The undervalued power of self-relevant research: The case of researching retirement while retiring

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The undervalued power of self-relevant research: The case of researching retirement while retiring

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Abstract

For decades, training in management research has emphasized objectivity, typically viewed as an arm's length distance between the topic of the research and the interests of the researcher. This emphasis has led most scholars to avoid research topics of deep personal relevance – or at least to avoid acknowledging such relevance. We argue that this headlong pursuit of objectivity has led the field to vastly undervalue what we call *self-relevant research*: immersive field research on a topic with which the researcher has had significant personal experience, and which is important to or part of the researcher's self-identity. As an illustrative case, we draw on our own current experience in a team of scholars doing self-relevant research on retirement. We argue that an embrace of self-relevant research can enhance the richness, validity, and methodological diversity of management research, and can actually be essential for understanding phenomena that involve unusual experiences, high degrees of emotionality, or identity issues. We discuss the advantages and challenges that arise when researchers have a deeply personal connection to the topic of research, and we describe measures that researchers can take to leverage the advantages and mitigate the challenges of doing such personally relevant research. We also highlight the particular value of engaging in group self-reflection in the course of collaborative research of this type, and discuss implications for both the field and researchers in management science.

Keywords: Qualitative research methods; case research methods; organizational behavior; careers; career changes and transitions; identity; self-relevant research; retirement

Five years ago, as each of us contemplated our upcoming transitions through retirement, we found ourselves grappling with a question that was surprisingly difficult to answer: What would we say when people asked us, “What do you do?”? Highly motivated, for both personal and academic reasons, to understand how other professionals approach this and related issues on retirement, we undertook an extensive research project with three colleagues at similar career stages.[1] As individuals, we embarked on this research journey with great curiosity and excitement. As scholars, we approached it with some trepidation, fully cognizant of the taboo in our field against studying a phenomenon in which the researcher is deeply involved personally (Anteby, 2013a). This paper is not about retirement, but about that taboo we faced. In this paper, we examine the taboo, briefly describe the research program we undertook despite it, and discuss the reasons why the field should discard it. We share our experiences, challenges, and lessons, and offer guidance for researchers who might consider undertaking what we call *self-relevant research*.

THE ARGUMENT FOR SELF-RELEVANT RESEARCH

Traditionally, management science and related fields have placed great stress on research methods that provide rigor and reliability in the collection and analysis of data, with the aim of ensuring the validity of the research in capturing important phenomena in organizations. The reasoning follows that, in order to achieve this rigor, reliability, and validity, researchers must be detached from the research, personally uninvolved and objective in relation to the subject of the

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[1] The current core members of our team, all of whom were consulted on the content of this paper, are Principal Investigator Teresa Amabile (semi-retired from Harvard Business School in 2018), Douglas T. Hall (retired from Boston University in 2017), Kathy E. Kram (retired from Boston University in 2015), Lotte Bailyn (semi-retired from MIT in 2005, fully retired in 2013), Marcy Crary (retired from Bentley University in 2018), and Jeffrey Steiner (doctoral student at Harvard Business School, who is a Millennial). In the past, the team has included another doctoral student and a number of young research assistants, all Millennials.

research (Starbuck, 2006). To be personally involved in the topic under study, the reasoning goes, is to risk distortions of judgment and perception, and perhaps even conflicts of interest, all of which could create biases that undermine the quality of the data and the validity of the findings. Routinely, new researchers are advised to avoid disclosing personal connections to their research and to avoid topics related to personal issues (Rudestam & Newton, 2014.)

For these reasons, the gold standard of methods in management research has been professional distance, which Anteby defines as "a scholar's engagement in a set of mental activities that detach her from a field" (2013a, p. 1277, after Elias, 1956, p. 227). This distance is generally assumed to differ sharply from – indeed, to be directly opposed to – personal involvement, defined by Anteby as "a scholar's engagement in a set of mental activities that connect her to a field" (2013a, p. 1278, after Elias, 1956, p. 227). Anteby argues, in contrast, that it is not only possible, but actually desirable, to both maintain professional distance *and* stay personally involved. Moreover, he asserts that doing so "creates opportunities for generating potentially strong theoretical insights" (2013a, p. 1277).

We agree with Anteby's stance, but we go further. We extend his argument beyond being personally involved in field research sites to personally *experiencing* the phenomenon under study, in ways that are central to the researcher's self-identity. We argue further that such personal experience may not only "create opportunities for […] strong theoretical insights." *Personal experience may actually be essential for truly valid research* – for accurately uncovering and deeply understanding the full range of complexities of certain phenomena, especially unexplored phenomena that involve unusual experiences, high degrees of emotionality, or identity issues.

In other words, we argue that our field's current approach to research is incomplete because it has systematically removed – or attempted to remove – the voice of the researcher. This first-person perspective can be essential in early-stage investigations of three types of phenomena. First, consider trying to understand experiences that are unusual among organizational researchers, such as parenting an adult child with Down Syndrome or Autism Spectrum Disorder (e.g., Kreiner & Joshi, this issue). Second, consider situations where a poorly understood phenomenon involves a great deal of emotionality – such as helping women who have worked in the sex trade (e.g., Sawyer, this issue). Third, many under-researched phenomena, such as simultaneously training to enter two very different institutions, closely involve identity issues (e.g., academic life and religious life, Bartunek, 2006). Particularly in these three types of inquiry, if researchers lack deep personal involvement with a phenomenon, they may limit themselves to superficial understanding. When, by contrast, their identities are involved in the phenomenon, they are unlikely to mistake either its fundamental meaning or its finer nuances. [2]

As an example of excellent research taking this approach, consider Anteby's (2013b) deep study of the faculty and student socialization and culture at the prominent business school where he worked for many years. Through deep reflection on his personal experience, his observations, and his conversations with hundreds of students and faculty over that time, he was able to describe and analyze an approach to teaching and learning that encouraged moral

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[2] By contrast, a recent paper by Mao & Feldman (2018) reveals the difficulties that researchers can encounter in a qualitative interview study when they do *not* share a key aspect of the identities of their research participants (in this case, when the researchers and the participants come from very different social classes.) The paper describes how these fundamental differences in identity interfered with creating openness and trust in their interviewees and, thus, in collecting valid data. Mao and Feldman then suggest steps researchers might take to overcome these obstacles.

complexity and individual responsibility for moral decision-making. His very personal, identity-rich involvement enabled a level of understanding that no outside researcher could achieve.

We refer to this "involved" research approach as *self-relevant*, and we define it as *immersive field research on a topic with which the researcher has had significant personal experience, and which is important to or part of the researcher's self-identity*.[3] We see self-relevant research as falling under the larger umbrella of "personally relevant research," which Jones and Bartunek (this issue) define as, "research that addresses questions in which scholars are personally invested or involves a population to which they belong or in which they hold a personal interest." Self-relevant research is, perhaps, of the deepest personal interest, because it "cuts to the bone" (Goffman, 1989, pp. 155-156) of the researcher's own life and own identity.

Although self-relevant research can bear similarities to other research approaches, it is distinguished not by a form of data or method of data collection, but by its self-relevance to the researcher. At the broadest level, although it is often primarily or solely qualitative, it need not be. For example, Khanna, Lakhani, and colleagues (this issue) are using quantitative methods to analyze qualitative data – oral histories of survivors and family members on both sides of the 1947 British Partition of India. This event forced a mass migration that deeply affected millions, including the families of Khanna (whose family migrated to post-partition India) and Lakhani (whose family migrated to Pakistan). In a further distinction, although self-relevant research can involve participant observation by the researcher (for example, Anteby's (2013b) business school study), it can use any of a variety of data collection methods. As we explain in the next section of

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[3] Mirvis and Louis (1985) call this explicit use of the self in the research method "self-full" research. Others use the terms "reflexive" or "self-reflexive" (e.g., Cunliffe, 2003), terms that have been used with varying meanings by scholars in other fields (e.g., sociology and feminist theory). Smith and Berg (1985) use the term "clinical," but they recognize that they are giving their own redefinition to a well-established term from the fields of the clinical behavioral sciences (psychology, psychiatry, social work, medicine, education), where the primary goal is therapeutic. Because we are wary of adopting a somewhat obscure term or a term that is used with different meanings in different fields, we prefer the term "self-relevant" for its more direct and descriptive meaning.

the paper, our own self-relevant research relies primarily on interviews of individuals selected from organizations of which we are not a part.

