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Adapting and blending grounded theory with case study: a practical guide

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Abstract
This article tackles how to adapt grounded theory by blending it with case study techniques. Grounded theory is commended for enabling qualitative researchers to avoid priori assumptions and intensely explore social phenomena leading to enhanced theorization and deepened contextualized understanding. However, it is criticized for generating enormous data that is difficult to manage, contentious treatment of literature review and category saturation. Further, while the proliferation of several versions of grounded theory brings new insights and some clarity, inevitably some bits of confusion also creep in, given the dearth of standard protocols applying across such versions. Consequently, the combined effect of all these challenges is that grounded theory is predominantly perceived as very daunting, costly and time consuming. This perception is discouraging many qualitative researchers from using grounded theory; yet using it immensely benefits qualitative research. To gradually impart grounded theory skills and to encourage its usage a key solution is to avoid a full-scale grounded theory but instead use its adapted version, which exploits case study techniques. How to do this is the research question for this article. Through a reflective account of my PhD research methodology the article generates new insights by providing an original and novel empirical account about how to adapt grounded theory blending it with case study techniques. Secondly, the article offers a Versatile Interview Cases Research Framework (VICaRF) that equips qualitative researchers with clear research questions and steps they can take to effectively adapt grounded theory by blending it with case study techniques.

Keywords Case study · Grounded theory · Qualitative research · Qualitative inquiry

1 Introduction

Methodology is pivotal to our knowledge inquiry, for through it, we effectively investigate phenomena and its context (Creswell 2013; Mullen et al. 2009). Whether our research serves to develop or test theory, or seeks to explore, explain, predict, control, or generate

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understanding, it is through methodology that researchers collect or generate the appropriate data to investigate or explore the research problem, (ibid). Therefore, regardless of it being a quantitative or qualitative research, methodology must be robust, failure of which leads to a lack of or limited rigor, clumsy findings and hazy implications to theory, practice and policy.

To qualitative researchers, robust methodology is the key to unearth, navigate and weave through the intricacies and particularities of complex and dynamic realities in social processes, (Charmaz 2006, 2014; Creswell 2013; Tobi and Kampen 2018). Consequently, there are increasing calls for qualitative researchers to innovate methodology including blending research strategies and techniques, (Hlady-Rispal and Jouison-Laffitte 2014; Mullen et al. 2009; Travers 2009). The five major strategies in qualitative research methodology (Creswell 2013), that is case study, ethnography, phenomenology, grounded theory and narrative, therefore, present researchers with opportunities to attain methodological innovation through blending their techniques. This is a key rationale for this article.

Consequently, this article is about how in my PhD research I adapted and blended grounded theory with case study to address the problem of decontextualized and limited understanding about human resources management (HRM) in micro, small and medium enterprises (SMEs). This is because most studies are quantitative, predominantly focus on large firms; hence, the dearth of contextualized theories for HRM in SMEs, (Lai et al. 2017; Nolan and Garavan 2016). I used grounded theory because it is mostly equipped to generate theory from empirical data and I adapted it by blending it with case study to attain methodological innovation while effectively gaining cost, time and versatility efficiencies.

For clarity, by drawing on research (Chamberlain 2006; Travers 2009; Wiles et al. 2011) this article defines methodological innovation as referring to either coming up with a totally new methodology or modifying existing research strategies and techniques by adapting and blending two or more research strategies and techniques in a single study or adapting a single research strategy in a single study by modifying its protocols and tactics to suit the research context.

Clearly, of the above two types of methodological innovation, coming up with a totally new qualitative methodology is complicated. Besides the five major qualitative research strategies are well-established with significant theoretical and empirical support: Great work by many scholars ahead of us. Consequently, methodological innovation through blending existing research strategies and techniques is the focus of this study. Doing this exploits the strengths of existing qualitative research approaches/strategies/techniques while minimizing their inherent weaknesses (Creswell 2013). Alternatively, we can creatively adapt a single qualitative research strategy such as case study or grounded theory (without blending it with another research strategy) but modify its protocols and tactics to better address specificities of the research context.

While extant qualitative research strategies are well developed, they have their own drawbacks, for example, in terms of cost-time and versatility efficiencies, hence, the need to innovate through blending them with other strategies and their techniques. A typical case is how although grounded theory is credited for innovating qualitative research through its novel techniques it is criticized for generating enormous data that is difficult to manage, (Dune2011; Ramalho et al. 2015; Sharma, et al. 2022). Further, its treatment of literature review and how to attain category saturation are all contested, (ibid).

Ongoing contentions have resulted in major grounded theory versions, thus, the classical version (Glaser and Struss 1967), then Struss and Corbin version (Strauss and Corbin 1998;

Corbin and Strauss 2015); Glaser's version (1998), Charmaz' version (Charmaz 2006, 2014) and Urquhart's version (Urquhart 2013). Of course, this proliferation improves clarity on some contentious issues but the downside is that still some bits of confusion remain. This is because not all the protocols apply universally to all different versions of grounded theory.

Consequently, grounded theory remains perceived as daunting, costly and time consuming, therefore, scaring many qualitative researchers to use it, (Dunne 2011; Ramalho et al. 2015; Sharma et al. 2022). Yet of all the five major qualitative research strategies, it is predominantly in grounded theory that qualitative researchers can avoid priori assumptions to intensely explore phenomena and develop theory entirely grounded in empirical data.

Given the abundant opportunities to adapt grounded theory and the need for methodological innovation, yet limited practical guides to do so, this study, therefore, seeks to address the primary research question of: How can grounded theory be adapted with case study to attain methodological innovation? To address this research problem the article is guided by the following research questions and objectives.

1. To examine the researcher's qualitative doctoral research process and identify phases during which a qualitative researcher can attain methodological innovation.
2. To draw on the researchers' doctoral qualitative research process and identify steps a qualitative researcher can take to attain methodological innovation.
3. To develop a versatile framework that guides qualitative researchers how they can adapt grounded theory by blending it with case study.

The article is significant in several ways inclusive of extending the discourse of methodological innovation in qualitative research as well as provision of a practical guide about how to adapt and blend grounded theory with case study. Regarding format, the article adopts the convention of reviewing related literature after the introductory section, followed by methods, results, discussion and concludes by drawing out implications and future research.

