20 Fielding ethnographic teams: strategy, implementation and evaluation

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Despite the heroic view of ethnography as the solitary pursuit of the maverick scholar, the enterprise has long been conducted as an extreme team sport. The holism espoused in data collection and analysis is often most effectively achieved by a group, rather than an individual. Arguably, even individual fieldwork and interpretation are best served by a multiphrenic, extended self in constant conversation with that internal voice comprising the portfolio of literatures that guides the hermeneutic tacking that is the ethnographic quest. Remember, *pace* Whitman, we contain multitudes, and this introjection of mentors and nemeses disposes us by nature to be team players. How much more interesting, productive and challenging to shift from psychodrama to actual teamwork in contemplation of consumer behavior.

I have written this chapter as an essay rather than as a more conventional academic tract, to reflect my personal experience of ethnographic teamwork and to offer some avuncular advice to readers capable on their own of sourcing material on ethnographic methods and perspectives. While I have appended a few references to this chapter, my intent in these few pages is practical rather than philosophical.

I have worked in ethnographic teams for over three decades across a range of marketplaces, industries, categories and households. I have developed some strong preferences and biases in the conduct of this work, many of which I share in the balance of this text. Principal among these, beyond the achievement of substantive understanding and the sheer enjoyment of the lived experience of fieldwork, is that the goal of any ethnographic undertaking is the acquisition and honing of portable skills. Insofar as ethnographic success is dependent upon the efficacy of the researcher as instrument, the cultivation and refinement of intraceptive intuition as well as the expansion and deepening of the clinical repertoire are opportunities and obligations resident in any field setting. Team-mates are a powerful catalyst for such professional and personal growth. Thus every team outing is a peripatetic seminar, whatever else it may accomplish.

In the following pages, I describe ways of selecting, building and maintaining an ethnographic team. I also discuss the intricacies of managing group fieldwork. I develop a template for the interstitial strategy sessions that inform the ongoing ethnography. I propose a framework for orchestrating interpretation as it emerges over the course of a project. I offer suggestions for crafting the written accounts that capture the team's understanding of focal phenomena. Finally, I consider options for using the current team project as a platform for future endeavors. For convenience's sake, I write from the perspective of the Principal Investigator, the coach whose task it is to lead by example, and who is an integral member of the team in both the field and the library.

Selecting, building and maintaining a team

Clearly the success of any team ethnography depends upon the capabilities that group members both bring with them and develop during the course of a project. On successful teams, these capabilities quickly become synergistic, inspiring group members to ever-greater technical precision and ever more nuanced interpretation. For example, a team-mate using an ethnic lens and an interest in social class in conversation with another team-mate using a sportsman's lens and an interest in racial 'stacking' in professional sports produce a more dimensional account of sales floor behavior in a postmodern sports bar than either researcher alone might accomplish. Properly motivated, each team member becomes a coach in his or her own right, steadily raising the ante for contribution as the project progresses. A healthy competition informs any vital collaboration.

I recruit team members on the basis of several criteria. While most of these criteria are functional in nature, there are several that might be more appropriately described as expressive in character. I begin this recruitment discussion with a consideration of the latter, to emphasize the importance of what might otherwise seem to be fairly trivial issues.

As I believe social scientific research to be at base a self-indulgent hedonic undertaking, the lived experience of the *doing* of research is important to me. I prefer to work with people whose company in the field I enjoy for more than the mere clinical expertise it provides, and whose engagement in hermeneutic discourse I enjoy more for the intellectual playfulness it liberates in me than in the mere idiosyncratically brilliant insight it brings to bear upon a problem. Thus a sense of humour, an appreciation of the ambiguities of social life, a willingness to achieve (in Burke's phrase) perspectives by incongruity, a work hard/play hard ethic, a tolerance for quirkiness and a deep commitment to a common goal I find essential in a congenial team-mate. Team ethnography is as much about family dynamics as it is about corporate dynamics. Researchers are not just a work group, they are a play group as well. Insight often arises from the ability to play well with others. The playful aspect of collaboration is one of the joys and strengths of ethnographic writing.

