Spotlight Session: The Four Stages of Research with MAXQDA

The Four Stages of Research is a conceptual model I use to teach undergraduates how to use MAXQDA for qualitative research. It is meant to be a set of guidelines and suggested best practices for maximizing the use of MAXQDA. The Four Stages have evolved since I first introduced them at MQIC in a poster session in 2017.

Stage 1
Identify the guiding questions that will shape the study

| Develop Conceptual Framework | Literature Review |

Stage 2
Create the workspace and set up the process to evaluate the data

| Develop Analytical Plan | Prepare research workspace |

Stage 3
Conducting the Content Analysis
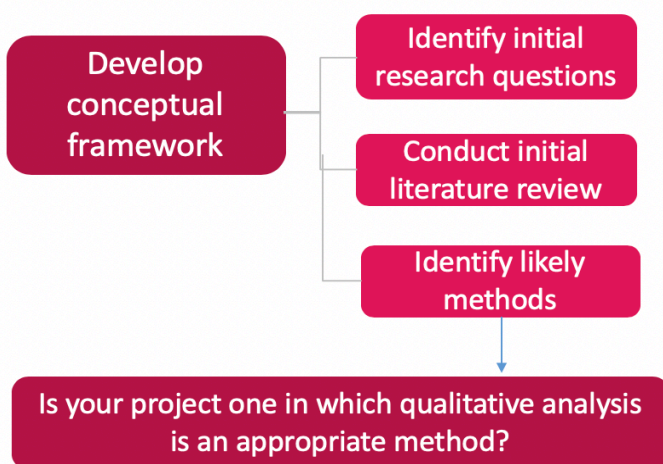
| Refine and Finalize Codebook | Content Analysis |

Stage 4
The art of data analysis
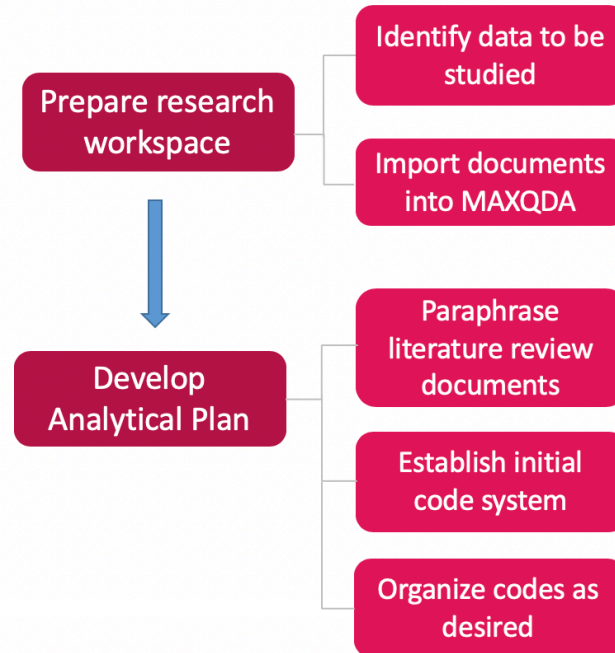
| Summarize, identify patterns and analyze data | Writing |

Stage 1 – Identify guiding principles

Develop conceptual framework

- Identify initial research questions
- Conduct initial literature review
- Identify likely methods

Is your project one in which qualitative analysis is an appropriate method?

MAXQDA is a tool. It does not do the research for you. But it can make the research process much easier, if you approach it in a systematic way and develop a conceptual framework. This stage isn't about MAXQDA, it is about conducting research, although MAXQDA can be used for your **literature review**.

Stage 2 – The Workflow

```
Prepare research workspace ──┬── Identify data to be studied
                             └── Import documents into MAXQDA
         │
         ▼
Develop Analytical Plan ──┬── Paraphrase literature review documents
                          ├── Establish initial code system
                          └── Organize codes as desired
```

Create Workspace

Create your workspace (a MAXQDA project) and setup your process to conduct the qualitative analysis. Import documents and organize them in groups or sets as needed.