Additionally, although self-relevant research can use a range of ethnographic methods, in which researchers observe and interact with a study's participants in their real-life environment (Van Maanen, 2011), ethnographic research is often not self-relevant. A classic example of ethnographic research that was not self-relevant to the researcher is William F. Whyte's *Street Corner Society* (1943). In this work, Whyte lived for three years in the North End of Boston – an area then inhabited largely by first- and second-generation immigrants from Italy; for 18 months of those three years, he lived with an Italian family. Whyte came from a well-to-do non-Italian family, considered the North End a "slum," and wanted to use ethnography to learn more about this largely foreign society through his own experiences with the people there.

Our study, which we present as an illustration of self-relevant research, is different from ethnography in important ways. Ours is a traditional field study, employing multiple methods, primarily interviews and surveys that contain quantitative items. We, the researchers, are not living or working among the people that we are studying, as we would if doing ethnography. We are living our lives in our accustomed ways. What is similar, however, is that, by virtue of our personal retirement transitions, we are having life experiences that parallel those of many of our participants in multiple ways. This self-relevance, we believe, enables us to better understand their experiences.

Personally-relevant approaches to social and organizational research have been well-described, and endorsed, by scholars such as Argyris (1968, 1980), Berg and Smith (1985), Reinharz (2010), Van Maanen (2011), and Whyte (1984). For example, over 30 years ago, Berg and Smith (1985) identified the central qualities of research that utilizes the personal experiences of the researcher during the process of gathering and making sense of the data. The aspects of this method that are most pertinent to self-relevant research include: “direct involvement with and/or observation of human beings or social systems”; “willingness to change theory or method in response to the research experience *during* the research itself”; and “participation in the social system being studied, under the assumption that much of the information of interest is only accessible to or reportable by its members” (Berg & Smith, 1985, p. 25). Yet, not even Berg and Smith, or other scholars working in this tradition, fully consider and endorse the special case of researchers doing work on a phenomenon that is a salient aspect of their own identity. Thus, we are building on and going one step beyond the path-breaking work of previous scholars.

Despite the endorsement of personally-relevant research by esteemed scholars such as Whyte, Van Maanen, and Argyris, and despite the publication of notable examples of such research (e.g., Anteby, 2013b), it remains marginalized in our field. Only certain journals will consider publishing this type of research, and authors seeking to publish in the few top journals that do occasionally accept it anxiously try to determine which action editors of those journals may be favorably disposed to such work. Moreover, as Anteby (2013a) has so eloquently argued, even when such research is published, the authors often avoid disclosing, in the publication itself, their personal involvement in the field or the phenomenon.

In our view, all of this is a loss for the field. Across our field, a more open, welcoming attitude toward research in which the researchers had deep personal involvement could lead to more valid discoveries, richer theories, and more interesting, persuasive publications.

The senior members of our retirement research team come to personally-relevant research with considerable experience. For example, Bailyn (1977) tells the backstory behind a paper she had published earlier (Bailyn, 1970), a paper typical of the detached, non-reflexive mode of scholarly writing. Working with Rhona and Robert Rapoport, she had analyzed questionnaires from women university graduates (class of 1960) and their husbands. Being herself a professional and a working mother (not typical at that time), with a professional husband, Bailyn was puzzled when initial data analyses revealed that the women respondents who were working outside the home were less happy than those who held traditional roles. The contradiction between her own experience and this first-order finding led her to go further into the data. Upon deeper examination, she found that couples' happiness was more a function of the husband's orientation toward his *own* career than it was a function of the wife's working status. Specifically, finer-grained analyses revealed that husbands' and wives' marital satisfaction was higher when the husbands were more family-oriented, regardless of whether the wives worked.

All of the other senior members of our team have had similarly significant personal experiences that shaped previous research topics and methods (Amabile & Kramer, 2011; Crary, 1987; 2017; Hall & Schneider, 1973; Ragins & Kram, 2007; Kram, 1988).[4] Through these prior research experiences, all five of us became sensitized to the pitfalls that await researchers who plunge into personally-relevant research unaware, but we also came to appreciate the ways in which such research can enhance both the quality of research output and our own experiences as researchers. And through our current collaborative retirement study, we have discovered that, by explicitly acknowledging and actively exploring the connections between our research and issues in our own personal experiences with the retirement process, we are developing deep insights that add considerably to the quality of this work. In the following section, we briefly describe our collaborative project. Since the topic of this paper is self-relevant research, not retirement, we focus here on the project's self-relevant aspects rather than its substantive content. In subsequent

[4] See the Appendix for examples of relevant prior experiences of other senior members of the research team.

sections, we use this project to illustrate the potential pitfalls and benefits of self-relevant research, as well as implications for researchers and the field more broadly.

AN ILLUSTRATIVE CASE: THE RETIREMENT TRANSITIONS STUDY

Although we had become keenly interested in understanding retirement decisions and transition processes for reasons stemming from our current life stage, we also had strong professional motivations to undertake what we call The Retirement Transitions Study. Specifically, as micro-OB and organizational psychology researchers, we sensed an opportunity to make a much-needed contribution to the scholarly literature. The opportunity, noted by Wang (2013) and others, was that, although much is known about the factors contributing to retirement decisions and retirement life satisfaction – with health and wealth being repeatedly identified as key determinants – the organizational and psychological literatures are relatively silent on the ways in which people think about and subjectively experience the retirement decision and retirement transition. (There are a few notable exceptions (e.g., Lee, Zikic, Noh, & Sargent, 2016; Weiss, 2005).) Offering insight into these poorly understood phenomena held great appeal.

Thus, in late 2013, when Amabile approached Hall and Kram for advice on the retirement research program she was beginning to develop (having heard that they were also interested in the topic), the ensuing conversation was so rich and exciting, overflowing with both research ideas and personal stories, that the collaboration was instantly born. Bailyn and Crary joined soon after, having been invited because of their own interest in the topic, the high personal and professional regard that the first three members held for them, and their geographical proximity. As we will argue, self-relevant research that is undertaken by a group (rather than a solo researcher) can do much to mitigate the challenges and heighten the benefits of this research approach, particularly when there is a high degree of interpersonal trust within the team and the team is geographically proximate.

For each of us, this research is highly self-relevant. Our specific research questions grew from each individual researcher's personal concerns and professional identities. Amabile's initial focal interests in undertaking qualitative, inductive research on retirement – identity stability and change through this transition, and the effects of leaving creative, meaningful work – grew, in part, from her personal apprehension about leaving her strong and powerfully rewarding "professor" identity upon her own retirement sometime in the next few years and, in part, from her professional expertise in human motivation, creativity, and work meaningfulness (e.g., Amabile & Kramer, 2011; Amabile & Pratt, 2016). Although the other members of the group shared these professional and personal interests in retirement, each added her or his own interests. Hall, planning to retire in three years, brought his professional expertise in the changing nature of careers (Hall, 2002) as well as his personal interest in understanding the "identity abrasions" (Ely, Meyerson, & Davidson, 2006) that he sometimes experienced as an older academic. Crary's expertise in life structure and transitions in life structure (Crary, Pazy, & Wolfe, 1988), interwoven with her personal desire to evolve a suitable and viable life structure as she contemplated retiring in a few years, added to the range of topics on which we would interrogate our informants.

