Researching Process and Organization: ‘In Situ Reflexive Probing’ as a Process Methodology

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Abstract

Despite a recent profusion of methodologies within organizational research, much of what have been formulated remains within the remit of what we call here a ‘substantialist ontology’. This includes methodologies formulated within a ‘weak’ process theory which we assert remains wedded to a substantialist ontology. Methodologies anchored in a ‘strong’ process ontology, however, remain nascent. In this paper, we argue that the operationalization of process ontology requires the development of research methodologies that are inherently sympathetic to process and movement as fundamental features of reality. This, in turn, implies the need for greater conceptual integration and translation to the practical activity of fieldwork in process research. We address this lacuna by fleshing out a methodological approach that applies insights from the recent conceptual developments in the ‘practice turn’ to researching organizational practices in within the remit of a ‘strong’ process ontology. We call this ‘in situ reflexive probing’, a quasi-ethnographic methodology that can aid the development of ‘strong’ process research in organization and management studies.

Key Words: process ontology, ‘strong’ process methodology, practice turn, dwelling mode, in situ reflexive probing.
Introduction

“By intuition is meant the kind of intellectual sympathy by which one places oneself within an object in order to coincide with what is unique in it and consequently inexpressible. Analysis, on the contrary, is the operation which reduces the object to elements already known, that is, to elements common both to it and other objects. To analyse, therefore, is to express a thing as a function of something other than itself. All analysis is thus a translation, a development into symbols, a representation taken from successive points of view from which we note as many resemblances as possible between the new objects which we are studying and others which we believe we know already. In its eternally unsatisfied desire to embrace the object around which it is compelled to turn, analysis multiplies without end the number of its points of view in order to complete its always incomplete representation, and ceaselessly varies its symbols that it may perfect the always imperfect translation. It goes on, therefore, to infinity. But intuition, if intuition is possible, is a simple act”

(Bergson, 1912/1999, pp. 23-24)

Process research within organization and management studies has come some way since Van de Ven (1992), made a valuable distinction between the three commonly prevalent meanings of the term ‘process’ in organizational theory. He contrasted the two ‘variance theory’ (Mohr, 1982) approaches which understands ‘process’ as either ‘a logic that explains a causal relationship between independent and dependent variables’, or ‘a category of concepts or variables that refers to actions of individuals or organizations’, with a third ‘process theory approach’ where ‘process’ refers to ‘a sequence of events that describes how things change over time’ (Van de Ven, 1992, p. 169). Process research, according to this view, put simply, is an approach to studying the dynamic processes in organizations by capturing ‘reality in flight’ (Pettigrew, 1997, p. 347) to explain how processes evolve over time and why they evolve the way they do. In other words, the ‘process theory approach’ requires researchers to directly observe the process rather than infer the process story or speculative logic through the causal influence exerted by an independent (input) variable a dependent (outcome) variable.

However, the ‘reality’ that the process researchers seek to ‘capture’ belies an ontological chasm that separates the metaphysical outlook of substantialist organizational theorists from their process-oriented counterparts. Substantialist organizational theorists regard the social world as comprising isolatable and circumscribed social entities including especially
‘organizations’, ‘individuals’ and ‘the environment’. Mainstream writings on ‘process’, stemming from a substantialist ontology, which include works by Pettigrew (1990) on change, Van de Ven et al (1999) on innovation and Langley and Truax (1994) on technology adoption, have tended to view processes as flows circumscribed and confined to organizational goals and structures. This approach, referred to as ‘weak process’ view (Chia & Langley, 2004) can be contrasted with a ‘strong’ process view rooted in a thoroughgoing process ontology, where social entities are regarded as essentially stabilised moments, analytically abstracted from an underlying fluxing and changing reality for the purpose of academic consideration by the organizational theorist. This conceptualization is manifested in the works of Chia (1997), Tsoukas and Chia (2002) and Hernes (2007) and draws inspiration from a long lineage of process thinkers from the pre-Socratic thinker Heraclitus through to twentieth-century philosophers like William James (1909/2011), Henri Bergson ([1911]/1998), Alfred North Whitehead ([1929] 1978) and more recently to process physicists like David Bohm (1980) and Ilya Prigogine (1996). This ‘strong’ process view privileges an understanding of organizations and even individuals to be constituted by dense socio-technical networks of primary organizing processes. This conceptual sharpening of a ‘strong’ process view, has, however, has not been accompanied by adequate empirical research (Van de Ven & Poole, 2005). This shift of perspective from organizations to organizing processes demands a renewed effort to explore different interpretations of doing process research in organizational theory.

