The process of casing in business studies - the impact of researcher's sense-making

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Abstract
Case studies are commonly used research tactics but despite of that, the definition and creation of a case is unclear. Research is often described as a linear process in which the definition of a case precedes the actual data collection. In reality, case research is not a linear process. Casing, referring to a process of making something into case, has been suggested as a research tactic as the relevance of a case may not necessarily be known prior to the study and process of casing may be the primary and most important finding of the investigation. In this research the process of casing is linked to sense-making discussion. The sense-making of researchers is a central component when moving from overwhelming and rich data towards obtaining a theoretical understanding. Thus, this research highlights the research tactic of casing and describes how the simultaneous data collection, data analysis, and literature review, along with the researcher's own sense-making, creates the case.

INTRODUCTION

Case studies are commonly used research tactics in business studies and also in social sciences as a whole. The concept of a case is a basic feature in social science, but despite of that, the definition and creation of a case is unclear (Ragin, 1992). Research is often described as a linear process in which the definition of a case precedes the actual data collection. In reality, case research is not a linear process, and a standardized conceptualization of the research process consisting of a number of planned subsequent “phases” does not reflect the potential uses and advantages of case research (Dubois & Gadde, 2002). When evaluating qualitative case studies we are left at wonder whether linear and straightforward reporting prohibits researcher to tell what actually has been done and what has been learnt from it?

Previous research (see e.g., Gibbert, Ruigrok, & Wicki, 2008; Gibbert & Ruigrok, 2010) has pointed the need for methodologically rigorous case studies that take into account the criteria of validity and reliability. However, these classic criteria have been criticized, as they originate from quantitative research and have only partially been adapted to fit qualitative research (Eriksson & Kovalainen, 2008: 291). The meanings of these criteria differ in quantitative and qualitative research settings. The traditional criteria are based on the assumption that the research has access to objective reality and truth (Lincoln & Guba, 1985). Qualitative researchers and literature are divided in their opinion of whether the accuracy of qualitative research can be evaluated using validity and reliability as criteria (Eriksson & Kovalainen, 2008: 292; Eskola & Suoranta, 2001: 211). For example, Andersen and Skaates (2004: 465) state that the concepts of reliability and validity are always useful because they have been widely used in qualitative studies and because there are not yet any generally accepted alternatives for them. Eriksson and Kovalainen (2008: 294) suggest that especially in case studies that rely on relativist ontology and subjectivist epistemology, the previously mentioned classical criteria should be replaced with evaluation criteria that are developed to better accommodate these philosophical starting points. In fact, Lincoln and Guba (1985: 300) propose that credibility, transferability, dependability and confirmability are the equivalents of the conventional terms of internal validity, external validity, reliability and objectivity (see also Miles & Huberman 1994).

Nevertheless, the evaluation of research is important criteria when discussing of rigor research. The discussion of research quality often includes inherent assumption that research should be linear and planned beforehand. However, at the same time the inherent flexibility of case research should thus be encouraged and actively pursued (Dubois & Araujo, 2007). As noted in previous literature (Dubois & Araujo, 2007), the relevance of a case may not necessarily be known prior to the study, and cases may be revealed to be relevant for reasons not known in the beginning of the research process, which creates the contradiction: writing a linear narrative is not consistent with the actual disorganized research procedure.

This research highlights the research tactic of casing and describes how the simultaneous data collection, data analysis, and literature review, along with the researcher’s own sense-making, creates the case. Casing can be defined as a single methodological step occurring at any phase of the research process but most often either at the beginning or end of the research process (Ragin, 1992). Qualitative studies are nowadays often described as abductive, instead of describing them inductive, thus highlighting the processual nature of research and dialogue existing between empirical data and theoretical discussions. Despite of that authors often are not precise in explaining how the research process has been abductive (see Dubois & Gibbert, 2010; Järvensivu & Törnroos, 2010).

Hence, in this research, the abstract and broad concept of casing is demonstrated by providing an illustrative example of how the case is created in relation to the data collection and analysis. By describing this process in detail and including concrete examples of the casing process, this paper offers valuable insight into the making qualitative research and reveals the process that is often left unexplained.

