

# Development In Business Simulation & Experiential Exercises, Volume 18, 1991

## THE ETHNOGRAPHIC CASE STUDY: AN EXPERIENTIAL APPROACH TO TEACHING RETAIL MANAGEMENT

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### ABSTRACT

This paper describes an ethnographic case study to be used in a retail management course. This technique provides an experiential approach to solving company problems and understanding corporate culture. The ethnographic case enables students to link theory with practice, use own knowledge to develop an understanding of people, and learn about an individual's job and work environment. Specifically, each student explored a topic relevant to the retail industry. This topic was explored through interviews and field observations of one individual at that person's work site. The final written analysis is an interpretation of what was said and observed with references made to the cultural domain and modes of behavior.

### INTRODUCTION

The goal of most classroom-related experiential exercises is to place the student closer to real world phenomena so that the meaning of the experience becomes more internalized by the student. Once the student is in the professional arena, this internalization lends itself to greater recall for use in problem solving. The ethnographic case study is one method of providing an experiential approach to solving company problems or understand jug company corporate culture.

#### What is the Ethnographic Case Study?

As university professors, we are continually striving to provide our students with a realistic exposure to what the professional world is like. In addition, we seek to develop our students' level of critical inquiry so that they become dynamic, visionary individuals in their chosen professions. Ethnographic research aids in the accomplishment of both goals. Ethnographic research is a qualitative methodology which requires the researcher to interpret the real world from the perspective of the informers in the investigation (Dobbert, 1982). The basic premise in ethnographic studies is that concepts, behaviors, and theories develop inductively, from the specific to the general (Fetterman, 1989).

The central core of ethnography is a concern with the meaning of actions and events to the people the researcher is trying to understand; it always implies an understanding of culture. All of us learn about culture by observing other people, listening to them, and then making inferences. In developing case studies using the ethnographic research approach, inferences are made from three sources: 1) from what people say; 2) from the way people act; and 3) from the artifacts people use (Spradley, 1979).

Ethnographic research methods have long been used in anthropology when studying small non-Western cultures. However, the value of ethnography in understanding our own society and organizations has been overlooked. In academe, we have taken a dim view of qualitative research in favor of quantitative studies. One criticism of the academics' approach to research is that we do a poor job of synchronizing the needs of organizations with our own

research agendas. An ethnographer can start with company--expressed needs, then develop a research agenda to relate these topics to social/behavioral science concerns. Urgent research needs are more likely identified by the company (informant) than by the researcher. A case in point is related by Spradley (1979).

"...I began with an interest in the social structure of an alcoholism treatment center. My informants, long-time drunks who were spending life sentences on the installment plan in the Seattle city jail, suggest more urgent research possibilities. 'Why don't you study what goes on in that jail?' they would ask. And so I shifted my goals to studying the culture of the jail system. My theoretical and scholarly interests could have been served by either project; the needs of tramps were best served by studying the oppression in the jail (p. 15)."

In applying the ethnographic methodology to an experiential classroom exercise, the student researchers work together with informants to produce a description of some organizational phenomenon, problem, or organizational culture in general. Such topics as leadership style, motivation techniques, corporate culture would be appropriate for students to pursue through the ethnographic method. This project allows the student researchers to hear and observe the informant on the informant's turf and in the informant's language... a very realistic preview of some segment of the profession. The informants actually become teachers for the researchers.

#### Benefits and Skills Developed by the Student

All of the techniques employed in the ethnographic case research process help to arm the student with real world behavior patterns, which are consistent in language and content of a professional setting. The specific skills developed during the project include:

1. Interview skills - Students learn how to frame questions to acquire specific information. They may learn to go from specific to more general questions or vice versa depending on the research goals. In addition, students learn how to ask questions in an understandable and interpretable manner. Since answers to questions are the data source for analysis, students will learn how to frame questions in the language of the informant. What the students learn from being the interviewer will help them become better interviewees when they pursue the job market.
2. Communication skills - While interviewing is communication, the students learn something more about communication on the job in a professional setting. Through having to clarify and reclarify interview questions, students will understand how to apply those techniques into their management practices. Learning the language of the informant makes the socialization process for the student when hired after graduation much easier for both

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employer and employee.

3. **Observational skills** - Since the student will be observing the informant in the informant own environment, the student learns to be aware of people from that perspective rather than a peripheral perspective. A sensitivity to the workplace environment is gained from the ethnographic research process. During the process, observation skills must be so keenly focused that researchers learn to view the environment with renewed attention to detail, a skill which greatly enhances job performance in the organizational setting--for example, when used in an organizational behavior context, students could identify such issues as problems in the mixed- sex workplace (Mills, 1986).
4. **Ability to synthesize information** - Because the student must take interview information and integrate it with observational data in order to relate it to theoretical concepts, the student learns the value of the process of synthesizing. This is one of the most difficult tasks for the students and requires guidance and suggestions from the university professor. However, once synthesis is achieved, the student has a much keener ability to problem-solve.
5. **Writing skills** - Since the whole research process culminates in a written case study of the organization and problem, students must learn to put their thoughts into writing. The ethnographic research process, more than any other, requires the researcher to begin writing early since recall of specific statements and descriptions is necessary. This project also gives the student experience in a completely different writing style, that of first person - so completely different from traditional technical writing style of third person. The first-person style is one that will translate easily to the job context.