Whilst, there has been a profusion of methodologies for carrying out ‘weak’ process research, methodological guidelines for ‘strong’ process research (Chia & Langley, 2004) have yet to be made explicit. In this paper, we argue that operationalizing process ontology by developing appropriate methodologies and methods that are inherently sympathetic to process and movement requires greater conceptual integration and translation in practice. The formulation of such methodological approaches would then allow researchers to focus on sharpening the analytical differences between ‘weak’ and ‘strong’ process views. The methodology we propose here, which we call ‘in situ reflexive probing’ is our response to this perceived lacuna. It sketches a framework which allows theorists to empirically access and subsequently theorise by directly observing the lived experience of people immersed within their own localised context. Our paper is organised as follows: We begin by developing a framework to understand the main ontological and epistemological assumptions underpinning mainstream process methodologies. Following this, we present insights from the ‘practice
turn’ in organization studies which distinguishes a ‘purposeful’ ‘building mode’ (Heidegger, 1926/1962) from a ‘purposive’ ‘dwelling mode’ (Chia & Holt, 2006, p. 644); by applying it to research ‘practices’ in current mainstream process methodologies. This re-orientation, we argue, is necessary to invoke the ‘intellectual sympathy’ required to understand processes. We then combine the differing ontological dimensions (organizations as consisting of things or processes) with the ‘practice dimension’ (‘building mode’ and ‘dwelling mode’) to develop a typology of four methodological approaches (see Fig. 1 below) to research organizing processes in organization research. This typology further highlights how the ‘weak’ process views, prevalent in mainstream process methodologies, remain hemmed in by either their ontological or their ‘practice’ strictures. We then synthesize from this analysis, a quasi-ethnographic ‘strong’ process methodological approach which we call ‘in situ reflexive probing’. By combining the data gathering skills of an evolutionary biologist with the data analyses skills of a historian (Poole & Van de Ven, 2010, p. 543), ‘in situ reflexive probing’ aids theorists researching organizing processes. Finally, we conclude by discussing the potential contributions, ‘in situ reflexive probing’ can make to organization studies.

Ontology in Process Studies

Process research in organisation studies has witnessed the emergence of two competing philosophical perspectives: substantialist and processual (see Tsoukas & Chia, 2002 and Van de Ven & Poole, 2005 for details). Reduced to their most pregnant differences, the analytical focus of those subscribing to a substantialist view of the world is that which endures; order and organization are substantial whilst change is construed as epiphenomenal. On the other hand, process-based organization theorists direct their focus towards what endures through changing; order and organization are thus regarded as temporarily-stabilised accomplishments, relatively stabilised patterns of relations in a churning sea of change. Put differently, substantialist organizational theorists by directing attention to what is and what is not, in contrast to what goes on, invariably absorb movement and change into its immutability as mere appearance and therefrom regard themselves as having fulfilled their intellectual duty in doing justice to raw experience (James, 1909/2011, p. 17). In contrast, what captures the attention of a process theorist are the multifarious modes of material
ongoing adaptations, practical coping actions and micro-processes of organizing that account for the emergence of novelty and the creative evolution of processes and practices as in situ responses to the *enigma of arrival* of an unfolding reality.

This ontological-epistemological (hereafter “onto-epistemological”) disagreements within the two camps in evident when the typology contributed by Van de Ven and Poole (2005) was critiqued by Hernes and Weik (2007) for being “too coarse” (2007, p. 252) for organizational research. According to Hernes and Weik, a more useful distition between the two ‘processes views’ would to differentiate the “exogenous” ‘weak’ process views where processes are seen as “flows” or “programmes” from the “endogenous” ‘strong’ process views where processes are seen as either ‘connectivity’ or ‘recursive reproduction’ (Hernes & Weik, 2007, p. 261). ‘Process onto-epistemology’, then, as it is understood in organization studies, is a theorizing tendency rather than a concise body of doctrine. Therefore, as this larger tendency makes itself explicit, certain specific expressions are bound to be relatively weaker than others and some even mistaken. If this is so, then for ‘process methodology’ to be aware of weak or mistaken expressions of itself would seem to be an advantage to this tendency as a whole.

**Impact on Methodology**

In this section, we review the impact of the ‘ontological turn’ on some of the mainstream process methodologies. The objective of course is to examine the various competing conceptualizations of ‘process’ and by doing so, expose their weaknesses and complacencies. Specifically, we demonstrate how current process methodologies anchored in a substantialist ontology, are hemmed in by their ontology while investigating dynamic behaviour. It is important to point and acknowledge that our selection is illustrative rather than exhaustive.

Majority of the research which subscribes to a process ontology, have been conceptual in nature with very little being said or written about its impact on the way empirical research is carried out (Van de Ven & Poole, 2005, p. 1390). This lack of conceptual clarity about a ‘strong’ process methodology could be one of the reasons for this dearth of empirical studies. The ‘ontological turn’ in process research suggests that process methodologies which influence the manner in which a researcher treats the stability of entities being analysed is an important question which needs exploring.
A review of the process methodologies.

