Navigating the Research Journey: A Practical Guide to Qualitative Coding and Thematic Exploration For Beginning Researchers

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[Abstract] Qualitative coding represents both a technical skill and an intellectual craft that beginning researchers must develop through deliberate practice and reflective engagement. Building on Williams and Moser's (2019) foundational framework of open, axial, and selective coding, this article addresses the practical challenges, decision-making processes, and cognitive demands that novice researchers encounter as they transform raw data into meaningful themes. Drawing from recent scholarship and acknowledging the emotional dimensions of the coding journey, this article provides beginning researchers with concrete strategies for navigating ambiguity, making defensible decisions, and developing confidence in their analytical voice. The article emphasizes coding as an iterative, reflexive practice that requires not only methodological rigor but also tolerance for uncertainty and the courage to make interpretive choices. As Merriam and Tisdell (2016) observe, qualitative data analysis is "a complex process that involves moving back and forth between concrete bits of data and abstract concepts, between inductive and deductive reasoning, between description and interpretation" (p. 202). Practical application sections throughout provide step-by-step guidance for implementing these concepts in qualitative research projects, including recommendations for utilizing computer-assisted qualitative data analysis software (CAQDAS) such as NVivo, MAXQDA, and Dedoose.

[Keywords] qualitative coding, beginning researchers, thematic analysis, research decision-making, reflexivity, grounded theory, CAQDAS

Introduction: The Paradox of Structure and Creativity

When you first encounter qualitative data—perhaps pages of interview transcripts, field notes from observations, or artifacts from your research site—the experience can be simultaneously exhilarating and overwhelming. Unlike quantitative analysis, with its predetermined statistical procedures, qualitative coding demands that you construct your analytical path as you walk it. As Williams and Moser (2019) eloquently articulated, coding provides" an organized platform for the construction of meaning" through processes that "enable collected data to be assembled, categorized, and thematically sorted" (p. 45). However, for beginning researchers, understanding coding concepts differs markedly from executing them in practice.

This article extends Williams and Moser's (2019) comprehensive overview of coding techniques by addressing a critical gap: the lived experience of learning to code and the practical wisdom needed to navigate the messy, uncertain, and deeply human process of qualitative analysis. While their work provides essential scaffolding through explanation of open, axial, and selective coding within the Grounded Theory Method (GTM) tradition, beginning researchers often struggle not with understanding what these stages are, but with knowing how to enact them, when to trust

their interpretations, and how to make the countless micro-decisions that coding requires. Merriam and Tisdell (2016) emphasize that "the right way to analyze data in a qualitative study is to do it simultaneously with data collection" (p. 197), highlighting the iterative, emergent nature of this analytical work.

Practical Application: Beginning Your Coding Journey

Before you begin the formal process of applying codes to your data, establishing foundational practices creates the infrastructure for rigorous analysis. These preparatory steps may feel like delays to coding itself. However, they are essential investments that will pay dividends throughout your analytical journey. As Merriam and Tisdell (2016) note, "data collection and analysis are a simultaneous activity in qualitative research" (p. 197), meaning that your analytical orientation should be engaged from the very beginning of your research process. The following steps operationalize this approach:

- Before coding begins, read through your entire dataset without applying any codes to become familiar with your data and form initial impressions. If using CAQDAS programs such as NVivo, MAXQDA, or Dedoose, import your data files but resist the temptation to begin coding immediately.
- Create a research journal where you document your initial reactions, questions, and emerging ideas about patterns you observe during this preliminary reading. In NVivo, use the memo function; in MAXQDA, utilize the memo manager; in Dedoose, create project memos linked to your data sources.
- Develop a timeline for your coding process that acknowledges iteration—plan for at least three passes through your data rather than expecting to complete coding in a single session.