Develop Code system

In some projects you might have a clear idea of the codes you want to content analyze from your work in **Stage 1**, but this is often not likely to be complete

- One of the best tools to use to develop a coding system is MAXQDA's **paraphrasing** tool.
- Paraphrasing lets you summarize documents with your own words and makes it easy to organize and identify codes you will want to explore in your qualitative analysis
- Use **categorize paraphrases** with your paraphrased summaries to organize and identify codes to create in your project
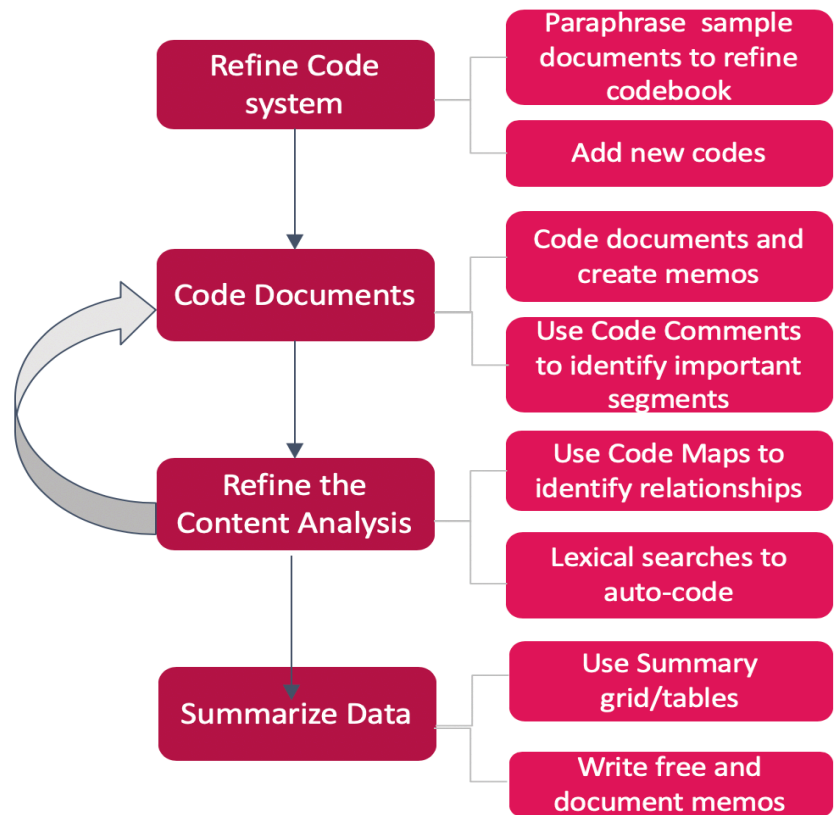
  Go to: https://www.4stagesofresearch.com to view a full tutorial on using paraphrasing as presented in a **spotlight session** at MQIC 2020.

Stage 3 – The Content Analysis

Stage 3 gets to the heart of the research: content analysing your documents:

- Refining the code system
- Content analyzing your documents
- Creating memos and comments
- Identifying patterns and relationships
- Summarizing your data

Refine Code system	**Paraphrase sample documents to refine codebook**
	Add new codes
Code Documents	**Code documents and create memos**
	Use Code Comments to identify important segments
Refine the Content Analysis	**Use Code Maps to identify relationships**
	Lexical searches to auto-code
Summarize Data	**Use Summary grid/tables**
	Write free and document memos

Coding your documents

Start with your initial **code system,** adding new codes as needed. You can go back to documents you've already coded and do lexical (word) searches to fill in the blanks
You can also do **word searches** to do a double-check to see if you missed examples. This is very valuable in my work, as legal documents get very complex.

There are many tools you can use as you refine your work. **Code Maps** enable you to see the relationships between codes. They can also help you identify redundant coding.

For more information on **code maps**, see the blog David Kunkel and I wrote: https://www.maxqda.com/code-map-data-analysis

Writing while you code

MAXQDA eliminates the need for post-it notes and paper notes. MAXQDA has no shortage of ways for you to take notes while content analyzing a document.

