

The Use of Focused Conversation in Qualitative Research: A Systematic Review of ORID and DEAL Models in Business Management, Accounting and Organizational Studies

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Focused conversation has emerged as a structured yet flexible qualitative data collection method, particularly through the application of the ORID (Objective, Reflective, Interpretive, Decisional) and DEAL (Describe, Examine, Articulate Learning) models. This systematic review synthesizes 60 empirical studies published between 2010 and 2024 that employed these frameworks within business, management, and accounting research. Using a PRISMA-informed qualitative synthesis approach, the review examines patterns in methodological design, facilitation processes, data richness, and analytic integration. Findings reveal that ORID is predominantly used in organizational and management contexts to facilitate decision-oriented dialogue and collective sense-making, while DEAL is more commonly applied in professional development and accounting education to support reflective learning and ethical reasoning. Hybrid applications demonstrate increasing methodological innovation, particularly in leadership development and strategic management studies. However, challenges such as inconsistent model fidelity and limited reporting of facilitator positionality persist. The review contributes to methodological advancement by proposing integrative frameworks and highlighting the role of structured dialogue in enhancing qualitative rigor in business research.

Keywords: focused conversation, ORID model, DEAL model, qualitative research, business research, reflective dialogue

Introduction

Qualitative research in business, management, and accounting increasingly demands methods that capture complex human experiences, organizational dynamics, and decision-making processes. Among these, focused conversation has gained recognition as a rigorous yet adaptable data gathering procedure that bridges structured inquiry and dialogic engagement. Rooted in constructivist paradigms, focused conversation enables participants to articulate experiences, interpret meanings, and co-construct knowledge within guided conversational frameworks.

Two prominent models underpinning this method are the ORID framework (Stanfield, 2000) and the DEAL model (Ash & Clayton, 2009). ORID structures inquiry through four sequential stages—objective, reflective, interpretive, and decisional—facilitating a progression from observable facts to actionable insights. In contrast, DEAL emphasizes experiential learning through description, critical examination, and articulation of learning, making it particularly relevant in reflective and developmental contexts.

While previous systematic work has examined these models in education, psychology, and organizational studies, limited synthesis exists regarding their application in business, management, and accounting. These fields present unique demands, including strategic decision-making, ethical accountability, and performance evaluation, which require nuanced qualitative approaches. This study addresses this gap by systematically reviewing how ORID and DEAL are employed as focused conversation procedures in these domains. Specifically, the review aims to examine patterns of ORID and DEAL usage in business-related qualitative studies; compare their methodological contributions across subfields; and identify emerging hybrid applications and methodological challenges.

Method

This study employed a PRISMA-informed systematic review design adapted for qualitative research synthesis to ensure methodological transparency, rigor, and replicability. The review process followed four key stages—identification, screening, eligibility, and inclusion—allowing for a systematic and structured selection of relevant literature. A comprehensive search was conducted across four major academic databases, namely Scopus, Web of Science, ERIC, and PsycINFO, which are recognized for their extensive coverage of business, management, and accounting research. The search strategy utilized combinations of key terms such as “focused conversation,” “ORID method,” “DEAL model,” “qualitative business research,” “reflective dialogue in management,” and “accounting education reflection.” Boolean operators and keyword variations were applied to enhance search precision and breadth. The review was limited to studies published between 2010 and 2024 to ensure contemporary relevance and alignment with current research trends.

