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## Navigating Rigor: An Autoethnographic Exploration of Templating and Crystallization

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## Navigating Rigor: An Autoethnographic Exploration of Templating and Crystallization

### Abstract

In this autoethnographic exploration, we engage in a dialogic investigation to examine how templating and crystallization shape rigor in qualitative research. The use of templates in qualitative research has been widely used as a means of enhancing rigor in organizational research design yet comes with caveats especially when wanting to push boundaries. With the interplay of templates and crystallization, the researcher is encouraged to apply iterative and reflexive modes. The aim here is to inspire and invite researchers to pursue the multiplicity offered by qualitative methodologies and expand the discipline through authentic, trustworthy, and credible approaches. To explore the development of rigor we reflect on five narrative vignettes to abductively review the interplay of templating and crystallization within our academic experiences. The autoethnographic lens provided the scope to engage in our discourse, and practices and to question our emerging insights in pursuit of informed understandings. Whilst the focus is limited, we bring an organizational research view that highlights some of the challenges of the discipline. Three themes that we term tenets – purpose, reflexivity, and transparency – were key in the interplay of templates and the appreciation of crystallization. We found that utilizing a template is a valuable starting point for structure or direction, but the researcher must move beyond to find purpose, extend knowledge, and advance thinking. Transparency is essential to evidence the rigor, authenticity, and transferability of findings. This autoethnographic exploration adds value to the body of qualitative research as we call for rigor especially when there is a tendency for overuse or misuse of templates. To be clear, crystallization is not about doing as you please, but fostering rigor to encourage new ways of sense-making.

### Keywords

templating, crystallization, autoethnography, reflexivity, rigor

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## **Navigating Rigor: An Autoethnographic Exploration of Templating and Crystallization**

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In this autoethnographic exploration, we engage in a dialogic investigation to examine how templating and crystallization shape rigor in qualitative research. The use of templates in qualitative research has been widely used as a means of enhancing rigor in organizational research design yet comes with caveats especially when wanting to push boundaries. With the interplay of templates and crystallization, the researcher is encouraged to apply iterative and reflexive modes. The aim here is to inspire and invite researchers to pursue the multiplicity offered by qualitative methodologies and expand the discipline through authentic, trustworthy, and credible approaches. To explore the development of rigor we reflect on five narrative vignettes to abductively review the interplay of templating and crystallization within our academic experiences. The autoethnographic lens provided the scope to engage in our discourse, and practices and to question our emerging insights in pursuit of informed understandings. Whilst the focus is limited, we bring an organizational research view that highlights some of the challenges of the discipline. Three themes that we term tenets – purpose, reflexivity, and transparency – were key in the interplay of templates and the appreciation of crystallization. We found that utilizing a template is a valuable starting point for structure or direction, but the researcher must move beyond to find purpose, extend knowledge, and advance thinking. Transparency is essential to evidence the rigor, authenticity, and transferability of findings. This autoethnographic exploration adds value to the body of qualitative research as we call for rigor especially when there is a tendency for overuse or misuse of templates. To be clear, crystallization is not about doing as you please, but fostering rigor to encourage new ways of sense-making.

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Qualitative research promises an abundance of paradigms and methods for sense-making (Plakoyiannaki & Budhwar, 2021) with the claims for rigor feeling like a treasure hunt. The balance of rigor (Seale, 1999) and communicating the depth and richness is often challenging. In the quests for rigor, templating can act as a panacea to guide qualitative researchers as they face the complexities of pursuing and communicating the richness, trustworthiness, and rigor of their qualitative research journeys (Bansal et al., 2018; Pratt et al., 2020). To add complexity rigor can be understood by different people in different ways, therefore, rigor should not be understood as a unified concept.

Templating comes in many forms; however, it is mostly used in data collection or analysis phases. It is crucial to ensure the validity (Cho & Trent, 2006) of the chosen methodological template, which is often positioned as a framing, typology, or methodology and is characterized by its homogenous or standardized practice (Mir, 2018). In organizational

research (the discipline from which we write), templating is a much-debated topic with vigilance advocated. As qualitative research gains momentum, the utilization of templates is on the rise; however, there is a growing awareness of the need to avoid fitting research within pre-existing templates (Bansal et al., 2018). Rather, it is important to prioritize and defend the ideas of trustworthiness and rigor to safeguard against the positivist objectives of promoting stability, representation, and order (Østern et al., 2021). In using templates, it is difficult to avoid the limiting and engendering of formulaic approaches (Alvesson & Sandberg, 2014) that are characterized as “boilerplate” (Pratt, 2009, p. 856), a “cookbook” (Gioia et al., 2013, p. 23), a “visual model,” or a “good place to start” (Doyle & Buckley, 2017, p. 109).

Crystallization encourages the researcher to reflexively contest the hegemony of methodology and methods to advance the sensemaking of organizational research (Alvesson & Sandberg, 2014; Cunliffe, 2020, Richardson, 2000b). When looking at social science disciplines, such as communication (Ellingson, 2009), tourism (Jennings, 2005), marketing (Polsa, 2013), and management (Stewart et al., 2017), plurality and multi-genre lenses are adopted through a crystallized approach. Crystallization encourages reflexivity to challenge and expose the vulnerabilities of the researcher whilst recognizing the richness of partial understanding (Ellingson, 2014; Richardson, 2000b). This reflexivity may include a mode of templating that challenges oneself as the researcher and their research role. For example, the researcher may find that to secure the richness of stories, a dendritic path leads to including additional participants’ thus expanding or crossing genres to include converging paradigms and methodologies.

To capture the personal, partial, and authentic experiences, an autoethnographic methodology allowed us to abductively pursue an understanding of the interplay, focusing on the research question of “how can templating and crystallization shape rigor?” Here our experiences with templating and crystallization particularly with research methods is to show how this influenced the rigor of our research through a nuanced and personal perspective (Haynes, 2018). As all authors are based in business schools, our focus is on organizational research where qualitative research can be seen as an easy or soft approach that is less rigorous. Nonetheless, as qualitative researchers from management, accounting, and education disciplines, we have drawn on the broader qualitative research traditions in developing our qualitative experiences. We aim to promote reflexivity in the qualitative process by adapting and adopting multiple genres (Ellingson, 2009). In this paper, we present a model to depict the interplay of templates and crystallization that is grounded in reflexivity to create rigor. The interplay model invites opportunities for qualitative researchers to seek new and intuitive ways of sense-making and offering guidance.

