The overlooked two- and three-case designs

Royer, Isabelle

Université Jean Moulin Lyon 3, iaelyon, UR Magellan

Isabelle.royer@univ-lyon3.fr

Résumé :

Les études de cas unique longitudinales et les études de cas multiples sont couramment utilisées dans les recherches qualitatives. Toutefois, les designs avec deux et trois cas ont été négligés en dépit de leurs avantages. Dans cet essai, je présente tout d'abord un panorama des recherches à deux et trois cas publiées dans cinq revues universitaires de premier plan dans le domaine de la stratégie et de l'organisation au cours des dix dernières années. Ensuite, des designs alternatifs à deux et trois cas sont développés et illustrés, dans le but d'améliorer la validité et la généralisation au moyen de dissimilarités. Enfin, des recommandations sur la manière de mener ces modèles alternatifs seront formulées.

Mots-clés : Etude de cas, validité, généralisation, design de recherche, échantillonnage théorique

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INTRODUCTION

Case-study research is one of the most common methods used for qualitative inquiry (Stake, 2000). It can serve various purposes including theory building (Eisenhardt, 1989; Gehman et al., 2018; Gioia et al., 2013), and theory testing (Yin, 2013; Bitektine, 2008). It can extend previous theoretical work and provide a better understanding of the dynamics or mechanisms of complex phenomena (Graebner et al., 2012). Although case study research offers a wide variety of designs, two templates tend to dominate in strategic organization research: the "Eisenhardt Method" and the "Gioia Method" (Langley & Abdallah, 2011; Abdallah et al., 2019). Eisenhardt (1989: 537) developed a post-positivist approach based on comparisons among several cases selected from theoretical purpose to "replicate previous cases or extend emergent theory," or "fill theoretical categories and provide examples of polar types." She recommended studying between four and ten cases to produce convincing grounding and generate complexity. By contrast, the Gioia approach is interpretive and often relies on a single case (Langley & Abdallah, 2011) from which Gioia and colleagues (2013) argue that it is possible to generalize. Despite its growing popularity, this single-case approach still poses concerns about the idiosyncrasy of the studied case (Langley & Abdallah, 2011), like single ethnography (Vesa & Vaara, 2014). Although the authors of the two templates stress that their methods are not characterized by a specific number of cases (e.g., Eisenhardt, 2021), the popularity of these two templates tends to overshadow other qualitative case study designs with few cases.

This essay aims at highlighting interesting two- and three-case designs. Case study refers here to "a specific entity under study" (Langley & Royer, 2006: 74) independent of methods used to investigate it, including ethnography and historical studies, although Yin

(2013) excludes the later from case studies. To explore the panorama of two-case and three-case studies, I first examined all articles in five leading strategic organization journals written between 2010 and 2020: *Administrative Science Quarterly, Academy of Management Journal, Organization Science, Organization Studies,* and *Strategic Organization*. To do so, I conducted a search in these journals using EBSCO to select articles containing "case" along with either "two" or "three" in the text. Two-hundred fifty-eight references were obtained, out of which 33 were actually two- or three-case qualitative studies. This quantity makes the study of their published design worthy. Table 1 shows that two-case studies represent about two thirds of identified papers. Among these 33 articles, two studies included more than three cases, but researchers chose to discard additional ones in their papers, presenting only two in one study and three in the other. These two articles were retained for this study for three reasons. First additional cases were deemed unnecessary by the respective authors; second, other researchers may have done the same without mentioning the additional cases; and third and most importantly, the rationale to select these specific cases for the paper were similar to that in other papers.

Table 1: Two- and three-case studies published in selected journals.