These foundational practices create what Merriam and Tisdell (2016) describe as the necessary "reflective stance" toward your data. By slowing down and resisting the urge to code immediately, you allow patterns to emerge organically rather than imposing premature categories. This initial immersion also helps you identify the boundaries of your data, understand the range of participant experiences, and begin formulating the analytical questions that will guide your coding. Think of this phase as getting to know your data, as you would a new landscape—before charting specific paths, you need to understand the terrain.

Understanding Coding as Decision-Making

The Nature of Coding Decisions

Elliott (2018) offers a transformative perspective for beginning researchers: coding should be conceptualized as "a decision-making process\" rather than a mechanical application of rules (p. 2851). This reframing is liberating because it acknowledges what you may already sense—that coding involves continuous choices about what matters, what connects, and what means. These decisions encompass density decisions regarding how many codes to apply to a single passage and whether to code granularly or broadly; size decisions about whether codes should capture single words, phrases, sentences, or entire paragraphs; frequency decisions concerning whether to code every instance of a theme or representative examples; and timing decisions about when to move from open to axial coding and how to determine saturation.

Elliott (2018) emphasizes that these decisions must be made "in line with their methodological background, their research design and research questions, and the practicalities of their study" (p. 2851). There is no universal formula—only principles that you must adapt to your specific context. Mihas (2019), cited in coding literature, describes one of coding's strengths: "it sustains this period of wonder, of checking and rechecking, naming and renaming, and diving in and stepping back" (Thematic, 2024). The discomfort you feel is not a sign of failure; it is evidence that you are doing the work of interpretation rather than merely categorizing.

Practical Application: Making Defensible Coding Decisions

The decisions you make during coding need not be perfect from the outset, but they should be deliberate and documented. By documenting your analytical choices transparently, you build credibility for your findings and create a roadmap you can revisit and revise as your understanding deepens. These practices transform coding from an opaque, mysterious process into a systematic, defensible methodology:

- Create a decision log that records each significant coding choice, your rationale, and any alternatives you considered—this becomes essential documentation for your methodology section. CAQDAS programs facilitate this process: NVivo's annotation feature allows you to attach notes directly to coded segments, MAXQDA's code memo function links decisions to specific codes, and Dedoose's descriptor fields enable systematic documentation of analytical choices.
- Establish explicit rules for your coding density by determining in advance whether you will apply multiple overlapping codes to rich passages or limit yourself to a primary code per segment. In MAXQDA, use the "Code Matrix Browser" to visualize overlap patterns; in NVivo, run a "Coding Stripes" display to assess density across your documents.
- Define your unit of analysis before coding begins—will you code at the word, sentence, paragraph, or entire response level? Document this decision and apply it consistently. Dedoose's excerpt creation tools and NVivo's auto-coding features can help maintain consistent unit sizes once your parameters are established.

By implementing these documentation practices from the start, you create an audit trail that enhances the trustworthiness of your findings. As Merriam and Tisdell (2016) emphasize, "qualitative researchers have an obligation to be as clear and forthcoming as possible about all phases of the research process" (p. 260). Your decision log becomes evidence of this transparency, demonstrating that your analytical choices were thoughtful, contextualized, and systematically applied rather than arbitrary or haphazard.

The Coding Process: Building on Williams and Moser's Framework

Open Coding: Embracing Expansive Exploration

Williams and Moser (2019) describe open coding as identifying "distinct concepts and themes for categorization" through creating "initial broad thematic domains for data assemblage" (p. 48). For beginning researchers, open coding often presents the first major challenge: the fear of missing something important or coding "incorrectly." Several practical strategies can support effective open coding. First, before applying any codes, read through your entire dataset to develop what Braun and Clarke (2013) call "data familiarization." Second, use the 5W-1H framework judiciously, as Williams and Moser (2019) recommend using "who, what, where, when, why, and

how" as a foundational exploration tool (p. 50). Third, code generously initially—in early open coding rounds, err toward inclusion since you can always consolidate codes later. Fourth, maintain code memos by writing brief notes for each code explaining what it captures. Fifth, accept provisional codes by labeling early codes with tentative language.