2 Literature review

2.1 Methodological innovation and philosophical paradigm

Methodology (Tobi and Kampen 2018) refers to all the steps we take in the process of collecting or generating data, analysing or interpreting it and how we choose and exploit it is influenced by our philosophical paradigm, (Creswell 2013; Levers 2013). Philosophical paradigm denotes our endemic system guiding our world view about the nature of reality and how we can understand it, (Burrell and Morgan 1979; Chalmers 1999). Four components constitute our philosophical paradigm and these are our ontology, epistemology, axiology and methodology, (ibid).

Ontology illuminates how we understand the nature of reality while epistemology reflects our understanding about the nature of knowledge and how we can gain it, (Burrell and Morgan 1979; Chalmers 1999). Axiology, in turn, refers to our values system and judgments (research ethics) in conducting research (ibid).

To exemplify, two major philosophical paradigms in research are positivism and interpretivism. Positivism espouses an external, observable, verifiable (i.e., objective) reality that exists independently of the social actors, (Burrell and Morgan 1979; Chalmers 1999). Positivism is the leading and almost exclusive paradigm that quantitative researchers use as they seek to develop objective knowledge also referred to as nomothetic knowledge, (ibid). Therefore, positivist researchers are also called objectivist because they are driven by objectivism; hence, in their methodology they talk about collecting and analysing data, signifying that the data and the process are objective, externally existent, observable, verifiable and independent of the researcher, (Adrade 2009).

Conversely, interpretivism postulates a reality that is socially constructed and co- created by social actors in different social settings leading to subjective situated meanings and multiple realities, (Burrell and Morgan 1979; Chalmers 1999). Interpretivism dominantly drives qualitative researchers as they seek to co-generate with participants what is called idiographic knowledge (ibid). Consequently, qualitative researchers are called subjectivist because they are predominantly driven by subjectivism; hence, they talk about generating and interpreting data during their methodology, (Lauckner et al. 2012).

Therefore, methodological innovation through blending research strategies and techniques has to be compatible with our underlying philosophical paradigm. For this reason, researchers should disclose their philosophical position: Non-disclosure mars data collection/generation, data analysis/ interpretation, (Andrade 2009; Lauckner et al. 2012). Consequently, this article draws on my interpretivist doctoral research methodology to explain how qualitative researchers can adapt and blend grounded theory with case study and how this can also apply to other philosophical stances.

A special caveat that qualitative researchers should take note of is that blending research strategies and techniques should not be mistaken with the well-developed methodological innovation of mixed methods. Research show that mixed methods is all about blending or combining of different research approaches, (i.e., quantitative and qualitative) adapting them in a single study, (Allwood 2012; Mauceri 2014; Tzagkarakis and Kritas 2022). Therefore, this article is not about the use of mixed methods because quantitative approach is not involved.

Further, to attain methodological innovation through blending qualitative research Strategies, qualitative researchers should not only consider their philosophical paradigm but also the inevitable roles of cost, time and versatility. Undoubtedly, whether research is academic, private sector or government driven, best practice across these organizations is that researchers should conduct ethical and robust research within the inevitable constraints of costs, time and versatility, (Charmaz 2014; Urquhart 2013). Given this evidence, this prudent effort to attain methodological innovation through blending research strategies should not be misinterpreted as bad research that seeks to do a shoddy job citing cost, time and versatility constraints. Instead, as Andade (2009), Charmaz (2014), Creswell, (2013), Lauckner et al. (2012) and Tomaszewski et al. (2020) observe the opposite is true, that is, it is amiss in research not to adequately plan for the sufficiency of resources in terms of cost, time and versatility.

Therefore, this article seeks to explain how adapting and blending grounded theory with case study leads to cost-time and versatility efficiencies while at the same time enhancing theoretical rigor. Put differently, the key question is can qualitative researchers blend research strategies and attain cost-time-versatility efficiencies while still undertaking robust research and delivering credible research outputs? If yes, then such methodological innovation should be exploited.

2.2 Case study versus grounded theory

2.2.1 Efficacy of case study

Case Study is a robust qualitative research strategy executed either from a positivist perspective (Yin 2014) or constructivist paradigm (Stake 1995). Its advantages include being able to describe, explain or explore any issue within bounded contexts, especially current challenges embedded in underexplored research fields or scantly known areas. A researcher can use the case study in any situation and results are crucial to test, verify, or build new theory, (Andrade 2009; Diefenbach 2009; Lauckner et al. 2012).

Further, participant selection is quite straight forward mostly either conveniently and or purposeful and all done before data collection or generation. Key challenges include the complexity to identify the case and the unit of analysis. The third is about deciding how many cases are adequate. Fourth is the risk of bias given qualitative researchers struggle to generalize to populations (Niaz 2007) albeit generalizing to particularities and theory is possible, (Andrade 2009; Lauckner et al. 2012). A fifth challenge, is time, given a researcher can take long holding interviews from one unit of analysis to another, for example, interviewing the business owner, senior executives, senior managers, line managers, employees and even customers and suppliers to comprehensively investigate an issue or case of interest such as declining business performance.

2.2.2 Efficacy of grounded theory

Grounded Theory, founded by Glaser and Strauss (1967) solely seeks to develop theory from empirical data. The classical position is that, an emerging, observable or experienced issue motivates the researcher to commence a conversation with a participant embodying such an issue. From this conversation, the researcher gets slight insight into the issue leading them to iteratively ascertain who else to converse with. This is called theoretical sampling. This iterative process also includes the data interpretation via the special coding of participants' narratives aggregating similar and or characteristic words, phrases, and themes.

Drawing on this coding and aggregation the researcher can undertake constant comparison, that is comparing observed cross-relationships across data-codes-categories-concepts- theoretical permutations-theory, (Charmaz 2014; Glaser and Strauss 1967; Iman and Boostan 2012). To enhance theorization the researcher writes a theoretical memo for each participant transcript, clearly articulating their objective or subjective understanding about what is going on, why, how, where, when, by who, with whom, and so what (ibid).