Kram, who was experiencing her retirement transition during the year we began the project, infused the research with her expertise in mentoring relationships and developmental networks (Ragins & Kram, 2007; Kram, 1988), along with a deep personal interest in learning with the close friends – the peer mentors –that she already had in the group (Hall and Crary). Bailyn, semi-retired since 2005 and fully retired since 2013, brought decades of scholarship on issues of work and family (e.g., Bailyn, 2006; 2011), as well as her personal experience of being half of an academic couple – a life role that all senior members of the team happen to share. (Indeed, Crary and Hall are, themselves, a couple.) Based on our own experiences, we wondered if spousal relationships and attitudes toward retirement might serve as important influences on retirement decisions and experiences – particularly when the spouses share a common profession. Thus, almost from its inception, the breadth of this study was enhanced not only by the professional expertise areas of the research team members, but also by their open, trusting personal relationships with each other and their first-hand experiences of and concerns about retirement.[5]

Our primary data source is long semi-structured interviews, which we supplement with surveys yielding background, personality, attitudinal, and daily diary data on the current experiences of our 120 participants. These participants come from four cohorts in each of three organizations: millennials, older employees (age 55+), employees retiring during our study (whom we interviewed longitudinally), and retirees. The interview topics include identity and identity reconstruction during the transition to retirement, as well as the meaning and importance of work for the individual, the experience of everyday work life, relationships at work and outside of work, activities (including creative activities) at work and outside of work, and attitudes toward, feelings and decisions about, and experiences of the retirement transition (either prospectively, retrospectively, or in real time). Although these topics might have been chosen by any researcher interested in psychological and social factors and processes in the retirement transition, we believe that the self-relevance of this research led us to include certain interview

[5] Although the younger members of our team – the doctoral students and RAs – have been important in many ways, the research is not self-relevant for them in the way that it is for us older members. Thus, throughout this paper, statements about "our research team" or "us" refer only to the senior members of the team, unless otherwise specified.

questions that may not have occurred to a younger researcher. A prime example is the question with which we opened this paper, a question stemming from our own identity concerns, and based on questions that we, ourselves, have often been asked: "What do you say when people ask you what you do?" If a retired participant didn't admit to being retired, we followed this up with the more direct, "What do you say when people ask you if you're retired?" We received a rich variety of revealing responses to these questions.

As another example of data collection stemming, in part, from the self-relevance of the research, we asked the subset of participants whom we followed longitudinally to draw and discuss their "life structure maps" to depict the important relationships, activities, memberships in groups, organizations, and other important contexts, in their current lives. These maps allowed us to get a view of how individuals' engagement with their significant life contexts changed as they approached and moved through the retirement transition. Research team member Crary, and her colleagues, had employed life maps to reveal individuals' life structures in research they conducted decades ago (Crary, Pazy, & Wolfe (1988). Reflecting on the utility of this method then, as well as her personal life structure concerns, Crary introduced life map questions into our interview protocol to enable a fine-grained examination of the ways in which retiring participants' lives change over time. All senior members of our research team have found personal resonance in the concept of life structure change, as our own life structures have altered during our retirement transitions.

We also used our own specific retirement experiences and concerns to generate other interview questions. Table 1 presents a few of the questions in our study that were inspired by our own experiences as professionals approaching retirement from organizations of which we had long been members. The left-hand column presents the interview questions, and the righthand column describes the personal experiences that inspired these questions. These represent only a small subset of the interview questions, but they are among the most self-relevant for us:[6]

Insert Table 1 About Here

We acknowledge that the study, with 120 participants from three companies, and up to ten interviews with the 12 retiring participants whom we followed longitudinally, is a rather ambitious one for retired (or nearly retired) academics to undertake. We spent nearly a year designing the study and its data collection instruments and, by mid-2019, we will have spent over four years collecting data; we anticipate that fully analyzing the data and writing up our findings will take several more years. But to us, most of the time, this massive effort feels like a labor of love. Given the depth of our personal interest in the topic of this research, and the extent to which we were able to both enrich and bring to bear our own identities and experiences throughout the research process, we have greatly enjoyed each phase of the work to this point – and we eagerly anticipate upcoming phases. This enthusiastic perseverance is one of the great advantages of self-relevant research.

The research group processes that we developed have played an integral role in amplifying the advantages and mitigating the challenges of this self-relevant research for the quality of the work we are producing, as well as increasing the benefits that we, the researchers, personally derive from it. Since early 2014, we have met approximately monthly as a full research team, in meetings lasting from two hours to (occasionally) all day; in addition to the central focus on our work, each of these meetings has involved personal conversations and,

[6] Table 1 presents the wording used for retired participants. Questions were similar, but worded in other tenses, for currently-employed participants or those actively going through the transition.

occasionally, extended discussions of personal issues arising from this retirement research and/or from our lives as we experience (or experienced) the retirement transition. From time to time, we have socialized in various venues, including group dinners with our spouses at team members' homes; dinners preceding the concerts of Kram's musician-son; and meals associated with our interview trips, company report-back meetings, conference trips, and qualitative analysis assignments in pairs. Through all of these formal and informal encounters, we have deepened our knowledge of one another, our own retirement-life and identity-related issues, the issues facing our participants, and the emerging insights from our research into the retirement transition experience. This degree of depth would not have been likely, had the research not been so deeply self-relevant.

Later in this paper, we revisit and expand upon the potential benefits of self-relevant research. But first, in the following section, we consider the potential hazards of this type of research, along with ways to mitigate them. These considerations bear important implications for scholars who might be interested in, but wary of undertaking, self-relevant research, concerned that such an approach could threaten both the quality of the work they produce and its ultimate contributions.

CONSIDERATIONS FOR SCHOLARS CONTEMPLATING SELF-RELEVANT RESEARCH: POTENTIAL HAZARDS AND WAYS TO MITIGATE THEM

Although the possible hazards of self-relevant research are very real, they can be addressed by thoughtful researchers. Many of these challenges and potential pitfalls have arisen throughout our own project. We describe steps we have taken to mitigate them, and we recommend these same methodological tactics to other researchers undertaking self-relevant empirical work who are anxious to safeguard its quality. We acknowledge that some of these approaches are useful more generally, in qualitative research that is not personally relevant, but we believe they are even more critical in qualitative research that is. They can help to achieve the crucial combination of personal involvement and professional distance that Anteby (2013a) endorses for such immersive field research.

We focus on specific hazards that arise at four stages of qualitative self-relevant research: selecting a participant population; developing data collection methods; actually collecting the data; and interpreting and writing up the data. For each, we recommend approaches that should be helpful in mitigating these hazards, and we describe the specific measures we have taken in our retirement study as examples. Table 2 summarizes the issues and recommended approaches.

Insert Table 2 about here

Choosing a Specific Participant Population

Because self-relevant research involves an important aspect of the researcher's identity, significant risks to validity arise from the possibility that researchers doing such work may be unable to separate participants' perceptions and reactions from their own. These risks arise primarily in qualitative data collection, analysis, and interpretation. One useful mitigation approach in such cases is to select a participant population that is close in important respects, but not identical to, the population that includes the researchers. The "important respects" are the key aspects of the phenomenon under study. For example, in planning our retirement research, we knew that we wanted to do a deep, interview-based qualitative study of retirement attitudes, decisions, and transition experiences, interrogating individuals at various career stages, including post-retirement. All of us, deep in our hearts, were most curious about academics' retirement decisions and experiences, feeling that we could best harness our personal insights when analyzing data from academics, while learning the most relevant lessons for our personal retirement journeys.

