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# CRITICAL MANAGEMENT RESEARCH

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# TWO

## Problematization meets mystery creation: Generating new ideas and findings through assumption-challenging research

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### Introduction

A key objective of research is to develop new ideas and theoretical contributions. This is somewhat different from what is normally emphasized in methodology, namely, procedures that enable precision in description and analysis. In the latter, the issues of interest include validity, reliability, 'data collection' (depth and richness in the production of empirical material) and 'data processing' (how data are codified, categorized, analysed, interpreted and written). Such methodological procedures can be 'tight' or 'soft'. For example, a tight procedure may stress a fixed interview schedule and codification, while a soft procedure may emphasize the importance of having 'been there', in-depth interviewing, and interpretations that are fair to the experience of subjects.

Our purpose in this chapter is not to develop methodological procedures for generating more accurate and 'objective' representations of reality or of the authentic experiences and meanings of people; rather, our purpose is to discuss ways of generating interesting and potentially influential new ideas and theoretical contributions. This is of particular interest for critical studies in which the key aim is not so much the 'mirroring' or 'mapping' of reality, but instead the encouragement of novel ideas and path-breaking thinking. Breaking away from dominant constructions and institutions

calls for some latitude from an overly strict focus on empirical details and slavishly following methodological procedures. But as good ideas and contributions require a grounding in empirical examinations – or, in a strong sense, how reality looks and can be understood – critical and theory-developing research are not in contradiction to, or disconnected from, empirical ambitions. Nevertheless, doing research – both theoretical and/or empirical – with the intention of developing new ideas often requires ‘data’ to stimulate imagination and creativity, rather than a narrow focus on ensuring that data mirrors reality: whether in the form of representing a phenomenon ‘out there’ (facts) or in the form of the experiences, beliefs, feelings or cognitions of subjects under study (meanings).

More specifically, for a theory to become interesting and influential it needs to attract attention from other researchers and practitioners, to lead to enthusiasm, to generate ‘aha’ and ‘wow’ moments, to trigger responses such as ‘I have not thought about this before’ or ‘perhaps I should rethink this theme’, and possibly to act as an effective tool for animating dialogue and reflexivity among practitioners. During the last four decades, originating with Davis’s (1971) seminal sociological study, a large number of researchers have shown that rigorously executed research is typically not enough for a theory to be regarded as interesting and influential: it must also challenge an audience’s<sup>1</sup> taken-for-granted assumptions in some significant way (e.g. Astley, 1985; Bartunek et al., 2006; Weick, 2001). In other words, if a theory does not challenge some of an audience’s assumptions, it is unlikely to receive attention and become influential even if it has been rigorously developed and received substantial empirical support. Of course, not all forms of assumption challenging are in line with a critical management studies (CMS) agenda – CMS assumptions of the rotten nature of capitalist society, patriarchy, managerialism and other typical subjects can (and should) themselves also be scrutinized – but the research ideal of assumption challenging is broadly congruent with, and supportive of, the CMS project of unsettling dominant worldviews and constructions of reality. Emancipation means that a fixed set of beliefs are opened up for critical examination with the intention of increasing ethical awareness and autonomy (Alvesson and Willmott, 2012).

However, although this growing body of literature has clearly shown the importance of assumption challenging for developing novel research ideas, it has been considerably less clear about *how* we can productively go about challenging assumptions as a means for developing more interesting and influential theories. In previous studies, we have suggested two major ways of producing new ideas through assumption-challenging research, namely through *problematization* (e.g. Alvesson and Sandberg, 2013) and through *mystery creation* (e.g. Alvesson and Kärreman, 2011). The problematization methodology is used for critically scrutinizing and challenging dominant assumptions in a field, while the mystery methodology uses empirical material as a

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<sup>1</sup>Here we mainly have in mind the academic audience targeted. However, ‘audience’ is a complex issue as it typically is not a unitary group but consists of several subgroups within a theoretical field. For further detail, see Alvesson and Sandberg (2013: Chapter 5).

source for constructing breakdowns and mysteries in social life. The former emphasizes critical examination of existing theory and studies within a field with the aim of questioning established truths and lines of thinking. The latter means that one tries to mobilize empirical material as a dialogue partner to talk back to established knowledge and through that encourage rethinking.

