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Becoming the Corporate Native...Virtually: An Ethnography and Corporate Culture Assessment of a Virtual Organization

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An Ethnography and Corporate Culture Assessment of a Virtual Organization

by

Jennifer L. Avery

Dedication

To my kids, Atticus and Athena, who remind me each day which side of the work/life

balance holds the most weight.

Acknowledgments

This dissertation could not have been completed without the contributions of many. I thank those who provided me with an invaluable employment opportunity and, by allowing me to conduct this research, showed an admirable willingness to put their company under a microscope. Thanks also to the employees who participated in this research. I hope they were always aware that I had their best interests at heart.

Thank you, Dr. Baer, for sticking with me and giving me those periodic but necessary pushes toward the finish line and for your consistent, no-nonsense advice. Dr. Bird, Dr. Messing, Dr. Amen, and Dr. Bingham also deserve many thanks for their kind support, thoughtful feedback and flexibility throughout the process.

Thanks to my parents, Rick Avery, Cherie Lurvey, Bob Lurvey, and Maria Villar, for keeping the faith that I would eventually finish my degree and for all their support along the way. Thank you to my *suegra*, Gioconda Ruiz, for helping me keep it all together while I juggled school, a job, and a home and for being an incredible *abuela* to my children. Thanks to Kate Brelsford for showing us all how to just get it done.

Finally, thank you, Edgar Amador, for putting up with five years of my groans and gripes and for your annoyingly intelligent advice during my writing phase. I'm a better person for knowing you.

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Abstract

This dissertation presents an investigation of a rarely studied business entity in the cross disciplinary literature on organizational culture, a completely virtually organized firm. Subscribing to a conviction that any culture can only be understood through an approach that uncovers the lived experiences of its members, I employ the traditional anthropological method of participant observation as my foundational data gathering technique. In an effort to help engage anthropology with the cross disciplinary organizational culture literature generally, I also use two well-known methods of corporate culture assessment from the management sciences. I provide a number of recommendations to the sponsors of the research for addressing problems that relate directly to worker morale and performance and which, consequently, impact the company's overall potential for success. Some of these problems are unique to this particular company while other issues that I identify, such as weak organizational identification among employees, loose networks of social capital between co-workers, employee training and nurturing deficits, email overload impacts on employee productivity and regard for organizational leaders, and the encroachment of work on personal time, are problems likely to be encountered by members of other virtual work organizations. As such, my findings should be of interest to applied researchers who study these fast-growing types of work arrangements.

Chapter One

Introduction

Background of the Research

On a sunny afternoon in 2004, I sat at my desk at home, working on my master's thesis, when a message popped into my email inbox. It was sent through the USF Anthropology graduate listserv, an email distribution list to which students, faculty, and alumni from my department subscribed and through which members circulated information and engaged in department-relevant discussions. This email was forward by the lead administrative assistant of the department, and the subject read "ETHNOGRAPHERS NEEDED FOR CONSUMER REASECH $25/HOUR." I did a quick Google search on the company, which turned out to be a market research firm based in the northeastern United States. Mildly horrified and yet intrigued by the prospect of using my research skills to help corporations gather data on shoppers (as well as motivated by the hourly rate that far exceeded what I was currently earning through my graduate assistantship), I sent off my resume. Over the course of two days, I was briefly interviewed by phone, shipped a box with a handheld data collection device and store gift cards, trained in a hour long telephone conference call with a dozen other "ethnographers," and sent to a Tampa 7-11 to accost innocent shoppers for a ten minute structured survey after having observed them browse the cold beverage section.

Thusly, within a 48 hour period, I went from graduate student to professional market researcher. I would work several more projects that summer, stalking the aisles of Walmarts, Targets, and grocery stores to talk to shoppers to gather data about how they made their decisions to buy allergy medicine, sunscreen, chocolate candy, and breakfast cereal. The end clients for whom the data was being gathered were all Fortune 500 manufacturing giants. I imagined the market research headquarters of this company that had hired me to be a bustling office where numbers were crunched, ethnographic reports poured over, and clients thrilled with the insights that were built from data collected by hundreds of anthropologists across the country. I had not visited a company headquarters or met a single other individual who worked for the company in person. Over time, it dawned on me that no such bustling headquarters existed. The phone numbers for my various project managers and company contacts had area codes across all U.S. time zones. Nobody seemed to work where the company headquarters was based. I realized that this company was virtually organized. It was a collection of individuals from all over the country who interacted with each other and with ethnographers like me strictly through phone and email. I remember being impressed that this kind of work could be accomplished without the benefit of a shared physical workspace. I was now doubly intrigued. What could it be like to work full time for a company when all its employees were geographically distributed and where almost all communication was electronic?