Nonetheless, we were wary of studying academics. We worried that it might be too difficult to avoid subtly, unintentionally, shaping their responses during the interview process to confirm our own attitudes toward retirement, and we were unsure about how effectively we could separate academic participants' thoughts and feelings from our own when analyzing and interpreting the data. Moreover, we believed that the uniqueness of the academic profession as we have experienced it – lifelong tenure, the ability to continue our central activities of research and writing long after formal retirement (as long as cognitive abilities, energy, and motivation hold out), and intense identification with the profession – might render our insights and conclusions less directly relevant to the vast majority of retiring employees or even retiring professionals. Thus, we decided, somewhat reluctantly, that the most appropriate way for us to study our phenomenon of interest while both leveraging our personal experiences with the phenomenon and minimizing the hazards of the potential biases just outlined, was to recruit professionals working in or retired from corporations.[7] This approach is similar in intent to the

[7] We are grateful to a reviewer for pointing out, as another perspective on this issue, that our paper is a specific example of the emic and etic issue. As discussed in Headland, Pike, and Harris (1990), many researchers must grapple with the issue of striking the proper balance between being insiders (emics) and outsiders (etics); we certainly faced this dilemma in planning our own data collection and analyses. The emic approach can be very fine-grained and close to real experience, while the etic approach is often broader in scope and more amenable to generalization. Outsiders may not always be the best observers, but insiders, even with their first-hand and up-close experience, can have their own biases, as well. Thus, we felt that studying academics would be too emic for us, but studying professionals in fields different from us, employed by organizations that are different from universities, would give us a reasonable insider-outsider balance. We believed this approach would optimize both our awareness of participants' issues and our distance from their context.

"liminal researcher" approach described by Kreiner & Joshi (this issue), wherein the researchers' specific personal concerns and issues are "not quite" the focal point of the research inquiry.

Developing Data Collection Methods

Self-relevant researchers doing interview or observational studies run the risk of soliciting or seeing only what they expect or hope to see, blinded by their own personal identities and issues. In developing the protocol for our semi-structured interviews in the retirement study, and the procedural guidelines for conducting the interviews, we were most concerned about "leading the witness" – formulating or asking questions in such a way as to nudge interviewees toward responses that confirmed our implicit intuitive theories based on our own retirement experiences. To mitigate against these hazards, we involved not only all senior members, but also the millennial members of our team, in drafting, reviewing, and revising the interview questions and guidelines. We also solicited feedback on the draft interview protocol from a much-younger organizational psychologist who is a leading expert in quantitative retirement research. We feel strongly that involving "outsider" collaborators and advisors, for whom the research is not strongly self-relevant, can help guard against researcher biases in designing data collection methods (see Dwyer & Buckle, 2009). In our case, for example, the millennials on our team suggested more neutral ways of asking about participants' identification with their work, compared to the positive spin that characterized some of our draft questions.

Self-relevant researchers should also be alert to – and guard against – ways in which they might subtly (and unintentionally) shape participant responses to conform to their own experiences, during interviews or even during observations. To this end, we held two practice interview days, as a group, before the first interviews were conducted. In the first, scheduled as we were refining the interview protocols, each of us had the opportunity to interview one member of the research team, using the version of the interview protocol appropriate to that person's actual career stage, as the other members observed and took notes. Each of these practice interviews was followed by a debrief where all team members, including the interviewer and interviewee, discussed what worked well and what difficulties we spotted – including any instances in which the interviewer seemed to be influencing the interviewee's responses or referencing his or her own retirement experiences.

We additionally recommend that those doing self-relevant research meet beforehand with representatives of the participant population to get feedback on the planned data collection methods, to ensure against researcher behaviors that might serve the researcher's personal purposes over the participant's privacy. Our second practice interview day, conducted just a few weeks before the first scheduled participant interview, involved bringing in friends or acquaintances – one to represent each participant group in the study – who were eager to help us with our study by being interviewed in the practice session. Again, the entire team observed, took notes on, and debriefed each practice interview after the volunteer left. Importantly, before we thanked and dismissed each volunteer, we asked him or her to describe the experience of being interviewed, any confusion or discomfort they felt, and, in particular, any instances in which they felt the interviewer was over-probing or trying to elicit a certain answer from them.

For example, in one of those practice interviews, a retired volunteer became visibly upset when the interviewer probed into his relationship with his wife. This led to a helpful discussion in which the research team both explored possible reasons we might over-probe in future interviews (such as our personal need to better inform our own life choices by discovering the details of someone else's story) and considered when and how to ask about this and similarly sensitive topics in a manner that would not be upsetting to interviewees. The practice sessions served as crucial training for each of us in how to monitor and control our own behavior during the interviews; indeed, several of us did have to stifle occasional impulses to keep probing a participant on an issue that we were personally focused on at that time in our lives. The practice sessions also allowed us to fine-tune the interview protocol so that it elicited deep, rich data on a wide range of topics relevant to work and retirement without introducing significant interviewer bias or interviewee discomfort.

Indeed, as a result of observing, in these practice interviews, that the questions could arouse negative emotions for some participants, we decided to schedule a later research meeting with a psychotherapist/coach who specializes in working with retiring individuals and couples, to get her advice on these issues.[8] As a result, we made some modifications to our interview protocol, such as ending interviews with the upbeat question, "What is (or What do you think will be) the best thing about retirement for you (so far)?" This change arose from our desire to avoid having people finish the interview in a psychological or emotional state that was below the baseline at which they had entered the interview. As illustrated in research by Redelmeier, Katz, & Kahneman (2006), the final few minutes of an experience (in the case of their study, a medical procedure) can have an outsize impact on the individual's memory of and responses to that experience.

Conducting Interviews

When self-relevant research involves direct interaction with participants in the form of interviews, researchers can reduce the potential for bias by working to achieve a balance between interviewer-interviewee empathy (which is likely to enhance the honesty and richness of interviewee responses) and appropriate interviewer distance or detachment from the

[8] We are grateful to Dr. Dorian Mintzer for her helpful advice.

interviewee's disclosures (without which interviewers could overly influence responses through their own emotionality about the topic under discussion). Again, as in ethnographical research, there is the risk of the researcher's becoming overly involved in the community being studied, which could bias the data collection or the analysis.[9] For example, Hall & Schneider (1973) describe the bias that arose from the close relationship they developed with the group of priests they had collaborated with on a study of a Roman Catholic archdiocese. This bias led them to inadvertently intervene in the power dynamics between the priests and the archbishop, which could have affected the credibility of the researchers as impartial third parties – and thus the validity of their findings -- as viewed by members of the organization and the scholarly community. Fortunately, this particular error was reversible. In other research, particularly self-relevant research, it might not be.

We acknowledge, at the outset, that most of the measures we have taken in our retirement study to mitigate threats to validity in conducting interviews are adaptations of generally accepted methods for good interviewing in the social sciences (e.g., Weiss, 1995). However, we believe that the need for these measures is heightened in self-relevant research, because of the researcher's personal involvement with the phenomenon and the attendant risk of over-involvement. Having Millennials as members of our research team has served as an important check on possible generational bias in our methods. Because the interview questions in our study involved several potentially sensitive questions (e.g., "…how do you feel (or did you feel) about collaborating with coworkers who are considerably older or considerably younger than you?"),

[9] A famous example of this issue's appearance in anthropological research is the claim by Freeman (1983) that Margaret Mead (1928) was misled in her observations about the sexual practices of young Samoans because of her close relationships in the Samoan village where she was living during her research. The complexities of this issue were raised in subsequent writing by Shankman (2009), who knew both Mead and Freeman, and who argued that Mead's data may have been more valid than Freeman's, because Mead was a woman and closer in age to the young Samoan women that she was observing.

we were concerned that interviewees might offer responses that they deemed unlikely to offend the interviewer, rather than responses that revealed their true thoughts, feelings, and experiences. Just as importantly, both the older and the younger members of the research team reflected that they, personally, felt much more comfortable discussing such issues, and retirement questions in general, with same-age peers. For these reasons, we age-matched interviewers and interviewees for all 120 participants; we believe that this decision enhanced the depth of self-disclosure from participants. For example, Hall, who was then on the verge of retirement, was asked by two different participants if he was retired. In both cases, after he told them of his upcoming retirement date, they replied with smiles and comments to the effect that he surely understood what they were talking about. Hall experienced these exchanges as bonding moments.

