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## **Shadowing Research in Organizations: The methodological debates**

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### **Structured Abstract:**

**Purpose:** The purpose of this paper is to provide some context for the special issue and to introduce the collection of invited commentaries and research papers that follow. It also sets out to clarify the contribution that shadowing methods can make to the study of organizations.

**Design/methodology/approach:** This is done by briefly outlining the ways in which shadowing methods have developed in parallel within a number of disciplines. In order to tackle the question of why this has happened, a grounded approach is taken which centres on data excerpts generated by a shadowing method and three of its closest methodological neighbours: interviews, observation and participant observation. We further develop this analysis through the presentation of a set of illustrative analogies which use the idea of the researcher's gaze as a beam of light.

**Findings:** Similarities and differences between shadowing, interviews, observation and participant observation are identified, which support the articulation of shadowing as a family of following methods.

**Research limitations/implications:** Taken together with the contributions from the invited commentaries and research papers, this suggests a number of ways in which the debate surrounding shadowing research in organizations needs to be developed going forward.

**Originality/value:** The reflexive, comparative methodological approach taken here provides for the first time a systematic comparison of shadowing in relation to other common qualitative data elicitation methods. Further, the development of a critique of the extant literature on shadowing provides a basis on which to progress the field, both in terms of shadowing practices themselves and writing about them within disciplines and across the research methods literature.

## **Shadowing research in organizations: The methodological debates**

### **Introduction**

This special issue on shadowing as a research method is set in a context where organization and management scholars are increasingly challenged to find better ways of exploring and engaging with the day-to-day dynamics of practice, especially as events emerge over time and space. The accelerating pace of organizational life (Rosa, 2003) and the complex simultaneities of organizational activities at different locations (Czarniawska, 2008) require a research method that can keep pace with events as they unfold in real-time over the many spaces of organizing. Here, we examine the extent to which shadowing can respond to this need.

Advocates of shadowing are located in a variety of different social science traditions. Many, like Wolcott (1973), Mintzberg (1970), Perlow (1998) and McDonald (2005), have independently developed the techniques they used in order to address a specific research question that, in their view, could not be approached using other methods. The relative silence in the methods literature on shadowing, and the tendency to give it different names (or no name at all) in different literatures, means researchers are effectively reinventing the wheel every time they develop their own shadowing approaches, without the benefit of the theoretical and empirical support available for almost any other technique for accessing data. Thus, although lots of shadowing is being done across the social sciences, we argue that it has not yet been exposed to the same level of critical scrutiny as other research methods. In this introduction, we begin this task, firstly by tracing (briefly) the history of shadowing across various social science disciplines. We then present a series of empirical examples to demonstrate what is unique about the type of data that can be accessed by means of shadowing, and suggest how such data may be useful in addressing different types of research questions. These examples form the basis of a comparative critique of shadowing in relation to three other commonly used methods for accessing qualitative data, namely interviewing, observation, and participant observation.

The contributions to this special issue include three research articles (Bart; Gill, Barbour and Dean; Urban and Quinlan) that were selected from those submitted in response to our call for papers. These are interwoven with invited commentaries from renowned shadowers who hail from a variety of disciplines (Czarniawska – organization studies, Noordegraaf – public management, Sclavi - sociology, and Wolcott - education). By gathering these various perspectives together, we hope to both deepen and enrich understandings of shadowing as an approach to data elicitation, while answering the question ‘why do researchers choose to shadow?’

We dedicate this collection to the memory of Harry Wolcott, who passed away in 2012 (King, 2012) while this project was still in development. He leaves a vast legacy to social science, not only through the development of the shadowing method, but also as a champion for qualitative research more generally. We are honoured to have permission to publish posthumously the short piece that he wrote in response to our request for his contribution on the subject of shadowing.

### **The history and development of shadowing**

Professional education within Medicine, Nursing and other health professions has a strong tradition of using shadowing as a form of induction into a role, or as training in elements of a role (e.g. Paskiewicz, 2002; Saine & Hicks, 1987). This has led to a natural evolution towards using shadowing techniques for research purposes (see e.g. Vukic & Keddy, 2002; Quinlan, 2008; Johansen & Forberg, 2011). Education is another discipline where shadowing is used for both learning professional roles (e.g. Roan and Rooney, 2006) and for research purposes (e.g. Wolcott, 1973). Here, 'crit' or classroom observation, whereby new teachers (role learners) are observed and assessed by experienced educators, is frequently used in professional development. Shadowing studies in this domain sometimes incorporate formal (e.g. Polite et al, 1997) or informal (e.g. Earley & Bubb, 2013) role 'feedback' from shadower to the educator being shadowed.

Sociology and anthropology have championed a gamut of observation-based research techniques and many organization scholars have borrowed from these traditions when conceiving of shadowing studies, often taking their inspiration from the ethnographic turn. Within the Public Management sphere, shadowing studies (e.g. Noordegraaf, 2000) take their cue from seminal work in that field such as Kaufman (1980), who uses the term 'direct observation' to describe his research with senior policymakers. He draws on techniques of "holistic observation" (p12) that hail from cultural anthropology. Organization and Management scholars have also made great use of shadowing methods drawn from anthropology, some taking an overtly anthropological or ethnographic approach (Cooren et al, 2008; Nicolini, 2009; Watson and Watson, 2012). For example Fransden (2010: 384), uses the term "mobile ethnology" to describe her shadowing practices. Other scholars take an approach that is implicitly anthropological (Perlow, 1998,1999; Gehman, Treviño and Garud, 2013), often mixing methods to great effect. Czarniawska (2012) presents a useful overview of the history of anthropological borrowing in organization studies.