	Total	**2 cases**	**3 cases**	**3 cases (%)**
Academy of Management Journal	4	3	1	25%
Administrative Science Quarterly	2	2	0	0
Organization Science	5	3	2	40%
Organization Studies	18	13	5	28%
Strategic Organization	4	2	2	50%
Total of the 5 journals 2010-2020	33	23	10	30%

These qualitative case studies varied in many ways. They included ethnography and historical retrospective cases. Many authors characterized their approach as a comparative case study. Most studies used an inductive approach but a few indicated that they were deductive

and aimed at extending theory. A majority of them displayed narratives for each case, while most of the others presented data by theme and a few pooled the data. The papers also shared some features. All involved longitudinal data collection, although few findings took the form of a temporal model. All authors explained the choice of cases by theoretical sampling, relying mostly on similarities or differences between cases. I examined the 33 papers and coded the designs according to their presentation in terms of similarity and differences, some of which became known only after data collection. For example, Aoki (2020) chose matched pairs of implementations of kaizen within the same company that produced opposite outcomes and thus are contrasting cases. I found two dominant published designs: similar cases showing common process and outcome, and contrasting cases explaining why or how outcomes differ. The two types of studies account for 28 articles. All the 28 studies were conducted in the same or similar settings. Settings were considered to be similar when the authors emphasized similarities over differences (e.g., Dolmans et al., 2014) or did not mention differences at all (e.g., van de Ende et al., 2012). However, two and three similar cases do not require similar settings. Other uncommon designs with dissimilar settings that extend generalization are possible. I thus complement the presentation of common designs from my sample with uncommon but interesting ones which are illustrated using additional published articles outside of the sample.

The paper unfolds in three steps. First, the dominant two-case and three-case designs in published articles from the studied sample are presented. Second, other possible two- and three-case designs are displayed- notably those with dissimilar settings - and their advantages are indicated. The third section focuses on three-case designs that combine contrasting cases and replications with dissimilarities. Recommendations and cautions are provided in the Discussion section.

1. TWO DOMINANT DESIGNS IN PUBLISHED ARTICLES

The published two- and three-case studies include 11 articles with similar cases showing commonalities (designs # 1 and 1' in Table 2) which were complemented by variations between the cases in comparative case studies. The 17 studies based upon contrasting cases (designs # 2, 2' and 2" in Table 2) emphasized a major explanation for the opposed outcomes, although they could additionally indicate common features as well. Both types have in common that the cases belonged to same or similar settings.

Table 2: Common two-case and three-case design in published studies

Type of design	Design #	2-case Designs	Design #	3-case designs
Similar cases	1	Setting A ○ ○	1'	Setting A ○ ○ ○
Contrasting cases	2	Setting A ○ ●	2'	Setting A ○ ● ○
			2''	Setting A ○ ● ●

○ similar case, ● contrasting case, ● contrasting intermediate case, 'and " similar design with three cases instead of two.

1.1 SIMILAR CASES

Designs with similar cases include cases with similar antecedents and outcomes in similar settings. The strength of this design is provided by the patterns that are common across cases. Common patterns provide evidence for validity and for generalization to the setting under study. Because cases are never exactly the same, differences between them can be noted to enrich the analyses by showing different forms that a concept can take or different paths a phenomenon can follow as displayed in comparative case studies (Bechky & O'Mahony, 2015).

Six such studies with two cases (design #1) and five with three cases were found. For example, Bucher and Langley (2015) studied two intentions of changing routines in surgical clinics of

two teaching hospitals. Their analyses of the two cases lead to a model that articulated the role of two spaces on the process of intentional routine change. The design with three cases (design #1') matched on attributes follows the same rationale. Finding three times similar patterns or explanations leading to the same result provides greater internal validity and generalization. For example, van de Ende and colleagues (2012) studied three battles between pairs of compatibility standards. These three replications showed how the flexibility of a standard early in the process contributed to the standard success. A third case is sometimes selected to rule out an alternative explanation. For example, in their study of the influence of perceived resource positions on entrepreneurial decisions, Dolmans et al. (2014: 517) selected a start-up that failed but had other similar features to the two others (founded at the same time in the same country and in immature industries) to show that ultimate failure does not impact their results.

Cases sometimes complement one another to enrich analytical categories and mechanisms rather than replicate one another. In such situations, analyses are presented by theme rather than as separate narratives. For example, Lawrence and Dover (2015) studied two programs that provide housing for people at risk of becoming homeless. The combined analyses of the two cases resulted in a process model showing the relationships between places, institutions and institutional work. Kauppila (2010) selected three embedded cases (see Yin, 2013) of innovation processes within a firm whose managers consider representing the whole range of processes from incremental to radical innovations. Together, the three cases show how the firm integrated and balanced exploration and exploitation through interorganizational partnerships.

