Reflections on Phenomenological Research in Organizational Studies

James Harvey, Vishal Arghode & Som Sekhar Bhattacharyya

The authors in this article discussed the application of the phenomenological research approach in organizational studies. The article provided three insights. First, an overview of how phenomenology developed as a research method was presented. Second, a review of the steps of phenomenology applied in the conduct of organization studies was presented. Illustrative steps to understand how phenomenology has been used in research and practice of organization studies were presented. Finally, a perspective on why phenomenology should be applied more frequently in organizations was discussed.

James Harvey is a Consultant & Coach at JK Harvey Consulting, United States of America. Email-jameskharvey@gmail. ***Vishal Arghode*** is an Associate Professor (Management Department), Dahlkemper School of Business, Gannon University, United States of America. Email-arghode001@gannon.edu. ***Som Sekhar Bhattacharyya*** is an Associate Professor (Strategy & Entrepreneurship), Indian Institute of Management Nagpur, India. Email-som@iimnagpur.ac.in

Introduction

Phenomenology, a qualitative approach, has been interpretive and drew upon the participant's information in the natural environment, such as the classroom or workplace (Pietkiewicz & Smith, 2014). It has been a useful approach to research while investigating and explaining a phenomenon or developing a theory regarding that phenomenon (Christensen, Johnson & Turner, 2011). From a research perspective, phenomenology has been defined as both a descriptive and an interpretive method (Giorgi & Giorgi, 2008) to seek and understand study participants' lived experiences (Christensen, Johnson, & Turner, 2011). In phenomenological studies, the researcher developed a sense of the experience as narrated by each study participant. Then the researcher interpreted these experiences to understand the phenomenon (Giorgi & Giorgi, 2008). Van Manen (1990) stated that phenomenology was a study of the living world. This was the world one immediately experienced. Phenomenol-

ogy allowed scholars to gain a more in-depth perspective of the characteristics and significance of life events. Phenomenological approach differed from other forms of research as it sought to understand and experience without pre-applying any categorization or classification (Gallagher & Zahavi, 2020; Van Manen, 1990). The phenomenological approach brackets the scholars' preconceived concepts from the participants' experiences (Høffding & Martiny, 2016).

Phenomenological research sought to comprehend what lived experience meant in the study participant's world (Pietkiewicz & Smith, 2014). Phenomenology did not seek to define how others, such as society, defined these meetings (Giorgi & Giorgi, 2008). Instead, it focused on how individuals understood and interpreted these definitions for themselves (Van Manen, 1990).In phenomenological research, the researcher identified the phenomena and collected data from the study participants specific to the phenomena. For example, Priest and Seemiller (2018) conducted a study that sought an understanding of how leadership educators came to form their professional identities (Brue & Brue, 2016). Finally, it was essential to realize that phenomenology was limited to phenomena that could be experienced by someone (Giorgi & Giorgi, 2008). For example, someone promoted into a new leadership role could narrate the lived experience of being promoted. The researcher would be interested to understand, from the newly promoted leader's perspective, the experience of their promotion.

Interpretive Phenomenology Analysis

The authors in this article focused on interpretive phenomenology analysis (IPA), rather than phenomenology as a whole. It was difficult to define phenomenological philosophy comprehensively to include its multiple interpretations (Giorgi & Georgi, 2018 : 165). These other phenomenological interpretations included Goethean, "Grass-roots" phenomenology, and descriptive pre-transcendental Husserlian phenomenology (Giorgi & Giorgi, 2008). The authors focused on IPA, not due to any shortcomings with the other phenomenological interpretations but to focus on an interpretation in detail. Additionally, Pietkiewicz and Smith (2014) posited that IPA was a methodological framework used more frequently by researchers. IPA was a research method that emphasized an in-depth investigation of participants' lived experiences and how the participants made sense of their experiences (Eatough & Smith, 2017). Creating a meaningful IPA-based research depended on the researcher's effectiveness in investigating the lived experience and their ability to conduct a discerning examination of the data from the lived experience. Eatough and Smith (2008) emphasized IPA has a long and a short history. Their perspective was that IPA was first described as an approach to qualitative research in the mid-1990s and that it connected back to phenomenological perspectives from prior eras (Hough & Oswald, 2008). They also articulated that the development of IPA was driven by a desire to create a qualitative approach