Clinically I select team members on several dimensions. Chief among these is problem-focused expertise. I find it helpful for at least one team member to have research experience grounded in the nominal focal phenomenon. This helps the team come up to speed more quickly in the literature search and evaluation, and facilitates access to informants earlier in the game. This particular team member may actually be a 'nonprofessional' key informant discovered in the prospecting phase of the inquiry, whose 'research', however informal or nonsystematic, may be so thoroughgoing as to provide an anchor in the beginning, and a sounding board throughout the project. As we reposition the role of informant to one of consultant, such cross-sectional collaboration will become increasingly common. Ethnographers have always employed natives as researchers in their own right, whether in the collection of aboriginal oral literary texts or of photo/video documentation of contemporary New Age rituals. I have been asked by citizens of Burning Man's Black Rock City to produce my anthropological union card (my AAA membership credential) before they would consent to an interview, in which subsequently they would hold forth on topics and literatures as competently as an Oxford don, enriching my understanding of the phenomenon and its hermeneutic context, before referring me on to other prospective occasions of enlightenment.

Methodological complementarity is another important recruitment consideration. While most ethnographers imagine themselves to be generalists, many likely rely on those 'go-to' techniques with which they feel most comfortable. Keen observers, game participants, flexible moderators, subtle and tenacious interviewers, precise surveyors, sensitive projective analysts, accomplished photographers and videographers, and vigilant project managers should all be represented on the team, if not instantiated in individuals. Techniques more orthogonal to traditional ethnography – experiment, LISREL modeling, CAT scanning and the like – are more commonly being brought into the tent. Others will surely follow. Complementary skills abet the partnering of team-mates to greater effectiveness.

Disciplinary diversity is a fellow traveler of methodological complementarity. An interdisciplinary perspective of the focal phenomenon leads to a deeper interpretation and a proliferation of managerial implications. Anthropologists, sociologists, political scientists, educational specialists, psychologists, ergonomicists, narrative analysts, historians, religious studies scholars and a host of other specialized disciplines have long incorporated ethnography into their folds. Other disciplines, which have either not yet or only recently embraced ethnographic method are usefully involved in the interpretation and analysis phase of team projects. A devotion to holism, however, can devolve quickly from synergy to faction fighting, if the negotiation of interpretations becomes a zero sum game. Confrontation is an expected byproduct of high-energy analysis, and must be managed to help integration triumph over schism, as Victor Turner might imagine it. Keeping a team agenda foregrounded, emphasizing the prospect of multiple papers and charging all researchers with stewardship of the stream are ways of encouraging cohesion.

Demographic heterogeneity is a final criterion I invoke during recruitment. I have found it most helpful to assemble teams whose members vary by age, gender and culture (national, ethnic, regional, etc.). This variance encourages greater diversity in sampling in the field, and produces a wider array of insight in the analysis and interpretation phases of a project. Properly motivated, diverse team-mates inquire into one another's perspectives, intuitions, assertions and assumptions, treating their collaboration much like a field site and mirroring techniques employed in the current project.

Team building requires the Principal Investigator to pitch the project to his or her prospects in a way that highlights the opportunities for both distinctive and holistic contributions, and holds out the promise of an almost acephalous governance structure of project management. Each team-mate is apprised of everyone's indispensability, collegial equality and reciprocal obligation; the PI assumes the role of player–coach. Unlike the legendary herding of cats and confederacy of dunces, the team is a committee everyone has enthusiastically joined, and is ostensibly amenable to the wise counsel and unstinting example of the PI.

Obligations, expectations, timetables and deliverables are negotiated at the outset, and revisited throughout the project, given the emergent nature of ethnographic research. I try to assume the role of focus group moderator throughout the project, building consensus and commitment by constantly polling and clarifying team-mates' positions, and catalyzing forward movement by continually exploring the implications of current findings for future fieldwork. Helping each group member achieve greater 'instrumentality' (in the sense of intraceptive intuition) throughout the project, and thus potentiating team-mates' growth as well, is the key to group maintenance. Like creating a sustained nuclear chain reaction, the coach encourages the released energy of each individual to energize the group. Project beginnings and endings can sometimes be arbitrary and mechanical,

sometimes reasoned and organic. I imagine such demarcations to be clinal zones in the polyvocal conversation researchers conduct with one another, but when tenure clocks and client deadlines are winding down, the team has got to make the trains run on time.

