

# RESEARCH IN TIMES OF CRISIS

Research Methods in the Time of  
COVID-19

**Edited by** Aaron D. Hill, Jane K. Lê,  
Aaron F. McKenny, Paula O’Kane,  
Sotirios Paroutis and Anne D. Smith

RESEARCH METHODOLOGY IN  
STRATEGY AND MANAGEMENT

**VOLUME 13**

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# RESEARCH METHODOLOGY IN STRATEGY AND MANAGEMENT

Series Editors: Aaron D. Hill, Jane K. Lê, Aaron F. Mckenny, Paula O’Kane, Sotirios Paroutis and Anne D. Smith

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RESEARCH METHODOLOGY IN STRATEGY AND  
MANAGEMENT VOLUME 13

**RESEARCH IN TIMES  
OF CRISIS: RESEARCH  
METHODS IN THE TIME OF  
COVID-19**

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# INTRODUCTION TO RESEARCH METHODS IN TIMES OF CRISIS: THE CASE OF COVID-19

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**Keywords:** Research methods; management; strategy; crisis; COVID-19;  
research methods opportunities

## INTRODUCTION

It is our pleasure to introduce Volume 13 of the *Research Methodology in Strategy and Management* (RMSM) book series. As we continue to develop RMSM as a key methodological resource for researchers in strategy and management, we are also facing critical shifts in the research environment. This year, perhaps more than any prior year, we have seen great uncertainty in relation to all areas of research – research funding, research design, research application, and research capacity. Of course, we are referring to the impact that the COVID-19 pandemic, and the various restrictions associated with it, have had on the *researcher*, our *research*, and the *research context*. Just like the impact felt across many other aspects of life and work, COVID-19 has significantly changed the way we approach and conduct research. Rather than being intimidated by these changes, we embrace them as challenges through which we hone our craft and as opportunities to conduct interesting research in a novel environment. Yet many researchers will need to tread unfamiliar methodological ground to address these challenges and seize these opportunities. That is precisely why we are making “crisis” the central focus of this volume.

### *Focal Topic: COVID-19 and Its Impact*

The recent emergence and spread of COVID-19, along with the associated social and economic measures to combat the pandemic, have profoundly

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Research in Times of Crisis

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impacted both organizations and, in turn, organizational research. Organizations have experienced supply chain disruptions, large-scale employee health and wellbeing issues, loss of in-person customer traffic, and even full shutdowns in the wake of the crisis and crisis response (Donthu & Gustafsson, 2020; Evans, 2020; Lund, Ellingrud, Hancock, & Manyika, 2020). Educational institutions and academic research have also been affected (DAAD, 2020), with many organizational researchers losing access to data sources and/or facing unique concerns related to data collection, data analysis, and research dissemination during the crisis (Drake, 2020; Wirsching, 2020). These circumstances not only challenge the feasibility and suitability of our existing research programs, but also raise the question of how well our current understanding of strategy and management will hold during the pandemic and into the post-COVID-19 world. At the same time, these circumstances provide valuable opportunities for the sciences to engage with new methods (Brainard, 2020) and build community resources (Samuels, 2020). Such tools open avenues for new and unique ways of approaching or adapting research methods to unearth novel insights regarding management in a changed “future” world.

Recognizing this moment as a critical inflection point in research and research methods, we embarked on this volume with the explicit intention to better understand and address crises and other critical events, their consequences, as well as how individuals and organizations respond to them. Many organizational researchers have shifted their attention to explicitly examine the implications of these events on organizations. This renewed interest in crises provides an opportunity to develop our understanding of both crisis management and broader organizational change processes. Yet, researching crisis and crisis management effectively requires methodological expertise and advances. There is a need to provide guidance to scholars pursuing research in this area. There is also a need to adapt, redesign, and innovate methods to ensure they are better suited to the new research environments in which we find ourselves. There is also, at times, a need to recognize that responding to crises may necessitate time-sensitive insights and thus some methodologies may not be practical or even desired. Our call for this volume sought papers that would contribute to these conversations.

