4. How to shadow organizing

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For organization scholars, one of the key events of the 1980s was anthropology's encounter with management and organization studies. It was most likely due to the fact that anthropologists were forced to come back from exotic countries, and found jobs – in business schools. Whatever the reason, all of a sudden, practically everyone in management and organization studies wanted to become an anthropologist, or at least to write an ethnography. The question was, how much of anthropological methods could be transferred to our field? The classical one, participant observation,[1] was possible, but was of necessity limited to simpler jobs. It has been done before – Michael Burawoy (1979) worked as a machine operator, and then produced champagne in Hungary (Burawoy and Lukács, 1992). Yet participant observation of top management was difficult, partly because of the unwillingness of people in power positions to be observed (Prasad and Prasad, 2002), but mostly because the researchers were either not competent to play the role of manager or too busy doing it to observe. Some other approaches were tried, like becoming a participant observer in the role of corporate anthropologist, when such roles have been created (best known is the work of Kunda, 1992/2006).

The most obvious possibility was direct observation – which meant sitting in the secretary's office or in a coffee room and observing. Yet such direct observation soon revealed a peculiar trait of contemporary organizations: instead of sitting, like the observer, people constantly went in and out, seemingly always on their way. They were 'already elsewhere', was a major conclusion of a study that Lars Strannegård (Strannegård and Friberg, 2001) drew from his observation of a computer consulting company. They were on the way to the airport or back from a trip, on the way to a meeting or back from another meeting. The researcher-observer was left to himself, watching these comings and goings.

The IT company Strannegård studied was not an exception; rather an example of what was becoming a rule in contemporary organizations. Sitting in the secretary's office was becoming less and less fruitful, as I myself learned sitting in the office of the secretary of the Mayor of Warsaw, who was so busy traveling, poor thing, that he couldn't even find time for an interview with me

(Czarniawska, 2002). It was then I came to a conclusion that shadowing is the best field method for organization scholars (Czarniawska, 2014b).

HOW SHADOWING ENTERED ORGANIZATION STUDIES

I first met the term 'shadowing' in the book of Italian sociologist Marianella Sclavi (1989), who followed like a shadow her daughter who went to school in the USA, and then repeated the procedure in an Italian school. Sclavi came up with the idea of shadowing after having read the story by Truman Capote in his collection, *Music for Chameleons* (1980). Capote told the readers how one day he followed a certain Mary Sanchez, a cleaning woman, who represented everything that Capote himself was not: a woman, a Mexican, tall, working class, heterosexual. Sclavi decided that it was a splendid example of what Mikhail Bakhtin (1981) postulated as the core of good novels and good sociology – exotopia (another place). As Bakhtin said in an interview shortly before his death in 1975:

> In order to understand, it is immensely important for the person who understands to be located outside the object of his or her creative understanding – in time, in space, in culture. For one cannot ever really see one's own exterior and comprehend it as a whole, and no mirrors or photographs can help; our real exterior can be seen and understood only by other people, because they are located outside us in space, and because they are others. (Kelly, 1993, p. 61)

What is compelling in this approach is the lack of ambition to present the 'true thoughts and feelings of the natives' – an ambition that at a first glance appears extremely humanistic, but at second glance is really quite colonialist (for a further critique, see Prasad and Prasad, 2002). The observer will never have better knowledge than the actors, the foreigner will never understand better the indigenous culture, but an observer and a foreigner may have a different and instructive view of how the culture operates than actors and the natives would have. Bakhtin was not a supporter of the behaviorist idea that the actors and the observers must avoid contact, however, because he believed in *dialogism* – fictive in the text, but reflecting the possibility of an actual dialogue.

Locating research reports in exotopia means replacing a sentimental idealization or a colonial contempt for the 'primitive people' with mutual respect between strangers. Respect is not necessarily the same as admiration and unconditional acceptance – a dialogical relationship in a study means that the researchers must present their findings to those they observed, but need to consider a possibility that the result will not be straightforward praise. Disagreements and differences in viewpoints are a valuable source of knowledge as such.