Statement of the Problem

I worked on over a dozen projects as an interview/ethnographer for the company, which I will call by the pseudonym "InsightCorp," over the next year. As I would learn, InsightCorp is a market research firm, serving manufacturer and retailer clients by

collecting and analyzing data related to how people shop. Over time, I was presented with opportunities to do other types of contract work for the organization, such as scheduling and data analysis. With my prior research interests being in the areas of globalization and "studying up" (Nadar 1976), I knew that I wanted to find a way to study this virtual company for my doctoral dissertation, even as I was unsure at the time what my research focus would be. Eventually, I would negotiate a full time salaried position with the company that would enable me to do just that. After six confusing months trying to navigate the process and politics of a company that existed only in cyberspace, I had experienced enough to help me formulate my research questions.

The company was small when I joined it (no more than 10 employees) and would quadruple in size by the time I concluded my research. From an employees' perspective, the company had a number of both structural and communication problems even when it was very small. These problems only seemed to get worse as we expanded. I began to seek out a means by which I could help my employers understand some of the problems the company was experiencing and search out solutions. I also wondered how many of the company's problems were linked to its virtual structure.

With a desire to study the organization's weaknesses (and strengths) from a holistic, anthropological perspective but one that was problem focused, I began to research the concept of organizational culture and the art and science of corporate culture assessment. By way of general definition, organizational culture is "the study of an organization as if it were a culture, in order to better understand behavior in the organization" (Jordan 1994:5). An approach to studying organizational culture, particularly within anthropology, generally relies on such a definition and utilizes a

variety of ethnographic methods to focus on problems and issues that are particular to the research site and problem.

Organizational culture studies have their roots in anthropology and originated nearly a century ago with the now famous Hawthorne study, which began in 1927 as a test of scientific management principles and evolved over time into a truly ethnographic study of formal and informal work relations (Roethlisberger and Dickson 1939). In the three decades that followed, anthropological studies of organizational culture flourished but growth was somewhat curtailed by the ivory tower bias against fieldwork conducted in the United States (Schwartzman (1993). Compounding the impacts of this bias, in the 1960s, functional cultural analyses came under general disciplinary critique (Hamada 1994). As anthropologists turned away from the study of organizational culture, researchers from outside the discipline in sociology, psychology, and the emerging field of management studies took up the study of formal organizations. When studies using the specific term *organizational culture* reached their height of popularity in the 1980s and 1990s, anthropologists had participated in both academic and applied ways (Jordon 1994). However, the common anthropological orientation toward understanding organizational culture symbolically and interpretively and harsh anthropological critique of outside disciplinary tendencies to chop culture up into measurable variables (Wright 1994; Denison 1996) proved obstacles to the rich engagement of anthropologists with other organizational culture researchers.

Anthropology has developed a strong sub-discipline in the ethnography of work, and, of course, the culture concept is central to researchers in this field (Burawoy 1979; Nash 1979; Britain and Cohen 1980; Gamst 1980; Yelvington 1995; Ross 2003).

However, in addition to a general failure to interface with the organizational culture literature arising out of other disciplines, anthropologists studying work have also failed to lead the way in the study of virtual business entities (Baba et al 2005). Virtual organizational culture generally has yet to receive sufficient attention from any discipline, even from the management sciences that have come to dominate the organizational culture debate (Davenport and Dallenbach 2011). Anthropology's failure to take the opportunity to lead the study of virtually organized work culture is particularly disconcerting given that the discipline's hallmark methodological contribution, participant observation based ethnography, is especially suited for the study of online human interaction (Hine 2001). When "there is relatively little theory regarding the effects of virtual work and even less empirical research exploring this phenomenon" Wiesenfeld et al 2011), the absence of significant anthropological participation in the discussion is notable. As such, the primary contribution of this research project is to analyze the relationship between an organizational culture and how employees relate and function within that organization, specifically one that is virtually organized.