We start by problematizing templates in qualitative research. Our intention is to explore how templates provide a level of confidence however advocate the richness and depth to go beyond through crystallization. To expand new ways of seeing, we look to rigor in terms of initiating research with the use of templates. This expansion into rigor is premised on a dialectical interplay between templating and crystallization as a way of extending and elevating authenticity in qualitative research. To synthesize and demonstrate the interplay of templates and crystallization, five narrative vignettes are presented. These reflexive illustrations of our emerging insights are further discussed through the interplay of templating and crystallization. In the next section we propose three guiding tenets based on the themes of purpose, reflexivity, and transparency. These themes are not proposed as a template, but as a way to succinctly present the findings of our autoethnographic experiences. Our concluding comments invite a call to action to pursue authenticity through rigor. The interplay of crystallization and templating is situated as one way to inspire researchers and to expand their craft through trustworthy, and credible approaches.

## Use and Abuse of Templates

Methodological templating is defined as a standardized or normalized mode often directed at the data collection and analysis phases in research (Mir, 2018; Pratt et al., 2020). The uncertainty and openness of qualitative research can lead to qualitative researchers feeling overwhelmed with the messiness of the data collected, the analysis, and the sharing of emergent understandings (Lambotte & Meunier, 2013; Linabary et al., 2021). In recording observations, templates are often used, but then abandoned or adapted to authentically capture the dynamics or narratives occurring in the field (Roach Anleu et al., 2016; Stewart & Gapp, 2017). Many forms of templating target the sorting and coding of qualitative data (Cassell, 2005; Locke et al., 2022) with some associated with computer-aided qualitative software packages, such as Nvivo or Leximancer that enable systematic and reliable methods of making sense of large data sets. There are many approaches available for traversing through the design, data collection, and analysis in qualitative research. Debates about what a template consists of oscillate between the benefits to the limitations and confines that might negate the richness sought in the qualitative approach (Dixon-Woods et al., 2006; Pratt et al., 2020). Common approaches include the constant comparison method (Corbin & Strauss, 2008); key features on ways to code and present findings (Gioia et al., 2013); and matrixes to assist in the design and entering of data (Miles & Huberman, 1994).

For early-career researchers or those seeking new approaches, the qualitative process can feel paralyzing with the use of templates offering a level of confidence, sense-making (Seale, 1999) or even standardizing (Pratt et al., 2020). Templates can be useful tools for teaching new qualitative researchers as they navigate through the divergences, complexities, and pathways of qualitative research methods. Unlike the objectivity of our quantitative colleagues with hypotheses and statistical tests, a social scientist needs to appreciate what methods, methodologies, and paradigms are appropriate for the qualitative research context. Those who are new or want to experiment with a qualitative research method might turn to a template and use exemplars to gain insight and experience. These exemplars can assist with connecting, commencing, or extending their inquiry to improve understanding of the salient features of the many genres available (Cunliffe & Scaratti, 2017; Welch & Piekkari, 2017).

Just as knowing the tools is not sufficient in creating an insightful piece of art or literature, or a worthwhile scientific invention, a qualitative researcher needs to be vigilant. This vigilance is about exploring rival or multiple lenses with a purpose (Pratt et al., 2020; Symon et al., 2018). Templating can be useful to communicate ideas (Pratt, 2008), and as a departure point for qualitative researchers to ensure rigor, especially when they are feeling overwhelmed by the messiness and complexities of new methodological explorations (Lambotte & Meunier, 2013; Barbosa Neves et al., 2021; Stewart et al., 2017). As the qualitative researcher matures, gains confidence, and becomes immersed in their research, it is vital for them to iteratively question their assumptions and emerging understandings using alternative lenses to enhance rigor (Natow, 2020; Barbosa Neves et al., 2021). Reflexivity is widely recognized as a key aspect in qualitative research to address and comprehend its inherent complexity, which helps to establish rigor (Linabary et al., 2021).

An example is Gioia et al.'s (2013) highly cited work in bringing rigor to grounded theory. Whilst the systematic approach to inductive work that Gioia et al. (2013) have developed is characterized as templating (Gehman et al., 2018; Mees-Buss et al., 2022), the authors refer to their approach as a methodology with a call for plurality to achieve rigor (Rheinhardt et al., 2018; Zilber & Zanoni, 2022). Emphasizing this need for multiple approaches, Zilber and Zanoni (2022) ask ethnographers to go beyond the hegemony of the "detective story" template (p. 11), which has key markers of a mystery requiring an ingenious detective (aka the researcher), to apply logic and reason in search of the truth. Thorpe and

Easterby-Smith (2012) also depict ethnographers as detectives like Miss Marple who are intuitive and inclusive of multiple approaches. Seminal work in case study research, including Eisenhardt (1991, 2021) and Yin (2015), is often referred to as templating even though their proponents refer to them as methods, roadmaps, phases, strategies, and processes. Whilst there is a nebulous distinction of what constitutes a template, there is a clear presence that suggests templating has a place in the organizational research community. Nonetheless, these scholars whose templates are employed, urge their audience to refrain from taking a formulaic or boilerplate approach that erodes the overall depth, richness, and quality of the qualitative organizational research (Eisenhardt, 2021; Gehman et al., 2018; Gioia et al., 2013; Mees-Buss et al., 2022).

It could be said that templating and triangulation are complimentary with similar benefits and limitations. Both come from positivist roots but offer a beacon for the qualitative researcher entering new terrains. The goal of triangulation is to minimize the bias and achieve convergence of a single reality (Tracy, 2019), which increases the credibility within the method or between methods (Denzin, 1978; Flick, 2018). Founded on the navigational term to calculate accurate points or destinations (Yin, 2015), triangulation is confused, jumbled, and sometimes used in parallel with mixed methods of gaining data from multiple sources, over time, location, or perspectives (Natow, 2020). According to Denzin (2012), the concept of triangulation is rooted in the existence of various forms of research methods; yet individuals new to qualitative research may refer to the use of triangulation as a fixed approach to rigor. This more set approach is often noted in doctoral dissertations with statements to claim rigor by taking triangulation literally and using three data collection methods such as interviews, observations, and archival documents without expanding on the options or reasons for choosing these methods.