### *The Power of the Research Community*

Despite the challenges most of us have experienced as a result of COVID-19 and its associated changes, we have nevertheless managed to produce Volume 13 in line with editorial requirements and deadlines. For this, we are indebted to our excellent authors and editorial board. We are supported by a world-leading editorial board of scholars known for their excellent research, community contributions, and leadership more broadly. We are pleased to continue counting the following among our editorial board: James (Jim) Combs, Kevin Corley, Timothy (Tim) Devinney, Richard Gentry, Robert (Bob) Gephart, Karen Golden-Biddle, Jennifer (Jen) Howard-Grenville, Paula Jarzabkowski, Scott Johnson, Ann Langley, Karen Locke, Xavier Martin, Jose Molina-Azorin, Torsten Pieper, Michael Pratt, Jeremy Short, and Sara Walton. The diligent

work of our editorial board, reviewers, and author teams means that we are able to continue to produce high quality chapters.

This quality of work translates into conversation and citations, with papers featured in *Research Methodology in Strategy and Management* being cited hundreds of times. For instance, key resources featured in RMSM include the important work by [Podsakoff, Shen, and Podsakoff \(2006\)](#) on “The Role of Formative Measurement Models in Strategic Management Research”; the well-cited piece by [Langley and Abdallah \(2011\)](#) on “Templates and Turns in Qualitative Studies of Strategy and Management”; and, of course, the contribution by [Felin and Foss \(2006\)](#) on “Individuals and Organizations: Thoughts on a Micro-Foundations Project for Strategic Management and Organizational Analysis.” This quality is critical in attracting contributions by world-leading scholars including Brian Boyd, Russell Crook, Kathleen Eisenhardt, Bob Gephart, Dennis Gioia, Joe Hair, Ann Langley, and John van Maanen, among others. Publishing in RMSM means keeping good company!

This year, we are also pleased to welcome four new editors onto the *Research Methodology in Strategy and Management* team to ensure the continued success of the series. Aaron Hill, Aaron McKenny, Paula O’Kane, and Sotirios Paroutis will form the new editorial team and represent deep knowledge of qualitative and quantitative methods. Jane Lê and Anne Smith will roll off the editorial team after managing the editorial team transition and completing this third volume under their editorship. We look forward to seeing RMSM go from strength to strength under its new editorial leadership.

## COVID-19 AND RESEARCH

Before the COVID-19 crisis, most people would not have predicted the upheaval we all experienced and the new practices that would become central to our lives. Researchers have responded in a number of different ways. One of the most notable has been the proliferation of writing on the impact of COVID-19. The pandemic has inspired many papers ([Dodds & Hess, 2020](#); Journal of Management Inquiry (JMI) Paradox Papers), editorials ([Greenberg, & Hibbert, 2020](#); [Brammer, Branicki, & Linneluecke, 2020](#)), special issues ([Wenzel, Stanske, & Lieberman, 2020](#); Journal of Management Studies (JMS) COVID-19 Commentaries), and community resources ([Academy of Management \(AOM\), 2020](#); [EarthLab, 2020](#); [Lupton, 2020](#)). Looking across some of these contributions,<sup>1</sup> we can identify some patterns in early focal points. First, a conversation is emerging around the effect of the crisis on management scholars and students, considering issues such as the impact on research and teaching, and spillover effects ([Verma & Gustafsson, 2020](#)). A second stream of work focuses on how the crisis is changing the way that people work, foregrounding new working arrangements such as remote working and virtual teams ([Graves & Karabayeva, 2020](#)). Third, these conversations examine how the effects of the crisis may be felt differently by individuals based on their varied backgrounds. For instance, the crisis is suggested to have a differential impact on academic research output along gender lines

(Amano-Patiño, Faraglia, Giannitsarou, & Hasna, 2020), on entrepreneurial versus established ventures (Ketchen & Craighead, 2020), and on individuals across socioeconomic groups (Huynh, 2020). A fourth stream of work examines organizational impacts, focusing on topics such as firms' strategic responses to crises and disruption (Wenzel et al., 2020). At a more macro level, a fifth conversation focuses on the economic impact of the crisis more broadly (Michie, 2020), paying particular attention to the uncertainty created by crises (Stewart, 2020). These are all valuable conversations and we are pleased to see them taking place in real time, despite the restrictions and delays inherent in academic publication processes.