The process methodologies described by early scholars like Pettigrew (1990); Leonard Barton (1990) and Van de Ven and Poole (1990, 1995) and Van de Ven (1992) can all be described synoptic methodologies designed to view process from the outside. By this we mean, processes are conceptualized as something occurring between two states. These early developments were important to shift the research focus measuring if, and not how, a change occurred in a variable measured at different points in time (Van de Ven, 1992, p. 170). However, process, here is conceptualised as the interaction between stable entities. The a priori assumption is of a world consisting of stable entities whose interaction constitutes processes and is thus labelled 'weak'. These methodologies have been useful only insofar as they have provided us with snapshots of the key dimensions of organizations at different points in time along with their trajectories (Tsoukas & Chia, 2002). The reliance on such a methodological approach oriented to generalize and abstract a phenomena into a concept always more or less deforms the property of the issue under investigation by the extension it gives to it (Bergson, 1912/1999, p. 29). Therefore, the knowledge generated by these approaches which view “change” from the outside typically takes the form of stage models in which the entity that undergoes change is shown to have distinct states at different points in time.

The other group of process methodologies rooted in a ‘substantialist’ ontology such as those used by Feldman (2000), Pentland (1995, 1999) and Barley (1990), originate within a ‘structuralist’ framework (Rasche & Chia, 2009), which looked for universal and ahistoric codes guiding action. Thus when such routines are abstracted from their context and labelled, the acts which sustained the ‘process’ are engulfed under the label. Such methodologies capture “lexical evolution” (new moves) and “syntactic evolution” (new patterns of existing moves), but the source of these changes would be exogenous to the model and thus elude it. (Pentland & Rueter, 1994).

A third group of process methodologies such as Weick (1995) and Chau and Witcher (2005) subscribe to a ‘process’ ontological reality where the act is made of verbs, “whereas the epistemological reality in which we make sense of things is made of nouns” (Bakken & Hernes, 2006, p. 1606). The onto-epistemological relationship between ‘acting’ and ‘sensemaking’ is for Weick, in a state of mutual tension, a kind of dialectical relationship.
As pointed out by Bakken and Hernes (Bakken & Hernes, 2006), and later acknowledged by Weick (2010), this dialectic tension vanishes when we shift our attention from nouns to nounmaking. It is this fourth version of process, where, reality manifests through the continuous interplay of verbs and nounmaking that we refer to as ‘strong’ process view. In other words, the apriori assumption is that of a world made up of processes in the making.

The Practice Turn in Organisation Studies

“The practice has a logic which is not that of the logician.” (Bourdieu, 1990, p. 86)

Theorists in management research have a penchant for attacking trackable rather than “relevant” problems (Weick, 1989). The propagation of theories emerging from this tradition led to management research being disconnected from studying real people, real problems and real organisations. The limited impact that such studies having on advancing management practice, is succinctly articulated by Siggelkow (2007, p. 23) when he wrote “If theory talks only to theory, the collective research exercise runs the danger of becoming entirely self-referential and out of touch with reality, of coming to be considered irrelevant.”

More recently, the dissatisfaction of “management theories’ capacity to be relevant to management practice” was expressed by Sandberg and Tsoukas (2011, p. 338). They suggest that the onto-epistemological assumptions interwoven into current research methodologies tend to “artificialize” the objects within the phenomena being investigated, stripping “out most of what matters” (Sandberg & Tsoukas, 2011, p. 339). Infusing a much needed dose of realism into academic theorizing to bridge the gap between the formal knowledge produced by management scholars and the applied knowledge practitioners need (Van de Ven, 2007); witnessed the growth of the ‘practice turn’ (see Wittington, 1996,2003,2006 and Jarzabkowski, 2003).

Process theory with its capacity to combine rich theory with rich data to create rich knowledge is seen as integral to this ‘practice turn’ in organizational research. In this section, we show why current research methodologies deployed to study organizing processes
pertaining to the issue being investigated, itself requires adapting and adjustment to uncover the contextual and hidden characteristics of organizational becoming. Specifically, we argue that data gathering in the dominant ‘building’ mode orientation of current ‘weak’ process methodologies tend to configures actors (whether individual or organizational) as distinct entities deliberately engaging in purposeful activities; thereby overlooking or mis-representing a more residual ‘dwelling’ mode in which actions emerge non deliberately through everyday practical coping (Chia & Holt, 2006). Understanding the Heideggerian (1926/1962) distinction between the ‘building perspective’ where individuals pre-exist their engagement with the world and that worlds pre-exist before they are lived in and the ‘dwelling perspective’ in which we are so intimately involved with the world that it is not perceived as an object we apprehend but an extension of us; is vital to understand the practice of process research from which we develop our organization theories.

‘Weak’ process methodologies such as those deployed by Pettigrew (1990), Van de Ven and Poole (1990), and Langley (1999); adopt an independent observer-oriented mode of engagement which we, following Heidegger, call ‘building’. Empirical contributions using a process methodology are often based on what people say they do or have done (Paroutis & Pettigrew, 2007), (Van de Ven, et al., 1999), (Leonard-Barton, 1990); a mostly beatific vision of accounts, rather than on a direct observation of styles of engagement. Other empirical strategies deployed are attending strategy meetings as a guest (Jarzabkowski, et al., 2007), (Van de Ven, et al., 1999), interviews (Paroutis & Pettigrew, 2007), practitioner diaries (Balogun & Johnson, 2005) and tracking data from online message boards (Carrol & Simpson, 2012). These methods rely on reported accounts and thus make it hard to understand and unravel the tacit and deeply embedded contextual-contingent nature of organizing processes at play. The texts they study are mostly “past-participled, hindsighted, stilled, closed” (Dening, 1996, p. 17). Theorizing in these approaches glosses over much of the plurality of possibilities of what might have happened, to the unity of what happened, thus stripping away the temporal reality of practice.