This attitude is not always easy to achieve by management and organization scholars, who, like the colonialists of yesteryear, tend to believe that they 'come to help', 'to explain', 'to advise', to decide what is 'best practice' or 'to emancipate the oppressed'. Shadowing is not only a method, but also an attitude of the investigator.

Actually, shadowing had been used in management and organization studies quite often, but under different names. It was used by Giuseppe Bonazzi (1998), who in turn referred to Henry Mintzberg's (1973) study as an inspiration. Walker, Guest and Turner (1956) used it in their study (described in detail by Guest, 1955). The term was launched by an ethnologist at the University of Oregon, Harry F. Wolcott, who spent his days following a school principal between 1966 and 1968 (Wolcott 1973/2003). At the time of his study, the radio was broadcasting a series called *The Shadow*, so the teachers began to call Wolcott a 'shadow'. He adopted it; after that it has been used in studies of consumption (Miller, 1998), and in apprenticeship, especially in medicine and nursing (see e.g. Roan and Rooney, 2006).[2]

In the following section, I present in more details three examples of the use of the shadowing method, which emphasize specific challenges related to this method.

FEMALE SHADOWS

Marianella Sclavi's study reported in *An Italian Lady Goes to the Bronx*, 2007, was conducted when she was on another prolonged visit to the USA. This time around she did not want to shadow her daughter, but undertook another project, which she described as follows:

> *The Program*: 'What I want to do is to visit a part of the Bronx where the people have gotten organized and are trying to save their neighborhoods, both morally and physically'.
> *The Method*: 'I need a few names and telephone numbers for people who're involved in this kind of work, and who might be willing to let me shadow them in the course of their daily lives'.
> *The Approach*: 'All I want to do up there is to look and listen. I want to take a good look at my difficulties in communicating with the people who live there, and at theirs in communicating with me. At the things that get on our nerves, at my own discomfort'.
> *The General Goal*: 'I want to find out what they do and how they live, what they believe in, what kind of hopes they have and what kind of difficulties they have to meet as people who have refused to resign themselves to catastrophe'.
> *The Specific Goal*: 'I hope to collect a lot of little clues that will fit together like the pieces of a puzzle. And at the end of it all, I might just come away with a better idea of the intellectual and moral climate of certain areas of the Bronx today'. (Sclavi, 2007, p. 231)

At that time, she taught sociology in a college at the border between the Bronx and Westchester in New York City. When she explained her project to her colleagues and friends, their comments were far from encouraging. In the first place, they found her methodological approach faulty: a proper approach would require a thorough review of all the literature dedicated to the Bronx, which would be crowned by one or several hypotheses, to be tested in a carefully designed study. Second, and this was the main objection, they considered the Bronx to be dangerous to a middle-aged Italian woman, a 'lady' from the title of the book. Third, and this comment represented the only real problem in Sclavi's eyes, nobody knew how to make contact with somebody from the 'real' Bronx. Sclavi suggested that she might shadow some of the high school teachers who actually taught in the Bronx, but the answer was negative. It seemed to her that those teachers went to the Bronx as if they were going on a dangerous but necessary excursion to be made as quickly as possible, without stopping. Sclavi's project was saved by the two factors that stand behind every brilliant field study: chance and persistence.

At a Christmas party organized by the company where her husband worked, Sclavi was sitting next to a lawyer who, awaiting the main dish, told her with pride that his son, also a lawyer, specialized in legal services to the poor, and worked 'in the heart of the Bronx'. Asking for the son's telephone number was an obvious move.

Two years later, when Marianella Sclavi was ready to begin her fieldwork, the young lawyer had already moved to Florida, but he knew immediately what she was after. The Banana Kelly Community (BKC) was a committee formed at the end of the 1970s – after the dramatic events that made up the notoriety of the Bronx – by some people living on Kelly Street. It originated with a black workers' family and a social worker of Italian origin, who together launched a slogan 'Don't move, improve'.

The first appointment Sclavi made was with the woman who was at that time the director of BKC. The first trip to the Bronx was perhaps the most trying, so that Sclavi set a task for herself: 'A white, affluent, middle-class Italian woman is alone on a subway on her first trip to the South Bronx. Let's try to take a look at the way she's looking at things!' (2007: 12). This task immediately helped her to discover three of her own implicit assumptions: that men are more dangerous than women, that those who look unemployed and/or homeless are dangerous, and that young people are dangerous. 'You deserve to be mugged by a calm, middle-aged woman who looks like a secretary' (2007: 12), she told herself.