Another source of shadowing research comes from the work study tradition, which is oriented primarily towards acquiring quantitative data. In the 50s, studies were carried out that entailed watching members of an organization in situ as they went about their daily work. A number of these were focused on the human roles within the mass production systems of the time (e.g. Walker and Guest, 1952; Nadler, 1953; Walker, Guest and Turner, 1956; Jasinski, 1956; O'Neill and Kubany, 1959). These studies tended to shadow a large number of people with similar roles within one company. Walker, Guest and Turner, (1956) for example followed all 56 of the foremen in assembly plant X. O'Neill and Kubany (1959) observed 84 supervisors from two different car assembly plants in General Motors. On the whole, these early studies sought detailed (and quantitative) accounts of how successful individuals were carrying out their roles in organizations. In other words, they were looking for 'optimum' behaviour.

Like this early work, the seminal study undertaken by Mintzberg (1970; 1973) of the daily lives of CEOs could also be read as a quantitative study concerned chiefly with recording codified behaviours. Mintzberg's use of three inter-linked forms of structured record (chronology, mail records and contact records) was arguably driven by a realist view of the world, contextualised and supported by other forms of data collection such as interviews and records of "anecdotal data". However

Mintzberg's explicit quest is to uncover meaning and purpose as well as content in the roles of the five CEOs he shadowed. The differences between this work and that of Walker, Guest and Turner (1956), for example, are subtle. Despite the presentation of statistics in the paper about this study (Mintzberg, 1970), the categories he presents are surfaced through his data, and developed inductively from observation. He explicitly contrasts his own approach with Carlson (1951) and Stewart's (1967) early diary studies which are based on pre-determined categories of managerial activity and can therefore never find what the researcher does not expect. Interestingly, Mintzberg has been criticised methodologically both for being too qualitative (Snyder and Glueck, 1980) and too quantitative (Martinko and Gardner, 1990). Nevertheless, his methods are still replicated today (Tengbald, 2006; Vie, 2010).

In the same way that shadowing has multiple histories (Czarniawska, 2007), it also has multiple forms. As well as the classic forms of organizational researcher following organizational actors, as outlined in McDonald's (2005) review of shadowing studies, variants include using video to record shadowing (Larsson, 2009) and shadowing a project rather than a person (Vasquez et al, 2012). Burgoyne and Hodgson (1984) have taken the idea of interviewing at the same time as observing a stage further. They make use of protocol analysis, a technique whereby they tape-record individuals, "articulating their stream of consciousness', their thoughts, feelings and emotions while they actually go about the activity being studied" (Burgoyne and Hodgson, 1984: 163). This is then followed by another technique, 'stimulated recall', which entails playing the tapes back to the managers and asking them for a richer description of their actions as well as the underlying reasons for and purposes of those activities.

Yet another tradition informing shadowing studies involves following organizational objects rather than actors. Perhaps the most well-known example is Latour's (1999) study which shadowed a soil sample from rain forest to published findings in a scientific journal. There is a number of scholars who are researching in this tradition (see Czarniawska (2007) for a summary of studies that shadow objects). In a hybrid between these research designs, Rennstam (2012) shadows people in order to produce an object-oriented ethnography.

Shadowing has kinship with a number of techniques that have grown up in other disciplines. For example, there is a range of 'mobile methods' that have been developed alongside the debates in sociology around the mobilities work of John Urry and others (see Büscher, Urry and Witchger, 2010 for an overview and Costas, 2013 for an account of how these debates are being drawn into organizational studies). One such approach is what Carpiano (2009) has termed the 'go along interview' which he has used to understand how local residents experience their neighbourhoods and what relationship that experience has to their wellbeing. In order to 'locate' interviewee impressions of place and space, geographers have also begun to carry out 'walking interviews' (Jones et al; 2008; Evans and Jones, 2010).

### **Shadowing elicits different data**

The fact that shadowing approaches have grown up in several disciplines raises an interesting question: why has shadowing been developed and/or pursued by these

researchers? In answering this question, we take a grounded approach that begins with data. We consider four short excerpts from qualitative data collected in different ways as part of the same research project. The project was based in an Engineering firm where the research team was studying the different leadership roles at play across the organization. The first excerpt (Figure 1) is a small section of a semi-structured interview; the second (Figure 2) is drawn from the observation of a weekly team meeting; the third (Figure 3) is a fragment of shadowing data. These excerpts all centre on the same individual, although they were collected several months apart. The fourth excerpt (Figure 4) is a participant observation account by a researcher involved in helping the organization develop strategy for an existing product range. Interviewing, Observation, and Participant Observation are selected here both because they are much more common and better established qualitative data gathering techniques than shadowing, and because they are its closest methodological neighbours. The purpose of comparing these data excerpts is to demonstrate that the data surfaced through these methods is substantively different and therefore useful for different purposes.