The use of triangulation in qualitative studies (Alvesson & Sandberg, 2014) is seen to cultivate credibility; however, understanding of how and why this is done is often skimmed over or incomplete. Whilst the use of multiple investigators, data points, or analysis modes can provide more robust support for research findings (Eisenhardt, 1989), caution is needed so that triangulation is not used to codify the process or ignore the diversity of mindsets (Jonsen & Jehn, 2009). This caution is due to the nuances in application and definition that come with increased uptake rendering the term triangulation unsettling and difficult to define for many dedicated qualitative researchers (Denzin, 2010). Flick (2018) offers insight into the limitations and weaknesses, including the prospect of triangulation being a standard for qualitative research, but emphasizes that the appropriate methods should always be directed at optimizing the aims of the research questions.

Historically, teaching qualitative organizational research methodologies to new researchers offered in a single course therefore relying on the teacher's experience, depth, and paradigm preference, plus limited time to engage in the diversity that qualitative research offers (Cilesiz & Greckhamer, 2022). The limitations of this approach are palpable in organization qualitative research and point to formulaic approaches which can be connected to the academic pressures of publishing and gaining tenure (Symon et al., 2018). Improvements in qualitative organization research training are critical as many students struggle to pinpoint a research question whilst also being tasked to wrangle the multiplicity of epistemologies, methodologies, and methods (Cilesiz & Greckhamer, 2022). The sheer complexity and diversity of methodologies especially when seeking new ways of knowing can often debilitate commencing qualitative researchers (Barbosa Neves et al., 2021) with a visual model offering guidance (Doyle & Buckley, 2017). Navigating this confusion is where research templates might offer exemplary pieces of research to support qualitative researchers in getting started and going beyond the hegemony (Guba, 1981). In using templates, there is the caveat that this is a starting point to gain confidence, draw on authenticity, strengthen creativity, intuition, and openness to

ensure that there is a genuine pursuit of new understanding situated under the umbrella of qualitative research. In essence, we observe a growing interest in templating for getting started in qualitative organization research with claims of rigor relying on rigid adherence to a research template.

### **Rigor and Reflexivity**

A strict and standardized application of templates contradicts the reflexive iterative processes (Locke et al., 2022; Nadkarni et al., 2018) that are critical for equity, advancement, and the fostering of “new ways of seeing” (Bansal et al., 2018, p. 1189). Templating affords the authenticity of a known design to open direction and give order to managing the chaos and quantity amassed in the data collection and analysis, however, there are concerns for rigor (Pratt et al., 2020). This concern has led to a call to go beyond “boilerplate” (Pratt, 2009) or “cookbook” processes that inhibit “innovative possibilities” (Gioia et al., 2013, p. 23).

The criteria for “good” or goodness in qualitative research should not be confused with positivist terms to assure representation of validity, transferability, dependability, confirmability, and reliability that limit the trustworthiness (Cho, 2017; Guba, 1981; Østern et al., 2021). Contesting the suitability of the terms, validity, and reliability, the premise of qualitative rigor includes trustworthiness, and credibility (Guba, 1981; Tracy, 2010). Lincoln et al. (2018) advocate for challenging the status quo through practices of reflexivity and “crystalline” methods with terms befitting qualitative inquiry and to develop techniques that heighten rigor.

To cultivate rigor there are calls for reflection and reflexivity (Alvesson & Sköldbberg, 2017; Cunliffe, 2020; Haynes, 2018; Linabary et al., 2021; Barbosa Neves et al., 2021). Reflection and reflexivity are often used synonymously with the former interpreted here as mirroring, observations, and making connections through organized approaches by seeking patterns (Chia 1996; Corlett & Mavin, 2018). Reflexivity amplifies reflection so the researcher reflects on the self, as the storyteller, gatekeeper, and investigator (Barbosa Neves et al., 2021). It is common for reflection to shape reflexivity, especially with novice researchers (Watt, 2007). Going beyond logical or objective thinking, reflexivity interrupts the equilibrium and certainty to bring new possibilities and encourage multi-positionality to capture new ways of understanding and embrace the subjectivity of qualitative research (Cassell, 2005; Cunliffe, 2020; Linabary et al., 2021). This inverse reflection of the self takes the researcher’s time and immersion to become “part of the research process” (Cassell, 2005, p. 170).

Reflexivity involves pursuing a deeper understanding by questioning, challenging, and responding through self-monitoring the impact, recursively engaging, and “back bending” in the research process (Alvesson & Sköldbberg, 2017; Corlett & Mavin, 2018). The embedding of reflexivity is the researcher’s responsibility, which demands questioning aspects of bias, dynamics, knowledge, and interpersonal relations to challenge the hegemony of the research and highlight the co-construction (Linabary et al., 2021). Seasoned researchers may have the ability to propose critical questions to challenge the researcher’s role, participant relationship, inclusion, and exclusion of researcher or researched voices, engaging in theoretical or methodological reflexivity and engagement (Corlett & Mavin, 2018; Cunliffe 2016, 2020). Although the introspection of reflexivity can lead to feelings of vulnerability and uncertainty for the researcher and at times the participants, there are calls for reflexivity for “those using existing, ‘new’ or evolving techniques” (Dixon-Woods et al., 2006, p. 40).

In autoethnographic research, reflexivity necessitates serious deliberation on the self, location/s, and culture where the researcher is cautiously exploring relationships to enrich the sense-making (Bochner & Ellis, 2016). The more dominant use of reflexive practice can be found in interpretive methodologies of autoethnography, ethnography, case study, and action

research with practices of reflexive journaling, narrative records, and learning conversations by the researcher and participants (Arias López et al., 2021; Haynes, 2018; Watt, 2007). Reflexivity has challenges of representation ontologically (Maclean et al., 2012) with complexities and complications in how qualitative research is framed and communicated (Linabary et al., 2021). However, this reflexivity can be scaffolded by transparency and trustworthiness.