Her first visit to BKC initiated a series of snowballing contacts, and she kept asking people she met for permission to shadow them for one day. The first was one of BKC's pioneers, Pearl White, a black mother of eight, hairdresser

and beautician, a Baptist. Here is the first encounter between Pearl and Maria (Sclavi simplified her first name):

> During the first ten minutes of their conversation, Pearl and Maria had continued to study one another. They found each other disconcerting; they were also drawn to one another and aroused each other's curiosity. Both of them were tall and solid, with a touch of irony in their eyes, a mouth that could broaden into a wide, winning smile, lively faces and a carriage like the Queen of England. 'A bit stiff and withdrawn, too much composure. Who knows what she's like when she lets herself go?' they each thought of the other. They were both forty-eight years old. (2007, p. 49)

Sclavi followed Pearl White many times; and on many occasions, including a visit to the church, she also stayed at her house for a couple of days.[3] While she interviewed Pearl about the history of BKC, the shadowing enabled her to experience life in the Bronx first-hand. On her way through the Bronx, she formulated another instruction for researchers attempting shadowing: Never eat too much or too fast, or you will risk falling asleep afterwards.

The result was a story comprising the history of BKC (drawn from document analysis and interviews), the report of the present actions within the project (interviews and shadowing), and impressions of life in the Bronx (shadowing and all other types of direct observation). As a final touch, she added some further 'maxims' for the adepts of shadowing:

1. Never be in a hurry to reach conclusions. Conclusions are the most ephemeral part of your research.
2. What you are seeing depends on your point of view. In order to see your point of view, you have to change it.
3. […]
4. Emotions are basic tools of cognition, if you learn how to decipher their language, which is relational and built on metaphors. They don't tell you what you are looking at, but how you are looking at it. (Sclavi, 2007, pp. 264–5)

Sclavi emphasized the fact that, when shadowing, the researcher does not try to avoid problems caused by the unexpected or discomforts related to the strangeness of the Other. On the contrary, shadowing puts those factors in the center of the researcher's attention. Psychic discomfort and communication problems are turned into resources permitting us to understand ourselves and other selves in interaction.

SHADOWING SOFTWARE

Attila Bruni (2005) studied the introduction of an electronic patient records system in an Italian hospital. The Electronic Patient Record (EPR) had been introduced there after a year-long participatory design process, where informa-

tion engineers collaborated with doctors. Bruni's aim was to conduct a structured observation of certain organizational events, but he became interested in the fact of the EPR's presence in some times and places but not in others.

This trait, in my opinion, is typical for just quasi-objects. Like calories in Coca-Cola Light, now you see them, now you don't. Ann-Christine Frandsen (2009) followed a quasi-object in the sense of a bill, an economic report. But literally speaking, it was an actual object: a piece of paper, and it was relatively easy to trace back its origin. Attila Bruni's quasi-object may be more precisely called a virtual object, in the sense of two of three meanings of the word 'virtual' listed by Marie-Laure Ryan (2001): virtual in the sense of containing a potential of many different actualizations, and virtual in the sense of being computer-mediated.

Bruni had become fascinated with this vanishing object and decided to follow the software for a month. Immediately he discovered the first actualization of the EPR. The computer that contained the EPR used by nurses was located in the patient reception area. At the time of the study, an electronic document of virtual existence only did not have a legal validity. Thus, each EPR document was printed out in order to be signed by the doctor and the chief consultant, and then included into the folder containing all the documents concerning the specific patient.

A typical EPR-mediated interaction between a patient and a nurse developed as follows: the patients presented themselves at the reception, told their names so that the nurse could check (on a computer or on a print-out) the appointment, and either delivered their latest test results to the nurse, or the nurse retrieved them from the computer if they were already there. Then the EPR provided the basis for an important decision concerning the color of the slip of paper that the patients received together with their queue numbers. The EPR showed whether the results of the tests differed from the previous treatment: if no, the patients were given a green slip, if yes, a yellow one. The color indicated the kind of treatment the patient was to obtain.

