



## 'Good' case research in industrial marketing: Insights from research practice

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### ARTICLE INFO

#### Article history:

Received 1 May 2007

Received in revised form 15 January 2008

Accepted 3 April 2008

Available online 30 September 2009

#### Keywords:

Case study

Industrial marketing

Qualitative methods

Methodology

### ABSTRACT

The purpose of this article is to contribute to the emerging debate about the use of the case methodology in industrial marketing. We conducted a content analysis of the 145 case studies published in three key journals (*Industrial Marketing Management*, *Journal of Business-to-Business Marketing* and *Journal of Business and Industrial Marketing*) over a 10-year period (1997–2006). The findings highlight the dominance of case research in qualitative industrial marketing research. They also lead us to distinguish between three different practices that influence perceptions of 'good' case research in this scholarly domain: 'common' practice, 'best practice' and 'innovative' practice. Our contribution lies in problematising what 'good' case research is, and showing how research practice – not just methodological literature – has a role in generating methodological conventions in a disciplinary field.

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### 1. Introduction

The past twenty-five years have witnessed a growth in the methodological literature on case studies in business and management research. Alongside the two dominant authorities on case research in business studies – Eisenhardt (1989) and Yin (2003) – texts on qualitative research in the field of marketing have been published (e.g. Belk, 2006). However, the specific challenges associated with using case studies for industrial marketing topics such as business networks have until recently received less attention (Halinen & Törnroos, 2005). This is despite the fact that, according to Dubois and Araujo (2004, p. 207), the case study has been the 'methodology of choice' for qualitative researchers in this area. In this article, we seek to contribute to the emerging debate about applying the case 'methodology'<sup>3</sup> to the study of industrial marketing. Previous discussions have largely focused on the abstract question of 'how research into industrial networks *might* be carried out' (Easton, 1995, p. 411, our italics). In contrast, we are primarily interested in the question of how the case study *has* actually been conducted, and

compare this to current methodological recommendations about how it *should* be conducted. In this article, we therefore review the use of the case study approach in the key industrial marketing journals over a 10-year period (1997–2006) to uncover case study practices in the field. Reflecting current debates about qualitative research (for a review, see Seale, 1999), we believe that no single set of 'best practices' for case researchers prevails; rather, there are conflicting standards as to what constitutes 'good' case research.

The approach we take in this article, of looking at research practice in a particular field of study, begs a number of questions. The first is why, given the existence of an already voluminous literature on doing case studies (for an overview, see e.g. Gomm, Hammersley, & Foster, 2000), it is necessary to add to it at all, and why conducting case studies in industrial marketing should be any different to conducting them in other areas. Industrial marketing researchers have argued that case research in this area is indeed different, because of the nature of the phenomenon under study. Halinen and Törnroos (2005), building upon the work of Easton (1995), argue that networks present researchers with a challenge since they do not constitute a closed, bounded and clearly delineated system. While we agree with Halinen and Törnroos's insights, we would go further and argue, following Platt (1988), that the disciplinary context to which case studies are applied matters in a more fundamental way: that perceptions of what a case and a case study are, as well as the procedures for undertaking such research, vary across disciplinary boundaries. While these variations are in part due to differences in what is beheld (for example, the organizational context of industrial marketing contrasted with the study of the individual in consumer behavior), they can also be traced to differences in the eye of the beholder. As the

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<sup>3</sup> Case studies are variously labelled a method, methodology or research strategy. Rather than entering into this debate, we will follow Easton (1995, p. 420) and term case studies a 'methodology'.

sociology of knowledge would suggest (for a discussion in the area of industrial marketing, see Morlacchi, Wilkinson, & Young 2005), disciplinary conventions, traditions and norms fundamentally shape our understanding of what we conceive case studies to be and which standards for case research we subscribe to.

Another question raised by our approach is why we should consider research practice. Again, we follow Platt (1996), who points out that the methodological authorities with whom case researchers may be familiar, and even cite, are only one influence on how research is conducted. Perhaps a more substantial one is the empirical research that is published. Published case studies become the models and exemplars for future research, and in this way also shape conceptions of how research should be conducted. However, in her history of the case study in sociology, Platt (1996) found a divergence between the case research that was actually conducted as compared to the recommendations made in key methodological texts. It therefore cannot be assumed that methodological theory and research practice (i.e. 'methodologies-in-use', to borrow a term from Gummesson, 2003) will coincide. Notions of 'good' case study research are, in the end, shaped by what is actually published in a field.