In these methodologies, it is supposed that there is an initial separation between the perceiver and the world, such that the perceiver has to first construct mental representations and models of the world prior to any meaningful engagement with it (Ingold, 2000, p. 178). This can be contrasted with the ‘dwelling mode’ of engagement, which we argue is more coherent with a ‘strong’ process methodology. In the ‘dwelling mode’, the researcher engages in iterative ‘wayfinding’ (Chia & Holt, 2009) by tracing chance incidents, noticing peripheral
happenings, acknowledging dispersive serendipity and unintended consequences, all of which manifest in the unfolding pathways traced by issues being tracked. To quote Ingold (2000, p. 155), the researchers ‘feel their way through a world that is itself in motion, continually coming into being through the combined action of human and non-human agencies’. Such an autopoetic dwelling mode, is a necessity in ‘strong’ process methodologies where the generative property of richness (Weick, 2007), is evoked through the ‘coming-into-being’ of the actors who are a ‘part and parcel of the process of coming-into-being of the world’ (Ingold, 2000, p. 168).

Research design in ‘building mode’ tend to be chronological in orientation, macro, embedded with a rational and focused ‘state’ logic. A ‘strong’ process methodology in the ‘dwelling mode’ on the other hand requires an orientation that is open, pragmatic, dispersive, and opportunity seeking. ‘Weak’ process methodology in the ‘building’ mode of engagement embraces a state logic. ‘Strong’ process methodology, grounded in the ‘dwelling’ is guided by a ‘nomadic’ logic which “situates itself within the milieu of practices and responds to the exigencies of situations through a reliance on an internally cultivated habitus or style” (Chia, 2004, p. 33). Adopting a particular perspective can have profound impact on the design and execution of a process research methodology. Research outputs in a ‘building’ mode can at best generate a spectator theory of knowledge: a bouquet of abstract concepts which are, as flowers gathered, “only moments dipped out from the streams of time, snap-shots taken, as by a kinetoscopic camera, at a life that in its original coming is continuous” (James, 1909/2011, p. 78). Such a methodological orientation, as Bourdieu so poignantly expresses, ‘lets slip everything that makes the temporal reality of practice in process…” (1990, p. 80). Research situated in the dwelling mode on the other hand is based within a framework of “practical rationality” (Sandberg & Tsoukas, 2011, p. 339), a practical logic that is internally coherent and plausible to the world of practitioners, that does not require “practice to speak itself in a language foreign to its application” (Chia, 2004, p. 33).

A Typology of Process Methodological Approaches

Based on the discussion above, we arrive at a typology which allows us to classify process research methodologies into one of the four quadrants (see figure 1 below):
Quadrant I: The ‘substantialist-building’ mode is populated by theorists whose methodologies are oriented towards assuming a ‘state’ like logic capturing organizational snap shots of the evolving issue. The ‘logic’ abstracted from the generated theory can be considered as generalizable. This quadrant includes works of theorists like Pettigrew (1990); Leonard Barton (1990) and Van de Ven and Poole (1990,1995) and Van de Ven (1992), Langley (1999), and Fox-Wolfgramm (1997).

Quadrant II: The ‘substantialist-dwelling’ mode has theorists like Mintzberg (1979), Pentland (1995,1999); and Barley (1990) who are actually concerned with the evolution of the issues within a context which is assumed to pre-exist and therefore unproblematic. The theories tend to be ‘conceptually’ generalizable. In order words, the concepts since they are abstracted from concrete data tend to hold good in similar contexts or for similar issues. Since only the “surface structure” is captured in their observations, any explanation that relies on

Figure 1

A Typology of Process Research Methodologies

Note: This list is for illustrative purposes only and must not be misconstrued as exhaustive.

abstracted from concrete data tend to hold good in similar contexts or for similar issues. Since only the “surface structure” is captured in their observations, any explanation that relies on
these prototypical process constructs requires “careful attention to the connections of surface and deep structure” (Pentland, 1999, p. 719). Put differently, because of their theoretical orientation, such methodologies are pre-disposed to give up some of their rich insights, modulation and complexity in order to remain workable.

**Quadrant III:** The ‘process –dwelling’ mode is nascent and has little empirical research undertaken till date. Recent research by Griesbach and Grand (2013), fits this bill. The outputs from this quadrant are ‘heuristically’ generalizable. In other words, such research generally attempts to generate outputs which represent the ‘meta-analysis’ of the issue under investigation and so provides a complex but detailed understanding of the issues in a specific context. It is oriented to account for the variousness, possibilities, complexities and difficulty which inform, transform and are transformed by the human activity of ‘organizing’. However, there is a lack of methodological guidance for this type of research and most studies alluding to this quadrant remain conceptual.