Recent scholarship reveals that many students, particularly in resource-constrained settings, face significant barriers to accessing qualitative software (Isangula, Kelly, & Wamoyi, 2024). Isangula et al. (2024) argue persuasively that manual coding with accessible tools such as Microsoft Word offers distinct advantages for novice researchers: lower costs, a simpler learning curve, and deeper engagement with data through the tactile process of marking and organizing text.

Practical Application: Conducting Open Coding

Open coding is where the generative work of qualitative analysis truly begins. During this phase, you are not simply labeling data—you are beginning to conceptualize it, to see beneath the surface of what participants said to understand what their words might mean. This requires both systematic attention to the data and creative interpretive thinking. The following steps provide structure for this inherently exploratory process:

- Prepare your data by formatting transcripts with wide margins and line numbers to facilitate code notation. If using CAQDAS software, NVivo allows you to import Word documents with formatting preserved; MAXQDA supports direct import from transcription software; and Dedoose accepts multiple file formats, including text, audio, and video.
- Begin with in vivo codes—use participants' exact words as initial codes to preserve their voice and reduce the risk of premature interpretation. In NVivo, right-click selected text and choose "Code In Vivo"; in MAXQDA, use the "Code with Selected Text" function; in Dedoose, create codes directly from highlighted excerpts.
- Create a codebook template with columns for code name, definition, inclusion criteria, exclusion criteria, and example quotes. MAXQDA's "Code System" allows hierarchical organization with definitions attached to each code; NVivo's "Codebook" export function generates formatted documentation; Dedoose's "Code Tree" provides visual organization with description fields.
- Use color-coding to visually distinguish different code categories, making pattern identification easier during later analysis phases. NVivo allows custom node colors, MAXQDA provides a full color palette for codes, and Dedoose displays codes with assigned colors in the excerpt view.

As you complete your initial open coding, resist the urge to evaluate whether you have "enough\" codes or whether they are the "right" codes. Open coding is intentionally expansive and exploratory. You are casting a wide net, capturing everything that seems potentially significant. Merriam and Tisdell (2016) describe this as the phase where "bits of data are systematically compared with each other as you go through the data" (p. 207). Trust that the refinement and consolidation will happen in the next phase. For now, your task is to engage deeply with your data and generate possibilities.

Axial Coding: Finding Relationships and Building Structure

Williams and Moser (2019) describe axial coding as the phase where collected data is "sifted, refined, and categorized to create distinct thematic categories" (p. 50). This is where many beginning researchers experience their second major challenge: moving from a proliferation of open codes to a more parsimonious, organized system. Key activities in axial coding include the constant comparison method, where you systematically compare codes to each other, asking which codes are similar enough to merge, which capture different dimensions of the same phenomenon, and which are distinct enough to remain separate. Williams and Moser (2019) reference the "Six C's Model" (causes, contexts, contingencies, consequences, covariance, and conditions) as one framework for exploring relationships (p. 51).

Practical Application: Conducting Axial Coding

Axial coding represents the transition from divergent to convergent thinking in your analysis. Where open coding encourages you to generate and explore, axial coding asks you to organize and refine. This is where you begin to see the architecture of your findings emerge. The following steps help you move systematically from the many to the meaningful few:

- Export all your open codes with frequency counts. CAQDAS programs streamline this process: NVivo's "Code Summary" report provides frequency counts and descriptions, MAXQDA's "Code Statistics" offers detailed frequency analysis, and Dedoose's "Code Application" chart displays coding patterns across your dataset.
- Sort codes into preliminary groups based on conceptual similarity. In NVivo, drag codes into hierarchical parent nodes; in MAXQDA, use the "Code System" to create subcodes under main categories; in Dedoose, organize codes into a hierarchical tree structure.
- Create a visual diagram showing relationships between categories. NVivo's "Project Map" and "Concept Map" tools create visual representations of code relationships; MAXQDA's "MAXMaps" feature builds interactive concept maps directly linked to coded data; Dedoose's "Packed Code Cloud" visualizes code co-occurrence patterns.
- Test your category structure by returning to the original data and verifying that grouped codes genuinely share conceptual properties. Use the query functions in your CAQDAS program to retrieve all excerpts coded with related codes and read them together to assess coherence.

