Cultural skills for leading sustainable change

This is #1 in a series of briefing decks designed for those who want to develop cultural skills for leading sustainable change.

This briefing deck—Ethnography: Observing Culture in Action—introduces the participant-observation method as one way to learn more about the culture of your organization.
Why use ethnography?
You can learn a lot by being there

“This dangerous viper, known for its peculiar habit of tenaciously hanging from one’s nose, is vividly colored ... ”
—Oo! Murray! Look! Here’s a picture of it!

- Gary Larsen, FarSide Gallery
Ethnography is a research method to understand how people see their world.

Ethnography goes beyond “being there.”

It’s a way of paying attention that tries to discover the cultural assumptions, unspoken rules, and mental frames that people use to make sense of the world they’re in.

“Ethnography is a research method whose goal is to understand the world as perceived by those within that world, to understand what activities mean to the people who do them.”

— Simon Roberts
Ethnography is good for some things, not for others

It’s a **tradeoff**.
Ethnography is **great** when you need **exploration**, **diagnosis** or **depth**.

It’s **not the right method** when you need **consistent breadth** or **statistical rigor**.

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<th>Ethnography is most useful when you ...</th>
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<td>Don’t know what you don’t know. It can help you figure out what’s out there, and the right questions to ask.</td>
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<td>Need a fresh perspective. If diagnosis or actions have stalled, you can find new points of traction.</td>
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<td>Need to implement change. You can implement change that sticks if you figure out what’s already happening and how you can build on it.</td>
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<td>Need a baseline. A baseline understanding is essential to any implementation effort.</td>
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Tools for observing culture in action

A sample set of tools that can be applied in learning about an organization’s culture
1 Shadowing: Ask people to tell the story “as they go”

You can learn a lot by asking someone to talk out loud to you as they do their work.

It’s a way to get people to notice things they wouldn’t otherwise think to tell you about.

A child welfare agency wanted to figure out how to still spend enough time in the field to help caseworkers get their paperwork done and with clients. They identified a few people who were quite successful at it. Instead of interviewing them “after” the fact, we followed them around on the subway, in apartment building lobbies, and in their own offices—and asked them to talk to us about what they were doing, why and how. We organized a regional retreat to share the strategies.
Follow the creation of a document or other artifact.

You might “staple yourself” to a piece of paper and follow it from person to person, observing and interviewing as you go.

The artifact focuses people’s attention and gives you access to the stream of work.

Software engineers do this to understand how people use the forms and reports they are automating.

At a major aerospace company, we finally “got” Six Sigma when we walked the assembly line and saw an airplane taking shape—with Six Sigma interventions and efficiencies pointed out to us at every step along the way—from sheet metal to the finished product.
3 Listening post—put yourself where things happen

Time, space, place. Set yourself up in a place where “things happen.”

Less tangible “places.” Don’t overlook less tangible places such as phone conversations.

The private part of public. Public settings are more straightforward, but still have private aspects, areas, interactions.

At a professional conference, hang out at a crossroads where most of the participants will have to pass by.

When trying to learn more about an organization’s culture:

- Eat lunch and breakfast in the employee cafeteria
- Negotiate an invitation to key meetings where people work across key “boundaries.”
Flip the frame to focus “before” and “after” the event

Flip the frame to treat a meeting or other event as the “background,” and everything around it as the “foreground.”

Take advantage of the time before and after the scheduled meeting to:

► **Talk with people** you need to know more about
► Learn how parts of the business work
► Visit areas you haven’t seen before
► Explore potential new projects or areas of work
5 Nothing never happens

As anthropologists say, “nothing never happens.”

Pretty much everything is data.

In the waiting room of a physician’s office, for example:

- What’s done to put people at ease, or not?
- How do people find out when things are running late?
- How does physical space affect privacy, or not?
Take advantage of something you have to do anyway, and use it to learn more about the organization and how it works.

Not only does this serve double duty, but it gives you access to areas that matter to the organization.

For example, data-rich tasks like these can serve double duty:

- Hiring interviews or exit interviews
- Data collection for a process improvement project
- Needs assessment for a new computer system
- Filling out and/or analyzing an employee engagement survey
Tips and techniques for “field” observation
Gaining access, negotiating entry

**Forming relationships.** Social interaction is a big part of fieldwork. It affects the kind of access you get—and what you can learn while there.

**Taking up a role.** Think explicitly about the role you will take up. How will you and others explain your presence? Will you “participate”? How?

**Slowing down to watch.** Think explicitly about finding ways to spend time “at the scene,” to have reason to be there. Think about how to take notes in the middle of everything that’s going on.

**Reciprocity.** It’s never too early to think about what you will give back to the people you observe.
**Taking good notes**

**How much.** Take more notes than you think you need, since you never know what might turn out to be important.

“Two columns.” Best to make two columns, one for straightforward description and one for your thoughts, feelings or open questions about what you’re describing.

**Get the quotes.** Nothing tells the story like quotes.

**When.** “During” is the best way to get details and texture. If you can’t take notes during an interaction, be sure to write things down before they fade.
Treat the “observer effect” as an opportunity for insight

**Observer effect.** As an observer, you will influence the event. To some extent, you can use this as an opportunity for insight about interaction and relationships (vs. a “contamination”).

**Even so.** You may need to manage people’s impulse to control your experience.

— Gary Larsen, FarSide Gallery
Getting many points of view

No “one” version. There’s no complete or correct version of “what’s happening.” Seek out multiple perspectives.

Seek a mix of sources. Imagine if all your information came from a disgruntled employee, a union president or an overstressed manager or leader.
Fieldwork is hard work. It’s messier and more exhausting than many other kinds of research, since it involves so much social interaction.

When you get tired, take a break.
Takeaways

Ethnography is a research method to understand how people see the world, from their perspective.

Ethnography is particularly useful when you need to explore, diagnose or go into depth.

**Mini Tools for Observing Culture in Action**

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**Tips for Field Observation**

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