Managing group fieldwork

Fielding an ethnographic team is both an antecedent to and consequence of recruitment. Before I begin a group project, I request that each of my prospective team-mates visits the field site on a solo reconnaissance exercise. A preliminary walk-through (or series of initial visits) contextualizes the problem for group members and gives each an initial, tangible sense of the contribution he or she stands to make, and of the fun likely to be had. Once the team is recruited and mutually introduced, I encourage another preliminary solo walk-through, to allow for projective fantasies of collaboration and grist for the marketing imagination that will be engaged at the next team meeting.

At the initial group assembly, I facilitate some open-ended discussion of first impressions of the context, the problem, preliminary minimal parameters, potential sources of theorizing and prospective managerial implications. This discussion is all by way of generating enthusiasm and camaraderie, rather than systematic, comprehensive insight. Teammates introduce themselves, and speak briefly of their backgrounds and motivations for involvement in the project. Then I turn directly to a logistical overview of the project, a template I expect the group to modify as the project unfolds.

I project a schedule of the enterprise that identifies key dates for obtaining IRB (Institutional Review Board) clearance, arranging permissions to inhabit proprietary sites, completion of sampling objectives, data archiving and sharing, progress reports, strategy sessions, draft writing, member checking and final document and/or presentation preparation, again allowing for the emergent character of ethnographic research. I encourage the team to inhabit the fieldsite with an immersive blanketing Geertz has described as 'deep hanging out'. I set up a timetable to achieve pervasive coverage of the phenomenon to the extent possible, with team-mates committing to particular times and dates of participation. Schedules are set so that everyone logs field time as individuals and as members of dyads and triads (and on rare occasions, population density permitting, even larger groups). Awareness of this schedule makes it possible for individuals to undertake additional ad hoc fieldwork without impacting the habitat.

I work rotations with everyone on the team, so I am able to assess core competencies and deficiencies, monitor potential conflicts and suggest compatible group pairings. I request each team member to work a rotation with every other team member, to help insure complementarity, redundancy and state-dependent learning. By project's end, everyone has worked a site with everyone else, and reaped the benefit of procedural and clinical instruction from everyone as a result. Polishing diamonds with diamond dust, as my own mentor advocated, the team teaches itself.

Interspersed with scheduled fieldwork days are days devoted to strategy sessions. As ethnography involves constant tacking between field and library, and constant comparison such that data collection and analysis are inextricably intertwined, it is imperative that team-mates discuss findings on a timely and regular basis. This requires preparation of epic proportions, since team-mates must be familiar not only with their own fieldnotes, but with those of everyone else as well. Early strategy meetings involve data sharing and the workshopping of methods and techniques, as well as habituation of team-mates to one another's work styles. In initial meetings, I both elicit and model tentative interpretations of current findings, laying down the template for the negotiation of understanding that will ensue in later weeks. Early sessions contribute primarily to team building and maintenance, so it is important to engage all team members in discussions, as tentative as contributions may be.

As the project evolves, strategy sessions deepen as well as broaden in their scope. A division of labor is negotiated that involves player-controlled environmental scanning, information brokerage and selective sharing of external readings. That is, each group member identifies a literature (both scholarly and managerial) of prospective theorizing, digests it for relevance and brings a summary to the attention of the group. Simultaneously, each group member searches for compelling linkage to current and traditional disciplinary concerns. Because ethnography is a grounded theory enterprise, researchers can only sift a literature for potential relevance, bracketing their insight as they return each time to the field. By apprising team-mates of relevant insights from various disciplines throughout the project, everyone's cognitive peripheral vision (in Jerry Zaltman's delightful phrasing) is enhanced. Thus a retail spectacle focus may morph from an emphasis on cultural construction and ludic agency into a concern with kinship dynamics, and thence into a treatment of heroic feminism, as team-mates blanket American Girl Place (flagship store for the American girl brand) over the course of several editions of the *Journal of Consumer Research*.

Hand in hand with this literature sharing goes a protracted discussion of cumulative findings. I model the proposing of interpretive themes from data, elicit contributions from the group, and work on constructing an exhaustive inventory of themes as the project emerges. The group quickly learns to negotiate interpretations, challenging and supporting views from data collected individually and communally. Early strategy sessions conclude with interpretive summaries of procedural and substantive learning, and a set of action steps to be accomplished prior to the next meeting.