to psychology (Neubauer, Witkop & Varpio, 2019; Paranjpe, 2021; Pietkiewicz & Smith, 2014). Pietkiewicz and Smith (2014) indicated that phenomenology was developed by Edmund Husserl (1980) so as to identify the essential elements of any phenomena driven experiences which made this phenomenon unique or distinguishable from others.

Analysis became an iterative process that applied inductive reasoning to develop perspectives on the significant points of interest.

Eatough and Smith (2008:186) provided a broad framework to define phenomenology studies as research that sought to "explore existential matters of considerable importance for the participant". This framework pointed to an approach focused on the study participants' lived experiences, typically a relatively small homogenous group. Furthermore, to engage with these study participants through in-depth semi-structured interviews (Gudkova, 2018). Following these data collection interviews, analysis became an iterative process that applied inductive reasoning to develop perspectives on the significant points of interest. Analysis continues to a final narrative that interpreted the participant's lived experiences from the researcher's interpretive perspective (Eatough & Smith, 2008). Eidetic reductions were used within phenomenology to focus on what made a phenomenon unique (Pietkiewicz & Smith, 2014). The above focus enabled researchers to study how participants comprehend their lived experiences without a preconceived conceptualization of those experiences (Neubauer, Witkop & Varpio, 2019). When using IPA as a method, the researcher was not seeking to test a hypothesis nor understand if a causal relationship existed within the phenomena (Neubauer, Witkop & Varpio, 2019). Instead, the researcher focuses on the experience itself (Pietkiewicz & Smith, 2014).

Identifying the Phenomenon

Referring to Van Manen's (1990) analogy regarding the first-day experience of an educator, something in question was that educator's first-day experience. That experience became the focus of the research, and all analyses should be carefully considered against the phenomenon. Even if this question was grounded upon the researcher's understanding of what might be the factors within the phenomenon (Giorgi & Giorgi, 2008).The researcher must let go of these assumptions and allow the study participant to describe their experience. Gallagher and Zahavi (2008: 6) add that when a researcher used phenomenology to study a phenomenon, they did not deny or affirm. The scholars allowed their predisposition to the phenomenon to be suspended and focused regarding the lived experience of the study participant. The phenomenon to be studied must be able to be observed by the researcher (Christensen, Johnson, & Turner, 2011).

The phenomenon to be studied must be able to be observed by the researcher.

The above observations could be based on the statements made during an interview (Gallagher & Zahavi, 2020). Additionally, written reflections made by the participant, for example, in a journal that was kept during the experience could also help in the observation of the studied phenomenon. The above notion aligned with Van Manan's (1990) viewpoint that all phenomena to be studied by participant reflection must have occurred in the past (Christensen et al., 2011). Using a journal record of the lived experience or an interview to recall the experience requires the participant to describe an experience (Brue & Brue, 2016). Additionally, since the phenomenon being studied was from the participant's perspective, the observer could not use phenomenology in real time. Researchers could observe the participant's behavior in a situation, but only the participant could describe their lived experience.

The phenomenological approach adapted itself to a wide variety of phenomena to be studied (Van Manen, 2016). Phenomenology was also helpful in studying topics that were difficult to study using quantitative methods (Sanders, 1982). As long as the researcher could explore the lived experience as described by the study participant, phenomenology could be used to examine the phenomenon of interest (Seidman, 2006). Unlike many research methods that formulate the fundamental research question as a null hypothesis that was clear and unambiguous, the phenomenological researcher must create a compelling question that identified the phenomenon and drew both the participant and the researcher into the phenomena being studied (Van Manen, 1990). This was needed as phenomenological research is the process of questioning phenomena from the perspective of the person who lived that experience. The researcher sought an in-depth examination of the participant's lived experience (Pietkiewicz & Smith, 2014).