Axial coding requires you to make difficult choices about what to keep separate and what to combine. You may find yourself wrestling with codes that seem related but not quite the same or discovering that codes you thought were distinct actually represent a single underlying concept. This is normal and productive. As Merriam and Tisdell (2016) observe, "this process of playing with the data, of comparing, of asking questions, of forming tentative hypotheses is the analysis part of qualitative research" (p. 207). The cognitive work you are doing—determining relationships, establishing hierarchies, creating categories—is the essence of qualitative analysis.

Selective Coding: Constructing the Narrative

Williams and Moser (2019) describe selective coding as enabling "the researcher to select and integrate categories of organized data from axial coding in cohesive and meaning-filled expressions" (p. 52). This is the phase where your analysis crystallizes into a coherent narrative or theoretical framework. Selective coding requires a shift in cognitive stance. Rather than asking

"What codes do I see?" you begin asking "What story do these codes tell together?" Guidance for narrative construction includes returning to your research questions, identifying your core category around which other themes organize, testing your narrative with peers, and balancing idiographic and nomothetic orientations.

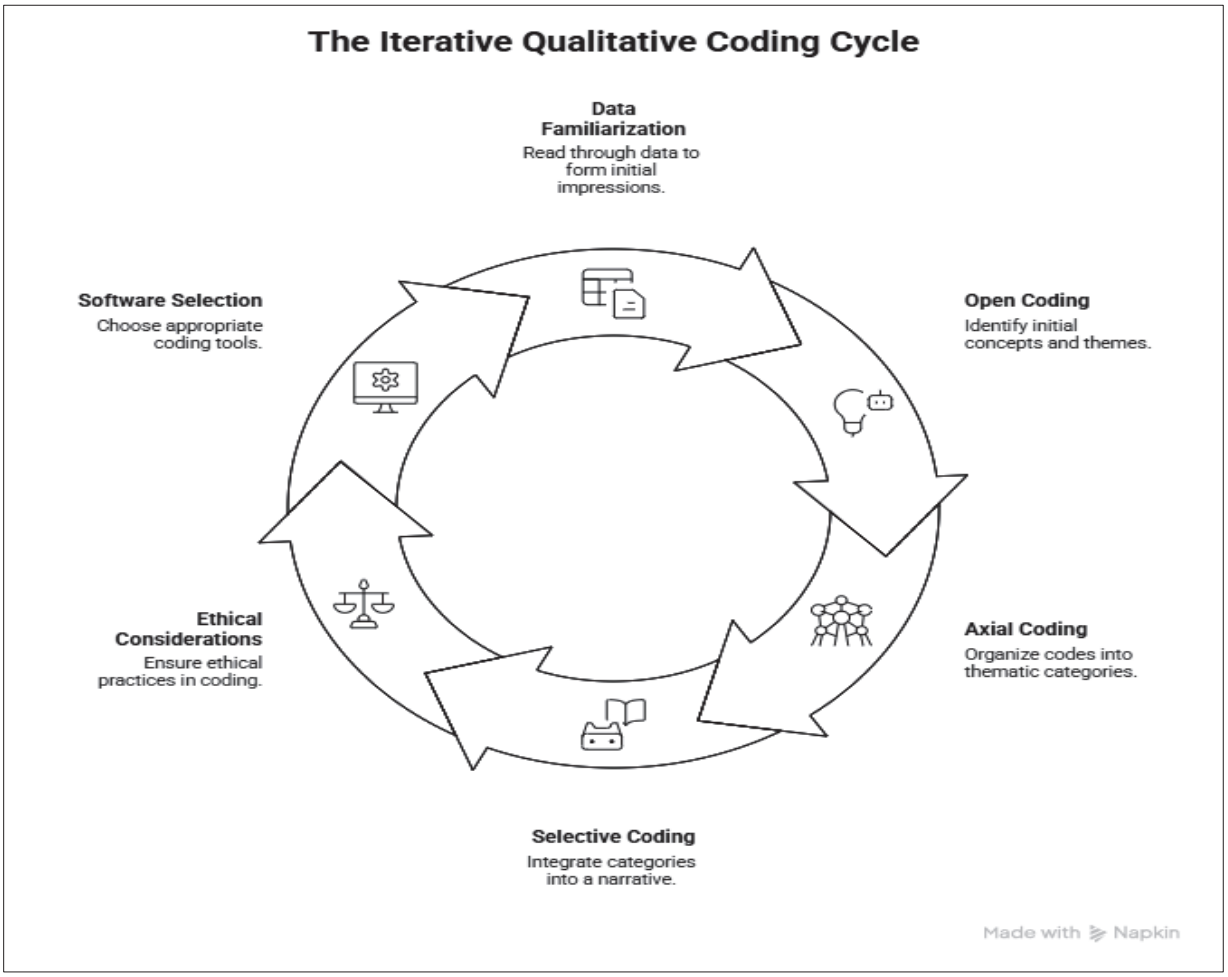
Practical Application: Conducting Selective Coding