### **Figure 1: Excerpt from a semi-structured interview with Team Leader**

Here, Team Leader is describing his personal philosophy of review meetings. He offers this without being prompted to talk about meetings or management styles. What he outlines is not any meeting in particular, but rather his ideal meeting and how he imagines that differs from the approaches taken by others in the company. What he tells the interviewer is selective, perhaps even slightly rehearsed. In other words, Team Leader is offering the interviewer data that he feels are (or should be) interesting to her. These are data that put him in a good light (he is after all, the hero in his own narrative). Further, it is the interviewee and not the researcher who is selecting both the discussion topic and the specific examples. In other words, Team Leader is taking a strong interpretative role in the research (see also Noordegraaf, this issue).

Interviews are very common in management research. An obvious weakness is that, "interview...responses are notorious for discrepancies between what people say that they have done, or will do, and what they actually did, or will do" (Robson, 2002: 311). However, the problem here is not so much that the interviewees are maliciously misleading the researcher, but that the framing of an interview situation means these discrepancies are a feature of a) the limits of the manager to remember and express the totality of their practices: "to ask the manager what he does is to make him the researcher; he is expected to translate complex reality into meaningful abstraction. There is no evidence to suggest that managers can do this effectively" Mintzberg (1973: 222); and b) the (often unremarked) distance they place between the researcher and the management practices they discuss (Potter & Hepburn, 2005). In conducting interviews within organizations, the researcher assumes that the account of an event is equivalent to the experience of one for the purposes of the research, implying that it is not important to have experienced an event in order to understand it or analyse it (May, 1997).

### **Figure 2: Excerpt from notes from observation of a team meeting**

This excerpt from an observation of a team meeting (Figure 2) shows the researcher gaining direct access to the scenario that was being described in the interview with Team Leader (Figure 1). This time we see an actual meeting rather than the idealised or 'typical' meeting. We can see who is there and what they say, we can observe the turn taking alluded to in Figure 1 and the focus on each project. We can also see evidence of the shared humour amongst this team, which gives us insight into what the 'atmosphere of having a coffee' means and also how that is achieved. The voice of the researcher also enters the frame. The 'I' here is not the Team Leader as it was in Figure 1, but refers instead to the researcher. The researcher records implicit judgements about the organisational players, noting that the Team Leader is 'quietly spoken', straightforward', and 'up on all of the projects'. What cannot be seen from Figure 2 is that the minute taking is a bone of contention between the Team Leader and some members of his team, or that the fact that some of them being there at all is unusual for the company.

### **Figure 3: Excerpt from the first day of shadowing Team Leader**

In this shadowing excerpt (Figure 3) we see some similarities with both the data streams that came before, but also a different kind of data. As well as seeing who is there and what they talk about, we can also see what they do between formal meetings, where they go and how they explain all of that to the researcher. If we had asked Team Leader in an interview situation the following week what he had done on that day, he would have remembered very little of these micro events, relating only the memorable, unusual and important, while the mundane, routine and habitual would have been lost to the research. By asking about one specific topic in an interview situation we also lose the chance to see how micro events are interconnected and interdependent (Light, 1979).

The fact that the researcher is openly researching and can ask questions of the actors they follow allows researchers to gather data on the "relatively large proportion of unobservable, abstract intellectual activity" (Martinko & Gardner, 1985: 683) and the growing proportion of computer-based communication (Czarniawska, 2007) that makes up managerial work. This approach, handled carefully, has the potential to offer a richer and more multi-faceted data set (Monahan & Fisher, 2010) than observation alone which "gives no insight into the meaning and intention of the observed action" (Burgoyne & Hodgson, 1984: 167).

The data interpretation has also become overt and changed hands between Figure 1 and Figures 2 and 3. There is no evident data interpretation role for the Team Leader in Figures 2 and 3. Instead, the data interpretation role at this stage in the shadowing study belongs to the researcher, who records early analytical notes or 'memos' alongside her data collection. Later we will discuss how this interpretation can become shared over time in shadowing studies. One of the differences between shadowing and observation data is that the shadower's questions are asked aloud, and are directed at the organizational actor rather than her notebook, and she receives further data by way of answers.

The extent to which Team Leader has tidied up and generalised his account of review meetings in Figure 1 becomes obvious when it is contrasted with the observation data presented in Figure 2, or the shadowing data in Figure 3. In the

interview excerpt, the account of the meeting is reported to the researcher, who does not see the meeting. In the observation excerpt the researcher does see the meeting first hand, but does not have access to what it means for the actors involved. However as readers of either of these data excerpts, our relationship to the data is the same: we are seeing an account of a meeting (albeit told from different perspectives) which is selective, and biased by the frame of reference of someone else (in the interview, this person is the interviewee; in the observation, this person is the researcher). This framing privileges some things and silences others, reflecting the pre-understanding of the teller and the view of that teller about what the 'reader' wishes to know. So, in terms of how these data are treated when written up and reported, the benefit of the 'first-hand' relationship with the organizational action remains with the researcher. It is not passed on to the reader of the research account who cannot 'see' the organization as the researcher does; rather the reader benefits from the different kinds of insights the researcher can glean from this experience.

The distinction between shadowing and participant observation is harder to define. Figure 4 gives an example of participant observation data.

#### **Figure 4: Excerpt from participant observation of a strategy team**

One important difference in the account of participant observation, compared with the data in Figures 2 and 3 is the many sentences which begin with "I". Here "I" is used to represent the different people: the participant observer, the man sat next to her, and the chair of the meeting. This stylistic clue points to a difference in the research purpose: in participant observation, the focus of the research is on the interaction between the researcher and a number of individuals. It does not separate the role of the researcher from the other participants. Instead it records all their voices and dwells on their conversations and interactions.