Identifying Study Participants

As Sanders (1982) had pointed out that a relatively small interview pool forced the researcher to probe deeply during the interview process. The researcher was on a quest for quality rather than quantity (Willems, 2018). Expanding the interview pool did not necessarily produce more helpful information. Furthermore, adding too many participants might overwhelm the researcher. Sufficient information may be received from 3 to 6 participants. Pietkiewicz and Smith (2014) reinforced this perspective with a view that IPA research has been published with participant sizes ranging from one to fifteen and larger sample sizes were less common. IPA research targets a relatively homogeneous group to study. The goal was to identify a population that was relatively similar in relation to the phenomenon of interest (Williams, 2021). IPA study participants needed to be selected to explore the phenomenon deeply. Concepts such as randomness and representation were often the focus in quantitative studies but, were unnecessary for

The researcher was on a quest for quality rather than quantity.

phenomenology. The topic of the study itself provided the margins for defining the study participants (Pietkiewicz and Smith, 2014). The researcher could continue to refine the study participants' homogeneity to limit the number to increase the information quality.

Interviewing

Interviewing in phenomenological studies depended upon each participant focusing on the phenomenon being studied and describing the experience as remembered in their own words (Christensen, Johnson & Turner, 2011). Phenomenological interviews were defined by Hoffding and Martiny (2015) as an exchange in which two individuals were involved. They were able to produce an independent perspective of the interaction. They could meet in an ongoing and ever-developing conversation. This interaction generated the researcher's knowledge to inform their study of the lived experience (Sandberg & Tsoukas, 2020). As the interview unfolded, each participant developed a deeper understanding (Vahia, 2022). The researcher learned more about the participant's lived experience in this study. The participant gained a greater understanding of what the researcher might want to know (Dörfler & Stierand, 2021). The researcher was asking the participant to recall an experience rather than react or reproduce the experience (Gudkova, 2018). There was a question as to whether the participant was accurately and validly describing their experience. "Phenomenological consistency" (Hoffding & Martiny, 2015: 545) was achieved when the researcher aligned the information from the interview against the established constructs or a theoretical framework. The above alignment ensured "external phenomenological consistency".

It was "better to ask fewer questions and to probe them intensively."

Interviewing required that the researcher developed in-depth skills to use the interviewing method successfully (Neubauer, Witko & Varpio, 2019). The researcher must create the right set of questions appropriate to their unstructured, semi-structured, or structured approach and then appropriately administer those questions (Rawat & Athaide, 2022). Unlike a survey or written response, interviewing was a person-to-person interaction that was undertaken in real-time (Paranjpe, 2021). The researcher had to allow the participant the flexibility to direct the interview as they viewed it as appropriate to share their lived experience (Thompson, 2018). Failing to allow this flexibility to the participant could potentially jeopardize the phenomenological approach (Eatough & Smith, 2008). The researcher has to be prepared for a dialogue that got to the core of the phenomenon being studied while remaining open to the direction provided by the participant's lived experience narrative. As the researcher prepared and then conducted the interview it was critical to keep in mind Sanders' (1982: 357) perspective that it was "better to

ask fewer questions and to probe them intensively." This guidance provided deeper interaction with the research participant, leading to higher quality data rather than more data.

Though widely used (Eatough & Smith, 2008) this was not the only data collection methodology appropriate to phenomenology (Sandberg & Tsoukas, 2020). Sanders (1982) pointed out two additional data collection methods. One was to observe the study participants in an environment where the phenomena being studied could be directly observed. As with interviewing, the observed behavior should be recorded and transcribed whenever possible so that the researcher could explore the phenomena in-depth during their analysis (Vahi, 2022). The second method, used in a few of the peer-reviewed articles examined the usage of written responses from study participants. Like interviewing, these could range from highly unstructured to structured (Vom Lehn & Hitzler, 2015). Written responses could also come from analyzing a journal kept by a study as they experienced the phenomena being studied. Finally, it was worth noting that these three approaches – interviews, observation, and writing – could be used in multiple combinations (Willems, 2018). For example, a participant in a leadership program could keep a journal of their experiences and then be interviewed post-program regarding what they recorded in their journal as well as their perceptions and narrative of their learning experience.