The focus of our editorial builds on commentaries about the pandemic and focuses on some of the challenges and opportunities created by COVID-19 in relation to *research methodology* in strategy and management. Therein we develop a simple framework to guide our writing and offer some focus (see Table 1). Specifically, we examine the positive and negative impacts of COVID-19 on the researchers, our research and the research context.

### *Impacts on the Researcher*

Much conversation around the impacts of COVID-19 on researchers is emerging (Bardelli, 2020; Su, 2020). This conversation predominantly focuses on the negative impacts, although positive impacts are also being recognized.

*Negative Impacts.* COVID-19 has led to heavier workloads for many academics who were faced with the prospect of converting and moving their activities into the digital domain with little or no preparation time. Days were longer, semester breaks consumed, and vacation days missed. Additional responsibilities around managing student queries, adjusting to various health and anxiety challenges, and increased overall teaching loads added to the complexity for many. Stay-at-home restrictions meant that working parents were additionally faced with the prospect of caring for and teaching children at home, while others faced further complexities through elderly or pet care (see Pradies et al., 2021; also JMI Paradox Commentary). The effects of this crisis are likely to be felt for many years as our ability to effectively conduct research has been hampered.

Academics also faced a change in the more rewarding aspects of the academic calendar. Extensive travel restrictions – both nationally and internationally – prevented most academic travel, relegating guest lectures and conferences to the digital domain. It also meant that few individuals could engage in leisure travel. The strain of these changes was felt throughout the academic community. As with other professions, academics faced health, emotional and psychological challenges which had a tangible impact on teaching performance and research productivity. In publishing, there were delays in editorial processes and the eventual published outputs, which may negatively affect scholars' career progression and lead some to exit the profession.

*Positive Impacts.* At the same time, however, there were beneficial impacts. For instance, with many individuals working from home, travel times were reduced because commutes were either significantly reduced or eliminated completely. Working from home also provided some with greater focus and

**Table 1.** Summary of COVID-19 Impacts.

	Pros	Cons
Researcher	<ul style="list-style-type: none"> <li>• Reduced commuting time</li> <li>• More focus and fewer service distractions</li> <li>• Proliferation of video conferencing, a time- and cost-effective alternative to F2F data collection</li> <li>• Ability to attend/contribute to a wider array of online events/conferences in a time- and cost-effective way</li> </ul>	<ul style="list-style-type: none"> <li>• Increased workload through digitalization of teaching</li> <li>• Long days, no or only limited semester breaks or vacation days</li> <li>• Work-life complexity</li> <li>• Potential health, emotional and psychological issues</li> <li>• Delays in editorial processes/published outputs impacting career progression</li> <li>• Viability of projects affected if members of the research team are unable to contribute</li> <li>• Challenges of developing social interactions and networks in online conferences</li> </ul>
Research	<ul style="list-style-type: none"> <li>• Better access via digital tools</li> <li>• Easier to reach out to other researchers</li> <li>• Incentive to identify online methods tools and training and data sources not previously considered.</li> <li>• Opportune time to look at organizational change and adaptation</li> <li>• Opportune time for pre-, during-, and post-crisis comparative studies</li> <li>• Wider array of funding specifically related to crisis research</li> <li>• Time for some to publish</li> <li>• Potential new ways of paper development with open-source, online comments made to drafts prior to formal review process</li> </ul>	<ul style="list-style-type: none"> <li>• Reduced outputs due to additional work and home commitments</li> <li>• Potential problems with fieldwork, especially in relation to access, engagement in the field and funding</li> <li>• Complexities for particular types of fieldwork, e.g., ethnographies</li> <li>• Difficult to obtain outside feedback and reviewers</li> <li>• Career uncertainty</li> <li>• Concern about distinctiveness of work when many researchers are interested in the same topic</li> <li>• Technological dependence, e.g., speed of internet, quality of hardware, access to various software licenses</li> </ul>
Research context	<ul style="list-style-type: none"> <li>• Better access to international research sites</li> <li>• Potential to reach out to larger, more diverse and geographically dispersed populations</li> <li>• Increased international collaborations</li> </ul>	<ul style="list-style-type: none"> <li>• Potential job insecurity, pay cuts or additional teaching load</li> <li>• Reduced funding from private and third-sector organizations, but also potentially governmental funding</li> <li>• Increased organizational boundaries; may not want an outsider to witness “crisis”</li> <li>• Delays in career progression/promotions, adding more stress</li> <li>• Strong focus on COVID-19 from journals and funding bodies might mean less space, funding and time for a wider array of research topics</li> </ul>