Selective coding is where you move from having organized data to having findings that answer your research questions. This is the culmination of your analytical work, where discrete categories coalesce into an integrated understanding. The following steps guide you through this integrative process:

- Identify your core category by asking: Which category appears most frequently? Which has the most connections to other categories? CAQDAS visualization tools support this identification: NVivo's "Hierarchy Chart" displays code frequency visually, MAXQDA's "Code Relations Browser" reveals co-occurrence patterns, and Dedoose's "Code Co-Occurrence" matrix quantifies relationships between codes.
- Write a one-paragraph story that integrates all your major categories around the core category—this becomes the foundation of your findings narrative.
- Select representative quotes for each major category that will illustrate your themes in the final manuscript. Use your CAQDAS program's retrieval function to review all excerpts within each category and choose quotations that are vivid, articulate, and representative.

The integrative narrative you develop during selective coding should do more than summarize your categories—it should explain how they fit together to illuminate your research phenomenon. Merriam and Tisdell (2016) emphasize that "the level of analysis we are after is beyond description and the simple reporting of findings" (p. 203). Your narrative should reveal patterns, relationships, and insights that were not immediately apparent in the raw data but that emerged through your systematic analytical process.

Figure 1
The Iterative Qualitative Coding Cycle



Common Challenges and Practical Solutions

Beginning researchers frequently encounter predictable challenges during the coding process. The first common challenge is having too many codes. After opening coding, you may have 100+ codes and feel overwhelmed. Solutions include hierarchical organization, code consolidation by merging synonymous codes, and frequency analysis. The second challenge involves overly descriptive code. Solutions include distinguishing descriptive from analytical codes and using gerunds—coding with "-ing" words such as "negotiating identity" rather than "identity" (Charmaz, 2014). The third challenge is uncertainty about when to stop coding. In GTM, theoretical saturation occurs when new data no longer generate new insights (Glaser & Strauss, 1967). The fourth challenge concerns the potential for bias. Solutions include practicing reflexivity, member checking, and peer debriefing.