In this chapter we elaborate how these two assumption-challenging methodologies can be *combined*, as a way to come up with something new and unexpected, not just to represent reality or to apply, conform to, or modify a framework. Of course, new ideas come partly through serendipity and creative ingenuity, and partly by using existing theories/ideas in a novel way, but using 'creative' methodologies can also be beneficial in this process. We start by describing what we call the problematization methodology, followed by the methodology for mystery creation. Then we show how they can be productively set in interaction to generate new ideas and contributions.

## Constructing research questions through problematization

It is important to consider what strategies researchers use for constructing and formulating research questions from existing literatures. Although a range of issues influences the purpose of a study, such as the researcher's knowledge and interest or what kind of research is likely to attract funding, the most crucial influencing factors are probably existing theory and empirical studies. The framing impact of earlier research is typically very strong. No researcher starts to study mergers, strategies, leadership or teamwork without 'knowing' something about previous thinking and studies in the area. The most prevalent strategy for constructing research questions in the context of established work is gap-spotting (Sandberg and Alvesson, 2011). It is by looking for different knowledge 'gaps' in existing literature that research questions are constructed. One common strategy is trying to spot *confusions* in the literature that need to be rectified. The most prevalent strategy is *neglect-spotting* in which the researcher tries to identify areas that are overlooked, under-researched, or lack empirical support and, in response to this neglect, construct a research question. A third route is *application-spotting*. Here, the researcher searches for an absence or shortage of a particular theory or perspective in a specific area of research, and then seeks to apply the theory in this new area. For example, CMS advocates commonly use a specific framework, such as gender, Foucault or Marxism. The specific framework is applied, perhaps even imposed on the object of study, which means that the object of study is typically being constructed in line with the favoured approach. Gender students find discrimination and Foucauldians find power exercising disciplinary effects. A common motive for such application-spotting studies is that nobody has applied the specific framework to a specific (sub-)area of research before.

By applying it for the first time, the study generates knowledge that fills an identified gap in the literature.

While gap-spotting research is a central ingredient in most theory development, it is unlikely to produce interesting and influential knowledge contributions. As pointed out above, for research to be seen as interesting and influential, it is not enough to improve existing theory; it also needs to challenge its audience's taken-for-granted assumptions in some significant way. Gap-spotting studies and their emphasis on filling gaps in existing theory tend to *reinforce* rather than *challenge* existing theories in any significant way and are, therefore, incapable of producing something new and interesting. A gap-spotting researcher applies, reproduces and varies or adds to existing knowledge, but does not substantively challenge it. This is because in gap-spotting research, the assumptions underlying the existing literature are more or less taken as given and, thus, reproduced. When the assumptions underlying a specific theory are reproduced, the theory is reinforced rather than challenged in any substantive way. This assumption-reproducing way of working, such as applying a framework, a vocabulary and a set of 'truths', therefore, counteracts what is typically seen as interesting – ideas and knowledge that challenge an audience's assumptions and show that what they thought was true or self-evident is actually not so (Alvesson and Sandberg, 2013; Davis, 1971).

In order to support efforts to more deliberately and systematically identify and challenge the assumptions underlying existing literatures, we suggest the use of *problematization* as a methodology for generating research questions. By this we do *not* mean a minor critical scrutiny of a concept or a truth claim, but a more open-minded critical inquiry, where the basic assumptions underlying existing literatures are examined and unpacked.

Advocating a genuine problematization approach does not mean that a problematizer is 'a blank slate' or position-free. A developed pre-understanding is a key feature of any researcher (as an academic and social being), and is brought into play in any intellectual enterprise. Any problematization necessarily takes its point of departure within a specific metatheoretical position (i.e., epistemological and ontological stance: Tsoukas and Knudsen, 2004: Chapter 1) as well as within the cultural framework into which the researcher has been socialized through upbringing, education and work. The ambition is therefore normally not – nor is it typically possible – to totally undo one's own position; rather, it is to unpack it sufficiently so that some of one's ordinarily given assumptions are scrutinized and reconsidered in the process of constructing novel research questions. Here *reflexivity* is key: the careful thinking through of one's position and how it easily locks the researcher into taken-for-granted assumptions and a view of the world as a set of 'truths' (including 'truths' offered by CMS perspectives).

The focal point in problematization as a methodology for generating research questions is to illuminate and challenge those assumptions underlying existing theories (including one's own favourite theories) about a specific subject matter. This is rarely done, at least very seldom seriously demonstrated in research publications.

Critique of others or phenomena 'out there' is not the same as problematizing one's own received wisdom. Also critical approaches being reproduced and applied score low on problematization.