fewer service distractions than they would normally experience on campus. Remote work also introduced unexpected points of levity as children and pets frequently featured in conference calls. The wider use of teleconferencing further enabled researchers to attend and contribute to a wider array of events/conferences

in a time- and cost-effective way. The crisis also posed new and exciting opportunities for researchers interested in examining emergent phenomena, changing conditions, and pre- and post-designs, among many others that might serve to rejuvenate some scholars. Likewise, changes to existing routines may have reminded, or opened our eyes to, different vantage points and ways of doing things that offer a number of benefits.

### *Impacts on Our Research*

Closely related to the impact on the researchers that drive our research endeavors, are the effects on the research itself. These effects impact both the process and outcome of research.

*Negative Impacts.* The pandemic had wide-ranging dampening effects on the research process (see Chapter 9). In particular, social distancing and stay-at-home requirements disrupted data collection in field research and the salience of the pandemic to individuals worldwide introduced potential artifacts in data collected in this period that threaten the external validity of conclusions drawn from these data. Researchers sought to adapt their research to overcome these obstacles; nevertheless, many research programs were delayed or otherwise disrupted. As such, researchers have much learning to do and have to be skilled at adapting their studies to the new environment in which they find themselves.

*Positive Impacts.* The pandemic also brought much research opportunity. Whereas the pandemic disrupted many organizational processes making research more difficult, it also amplified other processes that create rare opportunities for novel research. Research on how organizations affect, are affected by, and respond to crises became particularly timely as organizations worldwide contend with a very observable and multifaceted crisis (see Chapter 5). Looking at the crisis' effects more broadly also opened the door to interesting new perspectives on organizational change and dynamics. The fact that data collected during the crisis may include artifacts not found in "normal" times also created the opportunity to replicate existing work in this new and changing context to examine the boundary conditions of theory.

The pandemic and measures taken to mitigate its effects forced researchers to be resourceful and innovative in their research design and methods. Faced with the inability to conduct interviews and experiments in-person, field researchers took advantage of the increased digitalization of organizational interactions and methods to capture such data. While perhaps less personal, seizing this opportunity saved time, facilitated research with budget constraints, and made interacting with distant participants more readily accessible. Netnographies (Kozinets, 2006; Rouleau, de Rond, & Musca, 2014) and virtual interviews via technological platforms like Zoom, Skype, Microsoft Teams, and others (Archibald, Ambagtsheer, Casey, & Lawless, 2019; Deakin & Wakefield, 2014; Gray, Wong-Wylie, Rempel, & Cook, 2020) became increasingly popular. The dissemination of digital tools and the wider use of teleconferencing applications also means that scholars can reach out to larger, more diverse and geographically dispersed populations than was possible before the pandemic.

### *Impacts on the Research Context*

All of these impacts reflect the broader changes in research contexts.

*Negative Impacts.* A particularly poignant impact of COVID-19 for the academic community has been on universities themselves. Universities have struggled with reduced government funding, development of new COVID-19 protocols, and lost income from international students. These dynamics have created untenable financial positions, which have resulted in mass layoffs and pay cuts across the world. For instance, in Australia, where many universities are subsidized by income from international student fees, the University of Sydney initially forecasted losses of up to AUD \$500m and up to 3,000 job cuts across the University for 2020 ([Sydney Morning Herald, 2020](#); [The Guardian, 2020](#)). While these numbers were revised downward, university faculty and leadership nevertheless faced significant pay and job cuts. This uncertainty added to the complexity of working under COVID-19 pressure. It also created uncomfortable dynamics and intense competition for junior scholars about to head onto the job market for the first time.

