

Beyond the University

Teaching Ethnographic Methods in the Corporation

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Ethnography has grown popular in the business world. Corporate executives have become enamored with the idea that ethnographers actually go out into kitchens and factories, print shops and sweatshops, that they “hang out” on tuna boats and in hospital emergency rooms, that they ride in the trucks of service technicians and put on hard hats to follow construction workers (eg, “The Science of Desire,” *Business Week*, June 5, 2006). As a consequence, many of our corporate clients want us to transfer some measure of ethnographic skills to their employees. We and our colleagues at the Palo Alto Research Center (PARC) have been teaching ethnography to corporate clients for a number of years, with varying success. Here we use examples from our work with software engineers (SEs) in a major software development company to offer strategies for teaching ethnography in corporate environments (Ikeya et al’s “Teaching Organizational Ethnography,” *EPIC 2007 Conference Proceedings*).

Data Collection versus Analysis

A key observation is that teaching the nuts and bolts of data collection is relatively easy; what is unquestionably hard is teaching the intricacies of analysis. For example, in our work with the software company we started with a basic training course that provided some historical background and then discussed how to compose organized field notes from raw notes jotted down in the field. We went on to deal with a variety of data collection methods such as participant observation, on-site interviewing and documentation by photography and audio- and video-taping. We taught our trainees to negotiate entry into the field and build a productive relationship with research participants.

During short exercise sessions, carried out in actual field settings, we noticed that the engineers were initially hesitant to interrupt participants by asking questions. Through apprenticeships with PARC researchers, however, they soon learned how to conduct data collection competently and without undue effort. They became proficient at documenting their observations in detail and at identifying local problems in the workplace as they arose, such as miscommunication between groups, lack of consistent task management, or ineffective meetings. We were impressed with their capability to understand complex professional work full of technical vernaculars in a short period of time. What was difficult for them was to elevate those local insights to a higher, strategic level. They were missing the kind of

theoretical framework that would allow them to go beyond proposing “band-aid” solutions and instead consider the implications of their local observations for the company as a whole (Jordan and Dalal’s “Persuasive Encounters: Ethnography in the Corporation” in *Field Methods* 18[4]).

For example, when SEs observed miscommunications in a workplace, they were able to provide local recommendations to prevent them in the future. What they were typically unable to do was to generate hypotheses about how certain types of miscommunications might be typical for workplaces other than the one they were studying—either other workplaces in the same company or workplaces of the same type in the industry as a whole. Ideally, after collecting data they should also be able to go on to suggest what kinds of additional research would determine if an identified problem is purely local or is systemic. This would give high-level decision-makers the insights they need for effective management. Detailed objec-

tive descriptions of local problems are themselves quite valuable, particularly to managers and others who do not know the details of work in the field. However, learners’ difficulties with moving analytically from the local to the systemic are particularly problematic for corporations that need to avoid investing resources in local solutions, and instead require insights into factors that involve their whole organization or even a whole industry.

Fostering Analytic Skills

As we observed the software engineers doing fieldwork, it became clear that they focused mainly on the mechanical, “objective” aspects of study participants’ work. For many people, the idea that analysis should be analyst-independent and that reality is simply out there to be described is deeply ingrained. The SEs appeared to see themselves as outside observers—as data collection machines that document sites, events and interactions objectively rather than as participant observers. Our initial training efforts failed to fully convey the value of “thick description” (in Geertz’s sense), the reflexive nature of participant observation, and what might be glossed as “the ethnographic attitude.”

For professionally trained anthropologists, analytic skills are typically developed through years of graduate education and repetitive immersion in fieldwork, though we also know of very competent ethnographers who have no formal degrees. We speculate that intensive exposure to different kinds of analyses and considerable experience are necessary for development of analytic skills. How, we wondered, could similar skills be conveyed to non-anthropologists during a brief training period?

Recognizing that analytic skills are based in the ability to recognize systemic patterns and connections, we are in the process of designing a new

curriculum that will foster these skills. Based on our experience in a variety of corporate settings, we now believe that such a program would need to emphasize reflection and repetition and include one-on-one mentoring as well as group mentoring for a considerable length of time.

Approaches that promise to approximate in-depth learning should feature some kind of apprenticeship to a competent researcher that includes joint fieldwork and analysis. The curriculum should facilitate group learning through team “debriefs” of fieldwork exercises (Schoepfle and Werner’s “Ethnographic Debriefing” in *Field Methods* 11[2]). In spite of the fact that corporate employees tend to resist academic literature, joint reading with reflection and discussion is likely to be useful. Reading a variety of studies can prepare fieldworkers for seeing a phenomenon from different perspectives. However, we need to be careful to select appropriate articles tailored to the needs of particular groups of trainees, preferably as they develop their own analyses, as opposed to suggesting standard readings ahead of time or out of context.

Joint analysis of data collected by trainees should constitute the main teaching and learning method. In this regard, video is



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especially helpful. Playing back particular segments of a tape over and over again not only sharpens observational powers but also encourages discussions about the applicability and usefulness of theoretical concepts (such as gift-giving, ritual, power relationships and the difference between lived “practice” and documented “process”). A particularly effective way to use video consists of replaying the tape with study subjects. This allows contrasting the trainee analysts’ etic point of view with the emic understanding that target subjects have of their situation (Jordan and Henderson’s “Interaction Analysis: Foundations and Practice” in *The Journal of the Learning Sciences* 4[1]).

Learning ethnographic data collection is comparatively unproblematic. Learning ethnographic analysis is hard. For companies that want to grow their employees’ analytic skills, success requires a strong commitment to dedicating trainees’ time as well as the necessary financial resources to hire experienced trainers and mentors.

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