Once we conceive case research as a set of conventions constructed by a particular community of scholars, research practice can then be seen as generating and not just following methodological standards. By conducting a qualitative content analysis of published case studies, we seek to provide insights into how the case study has been constructed by the industrial marketing community and the methodological conventions that are upheld. Our focus is therefore on the authors' own understanding of the case study methodology. Our content analysis led us to induce three different notions of 'good' case study research in this scholarly domain: 1) 'common' practice (in other words, the most popular features of case study methodology as reported by authors, often coupled with limited methodological reporting); 2) 'best practice' (in other words, the standards that authors themselves profess, whether implicitly or explicitly, the methodological authorities they cite and, inevitably, the standards we too apply in our analysis); and 3) 'innovative' practice (in other words, uncommon or novel practice).

The article is organized as follows. In the first section, we start our investigation into case study conventions by providing an analysis of 'best practice' recommendations advocated in the industrial marketing literature. While these have been heavily influenced by Yin (2003), we argue that his recommendations have increasingly been challenged by industrial marketing scholars. In the subsequent section, we discuss our process of reviewing published case studies, including the basis for journal selection, our classification of case studies and the codes we used for our content analysis. We then proceed to describe and analyze the practices that we found in our sample of 145 case studies. In particular, we identify three different

practices in published case studies, which we have grouped under the categories of common practice, best practice and innovative practice. We conclude by arguing in favor of paradigm consistency, reflexivity and greater innovativeness in case research.

## 2. 'Good' case study research: the view from the industrial marketing literature

There seems to be no single set of 'best practice' recommendations in the disciplinary context of industrial marketing, although Yin (2003) remains the reference point against which other authors position themselves. According to his definition, the case study is 'an empirical inquiry that investigates a contemporary phenomenon within its real life context, especially when the boundaries between the phenomenon and context are not clearly evident' (Yin, 2003, p. 13). Table 1 summarizes Yin's model as it has been interpreted in the field of industrial marketing: it integrates Yin's key guidelines together with a recent attempt (Halinen & Törnroos, 2005), heavily influenced by Yin, to delineate the case research process in the specific context of industrial marketing. Essentially, the case study process is linear with clearly identifiable phases and corresponding decisions, with recommendations for best practice at each stage. Best practice lies in clearly specifying the research purpose and developing theory prior to data collection; deciding on the key features of the case design (e.g. single versus multiple) and case boundaries prior to data collection; using multiple sources of evidence (including quantitative methods) to converge on a single explanation; adhering to standards of validity and reliability adapted from quantitative research; and structuring the case report so it is aligned with the research purpose.

While Yin (2003) has been widely cited and remains the starting point for any discussion on case research in industrial marketing, dissenting views have emerged, and alternative approaches and best practices have been proposed. Specifically, criticism and debate have centered on the following: 1) Yin's definition of the 'case study'; 2) the use of multiple sources of evidence; 3) rethinking the philosophical foundations of case research; and 4) the process of theorizing in case research. Underlying these debates is a growing questioning of positivistic assumptions and goals.

First, Yin's definition has not been accepted uncritically. His specification that a case study concerns a contemporary phenomenon has been queried. As Dubois and Araujo (2004, p. 209) argue, the distinction between historical and contemporary events is impossible to maintain since '[h]istory is always encoded in the structures that shape current choices' (see also Woodside & Wilson 2003). This premise has led to an increasing interest in the use of case studies for processual research and a questioning of 'snapshot' studies (see Plakoyiannaki & Saren 2006). Taking processual research seriously would require the exploration of different methods of data collection

**Table 1**  
Linear model of case research.

Phases of case study process	Key decisions	Best practice recommendations
Relating theory to empirical data	Research purpose	*Clarity of research purpose: exploratory, explanatory, descriptive *Theory development prior to data collection
Choosing and justifying empirical cases	Number of case studies Sampling strategy	*Decision on use of single or multiple cases prior to data collection *Choice of single vs. multiple case design driven by research purpose *Purposeful sampling *Use of literal or theoretical replication
Establishing case boundaries	Defining the case (unit/s of analysis, temporal scope)	*Specification of unit of analysis: holistic or embedded *Longitudinal or cross-sectional designs
Selecting appropriate data sources	Multiple sources of evidence	*Use of multiple data sources to ensure triangulation and convergence on a single explanation
Analyzing findings and data reduction	Method/process of data analysis	*Application of analytic techniques e.g. pattern matching to ensure systematic approach *Use of initial theoretical propositions to steer appropriate analytical strategy
Ensuring quality of data	Method of verification	*Construct validity, external validity, internal validity, reliability
Writing up and presenting case data	Presentation and discussion of findings	*Choice of report structure should be aligned to research purpose and case audience *Case report may not need to include rich narrative

Sources: Halinen & Törnroos (2005), Yin (2003).

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