Common Misconceptions about Templates: Why We Need More, Not Fewer

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I will take an unpopular position in this commentary (Come on, it would not be fun otherwise!). I will argue that we need *more* templates, not fewer. This is not because I disagree with the common criticisms of templates. I simply come to different conclusions about what to do about it. I agree that templates can induce researchers to replace reasoning with "proceduralism" (Harley & Cornelissen, 2022), mislead novice researchers about the complexity of qualitative research (Pratt, Sonenshein & Feldman, 2022) and, if applied (or enforced) mindlessly, they might stifle methodological pluralism and innovation (Cornelissen, 2017; Pratt et al., 2022). And that is precisely why I believe we need to encourage a more constructive debate around common and emerging templates.

Rather that demonizing templates (ok, maybe demonizing is too strong, but you get the idea) and discouraging young scholars from using them, I would rather see us recognizing the benefits of using templates and shifting the discussion from "Are templates good or bad?" to "How can templates be used more effectively – productively, generatively – in qualitative research?" Rather than debating whether the Eisenhardt Method or the Gioia Methodology are good or bad, I would rather see us striving to sharpen our understanding of when, how, under what conditions, for what type of data, etc. these approaches might be more appropriate.

I have used Denny Gioia's methodology for at least seven papers. I have probably used it in a way that Denny might consider improper in another two and in two more I have combined it with other analytical steps, to adapt to the complexity of the study. I don't think I have ever applied this methodology exactly in the same way twice (actually, I don't even think Denny applied his own methodology *exactly* in the same way twice!). Yet, I always had this template in mind – its fundamental assumptions and its approach to data analysis – when I analyzed data. When I read about ways of doing research that are presented as alternative to templates (e.g. Pratt et al., 2022; Harley & Cornelissen, 2022), then, I am puzzled, because I not only agree, but it seems to me that they capture well how I approach qualitative research. Yet, at the same time, I also believe I am applying a template.

Part of the problem with templates, I suspect, lies in interpreting and describing them as "standardized protocols" – as inflexible rules, to be followed strictly. They are not. Denny Gioia has been very clear about his methodology not being a "cookbook" (Gioia et al., 2013) and Kathy Eisenhardt (2021) recently discussed a whole array of variations to her original guidelines. Either these two methodologies – contrary to what we have assumed so far – are not templates, or templates are actually more flexible than they are commonly portrayed to be. Being "systematic" – a word Denny frequently uses when describing his method (Gioia et al., 2013; Gioia, 2019) – does not mean being "standardized;" it means being disciplined, careful, methodical. It does not mean mindlessly following rigid prescriptions.

I also suspect that many of the problems people lament – scholars using templates incorrectly, reviewers and editors imposing templates inappropriately (Köhler, Smith, & Bhakoo, 2022) – also depend on partial or incomplete understandings of these templates, rather than on the templates themselves. Templates can be roughly seen as a combination of fundamental assumptions (ontological and epistemological), methodological guidelines, and visible artefacts (such as Gioia's data structure, data tables, etc.). Conceiving of templates as blueprints for data reporting, rather than guidelines for data analysis, however, can lead those who are less familiar with these methodologies to focus on their most visible features and overlook the guidance that they offer about how to produce an outcome. Here are, for instance, a few common misconceptions I have noticed over the years:

Tables are just for data display. Absolutely not! Tables are not simple repositories of evidence (Cloutier & Ravasi, 2021). They are not something you do at the end to please reviewers, by searching quotes here and there to claim support for a model developed intuitively. The tables I submit are streamlined versions of much richer tables I have been using until then, which contain *all* the relevant evidence (and can *be very* long…). It is by making tables – by cutting and pasting, moving things around – that I really immerse myself in the data and make sure that, however I make sense of them, they are really grounded in the available evidence. Denny often repeats "You got no data structure, you got nothing." For me it is "If we do not have a table, we do not have a paper".

All you need is a data structure. A data structure is important, but it is a mistake to assume that a data structure capturing informants' accounts will be sufficient to support your analysis. Sometimes, these accounts become meaningful only in light of other analytical steps. This is where the Gioia Methodology becomes the backbone of a more elaborate analytical journey that includes the careful tracking of actions, events, discourse, etc. Other tables and figures might be needed to capture the outcome of these additional steps, and/or add a clear temporal dimension to the analysis.

Building a model is an intuitive act. Yes, I know, there will always be a "conceptual leap" (Klag & Langley, 2013) when you eventually arrange your codes into a grounded model. But Denny Gioia's (2004) description of this step as a "Shazam!" might have given the impression that there is some sort of magic involved. If we accept the idea that a theory is composed of a set of interrelated concepts and an explanation for these interrelations, then I found this template helpful to gradually build a grounded model. I usually iterate writing definitions of second-order codes (i.e. concepts) directly into my working tables (to gradually articulate the building blocks of the model), sketch tentative visual representations of linkages among these concepts, and systematically write 'chunks' of theory explicating these linkages directly in the working tables or next to them. Then, I eventually merge these explanations into a first draft of the theorization of the emerging model. It's not magic; it's method.

If templates "codify best practices and conventions for a particular qualitative method" (Harley & Cornelissen, 2022), then the real problem behind their inappropriate use might actually be that we are still at an early stage of codification of the tacit knowledge developed by early users (even for the most common templates). If so, rather than trying to do away with templates altogether, we might instead want to support this codification process by "talking more and teaching better" – encouraging richer and broader conversations around best practices and creating more opportunities for knowledge sharing – to help more people reap their benefits, while minimizing their shortcomings.

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