Data Analysis & Results

Subsequent to the researcher having collected data from interviews, written sources, or direct observation, the phenomenological method turns to data interpretation. Generally, a multi-step process of classifying, analyzing, and interpreting the data would be developed as the process unfolds (Cypress, 2018). The descriptions of the participants' lived experiences provided the basis for analysis. The data analysis would follow a pattern outlined by Sanders (1982). This method outlines four levels of analysis: description, identification of themes, development of neomatic correlates, and abstraction of the essence (Frechette et al., 2020). Description utilized the transcribed interviews or other data to establish the participant's lived experiences, providing their unique perspective on the phenomenon being studied. Eatough and Smith (2008: 190) defined what emerged as "thick description", which was an in-depth impression of the participant's experience of the phenomena. These thick descriptions were intended to provide a thorough portrayal of the phenomena, or one aspect, from the participant's perspective. For example, a researcher investigating the development of a leader's self-efficacy would have a description of that leader's efficacy beliefs as a whole and, potentially, descriptions of sub-sets of overall self-efficacy, such as cognitive skills (Haber-Curran & Tillapaugh, 2015).

These descriptions were derived directly from the participant. The descriptions would consist of direct quotes or

paraphrasing from the participant, without interpretation from the researcher. The goal was to understand the phenomena as the participant described. Themes were uncovered from the commonalities across all participants and were developed from the thick descriptions from the first step (Priest & Seemiller, 2018). Themes emerged as the researcher analyzed the data by identifying a common pattern. Every time a researcher uncovered a description related to the participant's development of cognitive processing skills for leadership (Williams, 2021). The researcher would identify cognitive skill development as a theme. Researchers should note that the importance of the theme to the experience was the key factor in identifying these as a theme, rather than simply how often the common experience or perception occurred across one or more study participants. Drew, Hardman and Hart (1996) added that thick description must be both "accurate and vivid" to be useful to the researcher.

At this time, the researcher's goal was to transform the interview transcripts or other source materials into emerging themes (Pietkiewicz & Smith, 2014). The researcher sought to identify a succinct and unique phrase that accurately conceptualized the thick description provided by the study participant. When multiple researchers were working together to conduct a phenomenological study it became critical to build inter -rater reliability regarding themes and the descriptions that informed them (vom Lehn, 2019). The researchers might independently identify and define these themes, but to move deeper into analysis, they would need to have a consensus regarding the themes, their descriptions, and underlying data (Van Manen, 1990). Noematic correlates were derived from the themes (Sandberg & Tsoukas, 2020). Each noematic correlate represented "the individual's perception of the reality of the phenomenon under investigation" Sanders (1982:357). The above step was an essential step in the process as it connected an objective observation about the phenomena to a subjective perspective as to why this observation was essential. These correlates were also described as "theme clusters" (Pietkiewicz & Smith, 2014) as the researcher would often find overlapping and interrelated themes that shared common ideas. As these clusters were identified by the researcher it was the noematic correlated that binds them to gather and define the cluster (Sandberg & Tsoukas, 2020). This was an important distinction from a simple grouping of seemingly related themes. To be accurately described as noematic correlates, these themes must be the embodiment of the phenomena from the perspective of the research participant Sanders (1982). It was possible that not all themes that were identified in the previous step would be retained in this step. Themes that did not match with an evolving noematic correlate structure would be dropped. Similarly, themes that were not supported for inclusion were also not included (Pietkiewicz & Smith, 2014). Abstraction of the essence of the lived experience was derived from the noematic correlated or theme clusters (Thomson, 2018). Because each correlate had been identified and defined by

the researcher, the researcher must clearly link the correlate to the lived experience. This was accomplished via the results of an eidetic reduction that served to articulate why the experience was important to the participant (Sadri & Akhtar, 1995). These noematic correlates became the focus of the discussion and were used to extract meaning from the study participants' lived experiences (Pietkiewicz & Smith, 2014; Sanders, 1982). The above interpretations were based upon the data provided by the participant that was then subject to a thoughtful, methodical, and exacting process to develop these interpretations (Pietkiewicz & Smith, 2014).