In the shadowing account (Figure 3), there is only one "I" which represents the researcher and the heavy use of "he" denotes the researcher's concentration on the role, habits and purposes of one person. This belies a less personal involvement of the researcher in the world that is being investigated and a clearer cut distinction between the subject and the observer. As Stenhouse (1982: 267) notes, the shadower "does not enter fully enough into the pattern of interaction for his own experience of participation to become admissible as evidence". Perhaps then the most salient difference between these methods is that it is unusual for the shadower to 'participate' in the organization, except in very trivial (such as getting coffees) or obviously external ways (such as reporting on research progress to a member of the organization). Instead, shadowing is centred explicitly on the activities and views of one individual at a time, and that person is not the researcher, meaning that the shadower maintains an 'outsider' perspective throughout (Gilliat-Ray, 2011).

In the participant observation data, the reader can see the words and thoughts of the researcher but only the words of the others. By contrast, in the shadowing data the reader sees the researcher's thoughts (and not her words: she does not record them) but the shadowee's words and explanations. Data selectivity is silent, as it is in the interview data, but this time the invisible hand is that of the researcher.

Linked to this is the kind of language used to describe the two episodes. In participant observation the researcher makes use of quite emotional language, dramatic techniques and personal reflections (“worried”) to convey a sense of her own feelings about the situation. This is an important part of participant observation as the experience of enculturation is one of the main sources of data that will help the researcher unravel the organizations he or she studies. In the shadowing account, the “I” of the narrator is used to note reflections on the data which are intertwined with the account itself. The tone of this is more in keeping with Glaser and Strauss’ (1967) use of memos in data analysis: linking to other pieces of data; noting things that need to be followed up or better understood etc. In the shadowing account the researcher makes comments not about what she feels, but about what she thinks of what Team Leader is doing (e.g. working in a calm, patient way). These are implicit comparisons with norms that she may have seen elsewhere in the company, her own expectations or perhaps in the management literature. Coupled with the fact that the shadowing account is not verbatim like the one presented in Figure 1, it is possible to see that Figure 3 contains more than just raw data (see also Figure 2). The linguistic conventions used denote the beginnings of a first order data analysis and highlight the more active role of the observer or shadower in their sensemaking processes.

The accounts presented in Figures 3 and 4 are also typical in another respect. In the participant observation, the subject of the excerpt is the sense of the researcher not knowing what will happen and piecing together her expectations from shared information about the system in which she is becoming involved. In the shadowing account, the actors are seen going about normal routines. Their voices are more confident: they know each other; they know the purpose and shape of the process they are engaging in. They are by no means beginners. The researcher nevertheless is present within the practices being studied and has the advantage of being able to carry out the research at the pace of a competent practitioner. As Czarniawska points out (this issue), shadowing can also follow very senior organizational actors and witness organizational practices it would not be practically possible for a participant observer to either undertake, or undertake whilst researching themselves.

Shadowing is a research technique designed to happen at the pace and place(s) of organising (Czarniawska, this issue), setting it apart from all the other methods featured here. As is widely discussed in the literature, the speed at which shadowing data are generated means that researchers very quickly gather very large amounts of data, often leading to data management challenges. However there is a less well developed aspect of researching at the speed of organising, which is that this is a method that presents organising in a way that is both holistic and continuous. This can be clearly seen in Figure 3 where the notes are presented as an uninterrupted account of Team Leader’s day, without pre-judging the importance of any moment above another. This represents a methodological move away from a view of the organisation generated through the sampling of disconnected ‘significant’ events such as board meetings or training workshops through observation, or by adding up disparate perspectives of an organisation through interviews. In the same way that Team Leader would not have remembered many of the moments the researcher has gathered data about in an interview the following week, if you had asked the researcher the week before entering the organization which situations she wanted to

gather data from, it is equally unlikely that she would have been able to articulate any of these moments significantly well to 'sample' them in advance.

Another feature of shadowing research that can be discerned by comparing the shadowing and participant observation excerpts is the collusion that develops between the shadower and shadowee. Contrast for example the use of "they" and "them" in the participant observation data with the "we" in the shadowing data. See also the difference between the spontaneously offered, whispered aside made to the researcher in Figure 3 with the researcher wondering what the meeting chair is thinking in Figure 4. What cannot be seen from these short excerpts is that the degree and nature of this collusion can change over time. The collusion starts with the process, often documented in participant observation studies (Brannan and Oultram, 2012), where the researcher becomes acculturated to the point of view of the actor she is shadowing. However with extended periods of shadowing, the actor also undergoes a form of acculturation as an organizational researcher and begins to see their own organization as an outsider, through the eyes of the shadower. When this happens it gives rise to reflective and self-reflective conversations between the pair as their collusion spills over into analytical exchanges where both parties are engaged in the interpretation of the data 'they' are gathering. This raises interesting questions about the accepted notions of 'insider' and 'outsider' with respect to a specific organizational setting, a theme which is taken up by Urban and Quinlan (this issue).

### **Sources of light: A comparative metaphor**

As a way of highlighting the differences between these four research methods, we propose a set of illustrative analogies each of which centres on the metaphorical notion of the researcher's gaze as a beam of light. The purpose of this device is to emphasise what the researcher 'sees' and how that affects the data that can be obtained.