**Quadrant IV:** The ‘process-building’ mode, though processual, like Weick (1989), Orton (1997), and Chau and Witcher (2005), and capable of probing counter-intuitive insights from the issues being investigated must suffer the contradiction of reifying their ‘meta-insights’ into reified “conceptually” generalizable notions which gnaws away their some of their significance. In other words, while methodologies in this quadrant do not depreciate ‘process’ in the abstract and infuses it with variousness and possibility, in its manifestation the conscious and unconscious life of processes are not always in accord.

We acknowledge that our typology is nebulous and could benefit from further insights and analysis. Such a refinement, in addition to ‘sand-papering’ away at some of the coarseness existing in the current conceptualization of process would then, also accommodate the two competing typologies in process studies put forth by Van de Ven and Poole (2005) and Hernes and Weik (2007). Given the dearth of methodologies in quadrant three, in the next section, we propose developing a new methodology which we call *in situ reflexive probing*.

**‘In Situ Reflexive Probing’ – A Sketch**

*In situ reflexive probing* is a methodology for researchers interested in operationalizing ‘strong’ process research in which they can act reflexively to foreground organizing
processes, especially when they conduct their empirical work. ‘In situ reflexive probing’ combines the data gathering skills of an evolutionary biologist along with the data analyses skills of a historian (Poole & Van de Ven, 2010, p. 543), for researching organizing processes. It is a methodology which seeks to overcome the limitations of scientific rationality which is pre disposed towards underestimating “the meaningful totality into which practitioners are immersed”, ignoring the situational uniqueness in which action takes place and stripping away the temporal experiences of practitioners immersed in the issue under study (Sandberg & Tsoukas, 2011, p. 341).

A deconstruction of the phrase ‘in-situ reflexive probing’ aptly captures the essence of the methodology. ‘In situ’ refers to the situatedness of the researcher within the empirical flux of the complex social phenomena being investigated. This situatedness is of paramount importance because the researcher has to develop an intellectual sympathy while following the ‘action’ as it unfolds in real time, and not merely capture retrospective data on the issue by attending monthly meetings or interviewing individuals. This real time aspect allows researchers to keep a record of the possibilities, dilemmas, incoherence and contradictions discussed (for later reflection) and decisions taken throughout the data gathering period. Probing refers to soliciting information from multiple sources which include archival records and documents, interviews and ethnography all of which are important to comprehending the ‘becoming’ of an organizational situation. This is required to counteract the limitations of theories which ‘fix in space and separate in time’. The theorizing is tempered by ‘reflexivity’ which brings plausibility and rigour into the theorizing process. Being reflexive allows researchers to explore ‘equivocality’ and the inherent ambiguity of what happens in the theorizing process.

Doing in situ reflexive probing requires researchers to embrace the dialectic of indepth ethnographic research which oscillates between involvement and distance, moving from direct immersion in the life worlds of practitioners to the theoretical distancing needed to cleanse him or herself of the apparent neat coherence of ‘native-accounts’ (Bourdieu, 1990). In short, in situ reflexive probing requires researchers to focus less on stand-alone entities and more on exploring the inter-relatedness between actors and objects that manifest in the form of familiar practices for dealing with an in situ ‘becoming’ reality.
To paraphrase Bateson, if “[t]he if…then of causality contains time”, then how can the “if…then of logic” be timeless? (Bateson, 1979, p. 63). Time and temporality are fundamental issues to be considered while designing any process research methodology. Since the objective of a process study is to explicate the logic of how and why an issue unfolds over time, assumptions regarding temporality must be made explicit in the design of the methodology. Data gathering for the real time study must be carried out chronologically where the researcher can use a variety of data collection methods. Field notes ought to be maintained and the data gathering can be supplemented by attending, observing and recording regularly scheduled meetings of the management team, administrative review meetings, and interviewing project team members who tackle the issue being investigated as it unfolds over time.

Here, it is important to stress on a valuable clarification made by Van de Ven and Poole (1990) differentiating an incident (a raw datum) and an event (a theoretical construct). In other words, “an incident is an empirical observation, an event is not directly observed; it is a conceptual construct in a model that explains the pattern of incidents. For each event, one can choose any number of incidents as indicators that event has happened” (Van de Ven & Poole, 1990, p. 319). *In situ reflexive probing* allows researchers to track the translation of incidents into events along with the additional advantage of tracking “sensemaking” which captures the evolving responses of the actors to “what’s the story?” (Weick, et al., 2005, p. 409).