Finally, cases are sometimes selected within a single organization, which reduces evidence of generalization without denying the potential of transferability. For example, Garud and Karunakaran (2018) studied two identity-challenging innovations at Google and highlighted an ideology of participative experimentation that fostered identity-challenging innovations.

1.2 CONTRASTING CASES

Contrasting case design is the most common, representing 17 articles in the sample. It involves matching cases with opposed outcomes (design #2 in Table 2). The strength of contrasting cases lies in the validity of the main explanation that allows researchers to rule out all possible alternative relationships (Miles & Huberman, 1994; Yin, 2013; Durand & Vaara, 2009). A perfect match between the cases - except for the antecedents and outcomes - ensures the validity of the relationship between antecedents and outcomes (Stuart Mill, 2006). Although this ideal match cannot be achieved in real settings, researchers can maximize similarities between the contrasting cases. Selecting cases within a single organization is one way to do so. For example, Aoki (2020) chose two highly similar cases of implementation of kaizen in two production plants belonging to the same company. The plants were of similar size and engaged in implementation of kaizen with the same managing consultants who used artifacts that were mostly common to both plants. Despite these similarities, the outcomes were opposed: one ended with a sustained transformation and the other with a regression to previous state. His process model indicates that the outcome depends on whether employees have a competing or an interrelating understanding of the objectives.

In polar types design, cases are selected for their extreme opposed outcomes despite having many similar features (Eisenhardt, 2021). For example, Pickering (2015) selected two highly similar Australian publicly-quoted accounting companies with opposed outcomes (one success, one failure) to explore interpretative schemes of governance. Analyses suggest that the introduction of corporate style governance benefitted from being an evolution rather than a revolution.

In the negative or deviant case method (Piekkari et al., 2009), one of the cases is selected to test theory because it is not consistent with it. In other words, this negative case does not have the

outcome predicted by the theory. For example, Boghossian and Marques (2019) conducted a historical study of government responses to activist campaigns that threatened national industries. They studied two similar industries - sealing and fur - in Canada: the former ended with a ban of seal skin products and the collapse of the industry, whereas the later continued and controversy waned. Their analyses show how government used standards-setting bodies as a strategy to counter radical activists.

The three-case studies with contrasting cases in our sample often included two contrasted cases and a third with an intermediate outcome (design 2" in Table 2) rather than a similar case (design 2' in Table 2). For example, in her research on cultural and political toolkits for practice change, Kellogg (2011) studied three cases of attempts at change in three similar elite teaching hospitals in which interns obtained different results in their attempts to change practices: major change, minor change and no change. Her model shows that cultural and political toolkits impacted the process of change and ultimate outcome, both being required for major change. Similarly, the study on negotiation as institutional work by Helfen and Sydow (2013) included three international negotiation processes on labor market standards in the manufacturing sector with three contrasted outcomes: institutional stagnation, modification and creation. Also, Gal et al. (2014) studied three projects that unfolded over time in a single company using three different technologies: one old, one new, and the third a combination of the two.

The 28 articles that represent the dominant published two- and three-case designs all involve identical or similar settings. Similarity in the settings is important to improve validity of the results from contrasting cases. However, studying similar cases doesn't mean they have to be drawn from similar settings. Although less common, replications using dissimilar settings can provide additional benefits, as shown below.

2. ADDITIONAL DESIGNS INTRODUCING DISSIMILARITY IN REPLICATION

The first uncommon design with dissimilarities coming to mind is one where researchers select dissimilar settings. The obvious interest of doing so is in providing evidence for generalization. Commonalities between highly different cases indicate that they hold broadly. Glaser and Strauss (1967) and Miles and Huberman (1994) recommend maximum differences between cases to broaden the scope of generalization. Commonalities between cases in the same setting provides support for generalization *within* this setting, whereas commonalities between cases in dissimilar settings provides support for generalization *across* settings. The rationale is that findings can be extended across settings because they hold despite all the characteristics that differ among settings. Consequently, the more dissimilar the settings, the better the generalization of the findings. Because each characteristic that differs between cases increases generalization, there is an incentive to choose cases that differ on as many characteristics as possible, except for the antecedent or phenomenon under study.