Bruni's peculiar situation as an observer of a software is evident here: although, sitting in the reception room, he witnessed many interactions between the patients and the nurses, between the relatives accompanying patients and the nurses and the patients, he could only glimpse an appearance of the EPR now and then, although the software, in a sense, was always there. Once he realized its importance, however, he also started visiting other premises where the EPR could show up: the laboratory, the hospitalization ward, the therapy preparation room, and the infusion zone.

The significance of this presence is well illustrated in another vignette, showing the beginning of the day at a Day Hospital. The head nurse opened the door, switched on the lights, and then turned the computer on, waking up the EPR. The nurse then engaged in what could be seen as more proper

nursing activities (preparing drips, beginning therapies for patients who did not require a check by the doctor, etc.) An hour later another nurse arrived and entered in contact with the EPR: she checked that all the clinical records for the patients expected to arrive during the day were ready; she printed out the list of appointments and piled the patients' clinical records in the order indicated by the computer. She also printed out the EPR's records for the new patients to initiate new folders for them.

The EPR was also dependent on its host, that is, the computer and its operating system. A doctor who wanted to scan the test results made the operating system jam. A computer technician was asked to help, and he was able to start the system again, but he made it clear that if he started tinkering with the scanner, the nurse would not be able to use the EPR. The EPR won, and the scanner program had to wait till later on.

There were also complaints about the EPR's behavior. One nurse told the other to be careful because the computer had printed out a wrong therapy. The nurse explained to Attila Bruni that

> the program is a bit rigid in its structure … When the cycle requires a particular order, a particular drug, and then for some reason it has to be reduced … you have to be very careful because he [the software] always sets the same therapy at 100%. So that he [the doctor] often says 'Reduce the dose', but he doesn't reduce it, because you have to go into the first … first memory. (Bruni, 2005, p. 371)

The 'he' of the doctor and of the EPR were all of a sudden on the same level, cooperating (or, as the case may be, not cooperating). The EPR actually had some stable character defects; it consistently made mistakes concerning one type of therapy. The computer technicians had been told that, but did not do anything. As it happened, the doctors made also mistakes concerning the same type of therapy, partly because they relied on computers to run it properly, and did not realize that the changes in the original inscriptions had to be made to secure this. So it was the nurses (and the technicians, when in the mood) who had to correct the mistakes of software – and of the doctors.

One could ask, in what sense was Attila Bruni 'shadowing' the software? He was just sitting in one or another room, as every direct observer would, and watched the nurses, the patients, the doctors and the technicians. But a direct observer could have been inclined to notice that nurses 'do something on the computer'; Bruni, for one month, focused attention precisely on the EPR software. He watched the EPR appearances and disappearances, followed its actions and its interactions.

As most people now have become 'information workers', the ways of observing this work must be improved upon. While 'life in the cyberspace' and 'virtual reality' attract much attention (for a well-balanced review, see Ryan,

2001), more attention should be placed on the connections between the activities inside and outside the cyberspace (see Kociatkiewicz, 2004). Researchers' interest in work in finance directed attention to the central role of computer screens (Knorr Cetina and Bruegger, 2002) and mobile telephones in their work. All this can be, and is studied, by shadowing people and observing work settings; why not add shadowing objects to complete the picture, especially as organizing consists of actions of people and objects, many of which are in the virtual world.

SHADOWING PEOPLE AND SCREENS

I have studied news production in three news agencies: a national Swedish agency, TT; an Italian international agency, ANSA; and a global agency, Thompson Reuters (Czarniawska, 2012). My first study was that of the Swedish agency, and my plan was to shadow people in key production roles. I was denied this opportunity, and had to rely on a diary-interview technique, in which the journalists told me what they did the day before, or, if the interview was conducted at the end of their shift, what they had done that day (not bad at all as a secondary technique). Somewhat to my surprise, and in contrast to my previous fieldwork in Italy (Czarniawska, 2002), I had no problem achieving permission to shadow journalists at three ANSA units.