According to Pietkiewicz and Smith (2014) the researcher first provided an in-depth perspective of their analysis and the logical path that led them to the generally noematic correlates that were identified in the study. Generally, this included examples or quotations from the research participants that provided the reader of the phenomenological study with a perspective of the lived experience that came directly from the research participants (Cypress, 2018). The researcher should also demonstrate to multiple levels of analysis and interpretation that led from the initial thick descriptions of the themes that were derived from these descriptions, and how these themes were clustered together to create the noematic correlates needed to be presented (Seidman, 2006).The researchers followed the analysis with a discussion session that further interpreted the analysis from the researcher's perspective. Specifically, the researcher related how the interpretation of the lived experiences addresses the phenomena being studied. Using self-efficacy example perspectives the authors articulated how the emerging correlate addressed a leader's self-efficacy development (Drew et al., 1996).

Conclusion

In this article the authors provided a perspective on phenomenology as a method in organization studies. The authors began with an overview of phenomenology and how a researcher could structure a phenomenological study. This overview included identifying a phenomenon to be studied, using interviews to collect data from study participants, and analyzing that data to extract the essence of the lived experiences as articulated by the study participants. To conclude, the authors urged the researcher who is seeking an in-depth understanding of a phenomenon to consider the use of phenomenology as a method to develop that understanding. The creation of phenomenological data provided the researcher to get "up close and personal" with the participants in their study through interviews, observation, or the analysis of written responses to broad questions. Once the scholars had these rich and detailed narratives from the participants,

The creation of phenomenological data provided the researcher to get "up close and personal" with the participants in their study through interviews, observation, or the analysis.

the researcher must engage in multiple rounds of analysis to understand the phenomenon from the participants' perspective. And finally, the researcher had to extract meaning from these perspectives as it related to the phenomenon they were empirically investigating. Phenomenology based studies are becoming increasingly important in comprehending modern day phenomenon like digital leadership group cognitive habits and restraining digital organization routines and such others. We hope that this study would enable scholars interested in applying phenomenology-based approaches to clearly chart out their study path. Table 1 provides the do's and don'ts for phenomenology scholars while conducting their empirical investigation.