The aim of the problematization methodology proposed here is to come up with novel research questions through a *dialectical interrogation* of one's own familiar (or home) position, other theoretical stances, and the domain of literature targeted for assumption challenging. There are of course differences in terms of what a targeted theory domain looks like. Sometimes it is fairly weak, open, or pluralistic regarding specific theoretical ideas. Sometimes it is more distinct, and may deviate more or less from other ingredients in the interrogation. In some cases it may be difficult to separate the domain from the home position, as the boundaries may not be so clear. (Of course one's home position can be the target, but here we assume that the researcher is not exclusively focusing on the home position, but is partly or mainly focusing on another theoretical stance.) In other cases, such as when the home theoretical position and a new domain literature are clearly different, it is easier to separate one's home position from the domain targeted.

The idea of dialectical interrogation calls for the availability of different positions and lines of thinking. This should optimally include some clear variation or difference between the theoretical positions represented by the home position, other stances and targeted domains. Such variation in positions provides better options for opening up not only the domain literature about the subject matter, but also one's favoured home position. Hence, dialectical interrogation calls for going against one's preferred understandings of the world and programmed problematizations, and as this is difficult, intellectual resources need to be used. A set-up for dialectical interrogation, with position and counter-position initiating dialogue, will offer support. Reading other theories will give an indication of what is being missed by one's preferred position. It will stimulate rethinking of one's established ideas and facilitate imagination and creative reframing of the subject matter and/or novel ways of using a theoretical framework.

A key task in generating research questions through problematization, then, is to enter a dialectical interrogation between one's own and other metatheoretical stances so as to identify, articulate, and challenge central assumptions underlying the existing literature (including those assumptions underlying the existing literature in the CMS field), and to do so in a way that opens up new areas of inquiry. Rather than working with a fixed set of assumptions, one tries to develop awareness of alternatives.

Although not working with a fixed set of categories or levels of assumptions, we regard the following types of assumptions as particularly important to consider: in-house, root metaphor, paradigm, ideology, and field assumptions. *In-house* assumptions exist within a particular school of thought in the sense that they are shared and accepted as unproblematic by their advocates. *Root metaphor* assumptions represent the broader images used to conceptualize a specific subject matter, such as seeing organization as 'culture', 'machine', 'network' or 'pyramid'. *Paradigm*

assumptions refer to the ontological, epistemological and methodological assumptions that underlie a specific body of literature. *Ideology* assumptions include various political, moral, and gender-related assumptions that underlie a specific literature field. Finally, *field* assumptions point to a broader set of assumptions that are shared by several schools of thoughts within a discipline. Taken together, this typology of assumptions can potentially be used for identifying and articulating assumptions in existing literature.

To enable identification and problematization of assumptions via dialectical interrogation between one's own and other metatheoretical stances, we have proposed the following methodological principles as being central: (1) identifying a domain of literature by summarizing its existing knowledge and choosing a specific audience (parts of the research community and/or parts of the educated public), (2) identifying and articulating assumptions underlying this domain, (3) evaluating them critically and then focusing on problematic assumptions and, based on that, (4) identifying and developing an alternative set of assumptions, (5) considering the alternative

**Table 2.1** The problematization methodology and its key elements (Alvesson and Sandberg, 2013)

<i>Aim of the problematization methodology</i>					
Generating novel research questions through a <i>dialectical interrogation</i> of one's own familiar position, other stances, and the literature domain targeted for assumption challenging					
<i>A typology of assumptions open for problematization</i>					
<i>In-house</i> Assumptions that exist within a specific school of thought	<i>Root metaphor</i> Broader images of a particular subject matter underlying existing literature	<i>Paradigm</i> Ontological, epistemological, and methodological assumptions underlying existing literature	<i>Ideology</i> Political-, moral-, and gender-related assumptions underlying existing literature	<i>Field</i> Assumptions about a specific subject matter that are shared across different theoretical schools	
<i>Principles for identifying and challenging assumptions</i>					
1. <i>Identify a domain of literature:</i> What main bodies of literature and key texts make up the domain?	2. <i>Identify and articulate assumptions:</i> What major assumptions underlie the literature within the identified domain?	3. <i>Evaluate articulated assumptions:</i> Are the identified assumptions worthy to be challenged?	4. <i>Develop alternative assumptions:</i> What alternative assumptions can be developed?	5. <i>Relate assumptions to audience:</i> What major audiences hold the challenged assumptions?	6. <i>Evaluate alternative assumptions:</i> Are the alternative assumptions likely to generate a theory that will be regarded as interesting by the audiences targeted?

assumptions in relation to its audience, and (6) evaluating the alternative set of assumptions and crafting a research idea to be presented to the audience, who should, if one is successful, react by responding 'this is interesting!' – and mean it (Alvesson and Sandberg, 2013). This methodology is presented in Table 2.1.