This gap is present in spite of the fact that virtual work arrangements, made possible by the technological advances that many researchers would characterize as definitive of the age of globalization (Lewellen 2002) were and still are on the rise. Virtual work arrangements of one variety or another impact over a quarter of the global workforce (Lojeski 2009). And while the literature on virtual work that does exist has identified a number of negative outcomes for employees as a result of participation in these arrangements, the general consensus is that the advantages of these kinds of work environments outweigh the negatives (Harpaz 2002). Polls of the general public suggest

that U.S. workers view virtually arrangements quite favorably and that many would sacrifice considerably to obtain a virtual position. Virtual work arrangements are becoming more commonplace and receive both academic and popular support, yet few have attempted to problematize them.

Significance of the Research

This research seeks to help correct the deficit of empirical data on virtual organizations with an ethnographic study of one virtually organized company. Subscribing to a conviction that any culture can only be understood through an approach that seeks to uncover the lived experiences of its members, I employ the traditional anthropological method of participant observation as my foundational data gathering technique. In an effort to help re-engage anthropology with the organizational culture literature generally, however, I also use two well-known methods obtained from the management sciences that reduce the culture concept to a limited number of components. The main goals of this research are: 1) to conduct a "corporate culture assessment" of InsightCorp. 2) to critically analyze the virtual nature of the organization, exploring various subtopics with an eye toward how they are distinct from traditional work environments, and 3) to compare traditional anthropological methods of cultural description within organizations and those more typically utilized by practicing professionals of corporate culture assessment.

These three goals each align with the major threads of significance for this research project as a whole. By tackling objective one, this research contributes in a purely applied way to the sponsoring agency of the research with a thorough description of the company culture from the employee perspective, a diagnosis of key problems, and

recommendations for change. By meeting objective two, this research is important as an empirical case study of a poorly understood entity, the virtual organization. Finally, by accomplishing my third objective, I hope to help re-engage anthropology in the organizational culture debate by showing how a mixed methods approach, one that combines the best of what competing disciplines have to offer, enables a rich yet usable analysis of an organizational culture.

Organization of Chapter Contents

This dissertation is organized as a seven chapter monograph. In the next chapter, I will review the relevant literature on organizational culture more thoroughly. I will also treat relevant themes from anthropological discussion of virtual (non work) communities and provides background on virtual organizations generally as well as some concepts related to an employee-focused organizational culture assessment. Chapter three outlines the methods employed in the research and provides background on the research setting. Chapter four presents results and analysis of the data derived through one of the management science-based methods I used, Cameron and Quinn's (2011) Organizational Culture Assessment Instrument. The major themes identified in this analysis provide a framework for presentation of the results derived from my participant observations as well as the focus groups I developed following the proscription of another prominent researcher from the management sciences, Edgar Schein (Schein 1991). Chapter six contains a discussion and interpretation of data from all three principal methods. The final chapter provides concluding commentary, recommendations for the sponsoring agency, and elaborates on the significance of the research.

Chapter Two

Review of the Literature

Introduction

In this chapter, I will review literature arising out of anthropology as well as

related disciplines relevant to the study of the organizational culture of a virtual company.

I will first cover the concept of organizational culture itself, documenting the history of

its use, the competing versions of the concept arising out of anthropology and, most

prominently, the management sciences, and discuss why anthropologists have largely

disengaged from the cross disciplinary discussion of organizational culture theory. Next,

in the context of the paucity of anthropological literature explicating virtual organizations

in general and virtual business organizations in particular, I examine the anthropological

literature on virtual communities in an effort to identity relevant theories pertaining to

human interaction in virtual environments and substantive trends that may also apply to

the study of organizational business cultures. I then discuss the emergence of virtual

organizations in the context of globalization and examine the exiting literature on virtual

organizations arising largely from the management sciences. Finally, I discuss concepts

related to employee attitudes toward their workplaces, specifically organizational