Examination of using templates as an “emergent quality for reasoning” (Harley & Cornelissen, 2022, p. 239) are needed. Yin (2015) proposes transparency, methodic-ness, and adherence to evidence with the objectives of building trustworthiness and credibility to generate rigor in qualitative research. Tracy (2010) offers eight key markers for qualitative research including a worthy topic, rich rigor, sincerity, credibility, resonance, significant contribution, and ethics. Many examples stress the tension and critical role of intuition and imagination built on the foundations of thick descriptions, metaphors, and narratives to deepen understanding in a qualitative inquiry along with the license to improvise within the research whilst maintaining integrity (Tracy, 2010; 2019). The balance of authenticity and rigor that deepens the understanding through pluralistic views (Maclean et al., 2016) of phenomena and participants’ reality is a challenge for interpretive researchers (Alvesson & Sköldbberg, 2017; Tracy, 2019). The use of templates is widespread with discussions on rigor; however, the inherent complexities and messiness of qualitative research benefit from reflexivity and pluralist approaches to ensure the authenticity of research findings. Using formulaic, template, or boilerplate approaches in qualitative research can make the researcher overly reliant on current trends, which could lead to them losing their independence and originality (Freeman & Greenwood, 2020). This reliance on templating is counterintuitive to the introspection and co-construction that reflexivity affords (Alvesson & Sköldbberg, 2017; Linabary et al., 2021). In addition, moving beyond a template is where the richness can be gained so the qualitative researcher can skillfully narrate and continually refine their stories in order to produce the enchantment that is inherent in the methodology (Freeman & Greenwood, 2020; May, 1994). Rigor in research should be demonstrated through a congruence of experience, presentation, proposition, and practical knowing among research participants (Alvesson & Sköldbberg, 2017). As the bricoleur or artisan, the qualitative researcher pieces the research together (Kincheloe, 2011; Lambotte & Meunier, 2013). To optimize the subjective nature of sense-making and to develop rigor in qualitative research, time is necessary to cultivate and gain a deep understanding (Kincheloe, 2011; Linabary et al., 2021).

Rigor goes beyond being authentic and is viewed here as the pursuit of looking for multiple truths to navigate the complexities, have awareness of the partial accounts whilst pursuing a deeper understanding of the topic (Denzin, 2010; Richardson, 2000b). Rigor involves reflexivity and subsequent crystallization of the research, through the researcher’s lived experience with the phenomena and the participants involved (Fusch et al., 2017; Lincoln et al., 2018). When the phenomenon is examined from various perspectives, the establishment of expertise through practice and introspection (Lather, 1993) go beyond doing into being and becoming (Linabary et al., 2021) which we explore with the interplay of templating and crystallization.

### **The Interplay Between Templating and Crystallization**

Even though crystallization is gaining acceptance in social sciences (Barbosa Neves et al., 2021; Denzin, 2012, 2014; Ellingson, 2009), there is a scarcity of crystallized methods in organizational research (Polsa, 2013; Stewart et al., 2017; Tallberg et al., 2014). A comprehensive and transparent narrative reveals the difficulties and susceptibilities of both the researcher and the researched, as well as the context (Ellingson, 2009) of organizational life



through crystallization (Stewart et al., 2017). In the data collection, deconstruction, and reconstruction, the light metaphor of a crystal, offers many views, angles, and refractions for explicit support of the interpretive or abductive strategies (Jennings, 2005). Shifting between, across, and challenging the research process through the exploration of alternative accounts and the questioning of emerging insights, shapes the value of crystallization (Polsa, 2013; Stewart et al., 2017; Tallberg et al., 2014). Although the crystallization metaphor elicits mystical thoughts and comes with associated risks, the synthesis of tensions, connections and rigor confront the differences and similarities to maneuver from templating into crystallization. The “infinite variety of shapes, substance, transmutations, multi-dimensionality, and angles of approach” is a metaphor for crystallization (Tobin & Begley, 2004, p. 393) with a fundamental “concern for the ethics of representation” (Barbosa Neves et al., 2021, p. 1). To embrace the multiplicity of crystallization the body and spirit of the researcher are the primary tools (Denzin & Lincoln, 2011; Ellingson, 2009; Watt, 2007). The researcher and the researched cannot be separated (Polsa, 2013). Crystallization suggests that one can obtain a more profound and intricate understanding of the subject matter through a flexible combination of strategies, resulting in a thorough and partially biased comprehension (Ellingson, 2014; Richardson, 2000b). At times this may mean crossing genres, epistemologies, and world views that take the researcher outside their comfort zones (Ellingson, 2009). These considerations invite the researcher to extend logical thinking, to reflexively disrupt the hegemony of methodological strategies to seek out and extend sensemaking (Cunliffe, 2020).

The interplay of templating and crystallization is analogous to taking an extended trip to a foreign country where we don't speak the local language. Possibly we have an itinerary and a map (ethics and research design) but no Global Positioning Systems (GPS) to give real-time updates. If we follow an itinerary prepared by a travel agent, the trip may go smoothly (template) but we are less likely to gain access to experiences different from the other travelers. On the other hand, if we are willing to make the most of serendipitous opportunities that come along our way, the trip will be more exciting and insightful, even risky, confusing, and challenging at times. For the more seasoned qualitative researcher, each research project will undoubtedly be surprising and offer challenges. Crystallization positions the researcher at the heart of the research with a questioning gaze to iteratively interplay with the emerging experiences and insights (Fusch et al., 2017). This interplay enables “an openness that allows discoveries to unfold that would otherwise be lost” (Stewart et al., 2017, p. 1). The mindset of crystallization “invites researchers to examine relational topics using multiple lenses and a variety of genres” to explore intuitively (Ellingson, 2014, p. 442).