This methodology aims to say something new and thought-provoking to an audience of researchers and other interested people (professionals, managers, educated public). For this reason, challenging assumptions is of interest not only to the researcher doing the work but also to the audience he or she seeks to communicate with. In particular, assumption challenging is seen as a *means* (not a goal as it is sometimes viewed in more critical theory and, in particular, poststructuralist research; see for example, Knights, 1992, who emphasizes negative knowledge) for coming up with new and creative ideas and research contributions. Typically, the researcher him- or herself belongs, at least partly, to the target audience, but of course there may be differences. It is vital not to be purely self-focused or academically introverted, but work on and against the assumptions, while bearing in mind others interested in the subject matter in question.

We refer the reader to Alvesson and Sandberg (2013: Chapter 5) for a full exploration of the methodology, but here we address only its most important principle – which also represents a crucial stage in the problematization process – principle no. 2: Identify and articulate assumptions. A key issue here is to transform what are commonly seen as truths or facts into assumptions. In doing so the implicit or hidden is made explicit and open for scrutiny. This is demanding, and most people are not so interested or successful in doing it. It often calls for a hermeneutic process of noting, interpreting, moving between, and reinterpreting different cues, thereby indicating assumptions not directly expressed, or perhaps not being consciously grasped or considered by authors. Hermeneutic ideas such as the circle (constant and recurrent moves) between pre-understanding and understanding are helpful here (e.g. Alvesson and Sköldbberg, 2009).

We see a range of methodological tactics available for identifying assumptions in existing literatures. Some assumptions, held by specific groups/schools, can be identified by scrutinizing internal debates and the interfaces between a specific group of authors who frequently refer to each other and neighbouring areas, moderately relating one's work to the focused group's work, and using a similar narrative style and vocabulary. For example, various authors have challenged the idea that organizations typically form unitary and unique cultures (e.g., Van Maanen and Barley, 1984), or even clear and stable subcultures (Martin and Meyerson, 1988), by seeing culture as a process – a form of traffic – rather than as something stable (Alvesson, 2013).

A particularly important ingredient in creatively identifying assumptions is to engage in perspective shifting. This means that a variety of theoretical ideas are invoked in order to facilitate sensitivity towards various assumptions. As researchers with problematization ambitions – like other mortals – we do not only function intellectually and rationally. It is also central to realize our emotional preferences and how our own identity can give rise to blindness, one-sightedness, or a generally



reduced ability to seriously consider aspects other than those we normally tend to see. It is therefore important to try to work with one's own identity and associated emotional commitments and blinders, through distancing and identity shifting. For example, distancing and identity shifting<sup>2</sup> can be achieved by accessing alternative theories, talking to people with views different from one's own, and voluntarily stepping into the shoes of advocates of other perspectives (i.e. associated with various paradigms, knowledge interests, theories, or social identities). A critical researcher may try to identify him- or herself with a person in charge of an organization or another elite representative. A symbolic interactionist may attempt to take the outlook of a macro-researcher seriously. A poststructuralist may think about a problem that calls for a solution – rather than a deconstructionist ironic reading – and then imagine him- or herself as a functionalist trying to deliver a robust and clear result. All of these moves aim to increase reflexivity and imagination and thereby facilitate the often rather difficult project of identifying assumptions.

Since not all assumptions are likely to be strong candidates for problematization and the development of new assumptions and research questions, it is often fruitful to identify a surplus of assumptions that can be challenged and to formulate these in various ways, thereby offering different possibilities for further work. In the later stages of the process, some initially interesting assumptions may be reassessed as being less interesting to challenge than initially thought. One could also use the tactic of identifying a few assumptions that appear promising for challenging. How to evaluate them and what to do with them in the subsequent work is very much a matter of what the variety of assumptions looks like in the context of empirical work.

## An example: Values

Let us give an example – values. This is a key element in a range of different areas, not just focused 'value studies', but also in the context of organizational cultures, conflicts, leadership, careers, motivation, gender, sustainability, power, resistance and so forth.