During this analytical process, a researcher reaches a stage whereby additional conversations with participants and subsequent coding fails to produce categories different from those they already developed, (Charmaz 2014; Saunders et al. 2018). This entails category saturation. This is usually identified by the researcher's expression that additional participants are not telling them anything new.

However, what is particularly important is theoretical saturation, which entails the researcher being able to embed in the data-codes-categories and abstract all possible theoretical concepts that can explain what is going on, (ibid). This is practically impossible to do; hence, the researcher should instead draw on category sufficiency, which as Dewy (1999) first noted relates to the logical conclusion by the researcher that the categories they

have generated are rich and sufficient enough to theorize about what is going on. Logically, category sufficiency leads to theoretical sufficiency, which illustrates how the researcher makes similar logical conclusion that the theoretical concepts and permutations they have generated are good enough or satisfying enough to explicate the characteristics of the phenomenon under investigation, (Andrade 2009).

The discourse about category saturation and category sufficiency ropes in the golden question about what sample size is appropriate in a qualitative interview study. Extant knowledge show that arguments range from one to 90 participants and even more, with 30 being the most suggested size, (Creswell 2013; Francis et al. 2010; Mason 2010; Onwuegbuzie and Leech 2007). Also, a sample size of 5-12 is very much adequate for theory generation, (Andrade 2009; Charmaz 2006). Conversely, Vasileiou et al. (2018) argue that in grounded theory sample size cannot be predetermined as this is an outcome of theoretical sampling.

Given the above contrasting evidence, I relied on the case study technique of predetermining the sample size to help me effectively manage time. Therefore, I did not do a full-scale or classic grounded theory, but I adapted it: Blending it with case study.

2.3 Blending case study and grounded theory

I benefited immensely from blending grounded theory and case study and here is the illustration. The nature of the research problem at hand was largely decontextualized and limited knowledge about HRM in SMEs: Hence, paucity of contextualized theories for HRM in SMEs, (Lai et al. 2017; Nolan and Garavan 2016). This was mostly due to an abundant positivist and deterministic extant knowledge with very little idiographic knowledge, (ibid).

To address the above problem, grounded theory was naturally the most appropriate research strategy to use considering its primary purpose is to generate theory from empirical data. However, being a doctoral study, I faced serious constraints in terms of cost and time and to undertake a full-scale grounded theory, religiously following theoretical sampling and constant comparison was very risky. Consequently, overlooking theoretical sampling by roping in the case study technique of purposive sampling ensured that I already had my research participants well before undertaking the study.

Yet to ensure, my provisional concepts (Charmaz 2014) did not pollute the substantive theory I refrained from using them to inform my conceptual framework and interview guide. Consequently, I resorted to draw on induction by interviewing the first three participants and used this inductively generated evidence to construct a sensitizing conceptual framework that informed my interview guide.

Equally, had I used the case study as the sole research strategy, firstly, I would have been constrained to generate a robust micro theory given the case study is less equipped to do this than a grounded theory. Also, I was going to find it very challenging in terms of effectively managing cost and time considering I would have had to generate data at three levels of units of analysis: employees, line managers, and owner managers. Therefore, by adapting and blending grounded theory with case study I was able to effectively manage cost and time, be versatile in exploiting the strengths of both strategies minimizing their weaknesses and at the same develop a robust micro theory for HRM in SMEs.

Yet how to blend not just case study and grounded theory but also how to blend any two strategies from the list of major qualitative research strategies is limitedly understood by many, especially nascent researchers. This limited knowledge is worsened by the paucity of literature that comprehensively articulate how to blend qualitative research strategies to

attain methodological innovation. No wonder calls for methodological innovation in this regard, (Hlady-Rispal and Jouison-Laffitte 2014; Mullen et al. 2009; Travers 2009). This is a significant knowledge gap this article addresses.

3 Methods: Reflective critical review of my PhD qualitative research methodology

To explain how a researcher can blend techniques of case study and grounded theory, I draw on my reflective account about the research methodology for my PhD research. I must point out that during that time, I had no knowledge whatsoever about the Versatile Interview Cases Research Framework (VICaRF) that I shall develop under the results section. Instead, all that dawned on me then were these questions: How can I effectively contribute to knowledge not just based on my empirical results but also drawing on my methodology? How can I do my research more flexibly? How can I cut costs and time? Finally, how can I be creative and distinct in my research?

That I am learning new things years after my PhD research attests the power of reflective learning, which occurs when we reflect and critically review our previous actions and behaviours, thereby effectively completing our learning loops, (Cope 2005). Therefore, in conducting a reflective critical review of my PhD research methodology, I shall be illuminating the various phases, during which a researcher can pose several questions and take various steps to attain methodological innovation in a qualitative inquiry. Below are the results of my critical methodological reflection.

4 Results

4.1 Phase 1: Innovating during knowledge gap scoping

Doing research entails firstly joining a discourse about some topical phenomenon and in doing so it is crucial to have an independent view of what is going on. Without such independent perspective, a researcher finds it very challenging to bring in fresh insight, thus risking regurgitating viewpoints. Consequently, apart from affirmation, we learn not much from this. Therefore, scoping the knowledge gap about any issue becomes the first opportunity for a researcher to be independent, creative and see things differently. To do this, a researcher can pose the following question:

Question 1: What research problem confronts academia, practice and policy for which I intend to independently and creatively resolve?

By asking the above creative question a researcher can creatively identify the research problem take the following first step to innovate their methodology.

Step 1: Literature Review and Determining the Research Problem

The researcher can, with a desire for creativity, critically interrogate: What is this discourse about? What are the major and minor issues and why? Who is saying what, how and why? What are the impacts, how and why? What is being overlooked how, why and what is the impact? How can I effectively join the discourse and contribute fresh insights?

Therefore, a researcher can either draw on the narrative or the systematic literature review. Exploiting narrative review entails having very limited inclusion and exclusion criteria to embrace as many data sources as possible, from which to unravel a broad view

of what is going on, (Gordon 2018). But through a systematic literature review, (Tranfield et al. 2003) a researcher exploits specific inclusion and exclusion criteria, from data sources, to time zones and content. Narrative review is particularly helpful for exploratory research which seeks to gather multiple views whereas systematic literature review goes for robustness, objectivity and generalizability.