The French author and aviator Saint Exupery, once stated “the time which adds something new is by no means the same as the time which spreads itself out” (quoted in de Rosney (1970)). This suggests that issues pertaining to time and process data during data analysis are better dealt with in a synchronic, diachronic and parallel way (Barley, 1990). Though it is tempting to consider synchronic, diachronic and parallel process analysis as synonymous with “cross-sectional”, “longitudinal” and “comparative” analysis, doing so would ignore the crucial process perspective in research. Synchronous and parallel analysis deals with a chronological account of the interplay between various inter and inta organizing processes impacting the issue under study. Though diachronous and longitudinal analyses refer to chronological adaptation, “the latter does not have the former’s evolutionary connotation.” (Barley, 1990, p. 224). This distinction is vital to analyse transformations of action rather than merely identify and examine historical trends.
Data Gathering: Evolutionary Biologist Mode

Data gathering in the evolutionary biologist mode allows researchers to gain empirical access to the issue being investigated by inspecting and following the evolution of incidences into events. This is quite different from the commonly prevalent 'weak' process approach which tends to arrange abstract entities into unified patterns. Rigid frameworks which facilitate, cross case comparisons (Eisenhardt & Graebner, 2007) or those used in ‘weak’ process theories like those used in the “Methods For Studying Innovation Development In The Minnesota Innovation Research Program” (Van de Ven & Poole, 1990), are quite self-defeating exercises for this approach which requires the application of a modest kind of sociology where certainty is not assumed but that, to the best of its ability, pursues uncertainty, cautiously untangling an otherwise tangled world (Hernes, 2007, p. xviii).

In situ research is guided as much from drift as design and trails that go dead when probing are perhaps far more than the ones that do not. This therefore calls for a combination of ‘disciplined imagination’ (Weick, 1989) and the kind of detective work (Mintzberg, 1979), which requires the researcher to probe for illuminating speculation, peripheral occurrences, capture the present in all its possibilities and incoherence, note and pursue nebulous rival yet to be validated hypothesis and might-have-beens, all of which requires a healthy measure of creativity. This detective work, unlike Tsoukas (1989, p. 556), we insist is a necessary ingredient during the data gathering phase of in situ reflexive probing and cannot be pejoratively dismissed. However, we concur with him (Tsoukas, 1989, p. 556) when he insists that this sort of “synthetic reasoning” alone cannot serve as a sufficient condition to make plausible knowledge claims.

Abduction or Retroduction in data gathering

Data gathering in 'in situ reflexive probing' is guided by abduction or retroduction (Peirce, 1955), whereby theories are used to guide observations that further specifies the theory (Poole, et al., 2000, pp. 115-117). This is very different from the ‘analytical induction’
technique in grounded theory (Strauss & Corbin, 1998, p. 137). In order to understand this
distinction between an abductive and inductive orientation, it is worth quoting Pierce:

"Abduction makes its start from the fact, without, at the outset, having any particular theory
in view, though it is motivated by the feeling that a theory is needed to explain the surprising
facts. Induction makes its start from a hypothesis which seems to recommend itself, without
at the outset having any particular facts in view, though it feels the need of facts to support
the theory. Abduction seeks theory. Induction seeks facts. In abduction consideration of the
facts suggests the hypothesis. In induction the study of the hypothesis suggests the
experiments which bring to light the very facts to which the hypothesis had pointed.” (quoted

As can be inferred, premature alignment to theories, restricts the trails a researcher would
pursue closing down the possibility to find surprising ‘facts’. Since ‘strong’ process research
requires going beyond a surface description, to pierce the logic behind the observed temporal
progressions of the issue being investigated, an abductive style of reasoning which can
accommodate plurality is more conducive. This abductive style facilitates the required
dialectic between “discipline” in theorizing which comes from consistent application of
selection criteria to trial and error thinking and the “imagination” in theorizing which comes
from the deliberate diversity introduced into the problem statements through trials, and
selection criteria that comprise that thinking (Weick, 1989).

Data sources

Research methods used ‘in situ reflexive probing’ must have the twin capacity to sufficiently
respect both the primacy of theory and the primacy of evidence (Van Maanen, et al.,
2007). The key to data gathering are methods which can cope with multiple time scales and
can identify and test temporal linkages between incidents, events and also overall temporal
patterns (Langley, 1999). While the primary data source should be field notes described by
Van Maanen (1988) as an on-going stream of consciousness commentary about what is
happening in the research, involving both observation and analysis – preferably separated
from one another. The goal of the ethnographic approach is to capture as much information
possible on organizational becoming. This can be supplemented with a localist style of
interviewing which emphasizes that interview statements must be seen in their social context. An interview is an empirical situation that can be studied as such, and it should not be treated as a tool for collecting data on something existing outside this empirical situation (Alvesson, 2003, p. 16). A useful data gathering strategy for this methodology is to serve within an organization as a project archivist for a significant duration of the issue being researched. Doing so would allow the researcher the unfettered access required to gather data which can then be used to make a detailed study. Additionally, since the past is alive in the present, influencing but not determining the future, collecting and recording historical documents we can find, like annual reports, project records, etc can help develop a thorough chronology for studying the evolution of organising processes.