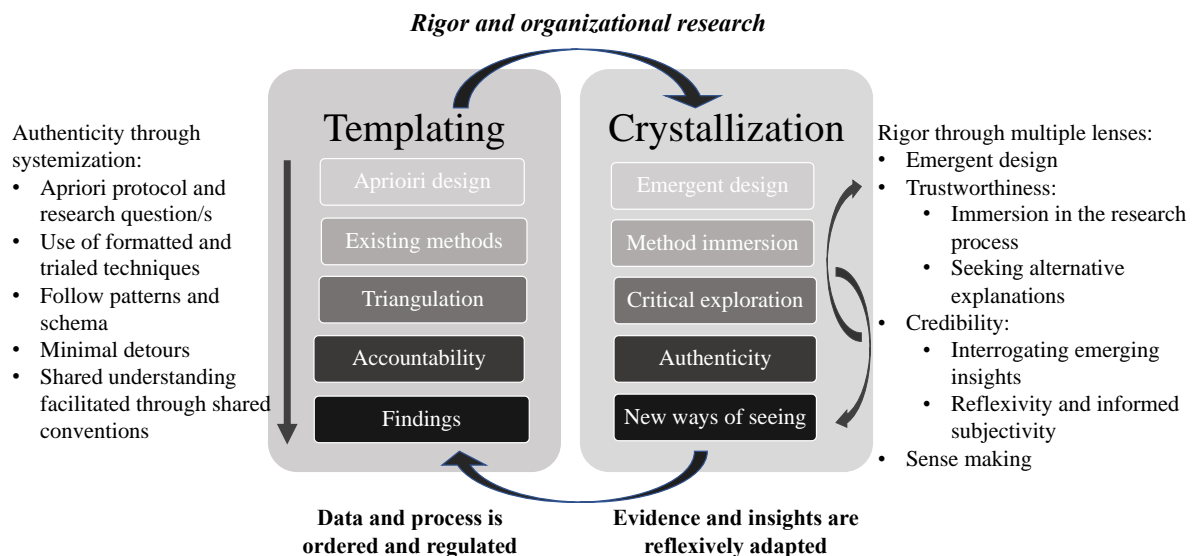
The shift to crystallization does not endorse an anything-goes approach but endorses the freedom to seek a continuum of methods and methodologies that optimize the capturing of stories and lived experiences (Ellingson, 2009). Paradoxically, the focus of what we do as researchers and being well-versed in models, techniques, and schemas can be seen as counterintuitive to being reflexive (Cunliffe, 2016). The qualitative continuum can extend how the researcher navigates their research and can be a catalyst to step outside of their comfort zone into alternative approaches as they reflexively search for depth and understanding (Ellingson, 2009; Stewart et al., 2017). What we see, hear, or feel intersects “our living and lived relationships with others” (Cunliffe, 2016, p. 742). The potential for crystallizing through genres, methods, and attitudes nurtures the qualitative researcher in their detective, alchemist, or bricoleur roles to pursue and work with the tensions and array of research pathways (Kincheloe, 2011; Rheinhardt et al., 2018). Enabling the researcher to fully engage with their qualitative expertise and produce rich and varied representations facilitates the creation of research procedures that are humane, insightful, and practical (Ellingson, 2013).

Through reflexivity, reimagining, and experimenting with multiple forms of representation, the qualitative researcher iteratively constructs, interrogates, and reconstructs

the emerging insights (Cunliffe & Scaratti, 2017; Linabary et al., 2021). While crystallization affords new ways of seeing, templating can be contingent on preventing us from repeating common errors in the research (Welch & Piekkari, 2017). In Figure 1, we illustrate how templating introduces rigor. The formatted techniques shift to emergent designs where crystallization cultivates immersion in the methods to build trustworthiness and reflexively understand participants' perspectives and organizational processes.

**Figure 1**

*Interplay of templating and crystallization to develop rigor and authenticity*



Templating (Figure 1) takes a chronological view of the research using conventional designs with existing methods and often borrowing from established methods such as triangulation. There are minimal detours in the methodological path. Findings are reported in traditional modes through shared conventions such as tables or graphs. Templating, in theory, may present a schema to follow. However, without the reflexivity and informed subjectivity needed for effectual qualitative fieldwork and analysis, steps may be overlooked, resulting in a minimalist approach to trustworthiness.

The reflexivity in crystallization is about seeking alternative or emerging insights with outcomes that are inherently not generalizable, objective, or testable and do not lend themselves to any checklist (Babcock, 2015; Barbosa Neves et al., 2021). In pursuing new ways of seeing, trustworthiness “seeks to keep, not flatten out, complexity” to create rigor and goodness of the research (Østern et al., 2021, p. 14). The key to the process is to engage with the most appropriate elements which may mean returning to templating to base ideas and build. To alleviate the unintended omission of focus and a clear direction, the research question and use of effective methodology are fundamental to the development of trustworthiness.

### Narrative Vignettes

Narrative vignettes observe and reflect the researcher's lived experience to demonstrate the first-person stories (Haynes, 2018; Zawadzki & Jensen, 2020). As collaborative researchers immersed in the subject and cultural setting the autoethnographic positioning and the use of vignettes provide a reflexive interplay to find new ways of seeing through templating and crystallization (Roy & Uekusa, 2020). The vignettes “construct a window through which the

reader can view some of the pleasure and pain” of the researcher (Humphreys, 2005, p. 842). The vignettes are to demonstrate the experiences and understandings of the researcher, the researched and the social context to embody the sense-making (Bochner & Ellis, 2016). Autoethnography is underpinned by “reflexive interpretation of previous events and experiences, so that pre-existing understanding is constantly revised in the light of new understandings” (Haynes, 2018, p. 28). The goal of employing autoethnographic methodology is to assign significance to actuality by analyzing individual experiences and conveying them to a broader audience (Zawadzki & Jensen, 2020). These experiences might include disputes, negativity, or impassioned experiences that provoke visceral responses (Bochner & Ellis, 2016). Academic experiences through autoethnographic accounts are escalating (Jamjoom, 2021; Roy & Uekusa, 2020), and point to the potential for qualitative researchers to extend disciplines where there is marginal acceptance of lived experiences (Haynes, 2018).