There are further steps that self-relevant researchers can take to guard against validity threats to their interview data, introduced by personal-experience biases of themselves as interviewers. For one, they can invite other researchers, ideally collaborators, to probe their experiences as interviewers in the early days of data collection. In our case, we held all-interviewer debrief conversations or conference calls at the end of each of our initial interview days. Along with discussing overall interview length and other logistical matters, we probed each interviewer's reactions to the experience of interviewing and to particular interviewees' stories, including intense emotions the interviewers experienced and any difficulties they perceived in formulating follow-up questions that would not "lead the witness" by implicitly suggesting appropriate responses.

In another tactic to mitigate this particular hazard of self-relevant research, we endeavored to resist, in ourselves and each other, the occasionally strong temptation to share our own retirement experiences with interviewees or even, on occasion, counsel them when they expressed confusion or distress about their work lives or retirements. In our early post-interview conversations, we discussed these challenges and exchanged advice on how to avoid them. Because most of the senior team members had decades of experience conducting semi-structured interview studies, the techniques suggested were, in our view, quite effective. (Some are quite simple, such as showing empathy non-verbally when the interviewee is having an emotional moment, and monitoring one's own emotional state to maintain equanimity.) Throughout the years of interviewing participants for our current study, we periodically recalibrated our interview methods through email exchanges and discussions in our monthly meetings.

And, finally, another tactic that we used to monitor for and mitigate possible biases in our methods, including over-identification with participants, was to institute periodic interview process checks. In these discussions, research team members would report our personal experiences in conducting the research, note similarities between our life experiences and those being reported by our participants, and counsel each other on maintaining appropriate distance in data collection and analysis. This tactic represents a type of peer- and self-supervision and, although issues with maintaining distance have not come up very often, we believe that this process has helped ensure the integrity of our findings.

Analyzing and Making Sense of the Data

A serious potential pitfall of qualitative self-relevant research is that the researchers could read elements of their own stories, rather than their participants' stories, into the interview data. To guard against this pitfall in our retirement study, we took a number of precautions to preserve the integrity of the data. For one, we recorded the interviews – along with our immediate post-interview impressions of and thoughts about the interviewee and his/her experiences – for subsequent verbatim transcription by an external contractor. We carefully checked the transcriptions against the recordings and made any necessary corrections. Most importantly, throughout our various phases of qualitative analysis, we have had multiple team members read and induce meaning from the same transcripts, discussing our interpretations of the data, endeavoring to keep ourselves – and each other – honest in adherence to the participants' own thoughts, feelings, and experiences. In one phase of analysis, for example, we analyzed the 83 interview transcripts from the older participants, in rotating pairs, so that each team member (including two of the millennials) was paired with each of the other members for subsets of the transcripts; disagreements in interpretation led to long (sometimes very long) conversations about the participant's intended meaning, until consensus was reached.

Self-relevant research will often involve the collection of partial life histories from participants, as does our study. A potentially serious concern in analyzing this sort of life history data is the possibility of retrospective rationalization, by which participants might intentionally or unintentionally report distorted memories of and explanations for events in their past. However, what we seek in our study is participants' meaning-making, or sense-making, of their memories, not necessarily objective facts (Weick, 1995). As Ibarra & Barbelescu (2010) have said, identity is revealed by a person's life narrative. Our interest lies in identity as evident in our participants' telling of their stories. We are considerably less concerned with objectively what happened in their lives. Strict objectivity would be more important to us if we were focusing on specific events, such as what career attainments the participant had achieved or what specific projects the participant had worked on, when, and with whom.

CONSIDERATIONS FOR SCHOLARS CONTEMPLATING SELF-RELEVANT RESEARCH: BENEFITS AND WAYS TO SEIZE THEM

We believe strongly that, if scholars interested in doing self-relevant research can manage the challenges in the ways we have outlined (as well as other ways that we may not have considered), the advantages that such research can hold for data quality and publication impact can be great – especially for under-explored phenomena that involve unusual experiences, high degrees of emotionality, or the personal identities of individuals experiencing them.

More Deeply Understood Phenomena

Early in this paper, we argued that the aggregate validity of research into certain phenomena can be increased when at least some researchers into those phenomena take a self-relevant approach. We will not repeat those arguments here, but we wish to emphasize the particular value that can lie in researchers drawing on their own lived experience with a phenomenon that is central to their personal identities. Important aspects of one's identity generally carry a great deal of emotionality (Bennis, Schein, Berlew, & Steele, 1968; Erikson, 1959). For example, one soon-to-retire participant in our study had tears in his eyes as he remarked that he was proud to have been a project manager for the past 25 years, but he guessed that he just wouldn't be that anymore. The interviewer, a senior member of our team who was also approaching retirement, experienced a strong emotional reaction as the interviewee spoke, tied to her own anticipation of role loss (i.e., the loss of work relationships, stepping away from the helping role with students, and the loss of the status of being a university professor). Although (as we have discussed) such emotionality can present challenges for avoiding bias in research, it can also greatly enhance the richness of researchers' understanding of the phenomenon. In addition, researchers who live close to a phenomenon are unlikely, in their theory-building, to fall into the trap of theorizing based on false but untested assumptions that may be prevalent in the literature (Kryscynski & Ulrich, 2015). Even at our current early stage of deep qualitative analysis, we are making discoveries about identity maintenance and change in retirement, as well as life structure alterations across the retirement transition, that we believe might have been missed by younger researchers not facing these issues themselves.

Another validity advantage of the self-relevant perspective is that such research may investigate aspects of phenomena that would be overlooked by arms-length researchers. As we have noted, a large percentage of retirement researchers have focused on financial planning and health, generally giving short shrift to the variety of identity issues, life structure transitions, and relationship shifts that appear in our study. They appear in our study, in large part, because of our team members' personal experiences with retirement. As another example, we believe it is unlikely that researchers whose families had not experienced the traumas arising from the 1947 partition of India would have undertaken the massive collection of oral histories being analyzed by Khanna, Lakhani, and their colleagues (this issue).

Intrinsically Motivated Researchers

Perhaps most obviously, researchers who conduct self-relevant research are likely to be strongly intrinsically interested in their topic of study. Earlier, we referred to our years-long perseverance in the massive retirement study as a "labor of love," a phrase that truly captures how we feel about this work. For us and our senior research-team colleagues, a deep intrinsic interest in the retirement research questions, stemming in large part from our current life stages, has kept us highly motivated as individuals and as a team – with that motivation currently increasing as our qualitative analyses progress toward emerging conceptualizations. As one of us has shown in her previous experimental and non-experimental research, this motivational state is likely to lead to both productive and creative work in the long run (Amabile, 1996; Amabile & Pratt, 2016).

The Particular Value of a Team Approach to Self-Relevant Research

Not only can many of the hazards of self-relevant research be mitigated if researchers work in collaborative teams, but so too can many of the benefits best be realized by a team approach. Indeed, we assert that self-relevant research is at its best when carried out by a pair or group of researchers. Many of the measures we recommended for avoiding threats to data integrity and research validity would be difficult or impossible to accomplish by a single researcher working alone. At every phase of a project, methodological decisions can be challenged and improved by collaborators for whom the research is not self-relevant, or for whom the self-relevant experiences on the topic vary from one's own.

To take our retirement project as an example, any one of us senior members, if left to our own devices, might have chosen academics as the study population. We might have failed to realize the ways in which our draft interview questions could have skewed participant responses toward our own identity issues around retirement, or our interview behaviors might have subtly nudged participants toward confirming our own retirement experiences. In analyzing and interpreting the data, had we not been working in pairs, we might have been more subject to self-confirmation biases. As we noted earlier, we believe that the quality of the research has benefitted greatly by having each other to steer us around these potential traps. Alone, any one of us might have walked into them.