- You can use a **Selection memo**, tied to a highlighted segment
- You can create a **Free memo**, not connected to any document
- You can add memos to documents and to codes.
- You can use **paraphrasing** to paraphrase a segment
- You can code a segment and include a **code comment** for that specific use of the code.

My practice is to reserve **memos for more detailed writing**, to capture ideas that I think I want to include in actual final product; or to identify something that I might need later. I will also use **free memos** when I am in Stage 4 and conducting my analysis and writing my results.

I use code comments to take brief notes that I want to add to a specific segment, and which I can see in coded segments.
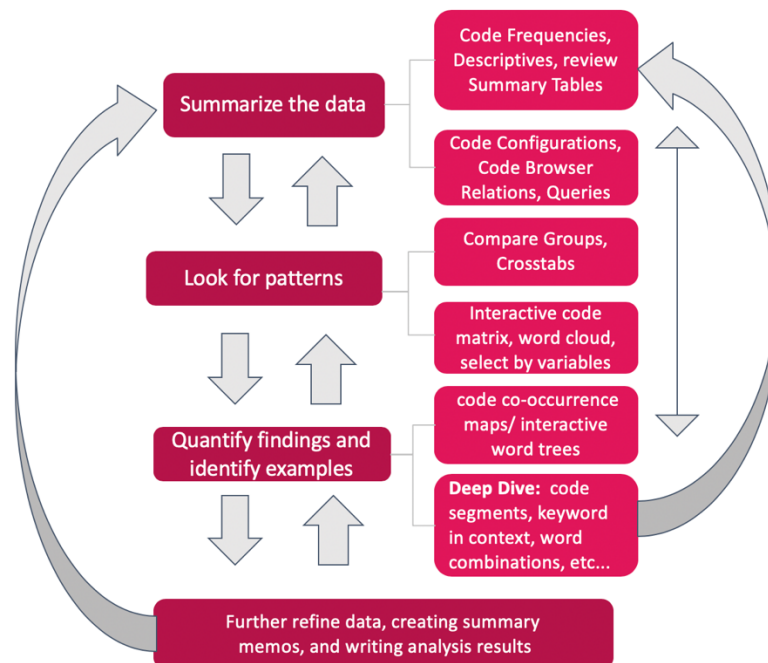
I usually paraphrase when I am trying to summarize a document and don't have an existing code system in place.

Summarizing your coded segments

The **Summary Grid** tool lets you see all of your codes and documents in which you have coded segments. It provides an easy way to create summaries of the materials you coded
Once each coded instance is summarized you can create a very useful **Summary Table** to see the overall results.

Stage 4 – The Art of Data Analysis

You have coded the documents in your project. What now?
- Here is where your options are numerous, and it isn't really a linear, follow steps A, B, C, and D approach
- It is initially exploratory, but as you progress through the data, you will develop your own workflow.
- Qualitative analysis with MAXQDA will be different for each user

Some tools you can use

In Stage 4 you will draw on many different tools. Some of the work is exploratory as you look for themes and patterns in your data.

- You might begin with simply looking at **coded segments**.
- You can use **summary tables**
- **Code frequencies** to see how your data is coded.
- There are visual tools you can take advantage of, such as **document portraits, word clouds, code maps, interactive word trees, code relations browser**
- You can use Mixed Methods such as the **interactive quote matrix, cross tabs, document similarities**
- With MAXQDA Analytics Pro you can use Stats and do more quantitative analysis. This can be made easier if important codes are transformed into document variables

The options are unlimited and there is NO one way in terms of how to proceed.
The graphic I provide illustrating the fourth stage is intended to help you think through some of the ways you can analyze your data. Qualitative analysis with MAXQDA truly is an art.

Writing

I like to store my analysis results in **free memos** where I can easily store my results.
As you are writing, make sure to go to the **Memo Manager** which will let you see all memos written in documents, tied to coded segments or free segments. It can become a powerful organizational tool as you move your project into a final form.

For more information

Please visit **https://www.4stagesofresearch.com** to learn more about the guidelis presented here. It includes some tutorials and information about getting in touch with Dr. Gizzi.

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