Given I sought to explore the multiple realities of HRM in SMEs I accordingly chose a narrative review, albeit just a technical review (Charmaz 2014). I did this technical narrative literature review because I was not doing a classical grounded theory (Glaser and Strauss 1967) which forbids reviewing literature before data generation but I followed contemporary evidence (Dunne 2011; Ramalho et al. 2015), which permits adapting grounded theory in like manner.

Through this technical narrative review (Charmaz 2014) I met the requirements of my university vis-à-vis: I understood the HRM in SMEs discourse, established the knowledge gap, produced a credible research proposal, explained my contribution to knowledge and crafted a tentative interview guide. Had I not done this I could not have advanced to the next stage of interviewing participants.

A caveat is that, doing a technical literature review did not prevent me from using grounded theory, for all human beings are not of a blank mind (tabula rasa) as they undertake research (Charmaz 2006, 2014; Urquhart 2013). Instead, through reflexivity I ensured my provisional concepts inclusive of this literature review did not pollute the social construction of my grounded theory.

During my technical narrative literature review I became aware of several academic viewpoints in respect of HRM in SMEs. Firstly, I observed diverse views about HRM in SMEs, the first issue being SMEs can exploit formal HRM best practices obtaining in large enterprises, (Lai et al. 2017). The second issue is about a contextualised approach that advocates for context based and mostly informal HRM in SMEs, (Marlow et al. 2010). The third issue is about the argument that formality and informality are not mutually exclusive in SMEs, therefore, blended HRM prevails, (Marlow et al. 2010).

My second observation was that diversity in views is largely driven by different philosophies and contention over conceptualizing the HRM concept. Positivists argue for prevalence of incorrigible constructs to explicate HRM while constructivists contend that processes in ordering work and managing people are good enough to explain HRM, (Marlow 2006). Thirdly, I also observed the dearth of idiographic knowledge about HRM given an abundance of quantitative studies. Similarly, large enterprises crowd out the SME owner manager's HRM viewpoints, (Lai et al. 2017). My fourth observation relates to the controversial interchangeability of the term HRM with people management, as academics argue, these two do not entail the same philosophically, (Marlow 2006).

Fifth, I found it quite surprising that although evidence suggests an entrepreneurship-HRM nexus (Katz et al. 2000) the mainline HRM discourse does not exploit entrepreneurship to understand HRM. Consequently, drawing on my knack for creativity I was quick to notice how I could bring in a fresh perspective by exploiting an entrepreneurial learning perspective as an investigative lens to explore HRM in SMEs. Doing this had empirical support in that SME owner managers do learn entrepreneurially as they undertake business (Cope 2005).

Ultimately, from my technical narrative review, I characterized my study's research problem as 'the de-contextualization of HRM in SMEs', which is leading to lack of clarity and limited understanding about people management in SMEs. Therefore, my primary aim was to explore how and why SME owner managers enact people management in the manner they do. Clearly, without embedding myself in the HRM discourse, retaining

independence and having a knack for creativity, I would not have comprehensively scoped my knowledge gap and set the platform to innovate my research methodology. This is an example others can follow.

4.2 Phase 2: Innovating during philosophical positioning

I posed the following questions:

Question 2 (a & b). What is the leading research philosophy being used to understand the research problem at hand and what is the resultant impact?

Question 3: Can I exploit a different philosophical perspective to better understand the research problem?

Question 4: What opportunities exist for blending philosophical paradigms to further enhance our understanding of the research problem?

Question 5: How does blending philosophical paradigms, if applicable, promotes methodological innovation?

Responding to the above questions, I therefore, undertook my second step, thus:

Step 2: Adopting an Alternative Philosophical Positioning

Being aware of the abundant positivist prescriptions about HRM in SMEs (Nolan and Garavan 2016) I opted to exploit interpretivism and social constructionism to bring a fresh insight into the research problem 'De-contextualization of HRM in SMEs'. Doing this was not difficult for me given my ontology is largely interpretivist. Consequently, switching from one's preferred ontology can preclude creativity as we perpetuate understanding phenomenon in the way we have always done.

By drawing on interpretivism and social constructionism, I was able to explore language, symbols and behaviour all embedded in social settings and within situated contexts to understand the multiple realities of HRM in SMEs, (Charmaz 2014; Levers 2013). Further, I was able to heed the calls for more contextualized research into HRM in SMEs, (Cooke 2017; Marlow et al. 2010). Readers should note that it is the interpretivism paradigm which informs this article.

4.3 Phase 3: Innovating during qualitative research strategy positioning

To innovate during this phase, I interrogated as follows:

Question 6: What qualitative research strategy from the regime of major qualitative research strategies is best suitable to explore the research problem?

Question 7: What opportunities exist to blend qualitative research strategies to enhance methodological innovation?

Question 8: Given questions 6 and 7 above, what is the most suitable qualitative research strategy or blend of strategies, inclusive of data sources that will result in greater methodological innovation, enhancing rigor, versatility, cost-time efficiencies and theory development?

Responding to the above questions, I took the next step, thus:

Step 3: Blending Techniques of Constructivism Grounded Theory and Case Study

Having reviewed the major qualitative research strategies, I observed that I had more opportunities to attain methodological innovation and enhance cost-timer-versatility efficiencies by adapting and blending constructivist grounded theory (Charmaz 2006, 2014) with constructivist case study (Stake 1995). Through the case study technique of unit of analysis, I could avoid interviewing all qualifying members of an organization (managers,

employees) but simply limiting myself to the SME owner manager. Considering it is the SME owner manager that predominantly directs the SME venture (Lai et al. 2017; Marlow et al. 2010) data that I generated was appropriate and robust to theorize HRM in SMEs.

Through constructivist grounded theory's techniques of iterative data generation and interpretation (Charmaz 2006, 2014), I was poised for robust theory generation. Also, by adopting the contemporary middle ground position (Dunne 2011; Ramalho et al. 2015) regarding the position of literature review in a grounded theory, I attained flexibility by doing two literature reviews. Also, I complied with the 'delay literature review' compromise position of not delving too much into the substantive field of research before data generation, (Charmaz 2006, 2014; Glaser 1998). After developing my substantive theory, I then did a second literature review and used it to illuminate my theory, (Charmaz 2014; Dune 2011; Ramalho et al. 2015).