Practical Application: Troubleshooting Your Coding Process

When you encounter obstacles in your coding process, remember that these challenges are not unique to you—they are endemic to qualitative research and represent opportunities for

deepening your analytical thinking. The following interventions address the most common difficulties that beginning researchers face:

- If overwhelmed by too many codes, use CAQDAS organizational tools: NVivo's "Aggregate" function combines related codes, MAXQDA's "Code System" allows drag-and-drop reorganization, and Dedoose's merge function consolidates duplicate or similar codes.
- Track saturation by creating a chart showing new codes generated per transcript—when the curve flattens, you are approaching saturation. NVivo's "Coding by Source" query, MAXQDA's "Document Portrait" feature, and Dedoose's "Code Application" chart can help visualize this progression.
- Conduct an intercoder reliability check by having a colleague code a subset of your data independently.
- Dedoose offers built-in intercoder reliability testing; MAXQDA provides "Intercoder Agreement" analysis; NVivo supports coding-comparison queries across multiple coders.

These troubleshooting strategies are not merely technical fixes—they represent opportunities to step back from your data, gain perspective, and refine your analytical approach. Merriam and Tisdell (2016) remind us that "data analysis is not a linear, step-by-step procedure; rather, it is an iterative, spiraling process" (p. 252). When you encounter difficulties, you are likely at a productive juncture where deeper understanding is emerging.

Ethical Considerations in Qualitative Coding

An often-overlooked dimension of qualitative coding involves the ethical responsibilities that researchers bear throughout the analytical process. As Saldaña (2021) emphasizes, coding is not a neutral, technical activity but an interpretive act that shapes how participants' voices are represented. Key considerations include representational fidelity (whether codes accurately reflect the complexity of participants' communication), power dynamics in interpretation, confidentiality during the coding process, and transparency in analytical decisions. Tracy (2020) advocates for "thick description" that preserves contextual detail and participant voice even as data is organized into analytical categories.

Practical Application: Maintaining Ethical Practice in Coding

Ethical practice in qualitative research extends beyond obtaining informed consent—it permeates every aspect of your analytical work. The choices you make about how to code, categorize, and represent participants' experiences carry ethical weight. These practices help ensure that your coding process honors your participants and maintains research integrity:

- Write a positionality memo before beginning coding that explicitly identifies your social position, theoretical commitments, and potential blind spots. Store this in your CAQDAS program's memo system: NVivo's project memos, MAXQDA's free memos, or Dedoose's project memos.
- Review your codebook for any codes that may contain personally identifiable information. Ensure CAQDAS project files are password-protected (NVivo and MAXQDA offer this feature) and stored on secure, encrypted drives.

- Maintain your audit trail in a format that could be shared with an external reviewer. CAQDAS programs support audit trail documentation: NVivo logs all coding activity, MAXQDA's "Logbook" records analytical decisions, and Dedoose maintains a history of project modifications.

Ethical coding requires ongoing reflexivity about how your interpretations shape participants' stories. Merriam and Tisdell (2016) emphasize that researchers must consider "whose interests are being served by your study" and "whether you are being respectful of all participants" (p. 264). These are not one-time questions but ongoing ethical commitments that should inform every stage of your analytical work.

The Role of Software: Making Informed Choices

Williams and Moser (2019) provide an extensive comparison of qualitative software options (p. 49), and the landscape continues to evolve rapidly. Considerations for beginning researchers include assessing needs first by determining data volume, whether work will be independent or collaborative, and whether multimedia analysis capabilities are needed. The learning curve should also be considered, as software proficiency takes time. Beresford et al. (2022) note that large coding teams often require extensive training. Software limitations must be remembered—qualitative software organizes and displays codes but does not interpret data. Free options like Taguette, QualCoder, and Microsoft Word can support effective coding; commercial options such as NVivo, MAXQDA, and Dedoose offer more sophisticated features but require financial investment.