identification and social capital that have particular relevance to this study of the

organizational culture of a virtually organized business. A key argument running through

this review is that anthropology as a discipline is largely failing to participate in a still

ongoing academic discussion theorizing organizational culture. This is Anthropology's

most central concept ,and anthropologists are uniquely positioned to study virtual

organizational cultures with a toolkit of ethnographic methods, most notably participant

observation. I will argue that a multi-disciplinary approach, one that mixes methods from

both anthropology and the management sciences, is ideally suited to help bring

anthropologists back into the larger academic dialogue on organizational culture by

showing how a holistic approach grounded in participant observation can provide

context, process, and meaning to an otherwise static and depersonalized view of an

organization. At the same time, anthropology can benefit from management science tools

developed to understand organizational culture which, even if they are reductive, offer an

efficient means to identify problems when an applied, change driven approach is

required.

Organizational Culture

The concept of culture as explicitly applied to formal organizations is not a recent

trend in the cross disciplinary literature arising out of anthropology, psychology, and

business management studies. Take, for example, three definitions below of

organizational culture that span five decades. Organizational culture is:

> "The relatively enduring quality of the total environment that is experienced by
> the occupants, influences their behavior, and can be described in terms of the
> values of a particular set of characteristics (or attributes) of the environment"
> (Tagiuri and Litwin (1968:25)

> "A pattern of shared basic assumptions that the group learned as it solved its
> problems of external adaptation and internal integration that has worked well
> enough to be considered valid and therefore to be taught to new members as the
> correct ways to perceive, think, and feel in relation to those problems" (Schein
> 1984:12)

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"A negotiated order that emerges through the interactions between actors—a negotiated order influenced in particular by people with symbolic power—the power to define the situation in which interactions take place" (Hallet 2003:25)

As a more general way of definition, organizational culture is "the study of an organization as if it were a culture, in order to better understand behavior in the organization" (Jordan 1994:5). An approach to studying organizational culture, particularly within anthropology, generally relies on such a definition and utilizes a variety of ethnographic methods to focus on problems and issues that are particular to the research site and problem. Definitions of culture as they are transferred to the organization, however, as is apparent in the above quotations, can be as variable as the problems that the methods may be designed to help solve. And, indeed, organizational culture work is generally focused around a problem within the organization which may very well directly influence the definition of culture employed by the anthropologist. Additionally, whatever definitions of culture are in use, researchers studying organizational culture need to be generally aware of the various subgroups that make up the larger group as well as the connection of the culture under study to the web of cultures and networks in the outside world to which it is connected.

Organizational Culture Studies and Their Origins

Organizational culture is a subfield within anthropology and a topic of interest to many researchers outside of the discipline, having become prominent in the late 1980s. . (Jordan 1994:3). In a general sense, it describes simply the application of the culture concept, both by anthropologists and non-anthropologists alike, toward the study of government, private sector, and voluntary organizations (Wright 1999). The spurt of popularity enjoyed by this kind of research was, in part, a consequence of Americans

taking note of business success in the early 1980s among the Japanese and of the role of particular aspects of Japanese culture that were theorized as contributing to it (Jordan 1994:3). The awareness of the impact of culture on the structure and function of business gained momentum, both inside and outside of academia, in early studies by such authors as Peters and Waterman (1982) and Deal and Kennedy (1982) on highly successful businesses.

Since these widely popular studies were published over two decades ago, the concept of culture within organizations has been in routine use not only among academics but among organizational members themselves. That is, businesspeople talk about their own corporate or organizational cultures. Since Peters and Waterman (1982) pinpointed culture as being a crucial element in the success of sixty two of American's most powerful and best run companies in a national bestseller, corporations have increasingly put the concept into use for practical purposes. (Weeks 2004). Often quite overtly defined and internally and externally publicized, corporate cultures are now part of virtually any private business' mission statement (Weeks 2004).