To expand on Figure 1 and illustrate the tension of the interaction of templating and crystallization, we draw upon our own experiences and critical encounters with qualitative research. These experiences are predominantly through the data collection and analysis phases of our qualitative organization research experiences. In this section, an autoethnographic (Bochner & Ellis, 2016; Haynes, 2018), approach with five narrative vignettes brings life to our ideas (Figure 1; Humphreys, 2005; Roy & Uekusa, 2020) to characterize how we drew upon templating and crystallization to enhance rigor in our research. The first and second vignettes are about “aha” moments from doing analysis and fieldwork for the first time where templated approaches are recommended, but as the researcher becomes more experienced and immersed in their research, they start to forge their paths. In the third vignette, the challenge of pushing boundaries, publishing, and championing the ideas is presented. Then the fourth vignette takes this boundary-spanning “informed by an empathetic tolerance of different methods” (Maclean et al., 2016, p. 627) to share a broad career experience. Lastly, the fifth vignette speaks to the methodological growth through an action research project that influenced this author’s relationship with a student.

### ***Exploring Alternative Approaches to Data Analysis: A Vignette of Tactile Analysis and Immersion in Fieldwork***

In the captivating first vignette, one of the co-authors recounts her transformative PhD journey, as she navigates the challenges of data analysis. Initially, she was advised to use Nvivo to sort and analyze the primary data collected from semi-structured interviews. After weeks of wrestling with the software, she decided to forge her own path. After abandoning Nvivo, she adopted a more tactile and engaging approach, using different colors to label themes and concepts on physical copies of the text. This hands-on method sparked a sense of immersion and interplay, leading her to organically develop mind maps that connected these themes and concepts. This powerful anecdote underscores the importance of finding the right analytical approach that resonates with both the researcher and the subject matter.

As a result of this immersive tactile analysis, the co-author was able to uncover hidden depths within the data. To her surprise, she discovered a significant government change that had occurred during the data collection phase, which had initially flown under her radar. This revelation prompted her to conduct further interviews to explore the post-change impacts, ultimately adding new dimensions and richness to her findings. Through the analysis, the intersubjectivity of her understanding, the participants’ words, and the political environment all came into question (Cunliffe, 2016).

The vignette beautifully illustrates the concept of crystallization, as the researcher builds a compelling chain of evidence that emerges from the dynamic and evolving data analysis process. The immersion she experienced in the fieldwork transitioned into an

abductive experience, marked by her intuitive adoption of an alternative approach to analysis and further data collection. This captivating story of moving from a rigid NVivo framework which is not in question here to a more fluid and immersive tactile analysis highlights the potential benefits of embracing the intersection of shifting methodologies and crystallization in the research process.

### ***Journey to the Heart of Reflexivity and Qualitative Research: An Exciting Chronicle of Crystallization-Driven Rigor and Depth in Data Analysis***

Step into the world of a researcher-turned-sleuth! Here, reflexivity serves as our investigator's trusty magnifying glass, tracing the journey from research design to full immersion in data collection, hunting for alternate narratives and viewpoints (Alvesson & Sandberg, 2014). Like a detective uncovering surprising clues, our investigator delves into the nonlinear, navigating through a sea of genres (Ellingson, 2017). This exciting adventure unlocks the potential of crystallization, stirring up a critical "aha" moment.

In the second narrative of our unfolding saga, the investigator reflects on her exciting, decade-long journey. This transformative expedition sees her mature from a novice into a skilled detective using rigor, trustworthiness, and credibility to weave a compelling story. This story highlights the complexity of reflexive interrogation and brings forth a deeply informed subjectivity that adds richness to her research (Stewart et al., 2017; Suri, 2014).

The researcher fondly recalls,

In my early research days, my "go-to" guides were insightful authors offering helpful frameworks and templates. However, during an expansive study on small businesses, these once reliable maps fell short in leading me to the depth I desired. That's when I discovered the light of crystallization, infusing a much-needed spark of creativity into my data analysis. An enlightening moment was when I realized the power of images – colorful snapshots of organizational life, such as triumphant award celebrations or lively lunchroom posters. These images added an extra dimension to my research, deepening the overall narrative of the organization.

In this exhilarating journey, the use of reflexive methods bolstered our researcher's confidence. Her favorite authors, much like trusty sidekicks, were aligned with her epistemological approach, fostering the growth of her instincts. Just like a detective refining her skills, she honed her craft, constantly shaping her instincts. As she pushed her personal boundaries through immersion and intuition, she also upheld her integrity, even when venturing into unexplored territories in the field. Although such skills were not inherent at the outset of her research journey, her "Eureka!" moment arrived when she realized her intuition was an essential tool in her investigative arsenal. This critical revelation played a significant role in her subsequent growth as a qualitative researcher. And thus, an invigorating tale unfolds.

### ***Challenging Mainstream Organizational Research: A Vignette on Navigating Risks and Rewards in Qualitative Methodological Innovation***

Our third vignette comes from a frustrating experience of writing and attempting to publish a paper aimed at extending a qualitative methodological boundary that was rejected after two revisions and resubmissions. A serendipitous conversation with the receiving editor revealed that the original editor whom we had been working with was on leave. The new editor confessed to having minimal experience and understanding of qualitative methodologies and

therefore decided the submission would be rejected. This same paper was then submitted to a high-ranking sociology journal where it was accepted with minor revisions. Perhaps this submission was too big a leap in offering original and dynamic tensions for qualitative thought, but it highlights inconsistencies with expectations (Piekkari & Welch, 2018; Symon et al., 2018). The first outlet initially supported our new ways of seeing, but we hit a barrier without the editor to champion this emergent design of sense-making. Despite this challenge, we were persistent and maintained the belief in seeking out the mysteries and challenging the mindsets of mainstream organizational research (Alvesson & Sandberg, 2014; Alvesson & Sköldbberg, 2017).

Advancing knowledge is the academic holy grail. When researchers follow a systemized approach, this safer path is appealing to those who are driven by recognition or furthering career prospects yet counterintuitive to new ways of thinking and advancing knowledge. The less-traveled path that is the impetus for new or alternative ways of sense-making can be risky and time-consuming in the short and long term. In this vignette we believe the rejection was based on the discomfort of pushing boundaries. If this submission took the safer path and followed formatted and trialed techniques, it is assumed that the second editor may be open to an acceptance. Following this logic, researchers publishing outside of their discipline may experience lower institutional recognition (funding and promotion issues) and decreased discipline reputation. Nonetheless, we stayed true to our beliefs and found an appropriate outlet.