4.4 Phase 4: Innovating during selecting participants

I questioned as follows:

Question 9: How can I innovatively select participants?

This led to the following step:

Step 4: Purposive Sampling

Instead of using the classical theoretical sampling used in classic grounded theory (Charmaz 2014; Glaser and Strauss 1967) I innovated by exploiting constructivism case study's (Stake 1995) purposive sampling. Doing this helped me to predetermine sample size before data generation, thus effectively manage time. Had I used theoretical sampling I would have taken much longer to settle for an appropriate sample size, and this would have been more costly, (Charmaz 2006, 2014; Glaser and Strauss 1967).

Given the need for rich diverse data to explore multiple realities and robust idiographic theory generation (Charmaz 2014) and not objectivist generalization, I purposefully selected 30 different SME participants operating in Greater Manchester-United Kingdom, in any business sector and recruiting between 0–9 employees (micro), 10–49 employees (small) and 50–249 employees (medium sized firms), (Lai et al. 2017; Marlow et al. 2010).

Question 10: How can I prepare to innovatively generate data?

This led to steps (5–6).

Step 5: Inductive Departure

The classical constructivism grounded theory recommends use of provisional concepts, or *"guiding interests"* (Charmaz 2006: p. 17) to construct some concepts that will serve as *"points of departure"* (Charmaz 2006: p. 17) to generate data. Conversely, I innovated by going all out for an inductive departure to allow only empirical data to guide interviews. Admittedly, inductive departure does not imply I was of a blank mind, that is, tabula rasa (Charmaz 2006; Dunne 2011) albeit through reflexivity I barred my preconceptions from influencing data generation. I further explain my inductive departure as follows:

Step 6: The Onion Peeling Questioning (OPQ): Constructing the Sensitizing Conceptual Framework.

In my abstraction I thought of how we can peel an onion, scale by scale each time revealing much deeper the inside of the onion. Therefore, I exploited this metaphor of the onion peeling process to inductively get into the field and start data generation. To do this, I simply asked the first three participants a very simple broad question: "What is it like to operate your own business and manage your own people?" In response, participants opened up in any way they liked, without responding to any leading questions. From

my conversation with the initial batch of three participants and through constructivism grounded theory's techniques of initial and focused coding (Charmaz 2014), I developed these key categories: Personal Background, Career Experiences, Business Experiences, Networking Experiences, Entrepreneurial Learning Experiences and People Management Experiences. Through higher abstraction of theoretical coding (Charmaz 2014) I then socially constructed the following theoretical memo:

> Within the context of their entrepreneurial learning, SME owner managers tend to draw on their personal background, career, past and current businesses as well as networking to acquire and generate knowledge to enact people management.

Drawing on the above first-hand issues (i.e., hearing straight from the horse's mouth) I constructed a sensitizing conceptual framework that then informed the development of a more elaborate interview guide. This interview guide then informed my remaining 27 interviews. Crucial is that, both the sensitizing conceptual framework and the interview guide do not draw on my provisional concepts neither on extant knowledge concepts, as most studies do (Andrade 2009; Charmaz 2014; Lauckner et al. 2012; Strauss and Corbin 1998; Urquhart 2013). This is rarely done, arguably the first and I have not come across qualitative studies that do this.

4.5 Phase 5: Innovating during data generation and interpretation

I asked:

Question 11: How can I innovatively generate data and make sense of it?

This resulted in steps (7–11)

Step 7: 1st Cycle Iterative Initial and Focused Coding

Drawing on the interview guide, I entered the first cycle of iterative data generation and sensemaking to develop a preliminary theory to share with participants. I therefore, iteratively interviewed 21 participants, inclusive of the initial three participants whose data I used to develop the sensitizing conceptual framework. The choice of 21 participants is a judgement call that I made in relation to my attainment of category sufficiency, which I shall explain later in this passage. Specifically, I interviewed an individual participant and when three were interviewed, this constituted a batch, which I then interpreted using only initial, and focused coding (excluding theoretical coding), (Charmaz 2006). Excluding theoretical coding was my own adaptation to cut on time. I repeated this process until reaching the 21 participants.

After each interview I would write field notes on my way home and upon arrival I would play back the audio and further write additional notes. I would follow this by yet another audio playback intensely listening and critically asking what this data was all about and what is going on here? (Charmaz 2014). Doing this informed how I would approach my next interview and this constituted some kind of 'issues sampling' (or some kind of modified theoretical sampling) and not theoretical sampling because I had pre-sampled participants before data generation.

For clarity, it is when we converse with participants that we interpret 'what is going on here', (Charmaz 2014; Glaser and Strauss 1967) that is, what are the sticking or distinct or predominant issues coming out. These issues then remain ingrained in our abstraction trajectory and we can use them to guide us on what issues to further probe in our next interview with either the same participant or the next participant. Therefore, I call this issues sampling. To attest this, the roles of people management experience, entrepreneurial

learning, values, life goals and religion in how owner managers approach HRM typify issues that informed my issues sampling.

Consequently, on one occasion, I had to replace my preselected owner manager with a Christian Minister of Religion to enable me to explore and triangulate evidence about the critical role of Christianity in HRM in SMEs. Note that if I was doing a full-scale grounded theory, replacing and finding new participants would have been the norm and as is quite apparent, this eats on time, which I did not have. Therefore, blending with case study really enhanced cost-time and versatility efficiencies.

To make sense of 'what is going on here' (Charmaz 2014; Glaser and Strauss 1967) I relied on firstly initial and focused coding which are data interpretation techniques in grounded theory. Initial coding refers to intense first, second and even third reading of interview transcripts while highlighting key words, phrases and or sentences that are distinct or strike out or trigger unique meaning about why participants did what they did and how.

Focused coding on the other hand, involves grouping initial codes which when put together give a clearer and broader meaning of what the narratives are all about (Charmaz 2014; Glaser and Strauss 1967). These focused codes constitute what are called categories. Secondly, through grounded theory's constant comparison I was able to strengthen my sensemaking of 'what is going on here'.