Practical Application: Selecting and Using Coding Tools

The decision about which tools to use for coding should be driven by your specific research needs, resources, and constraints rather than by assumptions about what "real" qualitative researchers use. Both manual and software-assisted approaches can produce rigorous, trustworthy findings when implemented systematically. Consider these factors when making your decision:

- Complete a needs assessment by listing your project requirements: number of transcripts, need for team collaboration, types of data, budget constraints, and timeline. NVivo excels at handling large datasets and offers robust team collaboration features; MAXQDA provides strong mixed-methods capabilities and intuitive visualization tools; Dedoose is web-based, facilitating remote collaboration, and offers competitive pricing for students.
- If using software, invest time in tutorials before beginning coding. NVivo provides extensive online tutorials and certification programs; MAXQDA offers a free online learning platform with video tutorials; Dedoose includes built-in training modules and webinars.
- Back up your coded data regularly and in multiple locations. NVivo and MAXQDA projects should be backed up as complete files; Dedoose, being cloud-based, provides automatic backup, but users should still export periodic local copies of their project data.

Whatever tools you choose, remember that they are means to an end, not the end itself. As Merriam and Tisdell (2016) observe, "the computer is a tool that can facilitate the work of qualitative data analysis, but it cannot do the analysis" (p. 214). The intellectual work of interpretation, the creative

insights that connect themes, and the theoretical understanding that emerges from your data—these remain uniquely human contributions that no software can replicate.

From Codes to Meaning: The Interpretive Leap

Williams and Moser (2019) conclude with a powerful reminder: "Coding in qualitative research enables researchers to identify, organize, and build theory" (p. 54). The progression from open to axial to selective coding is not merely a technical sequence; it is a journey of progressive interpretation and deepening understanding. The interpretive leap involves dialogue with literature, synthetic thinking, openness to creative insight, and attention to rhetorical crafting—choosing presentations that illuminate and persuade.

Practical Application: Making the Interpretive Leap

The transition from having organized codes to developing meaningful theoretical insights requires a shift from analytical to synthetic thinking. You are no longer breaking data down into components but building up an integrated understanding that transcends the individual parts. These practices support this crucial transition:

- Create a literature dialogue memo that explicitly compares each of your major themes to relevant prior research. Link these memos to your coded categories in NVivo, MAXQDA, or Dedoose to maintain connections between your interpretations and supporting evidence.
- Write multiple versions of your core narrative using different structures (chronological, thematic, causal) to determine which organization best communicates your findings.
- Use CAQDAS visualization outputs (NVivo's charts, MAXQDA's visual tools, Dedoose's analysis displays) to support your presentation of findings and their implications.

This interpretive work—moving from codes to concepts to theory—represents what Merriam and Tisdell (2016) describe as "making sense of the data in ways that go beyond description" (p. 203). Your analysis should ultimately tell a story that helps readers understand your research phenomenon in new ways. This story should be grounded in your data, supported by evidence, and transparent in its construction, yet also offer insights and interpretations that go beyond mere summary to genuine understanding.

Embracing the Journey: Final Thoughts for Beginning Researchers

Learning to code qualitative data is fundamentally a practice of becoming comfortable with ambiguity while maintaining analytical rigor. You will make mistakes. You will reconsider the codes you thought were final. You will sometimes feel lost in your data. These experiences are not aberrations from proper qualitative research—they are qualitative research. Drawing on Charmaz's (2008) wisdom, cited in Williams and Moser (2019), coding "requires constant interplay between the researcher and the data" (p. 47). This interplay is intellectually demanding and occasionally emotionally taxing yet gratifying.

Several principles can guide your journey: be systematic yet flexible by documenting decisions so others can understand your process; trust the process, recognizing that productive messiness is essential for creative analysis; seek support through writing groups and mentors; write throughout as writing clarifies analysis; and honor your voice, recognizing that qualitative research requires an interpretive stance. Williams and Moser (2019) remind us that coding "promotes

thematic integration and organizational strength, enabling researchers to be reflective and reflexive in joining the data in nuanced and intimate ways" (p. 54). Merriam and Tisdell (2016) offer this encouragement: "Doing qualitative research is exciting, creative, and at times overwhelming. But it is always a fascinating intellectual puzzle" (p. 279). The art of coding combines technical skill with interpretive creativity. May you find both challenge and joy in mastering this essential craft.

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