Data Analyses: Historian’s mode

If the objective of gathering data in an evolutionary biologist mode is to facilitate “synthetic” reasoning: reasoning from a set of events to their consequences, data analyses in the historian mode is to trigger “analytical” reasoning: reasoning backwards from the results to their causes (Truzzi, 1983, p. 65). If only “synthetic” reasoning were used, then the “other”, comes to be neglected. Process research methodologies lacking the ethnographic element discussed rely on a few outstanding ‘facts’, contributed by the participating members, mostly top management teams within firms, ignoring the “trifles”. This approach is vulnerable to the premature adoption of a hypothesis which later on refuses to consider data that do not support their positions. As Sherlock Holmes puts it in The Boscombe Valley Mystery, “There is nothing more deceptive than an obvious fact” (Sebeok & Sebeok, 1983, p. 23).

The historian Carr supports this view when he writes: ‘When you read a work of history, always listen out for the buzzing. If you can detect none, either you are tone deaf or your historian is a dull dog. The facts are really not at all like fish on the fishmonger's slab. They are like fish swimming about in a vast and sometimes inaccessible ocean; and what the historian catches will depend partly on chance, but mainly on what part of the ocean he chooses to fish in and what tackle he chooses to use – these two factors being, of course, determined by the kind of fish he wants to catch. By and large, the historian will get the kind of facts he wants. History means interpretation.’ (Carr, 1961, p. 12). It is this immersion into
the lived data gathered, which allows for rich insights. The task cut out for an *in situ reflexive prober* in the historian’s mode is well expressed by the historian Greg Dening when he writes “The energies of historical enquirers are focussed on discovering what that one possibility was. But by that we have not re-presented the past. To do that we have to enter into the experience of those actors in the past who, like us, experience a present as if all the possibilities are still there. If a historian’s ambition is to describe how people actually experienced their lives, then that historian has to slough off many certainties. To give back to the past its present, one has to be a little humble about what one can know” (Dening, 1996, pp. xv-vvi). It is this act of penetrating “the experience of those actors” that is indispensable for cultivating the required “*intellectual sympathy*”.

**Presenting it**

Just as surveys contain indicators for the underlying constructs in a variance theory, narrative text contains indicators for an underlying process theory (Pentland, 1999, p. 711). Given the rich complexity of the data and its tendency to spread in time and space, narratives offer a natural medium for articulating process data. Narratives that contain ‘thick descriptions’ (Geertz, 1983), are not merely detailed observations but powerful reconstructions of the empirical. Jeffery Alexander offers a valuable clarification on ‘thick descriptions’ when he writes: “Waving the Geertzian flag of ‘thick description’, the cultural approach in social science is often equated simply with close and minute observation, with listening, with a kind of sensitive and conscientious academic journalism. But this is decidedly what thickness is not. The description is thick, in a Geertz’s sense, when it is analytically informed and culturally contextualized. It is thick because deep meanings are ‘always already there’ before any observation or social scientific account” (Alexander, 2008, p. 159). The challenge of presenting how, when, where and why certain organizing processes influence the dynamic behaviour of the issue under analyses can be countered by ‘[h]opping back and forth between the whole conceived through the parts that actualize it and the parts conceived through the whole that motivates them, we seek to turn them, by a sort of intellectual perpetual motion, into explications of one another’ (Geertz, 1983, p. 69). A combination of judicious use of evidence, fresh conceptual framing of issues and clear writing which is lucid and engaging, seldom fail to offer up a number of critical, ironic insights into the organizing processes being
studied. The aim of the narrative is not unlike the postcards of paintings sold in museum art shops. Weick puts it well when he writes, “The postcard essentially alerts you to features of the painting you might otherwise have overlooked. The imperfect reproduction serves as a clue to sites where the artist’s genius is more evident” (Weick, 2007, p. 17).

When is it useful

Methodologically, ‘in situ reflexive probing’ we believe is most effective when it is deployed to simultaneously destabilize and reconstruct theories. To destabilize means to “hold theories intellectually accountable by problematizing the conditions and consequences of their formation: the rationality, truth, and progress claimed by particular theories are exposed as myth” (Alvesson, et al., 2008, p. 486). To reconstruct, means to “open up new avenues, paths, and lines of interpretation to produce ‘better’ research ethically, politically, empirically, and theoretically” (Alvesson, et al., 2008, p. 495). Alvesson et al (2008, p. 494), expresses the role of destabilizing practices well when they write: "By emphasizing how social science orders the world in a particular way, power, knowledge connections are illuminated and truth-creating effects are disarmed. These practices are conducted in attempts to counteract harm – to challenge efforts to stabilize the view of the world in a particular way and expose the un-reflexive reproduction of dominant vocabularies, rules or conventions in social research". In situ reflexive probing aims to render an account of what resonates with experience, where existing language obfuscates such an account.

Reflexivity is inserted into ‘in situ probing’ by introducing two distinct but intertwining strands of reflexivity, namely 'D-reflexivity' and 'R-reflexivity'. ‘D-Reflexivity’, "stands for deconstruction, defence, declaiming, destabilizing and danger warning"; and 'R-reflexivity', where " R refers to reconstruction, reframing, reclaiming and re-presentation" (Alvesson, et al., 2008, p. 494). ‘In situ reflexive probing’ by accommodating the dialectic tension between D-reflexivity and R-reflexivity, aids the theorizing process by allowing the researcher to move “between tearing down – pointing at the weakness of the text and disarming truth claims – and then developing something new or different, where the anxieties of offering positive knowledge do not hold the researcher back" (Alversson et al., 2008, p.495).
Distinction from Grounded Theory and ethno-methodology

The table below summarizes the main difference of ‘in situ reflexive probing’ from grounded theory and ethno-methodology.