THEORETICAL BACKGROUND

Case research in business studies

Qualitative case studies can be used for creating new understanding of the complex phenomenon in a complicated, cross-cultural research setting (Marschan-Piekkari & Welch, 2004: 7-8). According to the abstract definition by Miles and Huberman (1994: 25), a case is a phenomenon that occurs in a bounded context. Advantages of case studies include the inherent flexibility of the method, which is suitable for the study of complex, evolving relationships and interactions in industrial markets (Beverland & Lindgreen, 2010). Therefore, industrial marketing research is characterized by the use of qualitative case studies to build theory (Beverland & Lindgreen, 2010; Dubois & Gadde, 2002). A case study can be regarded as both the process of learning and the product of learning (Ghauri, 2004: 109). Case studies provide unique means of developing theory by utilizing in-depth insights of empirical phenomena and their context (Dubois & Gadde, 2002). In social sciences and especially in research focusing on international contexts, in which theories are sensitive to diverse national contexts, researchers confront the epistemological dilemma of how to develop robust explanations for phenomena in a social context (Welch, Piekkari, Plakoyiannaki, & Paavilainen-Mäntymäki, 2011).

Qualitative research attempts to understand the meanings and beliefs behind actions and can thus offer answers to complex and tricky problems that are especially typical in international management research (Marschan-Piekkari & Welch, 2004: 7-8). The case study method can involve either single or multiple case studies (Yin, 1994: 14) and can include different levels of analysis. A case study consists of detailed descriptions, and contextual descriptions are necessary for understanding. One characteristic of a case is that it focuses on a bounded system (bounded by time and place) through detailed data collection involving multiple sources of information (Beverland & Lindgreen, 2010). As case studies are always discussed in relation to contextual issues, and the boundaries between case and context are not always clear (Yin, 1994: 39-40).

Multiple case studies should not be favored over a single case study simply because some researchers believe that multiple case studies to create some degree of statistical significance (Dubois & Gadde, 2002). Learning from a specific case (conditioned by the environmental context) should be considered as a strength rather than a weakness (Dubois & Gadde, 2002). The interaction between a phenomenon and its context is best understood through in-depth case studies.

The process of casing

The process of casing may be the primary and most important finding of the investigation (Dubois & Araujo, 2007; Stake, 1995). Casing can be defined as a process of making something into case and can be viewed as a methodological step that can occur at any phase of the research process (but typically at the beginning and end of the project) (Ragin, 1992: 218). Case selection is needed at the beginning of the research process, but as the understanding of the phenomenon increases, the framing of the case can change (Dubois & Araujo, 2007). The justification for case selection and an explanation of why it deserves the attention of readers are necessary (Dubois & Araujo, 2007; Ragin, 1992: 217).

Casing requires an iterative process between theoretical and empirical choices, including reconsideration of the focus of the case study as the focus changes during the study (Dubois & Araujo, 2007). The notion of alternating between theory and empirical phenomena is a recurring theme of qualitative methods (Dubois & Gibbert, 2010). By constantly shifting attention from one type of research activity to another and between empirical observations and theory, a researcher is able to expand his or her understanding of both theory and empirical phenomena (Dubois & Gadde, 2002).

Thus, casing is closely connected to the abductive approach. In this study, the chosen methodology follows abductive research logic, which means that the theoretical framework evolves simultaneously and interactively with empirical observations, which combine to develop theory (Dubois & Gibbert, 2010). The redirecting of the case study is also part of the research process. Pure induction or pure deduction is not sufficient when focusing on in-depth case studies; rather, understanding is created by combining these two perspectives (Langley, 1999; Perry, 1998). The abductive approach is particularly useful for the development of new theories (Dubois & Gadde, 2002). However, merely referring to a research process as abductive or discussing the meaning of casing is not sufficient. Researchers confront the need to be more precise in terms of how a research process is abductive and to depict the different phases of the research process (Dubois & Gibbert, 2010).

Using researcher’s sense-making in defining the case

The roots of sense-making are in social sciences and the literature has been heavily affected by the work of Weick (1995). Weick *et al.* (2005) discuss sense-making by seeking an answer to the question “what is the story?”. In the changing world organizations need to understand – or *make sense* of – the market and the changes that are occurring is crucial for success. *Sense* refers to the idea that the social world is constructed of how people view and speak of the world (Gephart, Topal, & Zhang, 2010, 281). Sense-making activities are especially critical in dynamic environments, “where the need to create and maintain coherent understandings that sustain relationships and enable collective action is especially important” (Maitlis, 2005).