#### *Observation: Flood lights*

For an observation study, the researcher's gaze is like a strip light fixed to the ceiling of a room, or the flood lights around a football pitch. When the researcher enters the room, they turn on the light at the door as they enter and everything in the whole room is illuminated equally for them to see. Data may be recorded by cataloguing everything that happens in that room as long as the researcher stays there. In some senses the unit of analysis here is the place, in that the researcher selects a specific physical domain in advance to watch, but in another, the unit of analysis is a time period. The flood light is great at illuminating organizational context and the actions of actors, but it does not shed any light on the meanings that actors ascribe to their actions, the actions of others, or the organizational context.

#### *Interviewing: Desk lamp*

When an organizational actor is interviewed they select a page in their diary and switch on a desk lamp so that the researcher can see a version of the past that has been experienced by the actor which has been recorded from the point of view of that actor. If the story teller is good the researcher may feel like they have 'seen' the action but the researcher is in fact not a witness; rather, s/he is the audience for the re-telling of a tale, after the fact, from the perspective of another. In contrast to the

observation study which captures context and action without meaning, here the desk lamp illuminates actor meaning without much recourse to organizational context. As such, interviews can throw a lot of light on the dominant discourses at play within an organization and tell the researcher much about the process and outcomes of that actor's identity work and sensemaking of their own actions and the actions of others, but the researcher is at the mercy of the story teller: what is being sampled here is perspectives and opinions.

*Participant Observation: Lights round a dressing room mirror*

In participant observation, the researcher is also the organizational actor under scrutiny. Here the researcher's gaze is likened to those mirrors surrounded by light bulbs that are found in theatre dressing rooms, designed to give the actor the best possible view of their own face. As they sit in front of the mirror the actor/researcher can view the scene in the room behind them unfolding, but the primary focus is on their own feelings and reactions to those events. Here there is the opportunity to cast light on the actions of others and the organizational context in the same way as an observation study, but also on the meanings ascribed to those actions by a single organizational actor. What is sampled here is essentially the shift from outsider to insider in relation to that organizational context and/or the groups or organizational actors they encounter.

*Shadowing: Miner's helmet*

When shadowing organizational actors the researcher wears a miner's helmet with a light attached to the front (or perhaps a climber's head torch). When they talk, the light shines on the actor being shadowed and as they are walking the light shines out in front, lighting the way, showing the path through the organization, but it also sweeps around the organization as the researcher turns her head with curiosity. The light only falls on places and other actors inasmuch as they are relevant to the day and/or sensemaking of the actor being shadowed. The researcher is sampling actors but is also gathering data pertaining to their spatial and temporal paths through an organization.

The insights about the methods discussed in the last two sections are summarised in Table 1. Of course the statements made here are far too stark, designed to build up stereotypes of the different methods in order to allow us to distinguish them more clearly from one another for the purposes of discussion. In reality these 'methods' are clusters of varied and overlapping approaches that cannot be separated out or characterised as neatly as this schema implies.

**Table 1: Qualitative data elicitation methods compared**

Our discussion has been strictly confined to the consideration of method. A more comprehensive methodological argument would necessarily involve the ontological and epistemological positioning implied by different types of research questions. The methods themselves, however, are philosophically agnostic; that is, they do not automatically imply any particular philosophical orientation. Thus shadowing might be used in a variety of different types of inquiry ranging from post-positivist realism, to critical theories, pragmatist concerns with practice, and interpretive studies of situated meaning-making.

### **So what exactly does shadowing mean?**

The various contributions to this special issue demonstrate a wide variety of research practices that together constitute a family of following methods, all of which may be recognized as shadowing – that is, the researcher's gaze is predominantly, although not necessarily exclusively, directed by the light on her 'miner's helmet'. All are peripatetic, and all produce embodied knowing (Blackler, 1995) of organizations by engaging the point of view of a practiced, situated actor (or object). Their unit of analysis is the individual (or object), their fieldwork is measured in days, and their quest is to uncover the ordinary in a joined up, continuous way. Further, we are all agreed that it is an exhausting process. But shadowing can collect quantitative data, qualitative data, or both. It can be carried out for a variety of purposes (McDonald, 2005) and serve individual, organisational, methodological or theoretical ends. It can be analysed using inductive, deductive, or abductive logics of reasoning. Some shadowers are silent, resulting in a form of mobile observation, others are questioning, and still others section off their queries and save them all for reflective interviews at the end of the day.

Whilst shadowing is an excellent way to elicit actor perspectives situated within organizational contexts, it does of course produce highly selective data. This selectivity is not about what is told to an interviewer, but rather it is determined by the actor's movement through time and space. Wherever the actor's day takes them, the researcher is bound to follow. So there are lots of things the shadower does not see, but these are determined by the circumstance of the field under study rather than by the actor or by the researcher (see Gill et al, this issue). This arguably can produce more grounded, less biased data as the managerial process is being researched "from the perspective of the manager rather than, as generally is the case, that of the researcher" (Burgoyne & Hodgson, 1984: 168).

In other words, the selection of what is seen is grounded in the role that is researched. It is this lack of control over the data by either the researcher or the actor that offers the opportunity to surface insights that go beyond the preconceptions of the researcher or the extant organizational literature (Light, 1979). As Wolcott notes (this issue) even the name of this research method is grounded: coined by the organizational actors surrounding the school Principal whom Wolcott was following around.