To ensure the inclusion of high-quality and relevant studies, specific criteria were established. Studies were included if they explicitly employed ORID, DEAL, or hybrid models as part of their qualitative data collection or reflective processes, were situated within business, management, or accounting contexts, and utilized qualitative or mixed-method designs with a clearly defined qualitative component. Additionally, only peer-reviewed articles published in English were considered. Following the selection process, a structured data extraction matrix was developed to systematically capture key methodological features of each study, including research purpose, design, model application, format of focused conversation (e.g., interviews, focus groups, or facilitated

workshops), model fidelity, and data analysis techniques. The extracted data were analyzed using thematic analysis, employing iterative coding procedures to identify recurring patterns, model adaptations, and cross-disciplinary applications. Qualitative analysis software was utilized to support coding consistency and organization, enabling a comparative analysis of how ORID and DEAL models are applied across different research contexts. Bottom of Form

Results and Discussion

Table 1 presents the distribution of the 60 reviewed studies across business management, accounting, and organizational studies, revealing distinct patterns in the application of ORID, DEAL, and hybrid focused conversation models. Notably, business management accounts for the highest number of studies ($n = 24$), with a strong predominance of the ORID model ($n = 15$). This pattern reflects the model's alignment with organizational needs for structured dialogue and decision-making. ORID's sequential framework—progressing from objective observations to decisional outcomes—has been widely recognized as effective in facilitating collaborative sense-making and generating actionable insights in organizational settings . Recent studies further highlight its adaptability in complex environments such as stakeholder engagement and strategic planning, where structured conversations enhance participation, clarity, and consensus-building. The relatively lower use of DEAL in business management ($n = 5$) suggests that while reflective learning is valued, the primary emphasis in this field remains on decision-oriented and performance-driven outcomes.

Table 1
Distribution of Studies

Discipline	Total Studies	ORID	DEAL	Hybrid	Common Applications
Business Management	24	15	5	4	Leadership, strategy, decision-making
Accounting	18	7	8	3	Ethics, professional judgment, education
Organizational Studies	18	11	4	3	Team dynamics, change management

In contrast, the distribution within accounting studies ($n = 18$) shows a more balanced use of ORID ($n = 7$) and DEAL ($n = 8$), with DEAL slightly more prominent. This trend underscores the reflective and ethical dimensions inherent in accounting practice and education. The DEAL model’s focus on describing experiences, examining them critically, and articulating learning aligns closely with the development of professional judgment and ethical reasoning, which are central competencies in accounting. Contemporary literature emphasizes that structured reflective frameworks enhance critical thinking and deeper learning by moving beyond procedural knowledge toward interpretive and evaluative understanding . Moreover, the presence of hybrid approaches ($n = 3$) in this discipline suggests an emerging effort to integrate decision-making processes with reflective learning, particularly in professional training and case-based instruction.

Organizational studies ($n = 18$) similarly demonstrate a strong preference for ORID ($n = 11$), reflecting its utility in examining team dynamics, leadership processes, and change management initiatives. The model’s structured progression supports inclusive dialogue and helps organizations navigate complex interpersonal

and systemic issues by ensuring that discussions move from shared observations to collective action. Recent research indicates that ORID-based focused conversations are effective in fostering meaningful stakeholder interaction and producing actionable recommendations, even in digitally mediated environments . Meanwhile, the presence of DEAL ($n = 4$) and hybrid applications ($n = 3$) indicates a growing recognition of the importance of reflective learning within organizational contexts, particularly in leadership development and organizational learning. Overall, the distribution of studies highlights a clear pattern: ORID is predominantly used where structured decision-making and group alignment are required, while DEAL is favored in contexts emphasizing reflection, learning, and ethical engagement—findings that are consistent with broader trends identified in systematic reviews of focused conversation methodologies .

Table 2 presents a cross-model comparison of the ORID and DEAL frameworks across key methodological dimensions, highlighting their distinct yet complementary orientations in qualitative research. In terms of orientation, ORID is primarily aligned with decision-making processes, whereas DEAL is oriented toward learning and reflection. This distinction reflects their theoretical foundations: ORID, rooted in structured facilitation and participatory dialogue, is designed to guide groups toward consensus and actionable outcomes (Stanfield, 2000), while DEAL is grounded in experiential learning theory and emphasizes critical reflection as a pathway to knowledge construction (Ash & Clayton, 2009). As emphasized by Lunar and Dimaculangan (2024), focused conversation models such as ORID are particularly effective in contexts requiring collective sense-making and decision-oriented inquiry, while DEAL provides a structured pathway for deeper reflective engagement and learning articulation.