Orchestrating interpretation

Then, as the shampoo label advises, 'Lather, rinse and repeat.' Group members revolve from field to library, with past learning modifying current findings, which in turn guide future inquiry, until the team either achieves saturation and redundancy in its results or encounters the limits of its clinical ability to elicit additional insight. At this point, the current project is tentatively concluded, and becomes a platform from which additional projects may be launched. Pending the discovery of holes in the archive during the final rounds of analysis and interpretation that might require additional data collection, fieldwork is suspended and the team convenes in the library for the winnowing work of interpretation.

Throughout the strategy sessions, I revisit the inventory of emergent themes, soliciting both champions and devil's advocates for each of them, so that every team member is engaged in a constant contestation of our principal findings. This contestation produces penetrating and systematic discussion, which greatly enhances the coding process. I have used Spradley's diagnostic research sequence and Strauss' and Corbin's open/axial/selective process, both in isolation and in hybrid formats, to guide coding, but any coding scheme selected will only be as good as the processed data upon which it is overlaid. That is why the contestation during strategy sessions must be so vigorously encouraged. This hermeneutic cycling of insight within the group sets the stage for the ultimate coding.

Once the team is comfortable that all the major themes have been identified, we begin the process of segregating, aggregating and integrating the themes into the story lines that will eventually become manuscripts. This winnowing process mirrors the fieldwork enterprise, insofar as we work as individuals, dyads, triads and complete group, in part to whole fashion, in the reduction of our findings to manageable and compelling proportions. I have found it useful to work in conference rooms where the team has access to chalkboards and whiteboards, VCRs and computers, easels and post-it notes, and all of its data simultaneously, so that the built environment facilitates group process. When the group has thus tangibilized its understanding by getting its knowledge into the world, it can return to the field with discrete insights and elicit commentary on them by key informants. This member checking may or may not add additional grist for analysis, but it serves both as a reality check of sorts and as an ethical debriefing for participants in the study. Then the serious work of writing is ready to be undertaken.

Writing, representation and voice

Even (or especially) after 30 years of fieldwork, I find the parsing of findings to be the most difficult challenge I face as a consumer researcher. Ethnographers understand the fabric of their focal phenomenon to be of a piece, and chafe at the notion of a jpu (the infinitesimally incremental 'just publishable unit'). As an anthropologist, my inclination has always been monographic. My preference is to write up my analysis as comprehensively as possible, to capture the phenomenon as holistically as I am able, in one fell swoop. This tendency is dysfunctional in a field that values concise journal articles to the exclusion of other formats. I struggle mightily as a writer to produce accounts of my work that amount to a mere 60 pages, which I find unbearably concise.

Imagine collaborating with other like-minded souls on a common project. A team ethnography might easily be expected to yield a document running to several hundred pages. Such a product would be fit to export to contiguous disciplines that value books, but, for junior professors, it is merely a white elephant impeding their progress toward tenure. Cognate articles are the Holy Grail of team ethnography.

Once a project has been running long enough to provide a glimmer of the focal phenomenon's minimal parameters, I ask group members to think about the kinds of outlets that would be amenable to prospective findings. Given the distinctive positionings of journals in our discipline, it is convenient to imagine the kinds of stories that might be told for particular audiences. Compartmentalizing findings by streaming during the research process also makes it simple to avoid idioplagiarizing during the write-up phase, as the data set will be large and distinctive enough to be parsed over several publications with no duplication. As a PI with a big picture perspective, I find it most helpful to work with team-mates who have a more granular view and an appreciation of the discrete contributions to be made by particular components of the larger project. This interplay of perspectives makes it possible to plan for a series of articles fairly early in the fieldwork process.

Armed with a sense of what the group thinks is possible and reasonable, I outline briefly the projected contribution by journal, and elicit ramrods for each manuscript (or sections thereof), whose charge it is to develop the nucleus around which the article will eventually be written. As drafts emerge, they circulate within the group for discussion, elaboration, clarification and, sometimes, outright argument. As in other stages of the research, each group member brings particular skills – eloquence, theoretical sophistication, concision, diplomacy, etc – to the crafting of documents that ultimately result in a manuscript draft ready for final editing.