To make sense of organizational events, actors tell stories about events and assign meanings to these events (Näslund & Pemer, 2012). However, sense-making is viewed as a wider term than stories, as the former refers to the process through which people interpret the world and construct meaning (Weick, 2012). Stories and narratives are still used by organizations to construct and re-construct themselves (Näslund & Pemer, 2012) and same applies also to researchers, who are constructing shared understanding and aiming for theory building. Both managers and researchers create their own understanding through sense-making (Möller, 2010).

The qualitative research process is defined through various activities: first, the researcher approaches the world with certain ideas; with a framework (theory, ontology) that specifies a set of questions (epistemology), which are then examined in a chosen manner (methodology analysis) (Denzin & Lincoln, 2000: 18). Constructionism is interested in how people, as individuals or as groups, interpret and understand social events and settings (Crotty, 1998: 43; Eriksson & Kovalainen, 2008: 19). The aim of inquiry in constructionism is to understand the constructions that people hold (Guba & Lincoln, 1994: 112-113). In the moderate form of constructionism the truth exists as dialogue, critique and consensus in different communities and the aim of the research is to create new, usable knowledge through these multiple perspectives of the truth (Järvensivu & Törnroos, 2010). According to moderate constructionism there may be multiple truths and those multiple perspectives of reality that different communities have are focus of interest (see Järvensivu & Törnroos, 2010).

The ontological assumption that is often connected to constructionism is relativism (Guba & Lincoln, 1994: 109). This research exploits the idea of relativism, which claims that realities are understandable in the form of socially and experientially based mental constructions and that the elements of realities are shared among individuals and even across cultures (Guba & Lincoln, 1994: 110). The underlying assumption here is that there are multiple, sometimes conflicting social realities based on human experience and that the form and content of reality are thus dependent on individual persons or groups holding the constructions (Guba & Lincoln, 1994: 110-111). These mental models may change as their constructors become more informed and sophisticated (Guba & Lincoln, 1994: 111). The idea of relativism can thus be connected to the sense-making discussion.

According to subjectivist epistemology, knowledge is personal and dependent on individuals (Guba & Lincoln, 1994: 111) and researchers and interviewees create understanding together (Denzin & Lincoln, 2000: 21; Lincoln & Guba, 1985: 334), which reveals an additional link to the sense-making discussion (see also Järvensivu & Törnroos, 2010). Previous research (see Langley, 1999) has approached sense-making by discussing how researchers make sense when conducting process research. The sense-making of researchers is a central component when moving from overwhelming and rich data to obtaining a theoretical understanding that “does not betray the richness, dynamism and complexity of the data but that is understandable and potentially useful for others”.

Sense-making has been defined in previous literature (Weick, 1995: 4-5) as attempts to structure the unknown, enabling individuals to comprehend, understand, explain, attribute and predict events and actions and this is thus closely connected to process research, which strives to understand how things evolve and why they evolve in this manner; therefore, process data largely consist of stories about what occurred and who did what when – events, activities and choices over time (Langley, 1999). Van de Ven (1992) defines a process as a sequence of events that describe how things change over time. The time perspective that is used in this research is retrospective, stemming from the retrospective nature of sense-making. Although process data focuses on events, they are composed of not only descriptions of discrete events but also a variety of other types of information, which naturally increases the complexity of the analysis and interpretation (Langley, 1999). The complexity of process data is a reflection of the complexity of the organizational phenomenon (Langley, 1999).

Traditionally case studies utilize inductive theory building, but other methods of theorizing would enhance the explanatory power of case studies and their potential for contextualization (Welch et al., 2011). According to authors, interpretive sense-making is based on a constructionist philosophical orientation, and the case study outcome is used to understand the subjective experiences of various actors. The idea of describing case studies as interpretative sense-making stems from social sciences, where the objective is to understand rather than generate law-like explanations (Welch et al., 2011). Central idea in interpretive sense-making is emphasizing the uniqueness, where research subjects give meaning to their own behavior and researchers are part of the world they study (Welch et al., 2011), and thus researchers are creating the difference between "case studies seeking to identify cause and effect relationships and those seeking understanding of human experience".