Thirdly, and further demonstrating the crucial role of case study, I also relied on cross case analysis, that is, examining convergent and divergent issues and how these vary across different interview transcripts (Creswell 2013; Stake 1995).

Overall, to remain theoretically sensitive I wrote theoretical memos for each batch of three participants. Questions that guided me during writing theoretical memos (Charmaz 2006; Pentland 1999) include: What is this interview transcript about? Who is saying what, how, where, when and why? What is the underlying theme for this transcript and for this batch? What are the cross relationships unveiling in this transcript and in this batch? The rationale of the first cycle of data generation and interpretation was to only make use of initial and focused coding to generate numerous key categories that enabled me to attain category sufficiency. I made this judgement call about category sufficiency after interviewing 21 participants and having a preliminary insight into the developing theory for HRM in SMEs. I further explain this in my next step below.

Step 8: Preliminary Member Checking

Having done initial and focused coding for 21 participants (70% of the 30 interviews) it became clearer how the substantive theory would look like. Therefore, being a social constructionist and to strengthen co-owning the research with participants and co-creating meaning, I held a preliminary member checking meeting with my participants. We all met as one workshop group in a lecture room and participants' feedback largely consolidated my developing theory. This member checking differed from the positivist rationale of evidence triangulation and objective generalization which excludes relationships deemed as spurious. Also, this was not a platform for additional data generation.

Importantly, member checking heightened my theoretical sensitivity (Thistoll et al., 2016), which implies that I deepened my embedded sensemaking thereby making me to more thoroughly interpret the multiple relationships within and between categories.

Step 9: 2nd Cycle Iterative Initial and Focused Coding

Buoyed by my heightened theoretical sensitivity (Thistoll et al., 2016) I went back to sniff for new theoretical hunches as I completed initial and focused coding (Grounded Theory) of the remaining nine interviews, undertaking constant comparison as well as

cross case analysis (Case Study). Ultimately, I refined my key categories and had much clarity about the emerging substantive theory.

Step 10: 1st Cycle Iterative Theoretical Coding

Having completed initial and focused coding for the entire 30 interviews, I commenced theoretical coding (Charmaz 2014), which is an intense sensemaking process that brings together the key categories to develop various overarching meanings (substantive theories) conveyed by empirical data. To do this, I theoretically interrogated all the 10 theoretical memos I had written: One memo per batch of three participants and resumed constant comparison across data-codes-categories-theoretical permutations. Further, I also exploited case study's cross case analysis to establish how such theoretical permutations unveiled across different theoretical memos.

Specifically, I was informed by following the questions (Bruscaglioni 2016; Charmaz 2006; Pentland 1999): What is going on? What is intriguing, how and why? What is it not intriguing, how and why? How are the action-processes about people issues unveiling and why? What are the underlying drivers and the subsequent effects and outcomes? What different overarching narratives about managing people in SMEs can I possibly socially construct? How can I effectively frame such social constructions. Ultimately, I came up with various and more concrete theoretical permutations that explain HRM in SMEs.

Step 11: 2nd Cycle Iterative Theoretical Coding and Comprehensive Literature Review.

For rigor, I had to walk away from theoretical permutations: For two weeks, socialize and then reverted to theoretical coding. This was crucial to further heighten my theoretical sensitivity by inducing a fresher perspective of theorizing the same work. Throughout this theoretical coding, I upheld the grounded theory maxim of constant comparison, iterating across data- codes-categories-concepts-theoretical permutations.

A notable development is how I observed three points for attaining theoretical sufficiency. In this regard, I observed earliest theoretical sufficiency when I was theorizing with 9 interview transcripts and later with 12 and thirdly with 15 transcripts. The implication is that, I could have only used a maximum of 9 or 12 or 15 interview transcripts and still construct a similar contextualized theory about HRM in SMEs. However, I included all the theoretical memos drawn on the 30 participants, thus, broadening and deepening theory generation. Having socially constructed a contextualized substantive theory for HRM in SMEs I then undertook a comprehensive literature review, thus engaged my theory with extant knowledge.

Question 12: How Can I Ensure My Methodological Innovation Remains Ethical And Robust?

This question led me to take the next step as follows:

Step 12: Ethics Review Compliancy and Upholding Research Methodology Protocol

Firstly, I submitted my research proposal for scrutiny and approval by the Ethics Review Board. Secondly, throughout the study, I drew on reflexivity to prevent my provisional concepts (Charmaz 2014) from polluting the substantive theory. Further, I enhanced construct validity by exploiting the first three transcripts to construct a sensitizing conceptual framework which then informed the interview guide: The theory remained grounded in data.

The iterative 'issues sampling' and the constant comparison across data, codes, categories, concepts-theoretical permutations led to robust exploration of cause-effect relationships, thus, ensured internal validity.

Owing to the rigorous examination of particularities, my study attained external validity through generalizing only to theory, (Bruscaglioni 2016; Charmaz 2014). Reliability on the

other hand is assured through the transparent questions and steps I undertook during the highlighted five phases, all of which other researchers can replicate with ease.

To further affirm co-ownership and co-creation of the research process, I held a final member checking meeting with my research participants and again we all met as a workshop group in a lecture room. This was a resounding success as all participants affirmed the substantive theory. Drawing on the above critical reflection I develop below a Versatile Interview Cases Research Framework (VICaRF) that qualitative researchers can use to adapt grounded theory with case study and after this I discuss these results.

5 Discussion: Versatile interview cases research framework (VICaRF)

The article, as is quite apparent, has fulfilled the first research objective by reflecting on my PhD research methodology and managing to identify five phases during which a qualitative researcher can attain methodological innovation. Research objective two has also been achieved because the article managed to identify 12 questions and 12 steps that qualitative researchers can draw on to attain methodological innovation, see Tables 1, 2, 3, 4 and 5 below. Further, research objective three has been successfully achieved given the article developed a Versatile Interview Cases Research (VICaR) Framework to guide qualitative researchers in adapting grounded theory with case study.

Clearly, as shown in Fig. 1 above, attaining methodological innovation in a qualitative inquiry through VICaR is quite versatile and very straight forward. The researcher can exploit it from several philosophical perspectives: objectivist versus subjectivist; critical realist versus relativist. To further provide clarity and guidance, the article tabulates below (Tables 1, 2, 3, 4 and 5) the VICaRF phases, questions and steps that a researcher should consider when striving to adapt and blend grounded theory with case study while being rigor and enhancing versatility, cost- time efficiencies.