### **The future of shadowing: A critical view of outstanding problems**

Bringing together the many back stories of shadowing methods for the purpose of writing an introduction to this special issue has highlighted for us how separate these critical resources have remained. Those writing within management and organization studies, education, the health professions and public management (and now social geography and mobility debates) are inclined to use only those touchstones within the literature that are specific to their own disciplines. Whilst this is perhaps not surprising, it effectively dislocates large tranches of the shadowing literature, separating voices and slowing down the critical debates that are necessary to propagate and develop shadowing research methods.

A great deal of the shadowing literature that does exist makes the assumption that people will know what shadowing is. For example, rather than explain her method at all, Perlow (1998: 334) simply states that she uses "shadowing" (inverted commas in

original). These assumptions are not helpful, (not least for those we propose to shadow (Sclavi, 2007)) especially as we have established that different scholars, or traditions of scholars, use the term shadowing to signify a whole range of different research designs. Linked to this problem of not defining exactly what we mean by shadowing is that many of the voices in the literature(s), whilst they are critical of other techniques for data collection in comparison to their proposed shadowing methods, remain uncritical of their own research practices. The only downside of shadowing that is commonly discussed is the physical challenge it presents the researcher. Thus the shadowing literature when considered as a whole has a slightly evangelical tone. What is needed is more critical debate about the limitations of these methods.

Bart (this issue) points out that one obvious challenge for shadowers is how to adapt what we know about research ethics to find appropriate frameworks for shadowing studies. In terms of entry into the field, shadowing seems to address some of the ethical concerns that commentators have raised with respect to traditional participant observer studies (Brannan and Oultram, 2012). The shadower is easy for organizational actors to see, and also to understand as an outsider who is researching the organization. This puts the shadower in a more straightforward and overt relation to the field and to their data than a participant observer (see Urban & Quinlan this issue). It also allows the researcher explicitly to select their informants and negotiate directly with them about the research design, arguably reducing ethical tensions. In terms of operation in the field, on the other hand, however exemplary the process of obtaining informed consent from the organization's top management and from the individuals who are being shadowed, the researcher is continually thrust into the presence of actors from inside and outside the organization from whom consent has not been obtained. Bart (this issue) explores this problem in the context of the increasing vigilance of university researchers in terms of the ethics of their research practices.

Power issues are rarely discussed in the context of shadowing studies and yet these are clearly pertinent for a research design that depends on such extended and detailed knowing of an organizational actor. Issues of power are touched on by Urban & Quinlan and Gill et al. (both in this issue) as they reflect on how they dealt with direct requests to participate in the organizations they were researching. They felt in some cases that they did not have any choice but to comply or concede lest they damaged rapport with those they followed, or lost some degree of access, which reveals glimpses of the power relations their roles entailed. Bart (this issue) also touches on this when he reflects on whether the organizational actors who gave him consent to observe their meetings with the CEO he was following really did so voluntarily. These observations invite a much more explicit and systematic treatment of power in shadowing practices.

Like the interview, the shadowing study is very individual-centric. However, rather than privileging the espoused theories of individuals, it engages with the theories in use of those individuals. In designing interview studies, whether we seek results that are representative of a population, or choose instead to follow a more purposive sampling regime, we mitigate against this individualistic tendency of the method through selection or sampling strategies that aim to incorporate the views of a range of individuals. The increased temporal and physical commitments of a shadowing

study mean that smaller samples will almost certainly be necessary and, because of the depth of the data collected, satisfactory. Consequently, shadowing studies are necessarily more idiosyncratic as they are oriented towards the understanding of the individual rather than the organisation. This is not a problem per se, but it does produce limitations in terms of the range of research questions that shadowing studies are able to tackle. There is still considerable scope for more discussion about sampling in shadowing studies.

Much of what is written about shadowing asks how it can be used to deepen the organizational researcher's understanding of specific organizational contexts with a view to extending organizational theory. However Sclavi (this issue) also raises the question of how shadowing practices can be used by researchers to enhance the organizational actors' understanding of their own practices. For instance, she shows how shadowing can be used in a complementary way with a consensus building approach. In essence, Sclavi is suggesting we examine the potential for shadowing to underpin organizational change. At one level this presents an interesting challenge for shadowers to take up research designs in keeping with the action oriented research traditions. At another, it serves a quite a profound critique of the extant shadowing literature which almost uniformly views the researcher as recruiting the organization in order to further their academic understandings, and does not consider the opposite possibility for this partnership: organizations recruiting shadowers in order to help them see their own organizations from a new perspective that could facilitate organizational learning and change.

Despite the fact that many researchers laud shadowing approaches because of the movement around the organisation and through the days of those shadowed, most are still using shadowing to provide (joined up, continuous but) essentially cross-sectional views of organising at a moment in time. Noordegraaf (this issue) points out that there is much potential here to pursue longitudinal research designs that could inform research on how roles and organisations change over time. But shadowing also has the capacity to capture the flow of organising and uncover the dynamic nature of managing, demonstrating the shifts in pace, focus and priorities of organizational actors and organizational processes at a micro level (Czarniawska, this issue). This will entail the design of new forms of data recording and analyses that feature these flows.