Access to resources for conducting research was stifled during the pandemic. Universities significantly cut funding for research, but there were also significant losses of funding from the private and third sectors. As organizations “locked down” to recover from the crisis, access to data and research opportunities dried up for academic research. These research resource strains could have knock-on effects that delay the career progression and advancement of researchers, and could limit the scope of future potential projects.

*Positive Impacts.* At the same time, international academic reach was significantly extended in some ways. As organizations increasingly relied on digital means to communicate and conduct work, it became easier for academics to link into these conversations from across the globe. This closing of geographic gaps is also evident in the international collaborations, particularly with the improved ability and impetus to collaborate with academics from less well-represented geographies, for instance, Africa, Asia and Latin America. We believe that this will have far-reaching beneficial effects for years to come. While, as we note above, there has been some constraint in funding opportunities, there are also research and funding opportunities arising out of COVID-19. For instance, there have been specific calls for additional research into this area (see, for instance, [UK Research and Innovation, 2020](#)), resulting in additional management themed projects into crises being funded.

## **VOLUME CONTRIBUTIONS**

We continue to see research methodology as important as ever and view RSM as “an essential outlet for contributions about important and timely methodological issues in the strategy and management fields” ([Lê, Smith, Crook, & Boyd, 2019](#), p. 1). This focus includes responding to critical issues, challenges and changes in the research environment. It is our ambition to help solve problems researchers face in their everyday work by promoting high quality, innovative,

practical methodological guidance. That is why the papers collated in this volume again span the range of methodological work, including positivistic, interpretive and critical traditions (see [Lê & Schmid, 2019](#)), and include work by both experienced (e.g., Chapter 3) and emerging (e.g., Chapter 9) researchers.

We kick this volume off with a reflective piece by **Bob Gephart** on his illustrious career researching disasters. In his insightful career retrospective, he talks about his enduring endeavor to conduct research “at the edge of chaos” (Chapter 2). This deeply experiential account, looking back over the various stages of his research career, Gephart explains how he has approached research and research career, and the importance of pursuing meaningful work. The piece by **Jung, Koli, Mavros, Smith, and Stephanian** nicely complements this work, offering a perspective on doing research in the context of crisis. Delving into the process of methodological adaptation – both from a methods conversation and an experiential perspective – these early career researchers join forces to draw out lessons learnt from adapting to the new research context heavily shaped by COVID-19 in order to share them with the next generation of scholars. The work by **Suze Wilson** (Chapter 4) on doing discourse analysis under COVID-19 further draws out some of these lessons, particularly in relation to qualitative and critical management studies. She reminds us to be critical in our interpretations of how people use language, and to remember that the implications of language use are real. Focusing on discourses that reject scientific knowledge and advice about COVID-19, she offers a salient example of how the way we communicate and construct knowledge impacts our social reality. In another piece written in the critical tradition, this time focusing on the specific disaster of the Canterbury earthquake, **Wordsworth** (Chapter 6) draws parallel between the earthquake, the COVID-19 pandemic and disasters and crises more broadly. He highlights the researchers’ own vulnerabilities in studying crises, living through and being affected by crises, even as they seek to understand them. In a timely reminder of the importance of academic rigor and relevance, he challenges us to consider the adequacy of management studies to effectively and proactively respond to crisis. **Iqbal, Bundy and Pfarrer** (Chapter 5) explicitly discuss advancing research methods in crisis management, reminding us that we would benefit from an integrated approach to assessing crisis. Developing a behavioral process model of crisis management consisting of interpretations, responses and outcomes, they effectively outline various research opportunities and offer methodological recommendations to capitalize on these opportunities. Next, **Gong and Johnson** (Chapter 7) delve deeply into the bivariate probit model, highlighting its application and potential in strategy and management research, both within and beyond crisis. Their contribution emphasizes the ways in which probit models can be extended and improved to account for complex strategic issues, such as those created by the COVID-19 pandemic, by using bivariate probit models in specific ways that enable, for instance, better modeling of infection and detection of COVID-19. **Busenbark et al.** (Chapter 8) also focus on specific techniques - Impact Threshold of a Confounding Variable (ITCV) and the Robustness of Inference to Replacement (RIR) – that can shed light on the sensitivity of estimated relationships to confounds. Both ITCV and RIR are of particular promise