Perhaps the most important advantage of a team approach to self-relevant research, for the ultimate quality and contribution of the research, is the opportunity for frequent group reflection on both the data and team members' own experiences with the subject under study. In our case, monthly meetings and frequent email communications have been marked by free-flowing comparisons across our interviewees' retirement experiences, comparisons of their experiences with our own and, inevitably, comparisons of our own with each other's experiences and those of the people to whom we are personally very close (spouses, siblings, etc.). Reflecting on the experience we had recently with developing our first round of preliminary findings, we believe that, if we had not been able to test tentative conclusions emerging from our data analyses against our personal experiences, it probably would have taken us several more rounds of analysis to reach the same level of confidence in our conclusions.

It is important to note that, despite surface similarities, our own retirement experiences within the research team differ considerably. We do not merely confirm each other's experiences; we probe differences between them and occasionally challenge each other's interpretations of them. In this way, even among the five of us for whom the retirement topic is clearly self-relevant, individual team members can act as semi-outsiders. Aside from the obvious fact that we are different individuals, with different life circumstances and different preferences, we are actually at very different life stages and stages of retirement. The age gap between the youngest and the oldest of the senior group members is about 20 years and, as the oldest of us recently pointed out, she has quite different life perspectives and concerns, and has had quite different identity-related experiences, from the rest of us. Struck by this realization, we then acknowledged that we have much to learn from our diverse experiences, including insights that can aid our data analysis and theory induction, from carefully reflecting on the differences, as well as the similarities, in our own stories.

The value of this sort of group self-reflection feels like something much greater than simply adding more interesting data points to those provided by our interviewees. We experience it as increasing our insights exponentially – because confronting, discussing, and understanding the facts of these various retirement experiences, coupled with feeling, expressing, and hearing our own and each other's deep emotional reactions to those experiences, reveals nuances of the phenomena we study that, we believe, are far beyond anything any one of us could have garnered from independently studying written accounts of participants' experiences or even comparing them with our own. As we reflect, aloud, on our own reactions, we gain insight from the feedback and reactions of our trusted colleagues who, at times, seem to have experienced exactly what we are going through – and, at other times, seem to have had a very different experience even under superficially similar conditions. We probe; we question; we reflect; we respond; we encourage and support. Gradually – and sometimes suddenly – new understandings, new insights, emerge. This, we believe, enhances the quality and ultimate impact of our research.

BROADER IMPLICATIONS FOR THE FIELD: CULTIVATING, EVALUATING, CONSUMING, AND EMBRACING SELF-RELEVANT RESEARCH

Given growing calls for new approaches and more relevant topics to increase the credibility and real-world utility of scholarship in our field (e.g., Community for Responsible Research in Business & Management, 2017; Kryscynski & Ulrich, 2015), it is time for self-relevant research to move from the margins of management science into the mainstream. Alongside arms-length experimental, archival, survey, and other forms of research that rely on the professional distance of the researchers from the phenomena under study, self-relevant research can add depth, richness, and valuable new perspectives to a myriad of subfields. This argument bears implications for the ways in which scholars in our field train doctoral students, evaluate research, and plan their own research endeavors.

Implications for Doctoral Training

We believe that, across our field, scholars involved in doctoral training would do well to carefully reflect on their own methodological preferences and the extent to which those preferences might reflect unexamined prejudices that, when passed on to their doctoral students, could end up restricting the range of contributions those students will make over their research careers. We are particularly concerned about widespread prejudices against personally relevant research and the special case of self-relevant research, because it could lead generations of future researchers to avoid studying phenomena into which they might have special insight, and from which they could derive great meaning and satisfaction. Even when graduate mentors themselves work in traditional arms-length methods, their open-minded reactions to self-relevant research presented in papers, seminars, and doctoral students' or colleagues' research plans could strongly imprint the students they mentor with similar open-mindedness. We firmly believe that the field will benefit if, in general, students are taught to appreciate methods very different from their own – especially when those methods are underrepresented in the field, as is self-relevant research.

Doctoral training in management and organizations could be significantly enhanced if, in addition to courses in econometric, experimental, and survey techniques, programs added rigorous courses in qualitative methods that include the process of doing personally relevant and self-relevant research. These courses would, ideally, include considerations of both the hazards of self-relevant research (and ways to mitigate them), and the benefits of self-relevant research (and ways to reap them) – such as those we have outlined in this paper. Components in such courses might include: (a) Self-relevant research projects, even if only in the form of small sample studies – for example, informational interviews with established scholars in the students' fields of research. When learning to write up such projects, students should be encouraged to use the first person in disclosing the ways in which the phenomenon under study relates to an important aspect of their own identity. (b) Assignments to review journal articles and grant proposals on topics of personal interest to them, including topics relevant to their self-identities. (c) Readings on the topic of the role of the self in behavioral research, such as Berg and Smith (1985), Anteby (2013a), Greenberg, Clair, & Ladge (2018), and Reinharz (2010).

Implications for Journal Editors and Reviewers

Working on this paper has convinced us and our senior research team colleagues that, when the time comes to publish the findings of our retirement research in academic journals and books (as well as practitioner outlets), we will openly disclose the self-relevance of this work in our papers. As Anteby (2013a) has urged, "telling our stories" as researchers is something we should all become more comfortable doing. At the same time, we realize that making such disclosures will activate the biases that many scholars in our field hold against such research, and we have wondered aloud whether, given our status as senior scholars with little need to build our CVs, submitting our work to top journals is worth the bother. Yet we know that our contributions to the field would be magnified by publishing in such outlets.

Publishing rigorously conducted and carefully reasoned self-relevant research should be easier for scholars of all career stages, studying all content areas in our field. We strongly urge journal editors, especially those serving the top journals, to publish editorial statements encouraging such research and welcoming papers reporting it. We strongly urge journal reviewers, especially those evaluating work for the top journals, to open their minds to such research, regardless of their own training and methodological preferences. A welcoming editorial statement might read, "To help break what some have called the 'taboo' (Anteby, 2013a) against studying personally or self-relevant topics in research, we encourage scholars to submit studies in which their personal passions, values, and identities have motivated the research. We believe that the inclusion of the self in the design and execution of research can, if done carefully, provide added resources to enhance the validity and societal relevance of a study."

Finally, we urge readers of scholarly journals to become more eclectic in their tastes, reading with an open mind at least some research that uses methodological approaches very different from their own. Specifically, if consumers of self-relevant research who have previously been unfamiliar with that approach can suspend judgment long enough to discover value in it, the probability that they themselves might undertake such work, encourage their students to undertake it, and review it favorably, will increase. Such an outcome could lead to a healthy growth of methodological diversity and, ultimately, richer, more valid, and more useful research across our field.

Implications for Researchers' Personal and Professional Well-being

Throughout this paper, we have discussed the ways in which research quality can be enhanced by self-relevant perspectives, and suggested ways in which researchers can rigorously conduct such research. Beyond these implications for improving research, we believe that there are also strong implications for the researchers themselves personally and professionally – both benefits and challenges. To illustrate them, we draw again on our own group's self-relevant research program.

First, and perhaps most important among the personal benefits, self-relevant researchers can gain considerable insight into their own lives and identities. As we had hoped at the outset of our collaboration, each of us has learned a great deal about retirement and the varieties of experience that professionals (including our research-team colleagues) have as they anticipate, plan for, make decisions about, and go through the retirement transition. This learning has informed our own life decisions. We have also gained a great deal of insight into the cultures and practices of our own academic institutions, and their effects on our personal experiences, by exposure (through our interviewees' stories) to the cultures and practices of three quite different organizations. This exposure has illuminated the direct and indirect ways in which organizations can support or undermine the well-being of their employees – in general, and especially with respect to retirement. Some of us have already made recommendations to our respective deans based on these insights. The implication for researchers considering self-relevant research is to remain open, throughout the process, to consistently re-examining their own identities and life experiences; such re-examination can greatly enrich the researcher's sense of self and confidence in life decisions.