As shown in Fig. 1 and Tables 1, 2, 3, 4 and 5 above, attaining methodological innovation is underpinned by appropriately adapting and blending grounded theory with case study and doing so in the appropriate philosophical paradigm. Through the above blending, it is possible to uphold the case study's philosophical paradigms for theory development, (Welch et al. 2011) vis-à-vis positivist-empiricist (inductive theory building); positivist-falsificationist (natural experiment); interpretive-constructionist (interpretive sensemaking) and critical realist (contextualized explanation).

Therefore, qualitative researchers can strive for an objective generalizable theory or generalities, objective explication of causes, subjective explication for meaning as well as

Table 1 VICaRF Phase 1—Innovating during scoping knowledge gap

Question	Step	Action to take
Question 1: What research problem confronts academia, practice and policy for which I intend to creatively resolve?	*Step* 1: Literature Review and Determining the Research Problem	Infuse your critical review with a knack for creativity

Table 2 VICaRF Phase 2—Innovating during philosophical positioning

Question	Step	Action to take
Question 2 (a & b): What is the leading research philosophy being used to understand the research problem at hand and what is the resultant impact?	*Step* 2: Adopting an Alternative Philosophical Positioning	Choose a philosophy or blend that allows you greater chances for creativity
Question 3: Can I exploit a different philosophical perspective to better understand the research problem?		
Question 4: What opportunities exist for blending philosophical paradigms to further enhance our understanding of the research problem?		
Question 5: How does blending philosophical paradigms, if applicable, promotes methodological innovation?		

subjective explication for causes, (Andrade 2009; Lauckner et al. 2012; Welch et al. 2011). Also, conservative generalization to population with context compromised (empiricist) or generalization to theory (falsificationist) as well as context laden particularization (interpretive sensemaking) and context laden restricted generalizations (critical realist) are all possible, (ibid). Indeed, blending philosophical paradigms and qualitative research strategies is possible because these paradigms are not fixed bipolar dichotomies, but are continuums, (Burrell and Morgan 1979; Chalmers 1999; Welch et al. 2011).

In exploiting VICaRF, researchers can also get insight from some exemplar studies that sought to adapt and blend grounded theory with case study. Objectivists can take a cue from Andrade (2009)'s blending of Glaserian grounded theory (Glaser 1998) with Yin (2014)'s positivist case study. Subjectivists can learn from Lauckner et al (2012)'s blending of Stake (1995)'s constructivist case study with constructivism grounded theory (Charmaz 2006).

It is also possible to exploit VICaRF drawing on Corbin and Struss (2015)'s grounded theory, that is, a subjectivist relativist perspective blending it with Stake (1995)'s case study, the result being multiple realities. Exploring how Fairhurst and Putnam (2019) aligned grounded theory with discourse analysis and how Kibuku et al. (2021) combined grounded theory with ethnography (at micro level) will help a researcher know how to best exploit VICaRF in these orientations. What all this proves is that VICaRF is versatile and compatible with several philosophical paradigms.

Regarding validity protocols, the iterative data collection/generation and analysis/interpretation inclusive of constant comparison across data-codes-categories- concepts-theories

Table 3 VICaRF Phase 3—Innovating during qualitative research strategy positioning

Question	Step	Action to take
Question 6: What qualitative research strategy from the regime of major qualitative research strategies is best suitable to explore the research problem?	*Step* 3: Blending Techniques of Grounded Theory and Case Study	Ensure blending of techniques is compatible with your adopted philosophy
Question 7: What opportunities exist to blend qualitative research strategies to enhance methodological innovation?		As an example, positivist Grounded Theory (Glaser 1998; Urquhart 2013) to go with positivist case.study (Yin 2014). Constructivist Grounded Theory (Charmaz 2014) to go with constructivist case study (Stake 1995)
Question 8: Given questions 6 and 7 above, what is the most suitable qualitative research strategy or blend of strategies, inclusive of data sources that will result in greater methodological innovation, enhancing rigor, versatility, cost-time efficiencies and theory development?		

enhances construct validity. Inductive subjectivism further enhances construct validity by exploiting an empirical laden sensitizing conceptual framework, which is premised on participants' views. That participants' views and not researcher's cues inform the interview guide, implies the study is investigating what it claims to be exploring.

In contrast, objectivist researchers can further enhance construct validity through use of numerous data sources such as observations, focus groups, interviews, documents, and photographs, thus triangulating their data analysis, (Andrade 2009). As for internal validity, qualitative researchers naturally cannot resort to statistical methods to flush out spurious variables in search for causal relationships. Nevertheless, researchers can exploit the modified adapted theoretical sampling to evoke Popper's falsification (Popper 1959) critically scrutinizing cause effect relationships across different analytical/interpretive levels, while remaining empirically grounded.

Notably it is difficult to attain external validity in qualitative research especially from the subjectivist perspective but the observed particularities can generalize to theory, (Andrade 2009; Charmaz 2014; Lauckner et al. 2012). Regarding reliability, VICaRf provides for enhanced credibility, given it has logical and transparent steps, which are easy to replicate and produce almost similar results. The caveat of 'almost similar results' is raised because

Table 4 VICaRF Phase 4—Innovating during selecting participants

Question	Step	Action to take
Question 9: How can I innovatively select participants?	*Step* 4: Case Study Purposive Sampling	Ensure departure into field is compatible with your adopted philosophy
Question 10: How can I prepare to innovatively generate data?	*Step* 5: Inductive Departure	Positivists will not go for induction but an extant knowledge driven conceptual framework
	Step 6: The Onion Peeling Questioning (OPQ): Constructing The Sensitizing Conceptual Framework. Use the framework to develop an Interview Guide	

interpretivism and social construction are fluid concepts leading to multiple realities unlike objectivists who decontextualize findings in search of generalizability.