The Anthropological Origins of Organizational Culture

What is immediately shocking about the rise in the use of the culture concept to understand and describe organizations and institutions of various kinds is that Anthropology, as a discipline, is not responsible for its popularity nor has it adequately guided the development of the field of organizational culture. It has not stemmed what some authors (Hallet 2003; Bates 1997) perceive as a wane in interest in the use of culture for understanding organizational behavior as a result of its impracticality and conceptual nebulousness. This is an ironic state of affairs given that organizational

studies have their roots in anthropology and originated nearly a century ago. The Hawthorne study, which began in 1927 as a test of scientific management principles, evolved over time into a truly ethnographic study of formal and informal work relations and revealed groundbreaking insights on the relationship between worker fatigue, monotony, and job dissatisfaction. (Roesthliberger and Dickson 1939). The study, at its outset, involved an experimental design that was initiated by management itself to test the relationship between illumination intensity and worker productivity. The study took an ethnographic turn when the researchers found that increases in productivity occurred during their experiments, but in a way that was not at all related to the experimental conditions. Influenced by the work of anthropologist W. Lloyd Warner, the Hawthorne researchers shifted their approach to a psychological study and altered their methodology to one based on interviews and observations. Over time, the Hawthorne studies evolved into a holistic examination of the "attitudes, thoughts, and feelings" of the workers themselves (Roesthliberger and Dickson 1939: 388). The result was a new method for organizational research based on the "systematic description of the social organization of an industrial working group (Chapple 1953: 820).

Following the Hawthorne studies, the importance of human relations within the workplace impacted the work of several prominent anthropologists and sociologists working in the 1940s and 1950s. There was diversity in the approaches taken by different researchers from the beginning. Some researchers (e.g. Chapple 1953) stressed the systemic nature of organizations and the need for direct and specifically defined observations of individuals (including pace, tempo, and skeletal movements). Others (e.g.

Warner and Low 1947) were more inclined to relate working conditions and behaviors to economic, political and social forces that were operating outside of the factory.

In 1953, when Elliot Chapple summarized the potential and importance of anthropology to industrial studies in a published review, it appeared that the discipline would be a prominent force directing future research and theory development in organizational culture. This did not come to fruition, however, as a consequence of a number of factors. One of these is that many of the anthropologists who conducted early research on organizational culture following the Hawthorne studies, such as Burleigh Gardner, W. Lloyd Warner, F.L.W. Richardson, William F. Whyte, and Leonard Sayles, pursued careers outside the discipline or began to focus on other topics. Within the discipline of anthropology, as well, existed the ivory tower bias that fieldwork conducted in the United States was not "real anthropology" (Schwartzman (1993). Also muddying the waters was the variety of anthropological perspectives on studying culture in general that were emerging over the subsequent decades. Early studies arising from the discipline were grounded in a functional-structural perspective that sought to understand the integrated workings of an organizational culture as a whole. Such perspectives fell out of favor in the 1960s, when functional cultural analyses in general came under critique for a whole host of reasons including the inability to test functional hypotheses, the lack of perspective for radical cultural change, and neglect of the study of power relations, among other critiques (Hamada 1994). And as anthropologists turned away from the study of organizational culture, researchers from outside the discipline in sociology, psychology, and the emerging field of management studies took up the study of formal organizations.

This is not to say that anthropologists have not contributed to the field but simply that they have failed to lead it, even though it is grounded in what most anthropologists would argue is the root concept of the discipline. There were other trends, however, within the discipline that encouraged the study of formal organizations. Laura Nadar's 1969 article "Up the Anthropologist" was a call for anthropologists to put their theory and methods to use in studying the powerful. The anthropology of work soon evolved into a strong subfield within the discipline over the next decades, propelled by a number of theoretical interests including neo-Marxist, materialist, as well as post-structuralist orientations (Burawoy 1979; Nash 1979; Britain and Cohen 1980; Gamst 1980; Yelvington 1995). Of course, anthropological approaches to the study of work utilized ethnographic methods, and culture was a central concept treated in each study. However, for the most part, scholars in the anthropology of work did not interface with the organizational culture literature that was (and continues to be) largely from the disciplines of psychology and management sciences or business administration (Schwartzman 1993).

In summary, organizational culture began with anthropologists whose preoccupation was not on the assembly line but on the informal relationships and interaction patterns of the individuals on the line. The Hawthorne studies conducted between 1927 and 1932 established the solid cultural orientation of what would become the discipline of organization and management studies. Although studies of organizational culture continued to be conducted across disciplines after these landmark studies, the orientation generally fell out of favor until it was revitalized during the

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1980s—not by anthropologists—but by the popular press and disciplines outside of anthropology.