A conventional assumption is that people have values. This is often taken for granted and not reflected upon. Many authors, for example, define organizational culture in terms of shared values. Many would see this as a self-evident fact, beyond doubt and consideration. This leads to research questions such as 'What kind of values are prevalent in an organization and how do they influence outcomes?', 'What kind of leadership style is expressed as a result of specific values held?', 'How do

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<sup>2</sup>We don't have in mind that the researcher should and can permanently change all his or her basic assumptions about the subject matter in question. Rather, we suggest that researchers temporarily try to distance and shift identity as a tactic to better see the assumptions underlying their own favourite position.

masculine (Western, upper-class, consumerist, etc.) values and so forth dominate a specific setting? Measurement or, if values are seen as 'deep', in-depth interviews, are then viewed as possible and appropriate ways of studying values.

A counter-assumption could be people take value positions – i.e. there are various values in circulation, and people use these values in various ways so as to promote their interests or get along. Values would not then be seen as fixed traits, something people (or organizational groups) 'hold', but instead as something that people connect to or disconnect from. An alternative assumption would then be that values and value talk are a tactical resource for corporate actors. Values become then process, and it is not possible to nail them down through measurement or the interpretation of 'fixed meanings'. For example, sustainability, profit, growth, quality, gender equality, competitiveness, and so forth would signal alternative values for actors in particular contexts. Actors could then move between these alternative values, depending on their specific situation.

These two statements can be seen as varied – a conventional assumption and an alternative one – but they nevertheless have something in common. Specifically, both assumptions assert that the individual is somehow the central agent, holding or flexibly using values. The individual is at the centre of matters and is a container or a manager of values.

One can challenge and de-centre this notion and draw attention to how other forces are at play. A counter-assumption could be that the individual is not the agent, but is produced by discourses or social forces controlling or governing the value positioning of the individual. The idea would then be that value-laden discourses tend to frame, guide and constrain subjects in an integrated and coherent way, leading to the individual being fixed and appearing to 'hold values'.

Yet another assumption could be that various forces and mechanisms are regulating individuals in a more varied and shifting manner. The latter idea would be to emphasize how multiple forces are in operation, leading to flexible and fragmented modes of value-positioning prescribed by various instances or mechanisms operating on the individual. Pressures to sometimes be an isolated individual (to be assessed and developed as such), or to sometimes be a 'chain gang' like a team member (expected to be loyal and compliant), call for flexibility in terms of values and valuing. Sometimes autonomy and individualistic values may be expressed; sometimes loyalty, teamwork and community may define how the subject is supposed to approach and value the world.

We can thus work with four assumptions:

The individual holds values.

The individual is a strategic and tactical user of values.

Social and discursive forces operate on the individual and lead to a fixed association and subordination with (organizationally expressed) values (being present until a new regime produces another value-positioning).

Social and discursive forces operate on the individual in a myriad of varied ways, creating fragmentation and hopping between different values.

These four assumptions can inform the construction of research questions and the execution of studies. One may either fixate on one type of assumption and work with this (whilst trying to consider the alternatives), or take seriously all possibilities and bear these in mind during empirical inquiry.

## Problematization in empirical work

Developing an array of possible alternative assumptions in relation to those guiding the literature one is working with is essential for generating new ideas and contributions. Another major way of generating new ideas is to problematize the empirical work itself. The methodology literature often separates these two methods, but a good interplay between the two is typically required to produce new ideas and contributions. The ideal is a productive interaction between problematization of the literature and doing empirical work that strongly problematizes the empirical material. One conventional and established way to challenge dominant theoretical ideas is the use of empirical material as the final arbitrator of ideas and hypotheses. Here the fit between theory and data is viewed as central. Misfit or falsification can thus be seen as a source of problematization – similar to what Kuhn (1970) referred to as anomalies possibly creating problems for an established paradigm and triggering development towards (paradigm) revolution. Theory not supported by data should then be reconsidered and new theory developed.

