique or idiographic nature of the case being researched. From the quantitative perspective, this makes generalising the research findings problematic, as inferential statistical analysis can no longer be applied, given the large number of parameters. Therefore, statistical generalisation is not feasible. Secondly, qualitative research is ideographic in nature and not nomothetic. According to Baskerville (1996), generalisation can take one of two forms. In the nomothetic natural sciences, general laws of nature are pursued that cannot be broken, and no exceptions are expected. Here, nomothetic generalisation applies, and theory is developed for all cases. In contrast, social phenomena in the social sciences are idiographic, with generalisation limited by qualifications and exceptions of unique cases. Therefore, statistical generalisation is not suitable for idiographic generalisation.

Given that statistical generalisation is neither feasible nor suitable for idiographic generalisation, an alternative approach is required. Baskerville (1996) states that ideographic generalisation requires a two-stage process, consisting of first creating a general case from one or more base cases. Base cases are the cases that are selected and investigated through data collection and analysis. After that, the general case, which is theoretical, quite abstract, and conceptual, is applied to a goal case to ensure its relevance and "practicability" (i.e., being able to apply the theory in practice). That is, generalisation ultimately occurs when conceptual insights gained from base cases are applied to new goal cases.

It has been argued that explanatory case studies have a lot in common with experiments, where it is possible to generalise from even a single experiment (Yin 2014). Parkhe (1993) observes that selecting multiple cases is incorrectly thought of as being equivalent to increasing the sample size for a survey. Instead, it should be compared to conducting another experiment, where the case is selected because it is expected to either confirm the first case or, for sound reasons, produce predictably contrarian findings. That is, a negative case may be deliberately selected in an attempt to extend a theory (Hyde 2000). This process of analytical generalisation expands and generalises theories rather than attempting to determine the likelihood of their occurrence in a particular population of interest (Hyde 2000; Yin 2014).

While ideographic generalisation is feasible and appropriate in deductive qualitative research, it is not easy. Trying to develop generalised theory from qualitative studies has been likened to a “map drawn at too large a scale. At best, it does not do its subject justice, missing important details, and at worst, it produces misleading inferences, missing crucial twists and turns in the road” (Palmer 2006 p. 541). A fundamental challenge for the researcher is to locate the research study on an ideographic-nomothetic continuum (Fingfeld-Connett 2010). That is, as discussed earlier, in the interest of generalisation, more parsimonious findings are needed, but this must be balanced with qualifying features and contextual detail. As Flyvbjerg (2006, p. 225) states “Predictive theories and universals cannot be found in the study of human affairs. Concrete, context-dependent knowledge is therefore more valuable than the vain search for predictive theories and universals”.

5. Conclusion

Qualitative research has a long history of having to defend its legitimacy in comparison to quantitative research approaches. While many qualitative approaches have rejected a comparison to quantitative methods as a basis for establishing their legitimacy, the approach taken in this paper has been to juxtapose quantitative and qualitative approaches and to demonstrate their complementarity as a body of knowledge matures. In support of theory development and maturation, this paper provides guidelines to assist deductive qualitative researchers in positioning their research and making a more cogent and distinctive contribution to theory development. It is hoped that this will lead to a broader recognition of the contribution made by qualitative research, evidenced by more researchers adopting this approach and in increased citations of qualitative research publications.

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