The study on how teams handle surprise by Bechky and Okhuysen (2011) illustrates best such uncommon design. The findings rely on cases in two highly different settings – a police SWAT team and film production crews[1]. Their analyses show that in both settings, teams respond with organizational bricolage depending on the sociocognitive resources they had developed previously. The dissimilar settings enrich their analyses and increase generalization. As they explained: "By pursuing the commonalities and differences in the two settings, we developed the emic categories from each setting into an etic, more generalizable model of these processes" (Bechky & Okhuysen, 2011: 245). They concluded that their "findings are generalizable to

[1] Strictly speaking, their design is not a two- or three-case design and is thus not part of the sample, as explained below.

other organizations" (p. 256). Indeed, a police SWAT team and film production crews are so dissimilar that the findings can be generalized beyond the studied settings. Although Bechky studied four crews, the design presented in her article with Okhuysen follows the same rationale as the two-case design #3 in Table 3. Further, the data from the four production crews were pooled for comparison with data from the police SWAT team.

In addition to increasing generalization, similar findings in dissimilar settings also increase internal validity. Strangely, this feature of dissimilar settings is rarely indicated in empirical papers. Similar findings despite dissimilarities between cases mean that all the differences between the cases do not impact the findings. Each difference thus removes an alternative explanation, which improves the validity of the findings. From a theoretical standpoint, having similar findings in totally dissimilar contexts is equivalent to having contrasted outcomes in totally similar contexts, except for the antecedent that generates the outcome. As explained by Stuart Mill, there are two methods to single out an antecedent of an outcome: "In the Method of Agreement, we endeavoured to obtain instances which agreed in the given circumstance but differed in every other: in the [Method of Difference] we require, on the contrary, two instances resembling one another in every other respect, but differing in the presence or absence of the phenomenon we wish to study" (Stuart Mill, .2006: 391). Replication cases conducted in dissimilar settings (design # 3 in Table 3) are thus of great interest and it is regrettable that they are currently seldom used.

In addition to dissimilar settings that extend the scope of empirical generalization, Glaser and Strauss (1967) introduced another form of generalization, namely "conceptual level" of theory. In fact, they provided recommendations to select cases "to compare in order to control their effect on generality of both scope of population and conceptual level of (…) theory" (Glaser and Strauss, 1967: 52) and distinguished empirical generalization to population scope from theoretical generalization to high conceptual level. They distinguished two levels of theoretical

generalization: substantive theory and formal theory, the former being a subset of the latter that is more abstract. Although formal theory can be generated directly, the authors recommend starting with substantive level and select cases that are substantially different (here called intrinsic variation) but can be similar at a higher formal level (p.79). For example, when studying strategic decision, acquisitions and divestitures are substantially different but can be considered as intrinsic variations of strategic decisions. Studying these two types of strategic decision within the same setting would follow design #4 in Table 3. These variations further stimulate the inference process of researchers (Eisenhardt, 1989; Glaser & Strauss, 1967), helping them to build higher-order – and thus broader – concepts.

Table 3: Two-case and three-case designs with broader generalization

	Design #	2-case Designs	Design #	3-case designs
Replication in two dissimilar settings	3	Setting A: ○ Setting B: ○	3'	Setting A ○ ○ Setting B ○
			3''	Setting A ○ Setting B ○ Setting C ○
Replication with intrinsic variations	4	Setting A: ○ □	4'	Setting A ○ ○ □
			4''	Setting A ○ □ ◇
Replication in two dissimilar settings with intrinsic variations	5	Setting A: ○ Setting B: □	5'	Setting A ○ ○ Setting B □
			5''	Setting A ○ □ Setting B ◇
			5'''	Setting A ○ Setting B ○ Setting C □
			5''''	Setting A ○ Setting B □ Setting C ◇

○ similar case, □ similar case with intrinsic variation, ◇ similar case with other intrinsic variation,
' through '''' similar design with three cases instead of two.