6 Conclusions and recommendations for future research

The article joins the discourse about attaining methodological innovation through adapting qualitative research strategies and in the process provides a practical guide. Although extant qualitative research strategies are robust their effectiveness and efficiencies can further be enhanced through adapting and blending them with each other. This explains the increasing calls for blending research strategies to attain methodological innovation, (Hlady-Rispal and Jouison-Laffitte 2014; Lauckner et al. 2012; Mullen et al. 2009; Travers 2009). Yet not many studies look into this, and even fewer provide a practical guide. This article therefore casts several insights into this subject.

Firstly, whereas the tradition in qualitative research is to draw on provisional concepts (Charmaz 2014) or a conceptual framework (Corbin and Strauss 2015; Urquhart 2013) underpinned by literature, this article makes its first contribution by being arguably the first to introduce the perspective of drawing on empirical data to develop a sensitizing conceptual framework that informs the development of an interview guide. On the basis of extensive literature review which I ultimately conducted after my study and to the best of my knowledge, I have not come across qualitative studies that have done this.

The article also joins the sample size debate (Francis et al. 2010; Mason 2010; Saunders et al. 2018; Thomson 2011) and makes its second contribution by establishing that where purposive sampling is used, a sample of nine to fifteen is adequate to generate theory.

By drawing on Dewy (1999)'s concept of category sufficiency this article makes its third insight by demonstrating that there is no one fixed point at which a researcher attains category sufficiency as this also depends on the researcher's theoretical sensitivity. This logic also extends to how a researcher attains theoretical sufficiency, which differs

Table 5 VICaRF Phase 5—Innovating during data generation and interpretation

Question	Step	Action To Take
Question 11: How can I innovatively generate data and make sense of it?	*Step* 7: 1st Cycle Iterative Grounded Theory Initial and Focused Coding and Constant Comparison. Case Study Cross Case Analysis *Step* 8: Preliminary member checking to participants *Ste*p 9: 2nd Cycle Iterative Grounded Theory Initial And Focused Coding and Constant Comparison. Case Study Cross Case Analysis. Step 10: 1st Cycle Iterative Grounded Theory Theoretical Coding and Constant Comparison. Case Study Cross Case Analysis. Take a break from theorizing: Walk away *Step* 11: 2nd Cycle Iterative Grounded Theory Theoretical Coding and Constant Comparison. Cross Case Analysis. Development of substantive theory. Final member checking *Step* 12: Compliancy Ethics Review Board and with Research Methodology Protocol Final literature review	Exploit reflexivity to prevent provisional concepts from polluting the substantive theory Remain professional and ethical

from theoretical saturation; the latter being a practically impossible task to achieve, that is, to exhaust making all the theoretical interpretations possible. Fourth, the article establishes fresh evidence that a qualitative researcher gets a more solid theoretical insight into the emerging theory by undertaking initial and focused coding of 70% of the interview transcripts.

The sixth contribution the article makes is how it provides for three tier iterative data collection/generation and analysis/interpretation, that is at the individual narratives, subset

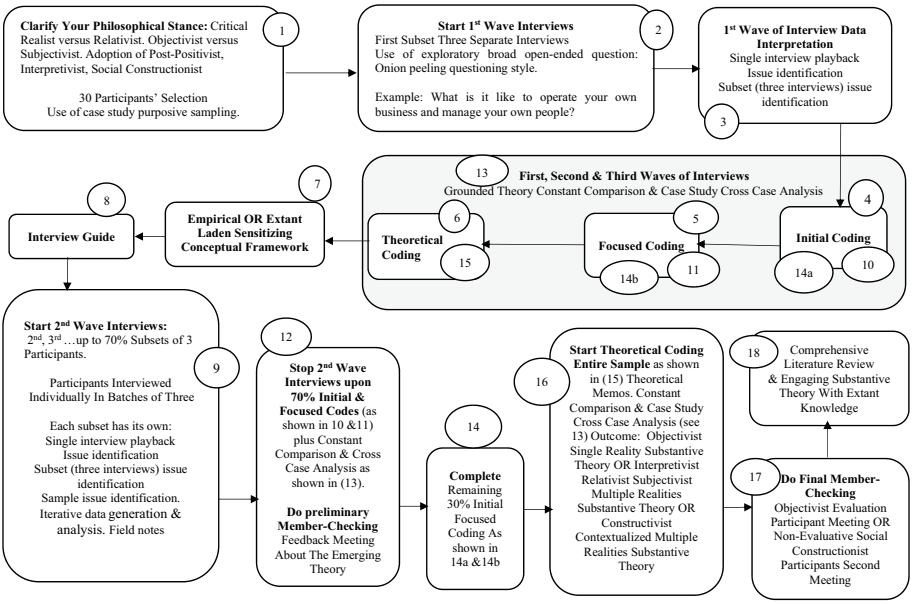

Fig. 1 Versatile Interview Cases Framework (VICaRF) For Qualitative Inquiry

narratives, and sample narratives levels. Further, as a forerunner to its practical guide, the article makes its sixth contribution to this discourse by providing an original and novel empirical methodological account about how to adapt and blend grounded theory with case study enhancing cost, time and versatility efficiencies while producing robust results.

Drawing on this empirical account, the article makes its seventh and major contribution by developing the Versatile Interview Cases Research Framework (VICaRF) (Fig. 1), which is a practical guide about how to adapt and blend grounded theory with case study. Crucial about VICaRF is how qualitative researchers can exploit it from different philosophical positions and this is clearly articulated through VICaRF's five phases, 12 questions and 12 steps, also see Table 1–5. Further, by exploiting VICaRF qualitative researchers can effectively decode, describe and unravel the antecedents for action and the underlying assumptions and motivations, ultimately exposing why and how social actors behave in the manner they do, thus deepening their contextualized theorization, (Charmaz 2014; Glaser and Strauss 1967).

Regarding limitations, like any other research, this article is also limited. VICaRF is a product of an exploratory interpretivist interview cases research study; therefore, caution must be exercised in applying it. Nevertheless, its rationale for blending philosophies and research strategies has rich empirical and theoretical support, (Andrade 2009; Burrell and Morgan 1979; Creswell 2013; Lauckner et al. 2012; Lever 2013).

As for further research, more studies are required to test VICaRF just as more research is also necessary to explore further ways to innovate methodology in qualitative inquiry.

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