Cross Disciplinary Commonalities in Approaching Organizational Culture

The specific term, *organizational culture,* came into its own in management, consulting, and academia in the1980s and 1990s as a tool for understanding organizations. Currently, research in anthropology on organizational culture takes on various forms from the general study of work to that of particular formal organizations, industries, as well as international businesses. Research can be academic in nature, contributing to general knowledge and theory of organizational life (e.g. Jordon 1990). Alternatively, it can be in-house and pragmatic, intending to improve relations among studied individuals (e.g. Briody and Baba 1991) or otherwise identify problem areas that may be causing workplace difficulties or inefficiencies that are a consequence of cultural factors or even misunderstandings, such as in intercultural training (McDougall 1991; Ojile 1986).

Not all anthropologists, however, accept without reservation the idea that the culture concept can be applied to organizations. The lack of unity from within the discipline is directly related the lack of leadership that the discipline has demonstrated within organizational culture studies. Such anthropologists cite the disparity between the culture concept as applied to a community of people with a historical connection since birth compared to a much smaller community of people who are introduced to organizational norms of behavior and belief only at the time of employment1. On the other hand, just as disagreement about the proper application of the term culture to organizations may cripple a unified anthropological front on organizational culture, some

of the schisms within the discipline can be viewed as actually contributing to a fresh interest and novel approach to the research. For example, less bounded notions of culture that have come into prominence in anthropology are well adapted to examining organizational culture as a continuous process whereby people in an organization "negotiate the meaning of their everyday routines" (Jordon 1994: 9). Such perspectives examine the way such groups "generate symbols through which organized activity is mobilized" (Wright 1994).

No matter the theoretical orientation, however, a researcher or practitioner concerned with organizational culture operates under the assumption that there is a, to a greater or lesser extent, some degree of "culture" to be understood and perhaps even actively transformed by research. Moreover, it is absolutely critical that any researcher taking an organizational culture approach carefully consider the definition of culture used as this will be a primary component of the theory that will be used to guide data collection as well as analysis. The specific definitions employed will strongly relate to the researcher's role and level of access within the organization as a research, consultant, or employee (Pedersen and Sorensen 1989)

In many cases, the work of researchers in organizational culture is problem driven and this may impact the definition of culture that is employed. In other cases, the end goals of the research are more about obtaining knowledge about organizational culture for its own sake, and the definitions of culture put to use in these cases will be far less pragmatic. Additionally, the definition of culture employed may have much to do with the field site in which the researcher is working. For example, definitions of culture for virtually organized companies, as opposed to traditional ones, may rely to a lesser extent

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on physical behaviors and artifacts and more on the integration of social networks (Rasmussen and Wangel 2007).

In spite of the end goals of the research, however, there are basic commonalities between the competing positions on why and how a workplace can reasonably be termed a culture. Primary among them is the idea that organizations "develop distinctive sets of emotionalized collectively held beliefs that compel members of these organization to act in certain ways" (Trice 1993: xi). Such beliefs are materialized through symbols, ceremonies, language use, rites, etc. in much the same ways as would be expected among a more traditional, societal culture. Across disciplines, organizational culture is consistently defined as more or less stable system of values, symbols, beliefs, and norms that is learned and perpetuated by individuals within the organization. It is a system that guides belief and behavior in such a way a way that it is perceived as natural and taken for granted by its members (Deal and Kennedy 1982; Peters and Waterman 1982; Christensen and Molin 1983; Pettigrew 1979; Schein 1984).