## Constructing and solving mysteries in empirical work

Unlike many others with a strong faith in the robustness of data (such as quantitative or grounded theory methodologists, who celebrate discipline and diligence rather than imagination), we claim that data, or – our preferred term – empirical material, are simply not capable of unambiguously showing the right route to theory or unproblematically screening out good ideas from bad. As we see it, the interplay between theory and empirical material is more about seeing the latter as a source of inspiration and a partner for critical dialogue than as a guide and ultimate arbitrator. Acknowledging the constructed nature of empirical material, which is broadly accepted in the philosophy of science (Alvesson and Sköldbberg, 2009; Kuhn, 1970; Gergen, 1978; Denzin and Lincoln, 2000), has major consequences for how we consider the relationship between theory and empirical material, and calls for giving up the old idea of data and theory being separate.<sup>3</sup>

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<sup>3</sup>We are talking here primarily in an ontological and epistemological sense. It can still, for analytical purposes, be fruitful to deal with 'data' and 'theory' separately.

One central aspect here is that assumptions tend to guide all understandings of data (empirical material), in that theories and vocabularies produce specific worldviews that tend to order reality in predictable ways, and confirm one's preconceptions. If a manager gives a talk and this is viewed as 'leadership', a theory about the latter produces the talk as leadership action (different from any other forms of talk not being 'leadership'). Any empirical material is sensitive to the assumptions guiding the research process that produces the material. It then becomes very difficult for empirical material to kick back at assumptions, unless these are clarified, opened up and problematized. Problematizing established assumptions makes it possible for researchers to approach field studies and other forms of empirical work in a much more open-minded manner and to consider more fully the variety of ways in which we can see empirical material. This is very different from aiming to 'fix' data through measurements or codification that freezes a specific meaning and direction of a representation of some phenomenon of interest. (For detailed exposure of how this is typically problematic, see Alvesson, 2011; Alvesson and Sköldbberg, 2009; Potter and Wetherell, 1987). Such measurement or codification tends to reproduce and reinforce assumptions, although there is always some scope for the empirical material to be at odds with some parts of the framework and assumptions guiding the entire enterprise.

It is crucial that researchers seek to challenge the value of an established theory or a framework, to explore its weaknesses and problems in relation to the phenomena it is supposed to explicate, and to do this not just in situations in which the empirical material is obviously at odds with it. Problematizing means generally opening up, and pointing out the need and possible directions for rethinking and developing established theory. In order to develop new and interesting insights that challenge dominant assumptions, it is important to mobilize empirical material in such a way that it can encourage rethinking. The idea here is not to approach the area of study as 'a site where academics can demonstrate their stance towards the world, rather than a place where the world stands as a potential empirical critique of our assumptions about it' (Miller, 2001: 226).

Consequently we suggest a methodology for theory development through encounters between theoretical assumptions and empirical impressions that involves an active search for opportunities to let empirical material inspire the rethinking of conventional ideas and categories (developed in Alvesson and Kärreman, 2011). It is the unanticipated and the unexpected – the things that puzzle the researcher due to the deviation from what is expected – that are of particular interest in the encounter. Accordingly, theory development is stimulated and facilitated through the selective interest of what does *not* work in an existing theory, in the sense of encouraging interpretations that allow a productive and counterintuitive understanding of ambiguous social reality and that differ from established frameworks and routine findings. The ideal research process then includes two key elements: creating a mystery and solving it (Asplund, 1970). A mystery is empirical findings that deviate from what is expected and lead the researcher into a (temporary) state of bewilderment and loss: a mystery appears when we cannot understand something, and it calls for a new set of ideas that diverge from established assumptions and wisdoms, in order to resolve the mystery.

An illustration from our own research is in the area of 'leadership'. Here, the managers studied claimed to do leadership and provided accounts of their work fully in line with contemporary leadership ideals (helping people develop, working with visions and values, rejecting 'micro-management', and so forth). However, when asked about their specific practices, they mainly referred to administrative, technical, and operative issues. This was out of tune with the 'leadership' they professed to believe in and practise. Here we found excellent inspiration to reinterpret what 'leadership' is about. Specifically, it is more a discourse used by managers to boost their identity and legitimize their work than a guiding force behind their managerial practices (Alvesson and Sveningsson, 2003).