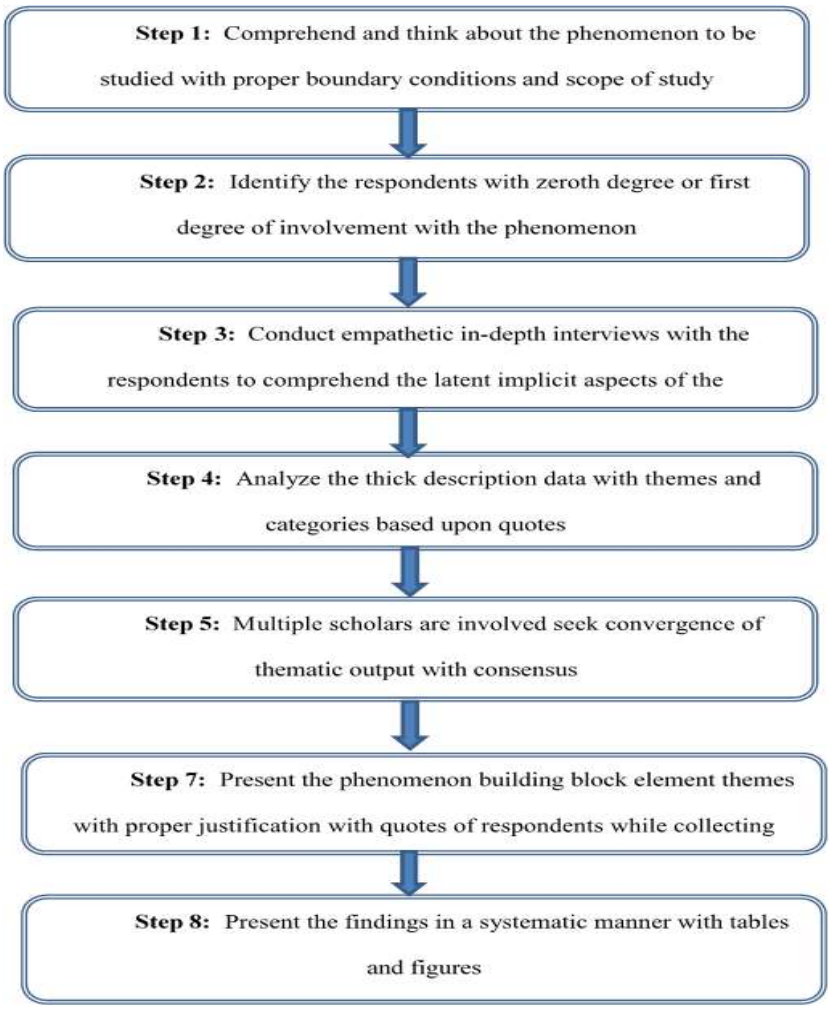
Table 1 Phenomenology Based Organizational Study Approaches Dos & Don'ts

S.No.	Do's	Don'ts
1.	Collect Data from respondents by active and patient listening	While collecting data do not judge the respondents' responses
2.	Select respondents who are active in the phenomenon to be studied	Avoid data collection from second or third order of difference from the phenomenon
3.	Collect data only and not analyze it at the first stage	Judgmental analysis based upon initial set of responses
4.	Provide deep and sincere effort to understand the boundary conditions of the phenomenon to be studied	Attempt to study the phenomenon without a proper understanding
5.	Define well the scope of the studied phenomenon	Set to undertake the study without understanding the context
6.	Figure out with openness the basis of the study	Be open to observe the different aspects and manifestations of the phenomenon but do not remain uncertain
7.	While collecting data probe deep with the respondents to secure a thick description. In other words, collect latent, implicit aspects of the phenomenon. Thus, conduct a very in in-depth interview	Avoid collecting just surface level data which are observable and explicit only
8.	Identify the themes by analyzing the noematic correlates well and the qualitative categories of data collected	Rushing on to the study themes based upon data
9.	When multiple scholar is involved seek convergence	Pluralism should not result in divergence
10.	While presenting the data present the relationship between quotes and themes	Pure presentation of themes without properly depicting the derivations should be avoided in a systematic manner

Source: Authors' Own Conceptualization

The steps of conducting phenomenology studies are given in fig.1.

Fig.1 The Building Blocks 2 Steps of Phenomenological Approach Based Organizational Studies



Source: Authors Own Conceptualization

References

Brue, K. L. & Brue, S. A. (2016), "Experiences and Outcomes of a Women's Leadership Development Program: A Phenomenological Investigation", *Journal of Leadership Education*, 15(3): 75-97.

Christensen, L. B., Johnson, B., Turner, L. A. & Christensen, L. B. (2011), Research Methods, Design, and Analysis. Pearson, Boston.

Cypress,B. (2018), "Qualitative Research Methods: A Phenomenological Focus", *Dimensions of Critical Care Nursing*, 37(6): 302-09.

Dörfler, V.& Stierand, M. (2021), "Bracketing: A Phenomenological Theory Applied Through Transpersonal Reflexivity", *Jour-*

nal of Organizational Change Management, 34(4): 778-93.

Drew, C. J., Hardman, M. L.& Hart, A. W. (1996), Designing and Conducting Research: Inquiry in Education and Social Science, Needham Heights, MA: Allyn & Bacon.