Earlier in this paper, we endorsed collaborative approaches for self-relevant researchers, as a means of mitigating some of the validity threats inherent in such work. The personal benefits that researchers derive from self-relevant research can also be enhanced by a team approach. In our own case, the collaborative approach has yielded perhaps the most important personal benefit of this project: our growing familiarity with and trust of each other over these five years, producing a psychologically safe environment in which increasing self-disclosure about our lives and personal dilemmas around retirement is met with empathy, deep caring, and wise counsel. We believe strongly that this growing familiarity and trust has been greatly enhanced by our ability to be in each other's presence, physically, sharing the same space as we give and receive these self-disclosures. For example, at an all-day meeting of the senior members of our team at

Kram's home, we shared our own retirement journeys, along with life maps[10] we had drawn, and we talked about how those journeys intersected with, influenced, and were influenced by our work in this research program. From those astonishingly personal and honest conversations, each of us not only gained deep insight into each other, but we also gained much instrumental help and socioemotional support. For this reason, we urge scholars considering self-relevant research not only to carry it out with trusted collaborators, but also to choose collaborators who are geographically proximate – or to arrange occasional in-person meetings that include considerable slack time for personal conversations. Ideally, in self-relevant research, those trusted colleagues will become valued companions on a significant life journey.

To be sure, self-relevant research can also present personal difficulties for the researchers undertaking it. We believe that perhaps the most significant challenge, given how close the phenomenon under study is to the researcher's own identity, can arise from the researcher's identification with research participants. Our work on the retirement project has certainly presented us with such challenges. In particular, the elder members of our team have felt a growing sense of identification with, and increasingly intense emotions about the experiences of, the 12 participants we have been following with repeated interviews across and beyond the retirement transition. Although the stories of some are uplifting, generating hope in us for our own futures, some have been marked by bitter disappointments and difficult struggles. For example, one participant who moved thousands of miles from her home of 40 years to be close to her young grandchildren suffered greatly when, soon after her move, a bitter divorce meant that her access to those children was severely restricted. Another participant we followed over 18

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[10] We decided to use the same life map instrument that we have administered longitudinally to the 12 retiring participants. Because we have found the exercise with participants to be so revealing of how they think about their lives, we reasoned that we could learn much about each other through the exercise. We did. Interestingly, we also gained considerable insight into our own life journeys.

months was very athletic and healthy when he and his interviewer first met, but showed signs of considerable physical deterioration by the final interview. Hearing about experiences like this, from people we have come to identify with closely, can drastically heighten our concerns about our own retirement plans, aging, and mortality.

Although personally-relevant research may or may not cause emotional distress to the researchers, we believe that self-relevant research is often likely to do so – particularly to the extent that the research topic is "hot" – emotionally charged, raw, or risky for participants – versus "cool" (Yeager & Kram, 1990). Researchers who are considering self-relevant research can mitigate the emotional risks to themselves in a number of ways. First, they can consider, instead, conducting personally-relevant research – that is, focusing on a phenomenon that they are personally invested in, in some way, but that is not central to their personal identities. We believe that, in general, personally-relevant research is less emotionally involving than the special case of self-relevant research. Second, if researchers do undertake self-relevant research, they can reduce the risk of emotional distress by choosing a relatively "cool" topic, or finding ways to cool their topic of interest. For example, we realize that our choice to focus on reasonably healthy and financially secure participants in the retirement study (because so much was already known about the strong effects of these factors on retirement decisions and experiences) rendered our topic much "cooler" than it would have been if we had been interviewing indigent retirees or those living in nursing facilities. Third, if self-relevant researchers do begin to experience emotional trauma in the course of conducting their research, they should – as advised by Sawyer (this issue) – be mindful of the possible long-term effects on themselves personally, carefully manage boundaries between themselves and participants, and deliberately attend to self-care throughout the process. This recommendation, like so many of our recommendations, is best implemented in collaborative research where group members can look out for and support one another.

Researchers should be aware, too, of the potential professional costs and rewards that can await them if they undertake self-relevant research. Clearly, the major downside is that, unless scholars across sub-disciplines in our field modify their attitudes toward this type of research in the ways we have recommended, self-relevant research may be met with skepticism or outright rejection – even if it is conducted thoughtfully and rigorously. An additional cost is that well-executed self-relevant research can be enormously time-intensive and, thus, can carry opportunity costs for completing other research projects; these costs will be more extreme for qualitative self-relevant research, to the extent that researchers adopt the additional safeguards that we have advised. For these reasons, we reluctantly recommend that young researchers consider carefully whether they should put off major self-relevant projects until they have achieved tenure – or until the field has the awakening that we envision in this paper.

Nonetheless, the professional rewards of undertaking self-relevant research can be great. If researchers have focused previously on quantitative methods, as some in our research team have, they will greatly expand their methodological toolkit and the richness of their understanding of the phenomena they study. They may find a new zest for their research programs, stemming from their deep, identity-related connection to the research topic. They can open their work to new scholarly audiences, those who readily accept qualitative – and even self-relevant – research. Academic readers from a variety of methodological traditions may connect more strongly to research that is openly self-relevant, to the extent that the writing draws them toward reflecting on their own experiences and own identities. Finally, researchers who make the leap to self-relevant research may find it much easier to translate their findings to terms that lay audiences can understand and, indeed, to develop deep connections with those lay audiences, because of the likelihood that many people will have shared the same self-relevant experiences.

Conclusion

In essence, this paper is a call for both courage in undertaking self-relevant research and prudence in carrying it out. It is also a call for all scholars in our field, whatever their preferred empirical methodologies, to be more open to such research and to recognize its value. We hope that researchers will heed the advice of previous scholars about the advantages of being personally involved in the phenomenon under study (e.g. Anteby, 2013a; Argyris, 1968, 1980; Berg & Smith, 1985; Van Maanen, 2011; Whyte, 1984; Reinharz, 2010) and thoughtfully consider the new arguments about self-relevant research that we have offered in this paper, with the illustrative example of our own retirement research. Our main contribution, we believe, is highlighting the fundamental value of self-relevant research for enriching our field's understanding of under-researched phenomena involving unusual experiences, intense emotionality, or deep identity issues. Although the illustrative case of our own retirement research project focuses on the quite common experience of retirement, it certainly involves intense emotionality and deep identity issues – for ourselves, the researchers, and for our research participants. We view this as a boon to our ability to formulate questions and perform analyses that will yield particularly useful new insights.

A wide variety of topics in the realm of work, management, and organizations seem particularly amenable to self-relevant research. For example, much of the best research on work-life experience has been done by people for whom this work was self-relevant (e.g., Greenberg, Clair, & Ladge, this issue; Kossek, Ollier-Malaterre, Pichler, & Hall, 2016; Lee, Kossek, Hall, & Litrico, 2011; Bailyn, 1977). Additional specific topics under the larger work-life umbrella would be good candidates for deeper self-relevant research, such as two-career couples, cross-generational career influences, and class issues in work-life dynamics. Also, research unpacking the role of gender in each of these topics would be very useful.

We believe that these critical issues, all involving social and economic justice, would greatly benefit from study by research teams that represent a mix of insider (emic) and outsider (etic) perspectives. Another promising area might be research on various facets of the addiction recovery process for employees, conducted by scholars who are, themselves, recovering addicts. For them, the topic, though highly charged ("hot," rather than "cool"), might feel safe enough to examine from the distance of the researcher-observer role. Here, too, a research team consisting of a mix of scholars with varied experiences vis a vis the addiction process (e.g., no experience, experience long ago vs. recent experience, or mild vs. intense experience) might provide greater psychological safety for each individual researcher, as well as a good insider-outsider balance to ensure research integrity.