The goal of case studies is particularization, referring to understanding the uniqueness of the case in its entirety (Stake, 1995). When emphasizing uniqueness and thick descriptions, the goal of research is differentiated from those seeking generalization. According to Stake (1995, 39-40) by seeking generalization, context often is nullified when compared to interpretative tradition where narratives and personal engagement of the researcher is embraced.

THE PROCESS OF CASING: AN ILLUSTRATIVE CASE EXAMPLE

The illustrative case example presented here describes the process of casing related to a dissertation process. In the empirical part of the dissertation, the focus was a global consolidated company (subsequently referred to as the Supplier Company). The company is a multinational corporation with three separate subunits. The company is a provider of process technologies for the mining and metal industry. The company in question can provide technology to an entire value chain of processing minerals to metals. This multi-project organization has deliveries from single equipment to turnkey plants and comprehensive services. The company also has multiple simultaneous projects with different subunits and customer units around the globe, but there are also sleeping periods in these relationships.

From the beginning, the research focused on three customer relationships of the Supplier Company, namely, relationships with Indian, Canadian and Mexican customer companies. Top management of Supplier Company defines all of these customers as important to them. Customers differ in their nature and therefore offer varying challenges for the supplier. All of the customers have multiple production units and can have projects with all of the supplier subunits. All of the customers are senior mining houses and steady customers for the Supplier Company.

Customer A primarily works in India, Zambia and Australia. The relationship with Customer A actively began in 2003, and the customer has been experiencing high growth and rapid expansion, especially in 2003-2006. Customer B is focused on North and South America, the Australia Pacific and Africa. This customer has had a long, steady relationship (since the 1990s) with Subunit I of the Supplier Company and offers great potential for Subunit II (a relationship that began in 2006). Customer C is concentrated on South and Central America. The projects with this customer are not massive, but they are constant and steady. Subunit I has had a relationship with Customer C since the 1980s and with Subunit II since 2003.

Both the customer and supplier companies are global and consist of multiple independent units and geographical locations. Not all supplier subunits have equal relationships with customers. Instead, some subunits are more important to certain customers than to others, and by contrast, some customers are more important to certain subunits than to others. In either case, multiple units from both the customer and supplier sides are involved in the relationships, each of which is embedded in its own cultural surroundings. Hence, there is a need to consider the special characters of these customers.

This dissertation process began in 2008 with the preliminary idea of the research topic. The basic idea was to study how to manage customer relationships in project organizations when there are discontinuities and inconsistencies at the project level. Project business logic occupied a central role. In the initial stage, there were no clear research questions or research framework.

The first interview round was conducted in December 2008 and the case was defined as a customer relationship, where each relationship represented an embedded subunit. The study aimed to focus on the challenges of managing global customers, and defining the global and local requirements of large global customers was regarded as an interesting research approach. The global-local discussion shifted the focus on the multinational nature of the customer relationships. Global account management occupied a more central role, as the focus of the research was then viewed as more related to customer relationships than to project business.

In the summer of 2009, the study was again slightly reoriented, and project business was again regarded as a central theme. In May 2010, it was observed that the concept of managing did not depict the phenomenon; thus, the concept of organizing arose. It was also observed that the case in question was not a customer relationship; rather, the case was how the Supplier Company internally organizes these relationships. The project business was viewed as a context for the study, and interest in MNC literature increased. In December 2010, the Supplier Company was defined as an internal network. Therefore, the definition of the case evolved to an internal MNC network in relation to customer relationships. However, focusing on organizing did not solve the actual problem. The research phenomenon did not focus on how an organization can manage or organize its relationships but focused more on creating understanding who the customer actually is and how the organization can create understanding of its customers in a multinational context. Thus, in May 2011, the focus began to shift toward making sense of global customers in an internal MNC network. Sense-making was considered to have an important role in the research, but the definition of research questions momentarily returned to relationship management. In February 2012, the role of sense-making became more central, and the focus shifted from sense-making in MNCs to MNC sense-making. At the end, the study employed a single case study setting with three embedded units of analysis and qualitative empirical data to create a deeper understanding of how an MNC can make sense of its global customer relationships. The case studied was the sense-making of an MNC (i.e., the Supplier Company) in relation to specific customer relationships. As the sense-making of the MNC varies between different customer relationships, the research referred those different customers as embedded subunits. Each of these subunits creates a unique understanding of the different views that the MNC may have of its customer relationships.