Eatough, V. & Smith, J. A. (2017), "Interpretative Phenomenological Analysis" in C. Willig & W. Stainton Rogers (Eds) Handbook of Qualitative Psychology, London, Sage

Gallagher, S. & Zahavi, D. (2020), The Phenomenological Mind. London, Routledge.

Giorgi, A. P., & Giorgi, B. (2008). "Phenomenological Psychology", in C. Willig & W. Stainton Rogers (Eds) The Sage Handbook of Qualitative Research in Psychology (pp. 165-178). London, England: Sage.

Gudkova, S. (2018), "Interviewing in Qualitative Research" in M. Ciesielska, & D. Jemielniak (Eds.), Qualitative methodologies in organization studies, volume II: Methods and possibilities. Cham: Palgrave Macmillan.

Haber-Curran, P. & Tillapaugh, D. W. (2015), "Student-centered Transformative Learning in Leadership Education: An Examination of the Teaching and Learning Process", *Journal of Transformative Education*, 13(1): 65–84.

Høffding, S. & Martiny, K. (2016), "Framing a Phenomenological Interview: What, Why and How", *Phenomenology and the Cognitive Sciences*, 15: 539–64.

Hough, L. M. & Oswald, F. L. (2008), "Personality Testing and Industrial–organizational Psychology: Reflections, Progress, and Prospects", *Industrial and Organizational* Psychology, 1(3): 272–90.

Husserl, E. (1980), Edmund Husserl (Vol. 1), Springer Science & Business Media.

Neubauer, B. E., Witkop, C. T. & Varpio, L. (2019), "How Phenomenology Can Help Us Learn from the Experiences of Others", *Perspectives on Medical Education*, *8:* 90-97.

Pietkiewicz, I. & Smith, J. A. (2014), "A Practical Guide to Using Interpretative Phenomenological Analysis in Qualitative Research Psychology", *Psychological Journal*, *20*(1): 7–14.

Priest, K. L. & Seemiller, C. (2018), "Past Experiences, Present Beliefs, Future Practices: Using Narratives to Re (present) Leadership Educator Identity", *Journal of Leadership Education*, 17(1): 93-113.

Rawat, P. S. & Athaide, N. (2022), "Women, Patriarchy & Work-life Balance: A Qualitative Study", *Indian Journal of Industrial Relations*, 57(4): 523-38.

Sadri, S. & Akhtar, S. (1995), "A Study of the Employee Collectivity and Working Class Consciousness among Senior Civil Servants in India", *Indian Journal of Industrial Relations*, 30 (3): 241-55.

Sanders, P. (1982), "Phenomenology: A New Way of Viewing Organizational Research", *Academy of Management Review*, 7(3): 353–60.

Sandberg, J. & Tsoukas, H. (2020), "Sensemaking Reconsidered: Towards a Broader Understanding Through Phenomenology, *Organization Theory*, 1(1): 1-34.

Seidman, I. (2006), "Interviewing as Qualitative Research: A Guide for Researchers in Education and the Social Sciences", Teachers College Press, New York.

Thompson, N. A. (2018), "Imagination and Creativity in Organizations", *Organization Studies*, 39(2-3): 229-50.

Vahia, M. (2022), "Women in Masculine Jobs: Capturing Lived Experiences of Women in Sales Occupation", *Indian Journal of Industrial Relations*, 58(2): 314-26.

Van Manen, M. (1990), Researching Lived Experience: Human Science for an Action Sensitive Pedagogy. New York: Routledge,

Vom Lehn, D. & Hitzler, R. (2015), "Phenomenology-based Ethnography: Introduction to the Special Issue", *Journal of Contemporary Ethnography*, 44(5):539-43.

Willems, T. (2018), "Seeing and Sensing the Railways: A Phenomenological View on Practice-based Learning", *Management Learning*, 49(1): 23-39.

Williams, H. (2021), "The Meaning of 'Phenomenology': Qualitative and Philosophical Phenomenological Research Methods", *The Qualitative Report*, 26(2): 366-85.