Table 2
Cross-Model Comparison

Dimension	ORID	DEAL
Orientation	Decision-making	Learning and reflection
Focus	Event and group process	Individual meaning-making
Format	Group dialogue	Written or individual reflection
Outcome	Actionable insights	Articulated learning

The difference in focus further reinforces these orientations. ORID centers on event-based and group processes, enabling participants to collaboratively examine experiences and co-construct meaning through guided dialogue. This makes it highly suitable for organizational and management settings where shared understanding is essential. In contrast, DEAL prioritizes individual meaning-making by encouraging participants to critically examine their experiences and articulate insights derived from them. Lunar and Dimaculangan (2024) highlight that DEAL fosters metacognitive development and reflective depth, particularly in contexts where learning outcomes and personal or professional growth are central . This suggests that ORID facilitates collective cognition, while DEAL enhances individual reflective capacity.

With respect to format, ORID is predominantly implemented through structured group dialogue, such as focus groups, team discussions, or facilitated workshops. Its staged questioning approach ensures a logical progression from facts to action, promoting inclusive participation. DEAL, on the other hand, is commonly applied through written or individually mediated reflections, including journals and reflective essays, allowing participants to engage in deeper introspection. According to Lunar and Dimaculangan (2024), this distinction in format reflects the complementary strengths of the two models—ORID in dialogic interaction and DEAL in introspective learning—both of which contribute to richer qualitative data when used appropriately.

Finally, the outcome dimension clearly differentiates the two models. ORID produces actionable insights that are directly applicable to decision-making and organizational improvement, whereas DEAL results in articulated learning that captures participants' insights, values, and developmental outcomes. Importantly, Lunar and Dimaculangan (2024) argue that these outcomes are not mutually exclusive but can be integrated through hybrid approaches that combine structured dialogue with reflective articulation. Such integration enhances both the practical and analytical value of qualitative research, reinforcing the complementary nature of ORID and DEAL as methodological tools.

Conclusion and Recommendations

This systematic review examined the use of focused conversation through the ORID and DEAL models in business, management, and accounting research. Findings confirm that both models offer structured yet flexible frameworks that enhance the depth, coherence, and rigor of qualitative inquiry. ORID is particularly effective for collective sense-making and decision-oriented discussions, while DEAL is well-suited for reflective learning, ethical reasoning, and professional development.

The review also highlights the growing use of hybrid ORID-DEAL approaches, which integrate group dialogue and individual reflection to enrich qualitative data. However, methodological issues such as inconsistent model fidelity and limited reporting of facilitation processes remain concerns. Overall, consistent with

Lunar and Dimaculangan (2024), focused conversation is affirmed as a robust and adaptable method capable of generating meaningful and actionable insights in increasingly complex business research contexts.

Building on the findings of this review, it is recommended that future research strengthen the methodological application of focused conversation models by ensuring full fidelity to the ORID

and DEAL sequences, as incomplete implementation may limit the depth and coherence of qualitative insights. Researchers should also develop and utilize standardized yet flexible conversation protocols that align with specific research contexts in business, management, and accounting, thereby enhancing consistency and replicability. Greater transparency in documenting facilitation processes, including the role and influence of the researcher, is essential to improve trustworthiness and rigor. Moreover, the integration of hybrid ORID-DEAL approaches is strongly encouraged, particularly in complex organizational and educational settings where both collective decision-making and individual reflection are necessary. Advancements in digital tools and qualitative analysis software should likewise be leveraged to support systematic coding, data management, and analytic clarity. Finally, future studies should expand the application of focused conversation models to emerging areas such as digital transformation, sustainability, and global business practices, while also pursuing empirical validation to further establish their effectiveness as robust qualitative research methodologies, consistent with the methodological directions.

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