Penultimate drafts face rigorous internal peer review from the team, as well as more informal external peer review (via invisible colleges in which team members participate), before the decision is made to submit the manuscript to a journal. To prevent the draft from reading like it was written by a committee, team-mates delegate an editor or editors to harmonize the voices as closely as possible. In some cases, the voices may actually be amplified, if discordant notes serve a representational purpose.

Diplomacy and grace must be cultivated and practiced among team-mates at this stage of the process, as everyone has a large stake in the outcome. It is one thing for official journal reviewers to call your baby ugly; it is quite another when you are encouraged to take one for the team by sidelining your own individually brilliant ideas or prose. Here the willingness of the PI to sacrifice as an exemplar is most effective. Equally effective is the practice of cultivating a team *bricoleur*, who tries to insure that anything left on the cutting room floor is recycled into yet another manuscript (or the stimulus for a new project). A team study of ESPN Zone Chicago foregrounding gender as its initial issue of interest produced more theoretically compelling possibilities as it emerged, pushing a systematic treatment of gender to the periphery of early manuscripts; insights eventually were culled from these textual backwaters to create a stand-alone account of an issue the team was reluctant to abandon all together. Finally, the negotiation of authorship order on the final manuscript should be public and decided by consensus. My rule of thumb has been to use alphabetical order in the case of equal contribution, and to rank authors by ramrod status in cases of unbalanced contribution. Order may often be readjusted during the revision process.

Once formal peer reviews are received and a revision is requested by the journal editor, the team handles the rewrite in the same manner as it negotiated the strategy sessions. Changes are agreed upon, additional data may be collected, theorizing may be reconfigured, and a ramrod shepherds the process to a revised manuscript. Outtakes and promising but unaccommodated reviewer suggestions are managed by the *bricoleur*, in the event that additional manuscripts might be produced.

Whither the regime?

One of the pleasures of team ethnography, once all hands are rowing in the same direction, is the realization that everyone has a roving eye and is prone to sighting exotic new islands of research just off the main course. The lone ethnographer is accustomed to thinking of his or her own research regime in terms of rhizome or walkabout, and of following emergent interests as they present themselves. Amplify this nomadic questing by the current number of team-mates and imagine how many side projects might delay progress on the focal group project.

I find it helpful to think of the current project as a platform for future research, whose outlines are dimly discernible at the moment, but promising nevertheless. Prospecting forays into this new geography are inevitable, but comprehensive exploration must await another day. I encourage team-mates to keep a journal of these interesting prospects against the day that we get the band back together, or until fission and fusion among our ranks produce new coalitions of researchers and other teams. In this manner, research streams can be advanced ever more rapidly, and researcher enthusiasm can be greatly prolonged.

Conclusion

Conducting ethnography in teams conveys some benefits that the lone ethnographer will find more difficult to reap. Teamwork allows for more ambitious projects to be undertaken. More comprehensive coverage of a phenomenon is possible with a group. Efficiency is an important benefit, with economies of scale and scope to be realized. Arguably teamwork leads to more and deeper insights, in the field and in the library. For continuing education and constant updating of clinical and analytic skills, group ethnography is a powerful motivator. Finally, for the lived experience of collegiality, the sense of dwelling in a scholarly community, team ethnography delivers a communitas of the road that is difficult to replicate.

Graduate students in marketing are accustomed to working on solitary projects, often one-off exercises that flow from their advisor's research stream, the published result often co-authored with that mentor. This is a tag-team tradition at best, and does little to promote the rhizomatic, synergistic impulse of truly collaborative research. It is easy to imagine a joint project pursued by a team of doctoral students, whose output would be a set of dissertations comprising a mosaic of monographic proportion, reduced in turn to a discrete set of solo- and co-authored journal articles. Such an approach would deliver a learning experience to doctoral students of much greater power, intimacy and satisfaction than they are currently receiving. It would provide junior faculty aspiring to tenure with a multidimensional coping mechanism, increasing their productive capacity and their resilience. The teamwork ethos is best laid down during graduate school. It is a challenge I hope some doctoral program will accept, and an opportunity I wish some academic department would extend.

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