Anthropological Holism and Method

Although all approaches to organizational culture are rooted in a general acceptance that culture in some form another exists within organizations and that this culture is understood, in a classic anthropological sense, as a "myriad of behavior, routines, and practices recognized as a distinct way of organizational life" (Gregory 1983), there are still other tendencies that tend to separate out anthropological orientations from non-anthropological ones. There are a number of approaches that are central to an anthropological approach to organizational culture and are not as frequently employed outside of the discipline. For anthropologists, there is a strong resistance to the

reduction of culture to a set of variables related to beliefs and behaviors. That is, culture is understood by anthropologists as *holistic*, uniquely attuned to "the *interplay* of knowledge/norms, behavior, and material artifacts" and not just the accumulation of all of these elements (Jordan 1994:5[emphasis mine]). Further, the various connections and complications arising between subcultures within a culture are recognized and examined, and no one subculture, such as management, is necessarily prioritized for the analysis. An anthropological approach further holds that the "culture" of an organization exists within a much larger culture or cultures at the local, national, regional, and even global level (Jordan 1994:5). An anthropological perspective always seeks to situate the organization in a larger socio-cultural context (Hamada 1994).

This historical perspective contrasts sharply with the future oriented vision of most other organizational and management models (Bates 1994). Anthropologists are most inclined to ground their analysis in historical context, not necessarily with an extensive historical treatment of the organization itself, but rather through an understanding the historical connections of contemporary norms and behaviors. Simply put, anthropologists make the past relevant in studying the present (Bates 1997). In this way, anthropologists strive to maintain a constant analytical thread between individual behavior and the macro contexts in which that behavior is embedded. Understanding the dynamics between individual and the society, beyond the organization itself, is a critical part of a holistic understanding of organizational culture. This macro perspective, long normative in the field, has become increasingly important in light of postmodern contributions to anthropology. These highlight difference and fragmentation within a culture over continuity and stability as a consequence of the unbounded nature of any

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organization as well as with the incorporation of globalization processes into

anthropology, which further expands the boundaries of any cultural system under study.

In general, anthropological studies are grounded in an ambitious degree of holism,

context, inclusivity, and interaction. All of these trends are well summarized by Hamada

(1994: 27):

> The power of the culture metaphor is in its holistic orientation: it unites various
> aspects of organizational phenomena such as the individual cognitive processes,
> languages and symbolic aspects, behavioral manifestations, material products,
> socio-political structures of power and hegemony, and wide and larger
> environments of the organization, that all contribute to sharing, creating,
> contesting, denying, interpreting, and changing human activities. Although
> contemporary anthropologists do not necessarily follow functionalism or
> configurationalism, it is safe to say that anthropologists are still and always
> interested in revealing dynamic, sometimes contradictory, inter relationships
> between different aspects of culture such as inter-subjective experiences,
> symbolic interpretation, reflection, and representation of such experiences, and
> site-specific development of political, economic, and social structures and power
> alliances among people."

This tradition of holism has its roots in another element that distinguishes an

anthropological approach from those utilized by organizational researchers in other

disciplines: the employment of ethnographic methods and prolonged fieldwork in the

study. Apart from standard interviewing and document collection, it is participant

observation is that truly sets anthropologists apart from organizational researchers in

combination with an orientation toward the culture concept that defies simplification

though its holistic bent (Bates 1997). The in-depth ethnographic approach is inextricably

tied to the anthropological orientation and is the result of a more holistic notion of

culture, a methodological history within the discipline as well as more pragmatic

concerns. As Hamada (2004a:26) puts it, outside of anthropology, "the general scarcity of

long-term, organization-wide, participant observational studies maybe due partly to the

organization scientists' 'objective' data gathering and hypothesis testing, and to the time

and monetary factors imposed by their clients-employers" (Hamada 1994:26)

<u>Definitions of Organizational Culture</u>

As already discussed, during the 1980s, "the concept of culture was displaced

from its anthropological origin by non-anthropologists, who introduced the construction

to the general manage science readership" (Hamada 2004a:22). While maintaining some

basic similarities with anthropology in terms of an arguably holistic concern with culture

as a system of forms, categories, beliefs, rituals, etc. embedded in daily organizational

life, there are some key differences. Outside of anthropology, researchers are

comparatively keen on producing formalized typologies that help to operationalize

culture at various levels that strictly define the data collection and orient the findings of

the research to be practically applicable in an immediate and elemental way.