At the outset I was not quite sure how to shadow people who work primarily at, and through, their computers. In the past, I was mostly shadowing managers who used the computers sporadically. Even if Barley and Kunda (2001) had appealed to researchers to look for new ways of doing fieldwork, ways of studying people working with computers were not yet well developed a decade ago, apart from IT studies, which usually have a different purpose.

Much to my relief, it was my hosts at ANSA who solved my problems. First of all, they gave me a place at a computer with two screens, like the ones they were using. And although I could not do anything myself, I could see 'the desk' (their work platform) and 'the wire' (the products), and follow the news through the production process. When a discussion started in the newsroom concerning any specific piece of news, I could trace it in the database and learn what they were talking about.

Not even my shadowing seemed to be a problem. In studying people who work with computers, shadowing consists mostly of watching over their shoulders as they work and receiving explanations. It turned out that the journalists in the newsroom were used to that activity. It was common for colleagues – invited or uninvited – to watch over each other's shoulders as they worked. It was also common for the person doing the work to explain what was being done and to invite comments and questions. Thus the journalists saw nothing peculiar about my wanting to observe their work at the computer. I also greatly

appreciated the possibility of following both virtual and physical interactions, much as Kociatkiewicz (2004) did in his work.

The main difficulty was keeping up with the speed at which things were happening. (As a matter of fact, speed became one of my main analytical categories later on; Czarniawska, 2014a.) Here are fragments of conversations that I recorded during breaks in an interview:

> The telephone rings: 'Yes, … A? … Ah yes, I do know. C is working on it and sent me a message saying that she's preparing a piece. Talk to her for a while … Yes, talk to her … talk to her for a second at any rate. OK? Ciao'.
> 'As you're here, you can tell me if the piece by X should be send to somebody else or straight to the wire?'
> 'I'd put it on the Internet, and send it to Newsroom Y'.
> 'Gotcha'.
> 'Put it … put it on the net, give it give it'.

> 'Hello, M? Hi beautiful.[4] Certainly, certainly, whenever you want … even in ten minutes … Listen M, how many non-journalists work in ANSA? …Then I got it right'. (lifts another receiver) 'S! Is the boss there?' … (returns to the previous call) 'Ah, M, there's the executive committee. When will it end? …Ah, at three o'clock? But we start now, no? At quarter to three … only recently?' (takes the other receiver) 'Ciao S. Thanks'. 'M, we talk later then. Learn how it looks. See when it ends … hem … cock your ears no? Eh, because now I'm … I'm running the risk of distraction because actually I'm in the middle of a long conversation … OK. Ciao'.

My fieldwork at Reuters was similar to my work at ANSA: attending meetings, shadowing people at work, shadowing the news on the screen, and completing it with interviews. The journalists in all places were generous with their time (especially considering speed pressure) and seemed sympathetic to my purposes (though, as often happens, their interest in the results was limited).

SHADOWING COMPARED TO OTHER FIELD METHODS

At the end of this chapter, I wish to emphasize that it is practically impossible to separate one technique of fieldwork from another – either in the field or at the desk. This is especially true of shadowing that uses a variety of field techniques; after all, a conversation is also an interview, and during shadowing one observes continuously – no matter if walking or if sitting. Textbooks of methods often introduce such differentiation for pedagogical purposes; in practice, however, the differences are relatively vague. An observer may be invited to accompany someone on a trip, and a shadow may be asked to remain in the office. All types of direct observation involve some kind of 'participation'. Each method is good if it matches the study purpose. Thus, contrasting shadowing with other methods is only meant to help the researcher choose – and the choice is not merely a technical matter, but an ethical one as well.

Seonaidh McDonald and Barbara Simpson (2014) have done a detailed comparison of the material collected from the same site using interviews, direct observation, participant observation and shadowing.

In an interview, the team leader described his personal ideas of how the meetings of his team should look like. He did not depict any actual meeting, but rather an ideal meeting, emphasizing how, in his opinion, it differed from the ideas typical for the others in his company. McDonald and Simpson noticed that the interview answers seemed to be rehearsed, and were without doubt selected according to what the interviewee believed was of interest to the interviewer. The selection was also obviously meant to present him in a positive light.