### METHODOLOGY

The learning objectives of the ethnographic case are 1) to link theory with practice, 2) to use own knowledge and research to develop understanding of people, and 3) to learn about an individual's job and work environment. The students participating in this project were undergraduate and graduate merchandising management majors at two major midwest universities. The students were encouraged to explore topics relevant to the retail industry. The research assignment was developed to support this qualitative or naturalistic type of research. To prepare students for this project, the steps in planning an ethnographic case study were explained. They are as follows:

#### Step 1: Select General Topic

The broad topic or ethnographic focus that will be explored through interview and field studies could emerge from courses students have taken, personal interest, or their own job experiences. For example, exploring what makes a store manager effective within a retail organization was an ethnographic focus for study selected by several students.

#### Step 2: Select Site and Informant

The ethnographic case study will center around an individual and work site. The informant and site that will be selected for field observations and interviews should be relevant to

the student's interests. They will become the student's sources of information. When contacting potential informants, an explanation of the project should be given. The time schedule and procedures should be negotiated with the informant. A consent form indicating the informant's willingness to participate in the project should be signed. It is very important that students do not make informants of employers, friends, or acquaintances. Rarely can an inexperienced researcher be successful with the process under those circumstances.

#### Step 3: Data Collection through Interviews

Three, one to one-and-one-half-hour interviews should be conducted with the informant. The first interview should consist of a general discussion. Broad, non-judgmental open-ended questions should be asked. For example, "Describe a typical day in your retail store" or "I am interested in your occupation. I would like to talk to you about what store managers do" would provide a base for an overview of the informant's position. Following the first interview notes should be reviewed to see what needs to be expanded upon and included in the next interview. The second interview needs to be more focused. The questions, based on the initial interview, should clarify responses from the first interview. Examples relative to some of the information given should be obtained. At this point, the student should begin to analyze responses. The third interview is used for final clarification of prior responses. "You said this; is this what you meant?" is an example used for clarification. Any final questions asked during this interview should be very focused. To conclude the interview sessions, the student should discuss theories and interpretations with respondent.

#### Step 4: Data Collection through Field Observation

A minimum of three field observations in the informant's work environment should be arranged. The observations should be completed before the third interview. How the informant accomplished his job and interactions with people should be observed. All sights, sounds, and student thoughts about what is being observed should be recorded. The observations should be used to form future questions to be asked during the interview sessions. The student should begin making a connection between the field observations and interview data. The first field observation should be a "grand tour" observation. This concept emerges from common experiences of having someone conduct a tour of a home, place of business, or school (Spradley, ~979). As the "grand tour" is taking place, the student should record every aspect of the work site, informant, and activities going on. The remaining field observations should focus on investigating smaller aspects of the first experience.

#### Step 5: Analysis and Writing

The student should weave together her/his analysis of the informant and her/his own point of view. The analysis will interpret what was said and what was observed. A profile of the work site and informant should be included. Major categories should emerge from analyzing the data. The written material should be based around the major categories. An introduction and conclusion to bring these categories into a story should be included. Descriptive statements elicited from the informant should make reference to the cultural domain and modes of behavior.

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As teachers, we want our students to learn to be critical thinkers. This concern for critical thinking and critical literacy leads to the question of how to incorporate this type of activity into course content. One such way is through an ethnographic research case study project. Ethnographic research means learning from people rather than studying people (Spradley, 1979). It is an activity that attempts to understand another way of life, another culture, whether it be corporate culture or culture of an ethnic group. An ethnographer seeks out ordinary people with ordinary knowledge and builds on their common experience (Spradley, 1979). Such is the purpose of the ethnographic case study. The ethnographic case study provides a deep insight into an individual and his/her work environment. Through a series of interviews and field observations, the student acquires knowledge about the important parts of a "corporate culture." For example, some students participating in this project were able to draw their own conclusions on what management styles and techniques were most effective in the workplace. This type of experiential learning will help students explore careers within any work environment and understand the role an individual plays in that culture.

The ethnographic study, to some extent, may be useful to the informants. For example, if a department manager's interactions with sales personnel were being observed, the results could lead to improved dialogue between sales personnel and department managers. Another advantage is that the description of an informant culture in an ethnographic case study may provide the informant with new insight and understanding. Also, the informants are given an opportunity to assist a student in learning about a potential career.

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