### ***Developing a Methodologically Inclusive Research Synthesis Framework: A Vignette on a Journey of Reflection and Growth in Qualitative Research***

For mid-career and beyond the qualitative researcher faces many highs and lows with humbling moments that offer growth. In the fourth vignette, we consider the 20-year career development of one of the co-authors. This career was focused on developing a methodologically inclusive research synthesis framework. Originally, a statistical meta-analysis was used to examine the effectiveness of an intervention in math education (awarded an Early Career Research Award). This was followed by a humbling moment when she realized that the rigor in the research had failed to capture insights from the qualitative paradigm that informed her teaching practice. This shaped the proposal of a comprehensive research synthesis method emphasizing the interplay of quantitative and qualitative research (preliminary insights awarded the Best Graduate Presentation – International Conference of the Association of Qualitative Research). Further immersion into qualitative research methods and appreciation for diverse onto-epistemological positions, resulted in a deeper understanding of the commensurability and incommensurability within and across positions. Methodological templates enabled this research to understand the subtle nuances within that methodology along with the rich insights afforded by multiple templates and adapting techniques across templates. Through a dynamic interplay of existing templating and the immersive nature of crystallization, she abandoned the original pursuit of an established synthesis method. This is when this co-author turned to conceptualize a methodologically inclusive framework to facilitate an informed crystallized approach to pursue diverse purposes, affording useful, partial, and situated insights.

### ***Expanding Ontological Views and Leadership Approaches Through Action Learning: A Vignette on Balancing Responsibilities and Adapting to Emergent Approaches***

The last vignette comes from our co-author who led an action research project that spanned disciplines and over two years. As a predominantly quantitative researcher, this

qualitative project took her out of her comfort zone. Action learning underpinned this project, which was an alien concept; however, this co-author embraced the methodology with enthusiasm. Whilst the prescriptive research methods used in previous quantitative work are akin to templates, she stretched and expanded her ontological views to immerse herself in the process and incorporate reflective processes in terms of leadership development.

As the leader of the project, she had the challenge of managing the responsibilities of the project in addition to balancing other responsibilities including a heavy PhD supervision load. This co-author became familiar with qualitative research and reflected on the action learning project which framed a critical conversation with her PhD student who was frustrated with the access they had to her. The student's expectations needed to be managed but this co-author also saw the opportunity to apply her new action learning skills to improve the supervisor-student relationship. This improvement revolved around self-reflection on her leadership which was based on the cyclic nature of action learning. This reflection shifted her supervision (and leadership) from a systemized schema to an emergent approach to accommodate obligations and the students' needs. The move from a templated model of supervision assumed a dendritic crystallized adaptation to highlight different ways of sense-making and purpose:

I'm being me and I'm being authentic, and I do what I say I'll do, and I lead in the best way I know-how, and I don't go out of my way to hurt or upset or anything else. But sometimes, I have to make a call and that's not always gonna make people happy.

In the five vignettes, we found that a dynamic interplay of templating and crystallization provided authentic and rigorous insights that enabled us to further our disciplines along with our knowing and sense-making. A common thread in these vignettes is that there was a journey to go through. Whilst this journey might be seen as a rite of passage into qualitative research, starting with nothing more than a random idea that a researcher is passionate about and wants to pursue can lead to failure. The fundamental purpose of research is to build knowledge from those who have come before us thus it is logical to seek guidance from ideas such as templates but then to go further. Crystallization gives the license to explore, however this is offered with some temperance and emphasis on the interplay of authenticity and rigor. Through our experiences, we have illustrated the interplay of templating and crystallization with the various qualitative inquiries to promote fairer, inclusive, and develop richer understandings of who we are and how we approach our research.

### **Themes (or Tenets) for Crystallizing Rigor**

In this section, we analyse our vignettes with the interplay of templating and crystallization and thematically describe our approach to enhancing rigor. We acknowledge that this might look like another template; however, as qualitative researchers it was an organic step for us to thematically look at our narratives. In essence, the reflexivity facilitated discussion to incite an extension of our autoethnographic research – we are not telling you how to do it, but rather inspiring the metaphor of crystallization in exploring new sense-making. We do not endorse the excessive or inappropriate use of templates, which has become an increasingly concerning and disorderly trend (Denzin, 2010; Pratt et.al., 2020). With publishing pressures, methodological bias (Symon et al., 2018) and paradigm schism (Mir, 2018), new ways of seeing for and by researchers are needed more than ever. Here we speak to how can templating and crystallization shape rigor through three themes that we term tenants. These three tenants are the themes from our reflexive narratives but are not pitched as a return to

templating. Drawing on literature and our own experiences we discuss authenticity and rigor to cultivate the multiplicity of crystallization in qualitative research:

1. Purposefully informed selective use of templates
2. Reflexivity and informed subjectivity
3. Audience appropriate transparency.

### ***Purposefully Informed Selective Use of Templates***

Any notion of quality is situational, subjective, and relational with the underpinning of the method and intended research purpose (Barbosa Neves et al., 2021; Suri, 2014; Tracy, 2019). The value of qualitative research lies in the opportunity to critique, question, and theorize in the pursuit of new knowledge (Nadkarni et al., 2018), yet there is a sense of “narrowly circumscribed areas of study” that are “portrayed as a template for good scholarship” (Alvesson & Sandberg, 2014, p. 967; Stewart et al., 2017). In vignettes one and five, even when starting with templates, vigilance was apparent that pushed personal schema to advance and go beyond the production of formulaic research (Alvesson & Sandberg, 2014; Stewart et al., 2017). In each vignette, there was personal development that allowed new ways of seeing to extend knowledge and to advance the researcher’s critical thinking and subsequent scholarship (Bansal et al., 2018).