> … 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: first, 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, p. 222); and second, the (often unremarked) distance they place between the researcher and the management practices they discuss. (McDonald and Simpson, 2014, p. 9)

McDonald and Simpson believe Mintzberg a bit too much: as Rosalie Wax (1971/1985) convincingly showed, oftentimes 'the natives' are much better observers (and translators!) than doctoral students. Yet the main point is valid: It is the interviewee who chooses the frame of her or his utterance – which may be of significance as such, but not a direct way of grasping the nature of practices under study. To put it succinctly: traditional interviews answer the question 'What do people say when they are interviewed?' – which is important as it reveals the dominant discourse, but nothing else.

Direct observation (video-recording included, see e.g. Jönsson, 2005) permits the researcher to see for example a meeting first-hand, but does not give insight about what it means for the actors involved. Also, pointed out McDonald and Simpson, the framing is once again made by one person – in this case, the observer.

> 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. (McDonald and Simpson, 2014, p. 9)

While shadowing, the observers can check the correctness of their framing by asking direct questions, and even if they do not agree with the answers, they are obliged to report the discrepancy.

Compared to participant observation, shadowing is much easier, because it does not require simultaneous action and observation or skills that the researcher may not have. It also helps in maintaining a distance and a sense of estrangement, whereas participant observers may be tempted to 'go native'. Shadowing and estrangement do not require that researchers disavow their feelings or negate them; on the contrary, as emphasized by Marianella Sclavi (2007), emotions become a critical research instrument. Researchers must act as responsible adults who offer respect and sympathy.

Perhaps the most obvious difference between participant observation and shadowing, pointed out McDonald and Simpson, is that 'the shadow' does not participate in organizing (she or he may help to carry something or make coffee). Instead, the researcher concentrates on the activities and views of one person at a time (though observing his or her surroundings), but maintaining the exotopic perspective all the time.

In my opinion, the main strength of shadowing is its *mobility*. This kind of mobility is not simply the fact of moving from place to place – even stationary observers need to move from one chair to another sometime. The advantage of shadowing is that the moves are double – the world and its events become available to the eyes and ears of both the person that is being shadowed and the shadow. The observation is four-sided: The observer and the observed observe one another, and they both observe what is happening around them – as with a four-lens reflex camera (Czarniawska, 2018).

As for the disadvantages, it must be pointed out that shadowing involves many practical problems. Access is not guaranteed once and for all. In every new situation, someone may protest the presence of the researcher and people being shadowed can suddenly change their minds. This can happen with other types of observations, but less frequently, because people who do not want to be seen can hide from the eyes of a stationary observer.

Another difficulty is the need to merge into the background. Relations between the shadow and the person shadowed may differ, but a shadow must not attract attention. This requirement is somewhat in contrast to the requirement of maintaining the distance, but can be resolved in various manners. Male organization researchers usually 'blend into the background' more easily, because men's dress code is simpler (McDowell, 1998). Women must guess and improvise.

I have already written a great deal about the psychological discomfort caused by these necessities – and the helpful role it plays in gaining insights (Czarniawska, 2007, 2014c). Of course, giving up one's professional and personal identity and the role-playing required are sometimes costly, but it is

a price worth paying. In the end, one can learn more, not only about what do the others do, but also about oneself.

The last but not the least important thing to consider in connection with shadowing is the impact on the person shadowed. Truman Capote ended his shadowing by smoking hash with Mary Sanchez at her workplace (definitely not recommended!), after which she was fired. The best I achieved was that my shadowing helped to maintain the reputation of a (highly competent) person whose position was threatened by a reform. But, if Latour (2005) is right, the results of our study should have made what we studied familiar not to those who we studied, but to everybody else.

NOTES

1. More on various kinds of observation in Monika Kostera's chapter in this book.
2. A detailed description of the various uses of shadowing can be found in McDonald (2005).
3. My shadowing of the Accounting Director at the municipality of Warsaw, who was also similar to me in both age and education, did not proceed so smoothly: perhaps we were too similar to one another (Czarniawska, 2007).
4. M was a man, as was the speaker. This was not a homosexual allusion, but the usual way of addressing people one likes in Italian.

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