One of the features of shadowing that comes through in most of the pieces within this special issue is the extent to which it requires improvisation on the part of the researcher. Gill, Barbour and Dean (this issue) for example describe their shadowing practices as "continuously negotiated". Whilst this can be portrayed as a creative process for the researcher, or evidence that the research is "uncontrolled" (Noordegraaf, this issue) and thus well grounded, it is also a source of trepidation, especially when entering the field for the first time. The fact that we know very little about the real work of an organization, to the extent that we don't know what will happen, cannot anticipate the situations we will find ourselves in and do not really know in advance what kind of data we will surface underlines the need for shadowing studies. However it also raises the question of how we can train social science researchers in order to prepare them for shadowing, as we do for other research methods.

In this issue, and in the wider shadowing literature, discussions tend to centre on what kinds of data can be elicited by shadowing, and the different ways in which these data can be recorded. However there remains a glaring gap in thinking about ways of analysing shadowing data. For researchers who take an interpretive approach, for example, it would be considered good practice to intersperse data collection with data analysis. In an interview study, analysis tends to be done after each interview, or every few interviews. In observation studies, many of the preliminary analyses take place in the field and become naturally interspersed with primary data. However the pace and physical demands of shadowing make periods of reflection in the field rare and analysis between days of shadowing unrealistic, so researchers need to develop new ways of thinking about the relationship between their data collection and data analysis that are sustainable and robust.

Gill, Barbour and Dean (this issue) and Urban and Quinlan (this issue) have written pieces that have arisen out of their personal sensemaking of their own shadowing practices surfaced in relation to the shadowing practices of other researchers (see also Vásquez et al (2012)). As these authors demonstrate, a process of comparative, shared, critical reflexivity offers a route to deepening our understanding of our own practices as shadowers. However if this reflexivity can be shared more widely through the research methods literature, it offers a means of fostering essential debate around the strengths, weaknesses and assumptions underpinning these practices as a community of researchers. In other words, the methodological, comparative approach set out in this paper to consider shadowing, interviews, observation and participant observation relative to each other needs to be replicated at the level of comparing different shadowing approaches. This in itself would make an enormous contribution to unlocking the potential of shadowing methods for organizational researchers.

In presenting this special issue then, we want to advocate strongly shadowing as a research method that has considerable potential to complement more commonly used methods, offering deeper insight into the types of problems that motivate contemporary organization and management research. At the same time, we recognize there are many as yet unanswered questions that present an ongoing challenge for researchers. There is still much work to be done.

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Team Leader: ...Each week I hold a 1½ hour meeting for the project team and that is better than having any plan. You only need a plan to be able to ask for resources. I like to see the meeting of having more of the atmosphere of having coffee not really people taking minutes. Not everybody is comfortable with that. Now some of the engineers have started taking their own minutes but I said I didn't want minutes and actions and stuff like that to come from the meeting, but they feel that they have to comply with company procedures so they do that. I like a discussion, I want them to tell me about the project, what is happening, what they are thinking about. Obviously, I do try to focus them on the week ahead and tell them about the issues that are affecting bids and about margins and that and keep them posted on the issues bothering me. I try to get the assembly guys to come too. That is maybe a bit frowned on in other parts of the company, it seems a waste of time. A waste of *their* time. I think it's a shame for the guys, I like to tell people more, these people never see the end result and people need time to bounce ideas and if nothing else that 1½ hours every week is time for them all to sit and think. What you want is openness. The last time I jumped down anybody's throat the guy came back and said to me when did you last design something that was flawless, I said fair enough. [...] I don't know if other people have this attitude, have this meeting on a Monday. The problem is that most of the work is done at another site so I am in a bit of isolation up here, I'm really the only one. People probably have those kinds of meetings but I'm not sure if they have the technicians and the draftsmen there which is my thing...

**Figure 1: Excerpt from a semi-structured interview with Team Leader**

...Although the electronics department meeting is at 8.45 every Monday, [Team Leader] goes round and checks with everyone that it is OK and that they are going to be free for it. They leave their desks and go to a small meeting area closed off by shoulder high screens. All seven of them sit round a square table designed for about four. It is obvious they all know and like each other: the atmosphere is jokey and light hearted. Some are taking notes with clip boards balanced on their knees or on the edge of the table. They are all dressed similarly in well pressed cotton trousers and open neck, short sleeve shirts, only [Team Leader] wears suit trousers and a tie. [Team Leader] sits at the head of the table. He starts the meeting by saying since it's the end of the month it is timesheets time and he hands round timesheets for people to look at. He comments, "as well as being accountants now the team leaders are supposed to be personal clerks".

Next he goes through his diary saying when he will be in during the week. He is going to be with a customer on Wednesday for project 1. The whole thing is very low key. [Team Leader] is a very quietly spoken man. Everyone round the table has a turn to say when they will be in in the week. [Engineer 1] asks if people will be in on Wednesday so he can arrange CAD training. Some people can't make it so there is a bit of debate about whether they should wait and reschedule and get everybody together or whether they should go for who they have got and miss somebody out for the moment. [Engineer 2] talks about the conflicts on his time already booked in the future. He also talks through what he has to do on his projects. He talks about plans; talks about the contingencies that he has got...[Team Leader] offers to help him out if he is getting very short of time.