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>In situ Reflexive Probing</th>
<th>Grounded Theory</th>
<th>Ethno-methodology</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary empirical material gathered</td>
<td>incident</td>
<td>Event/incident</td>
<td>Event/incident</td>
</tr>
<tr>
<td>Temporal Duration</td>
<td>Time for an instance of the entire issue under investigation to play out</td>
<td>Theoretical saturation</td>
<td>Conceptual saturation</td>
</tr>
<tr>
<td>Observation guide</td>
<td>Abduction</td>
<td>Analytical induction</td>
<td>induction</td>
</tr>
<tr>
<td>Reasoning</td>
<td>Synthetic + Analytic</td>
<td>Analytic</td>
<td>Synthetic</td>
</tr>
<tr>
<td>Reflexivity</td>
<td>D+R reflexivity</td>
<td>R reflexivity</td>
<td>R-reflexivity</td>
</tr>
</tbody>
</table>

Table 1

Limitations

In situ reflexive probing is a time intensive activity which requires significant researcher commitment and unfettered organizational access, which few researchers have achieved to date. The multiple pressures to teach, publish, attend conference whilst in the academia impose significant constraints on the time available to undertake this kind of research. But, this alone should not be an excuse to not get ones’ hand ‘dirty’ with fieldwork. The possibilities offered by going ‘in situ’, we argue, is necessary to allow for a richer mode of theorizing packed with cascading micro-insights which offer a refreshing counterpoint to the thin, abstract, indigent, and threadbare appearance, which most substantialist theories present.

One reason hindering organizational access has been the researchers inability to seldom place themselves into the manager’s frame of reference, while they conduct their studies (Van de Ven, 1992, p. 181). In situ reflexive probing seeks to address this issue by embracing a practical rationality framework which collects and analyses the applied knowledge
practitioners need. This orientation could facilitate the interplay of knowledge required to simultaneously enrich both management theory and practice.

To undertake, in situ reflexive probing means that theorists would inevitably be restricted to a single site of study. Critics may question about insights from a ‘mere case’. Van Maanen puts it well when he writes "The smart-ass but wise answer to this hackneyed but commonplace question is ‘all we can’" (Van Maanen, 2011, p. 227). By this, what he means is that the insights from such a detailed exercise must be seen as what Sandberg and Tsoukas (2011, p. 353) call “heuristic generalizations... built on concepts abstracted from concrete data”, which allow practitioners and theorists to think analogically and see the extent to which current conceptual formulations help them understand a situated issue. The point of in situ reflexive probing is to redress our current conception of organizing processes with close and detailed studies. It can indeed shines a light, "sometimes a very strange one on what people are up to and such doings are rarely if ever predictable or in line with what either ‘current theory’ or ‘the experts’ might say" (Van Maanen, 2011, p. 229).

**Conclusions**

In this paper, we have undertaken a detailed review of the dominant process methodologies in organization studies. We did this by comparing and contrasting these methodologies by explicating their ontological and ‘practice’ assumptions. We have then organized these methodologies to develop a typology of process research methodologies. This typology helps clarify and accentuate the difference between a ‘weak’ and a ‘strong’ process methodology and highlight a dearth of ‘strong’ process methodologies to aid empirical investigation of organizing processes. We address this gap by sketching out ‘in situ reflexive probing’ as a ‘strong’ process methodology. We believe that such a conceptual reorientation offers the possibility of a deeper level of explanation regarding the nature of organizing processes sustaining organizations because it focuses research attention on the situated social practices that are enacted and re-enacted by the primacy of ‘organizing’.

In 1990, Peter Monge (p. 409), writing on longitudinal field research methods for studying organizational processes, posed the question: “What form would knowledge eventually take
if organizational scholars were able to create valid scientific theories of dynamic processes in human organizations?” The earnestness of the question notwithstanding, now, in 2013, more than two decades since Monge posed his question, ‘process approaches continue to be seen as ‘“just entering” the field’ (Hernes, et al., 2013, p. 1). To paraphrase Max Weber, ‘weak’ process methodologies have and can continue to serve “as a harbour until one has learned to navigate safely in the vast sea of empirical facts” (Weber, 1949, p. 355). It is our hope that our clarification and reconceptualization of ‘process-dwelling onto-epistemology’ combined with ‘in-situ reflexive probing’ would nudge process research in a more ‘processual’ direction; allowing researchers to capture and excavate richer and more meaningful insights within the organizations they study. Doing so, we believe, not only advances our knowledge about organizational issues but also informs and advances management practice by making it intelligible to practitioners in meaningful ways.

References