Our secondary contribution is practical guidance for researchers wishing to take the self-relevant approach, such as our discussion of the value of group efforts to mitigate validity threats and the utility of group self-reflection in data interpretation. We firmly believe that, if researchers can adopt an open stance to self-relevant research, they will be better able to recognize and utilize their personal experiences and identities as legitimate sources of research ideas and, thus, be better equipped to conduct more thoughtful, rigorous, and useful research.

We also believe that, if the field of management scholarship, as a whole, becomes more open to self-relevant research – if journal editors, reviewers, and readers can welcome it as a legitimate approach to inquiry – we will, collectively, benefit from a richer, more robust understanding of the world of organizations and the people who work in them.

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Table 1. Some Interview Questions in the Retirement Study Inspired by Our Experiences

Question Number	Question	Our relevant experiences and feelings
1	How, if at all, did the importance of your job to you change, as you approached the retirement transition?	Several of us had a growing awareness, with retirement on the horizon, that there was more to life than work.
2	In what ways, if at all, did your everyday work life change over the last 5 years that you were formally employed? Did anything cause you to feel or think more positively or negatively about your everyday work life?	Some of us felt that there were changes in our own work lives, either in objective assignments or in self- or peer perceptions, as we got closer to retirement.
3	Did you experience a phasing down of your work responsibilities or work hours when you were transitioning out of formal employment? If so, was it voluntary?	Some of us have had flexible or part-time work arrangements at our universities, as we approached retirement.
4	Were there any noticeable changes in your interactions and relationships at work in the last couple of years before you retired?	We have seen relationships change with some of our colleagues as they moved into retirement, and we have experienced some such changes ourselves.
5	Do you have any work colleagues whom you thought retired too soon? Too late?	We have seen both situations with some of our own colleagues, with strong apparent effects on their well-being and/or the organization.
6	When did you first start thinking about what it would be like to retire? What was most important to you as you thought about that transition?	We experienced the prospect of retirement changing from something very remote and abstract to something quite real, in a short number of years.
7	What, if anything, were you hoping to leave behind as your legacy at your organization?	Among ourselves and most of our colleagues, leaving a work legacy is important. But among some of our relatives and close friends, it seems relatively unimportant.
8	Which aspects of your job and everyday work life did you hope to bring into your retirement life with you? Which did you hope to let go of? How is that working out so far?	As some of us thought about our own upcoming retirement, a very salient process involved considering what activities and experiences we wanted to hold on to and which we wanted to leave behind. Academic work is very amenable to this, and we wanted to see whether it applies for professionals in business organizations.

Table 2. Hazards of Self-Relevant Research and Ways to Mitigate Them

Hazards	Mitigation Recommendations	Examples from Retirement Transitions Study
Choosing participant population • Researchers unable to separate participants' perceptions and reactions from their own	• Select a participant population that is close in important respects, but not identical to, the population that includes the researchers	• Selected participants from among professionals in three different corporations; avoided academics.
Developing data collection methods • Researchers using methods that allow them to subtly (and unintentionally) shape participant responses to match their own experiences • Researchers soliciting or seeing only what they expect or hope to see, based on their own personal identities and issues.	• Involve outsider collaborators or experts (for whom the phenomenon under study is not central to their identities) to advise on data collection methods. • Test data collection methods on collaborators, outsider colleagues, and representatives of the participant population; probe for evidence of bias in interview protocols or processes.	• Collaborators included several millennials • Sought advice from a much-younger colleague with expertise in quantitative retirement research • Held two practice interview days, each involving extensive feedback after each practice interview: one where we interviewed each other, and one where we interviewed representatives of the participant sub-populations.
Conducting interviews • Interviewer influences interviewee responses due to interviewer emotionality and/or over-identification with interviewees	• Work to achieve balance between interviewer empathy for interviewees and appropriate interviewer emotional distance from interviewees' disclosures	• Age-matched interviewers and interviewees (to optimize empathy) • All-team debrief conversations after initial interview days to discuss difficulties, including interviewer emotionality during interviews • Avoidance of sharing own retirement experiences with interviewees
Analyzing and interpreting data • Researchers read elements of their own stories into interview data, when those elements are not, in fact, present	• Take measures to guard the integrity of the data and validity of interpretations • Invite friendly reviews from researchers for whom the topic is not self-relevant.	• Recorded and transcribed interviews • Interpreted data in researcher pairs and discussed disagreements to consensus

APPENDIX

Previous Self-Relevant Research Experiences of Senior Members of the Retirement Research Group

The senior members of our research team come to this style of research with considerable experience, though from different starting points. We have already described Bailyn's experience, in the main body of this paper. Crary has done interview studies of intimate relationships at work (1987) and of how diversity-aware white people learn the skills necessary to be comfortable and competent in cross-race work situations (2017). Both of these research projects were triggered by her own personal experiences, and she believes that her own learnings and personal awareness of these issues greatly aided her conceptual analyses of the interview data in those studies. Moreover, because of her prior diversity work (2006, 2008), Crary began her study of diversity-aware white people (2017) with a "head start" in several ways, such as knowing the right people to interview and knowing what issues to probe and what range of outcomes to explore. However, the most important advantage in the second study was the nontrivial skill of managing her own anxieties about entering into what can be "hot" terrain: the conflict-rich field of diversity-related initiatives within organizations.

Kram (1988) describes how her experiences as a young academic protégé affected her research and theoretical contributions on mentoring relationships at work (Kram, 1983; 1985). Clinical supervision (meeting regularly with one of her advisors during the data collection and analysis phases of the work) was essential for helping Kram differentiate her own experiences from that of her interviewees. She extended this research to include peer mentoring, after she had become more established as a faculty member and had formed mutually supportive relationships with colleagues (Kram & Isabella, 1985). Aware of what she was feeling and thinking as she entered the field, studying developmental relationships, she used those personal reactions to enrich her observations and conclusions regarding effective mentoring and the complexities of cross-gender mentoring – in both junior-senior settings and peer relationships (Kram, 1985). Her personal experiences and her unfolding work led to the new concept of developmental networks (Higgins & Kram, 2001).

As mentioned in the body of this paper, Hall, with Benjamin Schneider, did self-relevant work with a group of priests, called the Personnel Committee, as part of a larger study of the Hartford Archdiocese of the Roman Catholic Church (Hall & Schneider, 1973). The Personnel Committee was responsible for the research and its ultimate recommendations, and the researchers' work with them continued on a regular basis over a number of years. A major chapter[11] of the book reporting the study describes the emerging process of working with the Personnel Committee. These process data revealed how some of the authority issues between the authors and the Personnel Committee reflected a microcosm of the authority issues between the Church hierarchy and the clergy in the Archdiocese. The authors, who did this work with the Personnel committee on a regular basis over a number of years, describe in their book how they were temporarily co-opted into supporting an action plan of the priests, due to the close relationship they had developed with the priests. This put the researchers unwittingly in opposition to the archbishop, Fortunately, the authors were also meeting regularly with Chris Argyris, who was acting as their clinical supervisor. With his guidance, they were able to own up to the situation with the priest group, which led to positive results for the change process.

Amabile, whose early research was almost exclusively experimental (e.g., Amabile, 1983), more recently engaged in a study of everyday work life that included collecting daily electronic diary stories about the work day from dozens of professionals working on creative

[11] See Chapter Nine: Group development and the role of action researchers in an authority based system (in Hall & Schneider, 1973).

project teams (Amabile, Barsade, Mueller, & Staw, 2005; Amabile & Kramer, 2011). She believes that she was able to obtain the richest data from, and most deeply understand the experiences of, the professionals on teams with which she had the most frequent personal contact and with whom she formed the deepest emotional connections.

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