Everyone goes through and gives an update on what they are doing on each project. [Team Leader] knows what the problems are for each person and each project. His language is quite conciliatory and more straightforward than other engineers. [Engineer 2] speaks quite formally in this situation - he speaks about "potential conflict", [Team Leader] says, "you mean we haven't got enough people". They all smile at [Engineer 2] and he laughs and shakes his head: "yes, all right". As each person lists their projects and speaks about what is happening and what they are planning to do [Team Leader] asks about specific problems not ones that they have mentioned, obviously long standing problems or problems from the week before. He has been away on holiday for a couple of weeks, but he is up on all of the projects, he knows what is happening, asks questions and although when people give their summary everything sounds quite straightforward some of the questions that he asks they still can't answer. He doesn't seem concerned about that, he is just checking progress.

...[Engineer 1] and [Engineer 4] are complaining about some system being changed: people had made changes to the way that they were expected to do something without telling them. I am not very sure what it is, but I think it is to do with booking the number of hours that you did in a week. [Team Leader] defends the system and explains the new one to them. He is very calm and keen to show that it is very straightforward and that it is not a conspiracy or people being difficult. He is quite pacifying. He asks (grinning) if he should go to Finance to get them to explain it and this causes great hilarity: "see you in 2 weeks", they say...

**Figure 2: Excerpt from notes from observation of a team meeting**

...then [Team Leader] spends some time checking timesheets and signing them off for overtime and collecting sick forms for people. "Technically, that is a departmental rather than a team leader responsibility". I ask why he is doing it then, but before he can explain someone brings estimates for [equipment] repairs for him to look at and authorise.

The whole thing seems quite calm - he uses words like critical, etc. but he still has time to explain things to me and doesn't seem to have any urgency, rush or impatience with anything that is going on.

Someone else comes to consult him to ask which part number should they use: should they use BS or ISO part numbers. There is a bit of a debate about which ones to use - in the end they decide to go for the BS ones. (When it eventually comes back it has got ISO numbers on because BS ones were too hard to find).

[Team Leader] comments that [Engineer A] is screaming for something that [Engineer B] is working on today. Again there is no evidence of any actual screaming going on.

We go downstairs to take the timesheets and sick notes to Personnel. [Team Leader] explains "they need them today and they won't get them if I put them in the snail mail because it takes forever".

When he is in there he asks the guy who emailed him yesterday asking for training sheets how to fill them out and what he is supposed to put in them. [Personnel guy] says, "you write the business needs in this column and the actual skills in here so that the skills gap can be worked out so that hopefully training can be aimed at that skills gap and then we can graph it reducing". [Team Leader] asks "how am I supposed to know what the business needs are?" but gets only a shrug and a smile for an answer. On the way back he stops at some of the notice boards. I ask what he is looking for and he tells me he is looking at other peoples' filled out forms to see what they have put in the boxes to see if he can work out what other people are doing.

When we walk through the office where the manufacturing engineers sit [Team Leader] says, sotto voce, "This is the dangerous part, this is where I get collared" but we make it through and back without being stopped with any problems.

**Figure 3: Excerpt from the first day of shadowing Team Leader**

I go upstairs to the room early to look at the room, but [Director] is already there. I explain to him that [Senior Researcher] can't be here today, so I am going to join the group to represent the research team for this meeting. I am a bit worried he will be unhappy about that but I have interviewed him a couple of times before and he knows me. If he'd rather have had [Senior Researcher] he doesn't let it show. He says, "You're very welcome, where do you want to sit? Help yourself, wherever you think..." and so I take a chair about half way up the large, oval boardroom table from the end where he has laid out his papers. He asks, "do you need a wee catch up before they come in?" and for a moment I am tempted to say yes and get his take on progress so far, but decide that this would mark me out as different from the rest of them and so I tell him that I have been through [Senior Researcher's] notes from the first two meetings and that I know most of this strategy group from other projects. [Director] says, "I am pretty unhappy with this room, [Boardroom] is an unfortunate choice because there is no xeroxable whiteboard like next door or the new rooms downstairs, I guess they must be booked up". [Engineer] and someone else I don't know come in and they are talking about the communications between the groups, but I don't catch it all. The man next to me leans across, holding out his hand, and says quietly, "Hi I'm [2nd Engineer], are you from [another site]? This is my first one and I'm not sure what the drill is". [Senior Manager] hasn't arrived, and [Director] says, "where is our deputy chairman?" [3rd Engineer] says, "he has been sighted at the coffee machine". [Director] takes great delight in this because there is free coffee, on tap, just outside the boardroom and says, "Ha ha, when [Senior Engineer] eventually decides to join us he'll come up the stairs and realise that he's wasted his money". They all laugh.

**Figure 4: Excerpt from participant observation of a strategy team**

<b>Method</b>	<b>Observation</b>	<b>Interviewing</b>	<b>Participant Observation</b>	<b>Shadowing</b>
<b>What is illuminated?</b>	place(s), time(s)	actor perspectives	researcher perspective (changing over time)	actors, paths (in time and space)
<b>What is left in darkness?</b>	actor meanings	context	other actors' meanings	actors and places that don't cross the path
<b>Who samples?</b>	researcher	First the researcher; then the actor	researcher	First the researcher, then neither
<b>Who interprets?</b>	researcher	First the actor; then the researcher	researcher	First the researcher, then both

**Table 1: Qualitative data elicitation methods compared**