Utilizing a template, or boilerplate (Pratt, 2009), can be a starting point for the research process to create accountability, confidence, and often as a direction for contributing to theory as noted in the fourth vignette. The dynamic interplay of existing methods provided a foundation for the researcher in this vignette, yet there was a progression to an emergent design due to immersion as seen in crystallization. This was when the researcher created new ways of seeing through the conceptualization of her work. An ongoing responsibility of the researcher is to stay true to the aims that optimize meaning and sensemaking in answering the research question or phenomena (Symon et al., 2018). Templating can be a useful departure point to prevent researchers from drowning in evidence, however templating as the end game comes with the danger of blinding us to authentic insights emerging from the research contexts.

### ***Reflexivity and Informed Subjectivity***

There is a need to move beyond template limitations to break the box, use imaginative approaches, and the impact of research (Alvesson & Sandberg, 2014). To advance research, informed subjectivity and intersubjectivity crafted by critical reflexivity is a researcher’s key investment into rigor (Suri, 2014). Truth and knowledge from the inductive or abductive view are never complete (Sandberg, 2005), and comes with an acute awareness that all-knowing is partial, situated, and temporal (Ellingson, 2009; Lather, 1999).

The second vignette used the detective metaphor of Miss Marple. Exploring reflexively with an openness lends the researcher to embodying the subjectivity (Ellingson, 2017) that can take the research and researcher on nonlinear paths and into multi-genre directions. Embracing the diversity and continuum of qualitative methodologies offers organizational researchers and their research a cause for celebration that encourages integrity. This integrity may lead the qualitative researcher to use positivist approaches to be authentic to the research (Ellingson, 2009). Through deliberation based on integrity, innovative ways to make sense using compassionate means are incited to unashamedly cross boundaries (Cunliffe & Scaratti, 2017; Kincheloe, 2011) and paradigms (Ellingson, 2009).

Crystallization is where the self or researcher engages as the primary tool or bricoleur with reflection and reflexivity becoming an integral part of the trustworthiness in piecing

together the complexities of the interpretive inquiry and going beyond the banality of formulaic methodologies. Reflexivity is about being present (Linabary et al., 2021). Like the detective analogy it is about “questioning what we, and others, might be taking for granted – what is being said and not said – and examining the impact this has or might have” (Cunliffe, 2016, p. 740). How to be reflexive involves humility (Alvesson and Sandberg, 2014; Arias López et al., 2021), critical examination, and the challenging of assumptions (Guba, 1981), impacts (intended and unintended), decisions, and interactions (Guba, 1981; Barbosa Neves et al., 2021). In the vignettes, reflexivity was evident at varying levels with awareness of being “more self-conscious about claims of authorship, authority, truth, validity, and reliability” as well as “some of the complex political/ideological agendas hidden in our writing” (Richardson, 2000a, pp. 253-254).

### ***Audience Appropriate Transparency***

In each of the vignettes, attention to transparency and the intended audience is evident, which is underpinned by the qualitative researcher establishing an informed conversation and reflexivity. Transparency in crystallization includes how the research was designed, carried out, analyzed, and then the findings linked to the theoretical foundations with a clear demonstration of the participants’ voice to ensure the reader hears the meta-message – “we’re not making this stuff up” (Gioia et al., 2013, p. 23). In the fifth vignette, the researcher’s transparency was explicit as she reflected on her leadership and the need to balance responsibilities. The authentic conversations with her student showed vulnerability but this was grounded in her methodological learning curve. Leading a large and diverse team is in contrast to the more individual needs of a PhD student, however the transparency of the conversations and leadership proved to be philosophically connected.

Similarly, in the third vignette, transparency was evident in sharing the complexity of the qualitative research experience. The confusion with mixed reviews, editorial championing of new research combined with word limitations, and limited outlets is a common hurdle for organizational qualitative researchers (Symon et al., 2018). In the vignettes, whilst the cookbook processes (Mees-Buss et al., 2022) might inhibit “innovative possibilities” (Gioia et al., 2013, p. 26), templates can provide an initial anchor point as exemplified in vignettes one and two. A template might also offer a succinct or normative approach to communicating key points for qualitative researchers. It is important to remain critical of any claims of absolute transparency as “each telling is inevitably mirrored by not telling” (Suri & Clarke, 2009, p. 413). Audience appropriate transparency is aimed at providing critical details to the audience so that they can make informed decisions about the authenticity and rigor of the research.

### **Concluding Reflections and Ideas**

Despite concerns over the messiness of qualitative research, diligence and authenticity are needed. Reworking methodologies into templating as a normative or formulaic approach is problematic for the qualitative researcher’s rigor (Mees-Buss et al., 2022). It is vital to apply and comprehend rigor with the inclusion of intuition, reflection, and reflexive energy required by the qualitative craftsperson or explorer (Ellingson, 2017; Kincheloe, 2011).

As Einstein said, “a ship is always safe at shore, but that is not what it was built for;” so, too, is qualitative research when used as a standardized approach. The interdisciplinary lens we have used to review templating and the interplay with crystallization has raised concerns and addressed many points that hinder and promote rigor of organizational qualitative research. By exploring the potential and opportunity to extend the boundaries of qualitative research we have employed the subjective essence of crystallization underpinned by reflexivity, researching



with the participants, and immersing in the craft of qualitative research, to expand the discipline. The autoethnographic method has underpinned our idea with the dialectical interplay of templating and crystallization.

The aim here was to build rigor through the relationship between templating and crystallization. Our lived experiences as qualitative researchers in the vignettes illustrate how we embodied templating and worked with the more dynamic and intuitive approach of crystallization. In summary, through our own experiences, the vignettes led us to view three guiding tenets to support the authenticity of crystallization and to review how templating and crystallization shape rigor. From here we encourage and invite a call to go beyond templating and seek out the “aha” moments that create excitement for the qualitative (and quantitative) organizational researchers. Crystallization and the interplay of templating is one way that inspires the researcher to question how to pursue rigorous organizational research. The overarching premise is that templating is a useful tool for qualitative research, however, does not arouse boundary spanning for new ways of seeing. Through the dynamic interplay of templating and crystallization, we urge organizational researchers to seek out the diversity and multiplicity of qualitative methodologies to expand our discipline through authentic, trustworthy, and credible approaches.

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