In the process of casing, the research questions are always related to constructing and solving the case (Eriksson & Kovalainen, 2008: 115). The table below depicts the reorientations of study, the process of casing and the changing nature of the research focus as explained above.

Table 1. The reorientations of the study.

Timing	Research title	Key concepts	Research question	Definition of case	Data collection
Early 2008	Managing global customers in international project business	Relationship management, project business	How are global customers managed in project-oriented organizations?	Customer	None, supporting interviews
December 2008	Managing global customers – challenges of global versus local practices	Global account management, Global-local	How to manage dynamic global customers in international project business organizations?	Customer relationship (with three embedded subunits)	First interview round completed
July 2009	Managing global customer relationships in diversified project business organizations	Global account management, challenges, project business	How to manage dynamic global customer relationships in dispersed project business organizations?	Customer relationship (with three embedded subunits)	Second interview round completed

Timing	Research title	Key concepts	Research question	Definition of case	Data collection
May 2010	Internal organizing of global customer relationships in a multinational project business organization	Organizing, global customers	How customer relationships are seen and understood at different organizational levels of a dispersed project business organization, and what are the consequences of this view?	Internal organizing of global customer relationship (with three embedded subunits)	Third and fourth interview rounds completed
December 2010	Organizing global customer relationships in a network MNC	Organizing, network MNC	How is the network MNC organized in relation to specific customers?	Internal MNC network in relation to customer relationship (with three embedded subunits)	All data collected
May 2011	Making sense of global customers in an internal MNC network	Sense-making, MNC, customer relationships	How to manage global customer relationships in an internal MNC network?	Sense-making in MNC of global customer relationship (with three embedded subunits)	All data collected
February 2012	MNC making sense of global customer relationships	Sense-making, MNC, customer relationships	How do MNCs make sense of global customer relationships?	MNC sense-making of global customer relationship (with three embedded subunits)	All data collected

The focus of the research has thus evolved during the research process. The changes have been connected to data collection rounds, feedback received from research presentations and the additional understanding gained from an in-depth literature review.

This research also recognizes the benefits of deep single case studies, a single case study with three embedded units of analysis has been chosen for the purpose of this study rather than discussing a study of three cases. In the selection of a case with multiple units of analysis, defining these units is important. Moreover, attention must be devoted to the holistic aspects of the case rather than simply to individual aspects of its embedded units. By involving multiple units of analysis in a single case study, this study develops a more complex design than is used in traditional single cases. The advantage of involving subunits lies in the opportunities and enhanced insights that can be offered in the single case.

In addition to research's focus on sense-making in an MNC at different levels, it is also noted that the researcher herself makes sense of this phenomenon. The conclusion of the research is affected by the researcher's own sense-making. This notion is consistent with the constructionism view of epistemology, in which knowledge is created in interactions between investigators and respondents (Guba & Lincoln, 1994: 111).

CONCLUSIONS

One of the most often asked questions when conducting research or presenting the results is why have you chosen this discussion instead of some other? Quite often behind these decisions made is a reason and a long process, but by only providing "pretty", linear descriptions, this logic is not communicated to the reader. By showing how the study has reoriented, it can also be demonstrated why certain discussions have been chosen and why others do not function or describe the phenomenon adequately.

By making this process explicit, reader can more reliably evaluate the value of the study and also learn from the choices made. How we learn is only occasionally discussed in research reports (Dubois & Gadde, 2002), and thus this research states that by not describing the actual research process the value of the results is more difficult to evaluate and more alarmingly, part of the value of the research is lost. Defining the case for research - the process of casing - occurs throughout the study and is connected among others to data collection rounds, received feedback and additional literature review as shown in illustrative case example.

This research combines the process of casing with researcher's own sense-making of the case and highlights constructionism and notes how understanding of the phenomenon is bounded in different communities both in organizations and in research networks. As qualitative research is often aiming to understand the phenomenon, it is necessary also to discuss how the understanding of the researcher is evolved.

We are willing to discuss of longitudinal research in terms of data collection, but fail to notice the longitudinal nature of the actual research process where researcher's own sense-making of the phenomenon evolves. When describing the process of casing, time perspective and process nature of the research is often lost. The process of casing is thus closely connected to abductive approach. Researchers still fail to describe explicitly why and how their research is abductive and same is also seen in case research. Researchers should define what is the case, how the case is evolved and be more willing to admit and describe also the wrong turns taken.

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