The empirical material, carefully constructed, thus provides strong impetus to rethink conventional wisdom and to find new ways of understanding a given phenomenon, making it less self-evident and more surprising, and thus generative of novel insights. However, the ideal is *not*, as in neo-positivist work such as grounded theory (Glaser and Strauss, 1967; Strauss and Corbin, 1994), to aim for an 'intimate interaction with actual evidence' that 'produces theory which closely mirrors reality' (Eisenhardt, 1989: 547). This is an effective hindrance of imagination, as reality-mirroring easily means marginal theorization and trivial results. Chiefly, our goal is to explore how empirical material can be used to develop theory that is interesting, rather than obvious, irrelevant, or absurd (Davis, 1971). However, this calls for a more active construction of empirical material in ways that are imaginative, and not just passively waiting for data to show us the route to something interesting, as is the typical, perhaps unrealistic, hope in more conventional research. For example, careful work with data as advocated by grounded theory is hardly sufficient to trigger imagination that leads to really novel and challenging ideas (Alvesson and Sköldbberg, 2009). Of course, the approach that we suggest calls for some relaxation of the pressure for conventional rigour. Instead, the ambiguity of empirical material and the uncertainty of our interpretations are acknowledged. In particular, the researcher needs to carefully consider how any empirical material can be understood in more than one way, and that unconventional understandings may lead to new insights and the creation of a mystery in a study. For an extensive description and exemplification of the mystery methodology, see Alvesson and Kärreman (2011).

## Combining problematization and mystery construction

This 'mystery methodology' for how to work with empirical material can interplay with the 'problematization methodology' suggested above. The latter opens up and adds insights via alternative assumptions that can guide research; the former can be more sensitive and imaginative as a consequence of a decreased tendency to press empirical impressions into pre-established categories and theories. The

mystery methodology can also more directly encourage and fine-tune assumption challenging during empirical work. In many cases, one can imagine that there are problematization elements in both the review of the literature and the construction of empirical material, and that both 'parts' of the research process interact and support each other.

Research consistent with the spirit of this methodology is typically characterized by iterations and intersections between assumption challenging in relation to the literature and to the empirical material. Ideally, a preliminary problematization of the literature leads to a specific curiosity in fieldwork, which feeds back into how the literature is read (and reread), which again informs how to address and use empirical material, and so on. Importantly, empirical impressions must be considered as a vital input into the refinement of assumption-challenging outcomes. New assumptions may be convincing based on a critical scrutiny of the literature, but may later appear less promising in the face of empirical impressions. While there is hardly a one-to-one relation between assumptions and data, sometimes the latter may offer fuel for rethinking assumptions, and thus productively feed into an ongoing problematization process. This process is, as we have emphasized, not just restricted to the early stages of research, leading to fixed research questions derived from a literature review, but typically ongoing, emergent and/or shifting, right up to the point where the final research report or article is submitted for publication.

Let us underscore that the problematization methodology and its fieldwork (mystery) cousin imply a somewhat different *researcher identity* than the common one. Both methodologies call for drawing upon a broader set of theories and vocabularies as resources for challenging dominant assumptions and constructions of empirical material, greater emphasis on (self-)critical and hermeneutic interpretations of the frameworks and ideas in operation, as well as some boldness in counteracting consensus. A fair degree of scepticism is important. This typically means less detailed knowledge of all that has been done within a narrowly defined field, and a reluctance to divide up theory and data as separate categories and address these as distinct parts and sections in a report. It may also mean facing some antagonism from defenders of an established position. In short, our approach calls for a shift of emphasis in researcher identity: from cultivating an incremental gap-spotting research identity, to a reflexive and path-(up)setting scholar, with some preference for irony and promiscuity over a fixed, programmatic position. It also calls for some shift in professional norms, celebrating ideals other than 'find and fill the gap' and consistently working within and applying a specific framework.

## Returning to values

The interplay between challenging the assumptions underlying theoretical ideas and trying to bring out surprises in fieldwork can be illustrated in various ways empirically. Statements by interviewees (or people observed expressing sentiments in

specific episodes) can be interpreted based on assumptions about value-holding as well as value-jumping. In most cases it is not always clear-cut how to address empirical phenomena: is there some variation but also some underlying coherence, or is there some tendency to express not only a particular orientation but also fragmentation and variation? Different surprises and mysteries that allow for the challenging of established theoretical ideas can be produced in different ways. Proceeding from the conventional view of people and groups having values, one can point at empirical indications suggesting variation, fragmentation and shifting between values. A 'mystery' would then be the disinclination or inability to produce coherence and direction. How does it come to be that values are not integrated and directed in a clear way? How can we understand this and develop new ideas, for example on the individual as a value-jumper?

But one may also take seriously and proceed from other assumptions expressed in the literature, such as the notions of contemporary individuals as being 'other-directed', customer-oriented, lacking character and conviction, formed by contemporary capitalism and organizational life to be oriented to cope with a variety of demands, expectations, people and situations, and as being quite flexible and malleable. Given these assumptions, the indications of an individual or a group wholly or at least partially sticking to certain values and commitments, could be viewed as an interesting mystery. How can we understand instances of people holding on to a sense of integrity/rigidity/coherence, in a social world calling for adaption to social contingencies? How is someone capable of 'having' and being fairly consistent in 'holding' these values?