Combining the two aspects of generalization by Glaser and Strauss (1967) leads to another type of design with replication cases including intrinsic variations in different settings (# 5 in Table 3). The research on temporal shifts as enabler of organizational change by Staudenmayer, Tyre and Perlow (2002) best illustrates this type of design. They studied changes in three organizations with three types of intrinsic variations, in two different settings (#5" in Table 3). Their findings are based on three field studies of three different kinds of organizational change (intrinsic variations): changes in routine in product design and process; adaptation in technical features and routine due to disrupted events; and change in interaction patterns in teams. Because these three instances of change vary significantly, they support a theory of change rather than a subset of specific type of change (such as new product design). Further, the events leading to temporal shifts are also of different kinds, showing that it is not the type of event but the shifts they generate that matter, thereby improving validity. The events took the form of decided full- stop routine, interruption of process due to disrupted events, and decided alteration of daily work in the third case. In addition to intrinsic variation, the cases also greatly differ by setting: namely, a leader in personal computer software and two manufacturers (metal components and office equipment, respectively). These diverse settings broaden the scope of generalization across industries and rule out explanations related to a specific industry.

The two dimensions of generalization developed by Glaser and Strauss (1967) lead to four types of design with different potential strengths that are summarized in Table 4. The table highlights the potential of introducing dissimilarities that are rarely used or emphasized by authors. These designs are however prototypical, since settings are rarely either identical or totally dissimilar. Similarly, cases are never exactly the same. Consequently, the boundaries of the four categories are blurred and the analytical category in which published articles fall can be debated.

Table 4: Potentials of designs according to variations

	Similar case	Dissimilar case (intrinsic variation)
Same settings	- Substantive theory - Generalization to the setting Designs # 1s (Table 2)	- Formal theory with high-order concepts - Generalization to the setting Designs # 4s (Table 3)
Dissimilar settings (extrinsic variation)	- Substantive theory - Validity and generalization across settings Designs # 3s (Table 3)	- Formal theory with high-order concepts - Validity and generalization across settings Designs # 5s (Table 3)

3. COMBINING CONTRASTING CASES AND A REPLICATION WITH DISSIMILARITY

Another type of design results from combining two contrasting cases and a replication. Because the contrasting cases require maximum similarities, they need to be in the same setting. Dissimilarities can apply to the replication case only. This leads to three possible valid three-case designs. These are displayed in Table 5.

Table 5: Three-case designs with contrasting and replication cases

Type of design	Design#	3-case Design
Contrasting cases and replication with intrinsic variation in same setting	6	Setting A ○ ● ☐
Contrasting cases and replication in dissimilar settings	7	Setting A ○ ● Setting B ○
Contrasting cases and replication in dissimilar settings with intrinsic variation	8	Setting A ○ ● Setting B ☐

○ similar case, ● contrasting case, ☐ similar case with intrinsic variation

The three designs combine the two possible ways to increase validity: having similar findings when nothing else is the same, and having contrasted outcomes when everything is the

same except for the antecedent (Stuart Mill, 2006). Because real-life situations cannot provide such highly demanding conditions, combining the two approaches increases validity. Design # 8 is the best of the three designs because it includes more dissimilarities than the two others. It includes intrinsic variations and dissimilar settings, while design # 6 includes only the former and design # 7 only the latter.

I was not able to find a published example of design #8, but the study by Wiskin (2006) of businesswomen and financial management in the eighteenth century illustrates design # 7 with contrasting cases and replication in dissimilar settings. Wiskin showed that the success or failure of a woman's business depended on her competence in financial management. For that purpose, she studied three cases in England. Two of them were contrasting cases in similar manufacturing- and fashion-related industries with international activities. The first one - Eleanor Coade - was a manufacturer of high-quality artificial stone ornaments and architecture panels sold worldwide from 1769 to her death more than fifty years later. The second one - Jane Tait - was an international dressmaker and milliner who went bankrupt in 1828. Like Jane Tait, Eleanor Coade began her career as a linen draper before turning to ornament manufacturer. This additional feature increases similarity between the contrasting cases, thus improving validity. The third case - Charlotte Matthews - was a financier who ran her husband's business after his death in 1792 until her death in 1802. This last case is a replication in a highly dissimilar industry: banking, which provides generalization across industries. It further differs in background from Eleanor Coade. Whereas the former was a widow trained by her husband, the latter learned from the bankruptcy of her father who was a cloth merchant. The analyses show that Jane Tait got bankrupted because of her inability to collect outstanding debts (Wiskin, 2006: 156), whereas the two others were competent in book-keeping and managing credit rather than specifically 'female' types of trade credit, as argued by one stream of literature. The results of this comparison between cases clearly value general financial competence over the skills

specific to females back in the day, since the woman who failed performed the most traditionally feminine activity (dressmaker and milliner).