This is not to say that any data can be used for any purpose. Empirical material often kicks back against some ideas and interpretations; sometimes the material offers limited support for a specific interpretation. But different theoretical ideas often lead to different constructions of empirical material, and the latter is seldom so short of ambiguities that it only allows one clear kind of codification and interpretation. In order to develop new ideas, then, the dialectical interplay between theoretical assumptions and empirical material calls for bringing on board both the assumptions and possible counter-assumptions that the researcher can mobilize and work with to open up empirical material for alternative readings. To repeat, the purpose is not to maximize the fixity of empirical material through denying ambiguity and codification, but to use these in order to develop interesting ideas.

## Conclusion

Given the centrality of scrutinizing and challenging assumptions for producing interesting and influential research, we think it is necessary to question an exclusive focus on building upon published empirical studies and applying existing theory within social studies. Consensus-challenging work is important, and key here is

problematization of taken-for-granted assumptions within a specific research area. A supplement to this is a willingness to look for surprising field experiences and letting these kick back against one's theoretical framework.

We thus formulate two key principles and how they can be combined for developing interesting and novel research insights:

1. Critically scrutinize dominating assumptions and, when motivated, suggest alternative ones.
2. Find and solve a mystery in empirical studies.

We certainly do not claim that this is suitable for all researchers and research projects, and we are not saying that problematization of conventional theory and questioning of established ways of ordering data should generally replace mainstream views of research (e.g. treating theory and data as separate and emphasizing the collection and analysis of data as a 'theory-free' enterprise). It is important to maintain diversity in ways of doing research. However, given the dominance of the conventional view (as expressed in most method books and journal articles) and frequent complaints (e.g. Clark and Wright, 2009; Daft and Lewin, 2008; Grey, 2010; Starbuck, 2006)<sup>4</sup> about research often lacking new, surprising ideas and insights, we encourage researchers to be less inclined to one-sidedly employ assumption-reproducing research questions and lines of analysis. Instead, less reproductive and more *disruptive* modes should also be promoted and used, as they are likely to lead to the development of more interesting and significant research results. Of course, views of what is interesting differ between people, but demonstrating that earlier held assumptions are problematic, and that alternative ones make sense, will lead to an experience of 'this is interesting' (Davis, 1971).

Such disruption should focus on the assumptions in the literature of a field, as well as conventional ways of dealing with empirical material. An interplay between challenging assumptions of dominant theories within a field, and looking for unexpected and challenging interpretations in fieldwork is important. The former facilitates the latter, while fieldwork can encourage the kicking back and revision of ideas on both dominant and alternative assumptions. In the space between alternative assumptions and alternative meanings of empirical material, and the dialogue therein, creativity and imagination can be cultivated. This is not to deny the significance of discipline – our approach is not a licence to do whatever one wants with literature or fieldwork material. Having said that, typically it is possible to carve out more than one meaning from an aspect of the literature as well as from empirical material. These possibilities for alternative options do not appear to be used by most researchers. Our methodology can perhaps change this.

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<sup>4</sup>For an extensive review and discussion of these complaints, see Alvesson and Sandberg (2013: Chapter 7).



More generally, the proposed combination of the problematization and the mystery methodology also contributes to – and relies upon – more reflexive and path- (up) setting scholarship, in the sense that it counteracts or supplements the domination of cautious, strongly specialized, and incremental research ideals. A major problem is that much research tends to be quite predictable, and does not significantly advance the management field. In fact, most research applies and reinforces, rather than challenges, existing theories in the field. CMS researchers regularly target the usual suspects, reproduce and apply Foucauldian, feminist etc. perspectives in a predictable way, and thereby lose some of their critical edge and capacity to foster new insights. Researchers can develop a more critical, reflexive, and path-(up)setting scholarly identity by continuously scrutinizing, interpreting, critically investigating, and occasionally reconsidering their own and their research field's assumptions. We see a strong need for this kind of scholarly identity in the contemporary academic climate of specialization, journal publication focus and an emphasis on careers rather than having anything valuable to say. CMS is not altogether an exception. More creative and unexpected work is needed to make research more interesting and influential.

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