4. DISCUSSION

This essay aims at promoting two-case and three-case research designs that scholars currently tend to overlook, even though the examples described above, published in the best journals, prove that they are recognized by the strategic organization research community. Moreover, some can provide strengthened validity in results with high-order concepts and evidence for generalization across settings when cases are carefully chosen. Further, these two-case and three-case designs often provide the reader with rich narratives that may have intrinsic interest beyond the theory that they support, which is impossible with many cases due to space constraints. These advantages can make the choice of two or three cases a strategic one, since the inclusion of more does not necessarily improve the validity of the findings or complicate the writing. For example, Helfen and Sydow (2013) studied eight cases but chose to present only three of them in their article. Finn et al. (2010) also chose to display only two cases among the eleven they had studied.

In addition, as noted earlier, similar cases tend to be selected in identical or similar settings although replication in highly dissimilar settings and with intrinsic variations potentially increases validity and generalization. The fact that there are only few published articles with replications in dissimilar settings or intrinsic variations might result from the risk entailed in deliberately choosing this type of design. The selection of cases can prove disappointing (Vaughan, 1992). For instance, facing a case which upon analysis yields unexpected results, researchers might have difficulty deciphering among explanations when the cases differ heavily from the other intrinsically and extrinsically. Analyses can thus be inconclusive. Actually, the two illustrations of such designs presented above resulted from opportunities. Bechky and

Okhuysen had conducted independent studies before having the idea to match them and reanalyze their data for their published research cited above. Similarly, Staudenmayer, Tyre and Perlow had conducted independent studies on different topics before to find a new, common research question and reanalyze their data with another shared framework, leading to their cited study.

However, there are two possible ways to reduce this risk of inconclusive findings. One is to conduct retrospective case studies, in which the outcomes are known before data collection is commenced. This would not be atypical. Indeed, about one third of the papers in the sample, whether historical or not, use retrospective data. Another possibility for research requiring on-time data collection consists in conducting the cases consecutively, following an emerging logic (Piekkari et al., 2009). Contrary to the design logic in which the cases are chosen prior to data collection, this emerging logic involves selecting subsequent cases after having analyzed previous ones. Depending on findings from the first case, the second case can be selected as a replication to test the emerging theory in a dissimilar setting or with intrinsic variation. This emerging logic can also be used for three-case designs with contrasting cases and replication.

This essay has presented several valuable designs for publication but did not cover all possibilities for effective two-case and three-case designs. Among the 33 articles in the sample, five had designs that differ from those discussed in this essay. Three of them included cases selected for their equifinality to highlight different paths. For example, Peeters, Massini and Lewin (2014) studied how absorptive capacity routines influenced the efficiency of management innovation adaptation processes and showed that the two leaders in their respective sectors followed different paths to success. Another published article, by Kodeih and colleagues (2019), included cases of business schools selected for having a similar beginning but making different choices. It showed that the two leading French business schools had

chosen different categorization strategies in response to similar context of international categorical structure. The last one, by Gagnon and Collison (2014), highlights different strategies of leadership development leading to contrasting outcomes in different settings. Whereas designs with contrasting cases in different settings usually lack robustness, that is not true here because the settings had an impact contrary to the expected one. This last example from the sample recalls that each design can become relevant because of features other than similarities and differences. These additional criteria include extreme case, negative case, unexpected outcome and typical case (e.g., Patton, 2002; Piekkari et al., 2009). These criteria, often used for single-case studies, can be of interest in two-case and three-case designs as well. Without being exhaustive, this essay has provided a panorama of two- and three-case designs that differ in the way of combining similarities and differences. It thus provides researchers possible alternatives in selecting which cases to use. This essay further suggests uncommon or even rare but interesting designs based on replications with maximum dissimilarities. Finally, it aims at promoting two- and three-case designs to broaden the scope of research considered relevant in strategy and organization scholarship and enrich the variety of published case-study research.

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