Management scholar Edgar Schein's (2004) classic model, for example, divides culture

into three operational levels (artifacts, shared conscious values, and shared unconscious

assumptions that are taken for granted). The method for understanding the levels is

necessarily ethnographic but the orientation is decidedly clinical, in that the findings are

to be delivered to management in such a way as to facilitate their direct manipulation of

the various cultural elements to solve problems. Scholars and researchers in

organizational culture outside of anthropology are very much oriented toward a

manageable culture approach which has a tendency to reduce a specific work culture to a

monolithic entity understood through a number of discrete variables (e.g. Giovanni and

Rosanksy 1990; Beer et all 1990 Fitzgerald 1988; Denison 1990). In general, the

orientation toward culture outside of anthropology is one that is intent on building models so that values and beliefs can be altered.

This distinction between a holistic versus a variable-based approach to organization cultural studies is described by scholars in a number of different ways. Some discuss it as the distinction between studying organization "culture" versus organizational "climate" (Denson 1996). While researchers with a cultural perspective emphasize underlying organizational assumptions, meaning, and the native perspective, organizational researchers with a view toward climate focus on observable practices and procedures (and—to be fair—the insiders' perspectives on them) and attempt to operationalize these practices into quantifiable dimensions for the purposes of research. A climate perspective harkens back to the days before the cultural revolution in organizational studies of the 1980s occurred. Litwin and Stringer's classic 1968 piece on the subject, for example, identified the nine organization dimensions of structure, responsibility, reward, risk, warmth, support, standards, conflict, and identity. There is clearly much room for overlap between the two perspectives but key differences are critical. Where a cultural approach is historical and interactionist, a climate approach is temporary and static. The former is deeply connected to meanings embedded within the organization and is highly attuned to how those meanings are socialized, consciously or unconsciously, through long term interaction between individuals. In a climate approach, the emphasis is on controllable variables that are overtly perceived by organizational members. As Hallet (2003:128-129) puts it, where one approach "envisions culture as beliefs and values held by subjects in the organization," the other "removes culture from the subjective minds of actors and places it in the public by emphasizing espoused

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beliefs, ideologies, stores, myths, rituals, ceremonies, and artifacts." That is, among researchers who adopt a climate approach, culture tends to be characterized as if it were an entity that exists external to individuals. A cultural approach is a thickly descriptive one that is undeniably superior in its holistic treatment of culture and meaning, yet often falls short in explaining cause or in providing the means for direct, actionable change and improvements.

Smircich essentially makes this same distinction between two basic cultural concepts put to use in organizational culture studies but in another way: viewing culture as a *metaphor* versus viewing culture as a *variable*. Researchers who use the latter are described by Alvesson (1993) as drawing upon a "more traditional, objectivist, and functionalist view of social reality and try[ing] to improve models of organization by taking sociocultural subsystems, in addition to traditionally recognized variables, into account." Alternatively, those who take a root metaphor approach treat organizations "as if they were cultures and draw upon anthropology in developing radically new theories or paradigms" (1993:13-14).

Again, the key differences between these approaches as described in the literature are much like the difference between an organizational culture and an organizational climate approach. Researchers who take the culture as variable approach are grounded in the assumption that organizations have unique values, behavioral norms, rituals, etc. that direct employee thought and action. This line of thought is characteristic of the "strong corporate culture" proponents such as Deal and Kennedy (1982) and Peters and Waterman (1982) who see organizational improvements as dependent upon the direct manipulation of these variables that compose a culture. In this view, there are many

positive functions of a culture, including fostering group identity and commitment to the organization and maintaining stability. Direct action that seeks to change any of the cultural variables in question can change have positive outcomes.

The culture as metaphor approach, on the other hand, does not view culture as a conglomeration of variables that an organization has but rather as an entity in itself, i.e. the organization *is* a culture or can be viewed as one. One of the primary distinctions between the two approaches is a shift—though not a total one—in focus from the economic or material elements to the "expressive, ideational, and symbolic aspects." The organization becomes an experience to be understood subjectively, and the researcher's interest on the measurable is replaced by an interest in shared meaning and symbols that enable collective activity (Smirchic 1983a; Pacanowsky and O'Donnell_Trujillo 1983). The organizational culture as metaphor approach can be described in other ways that essentially amount to the same thing. Czarniawka-Joerges (1992:195), for example, would call it an "anthropological frame of mind." At its heart, this approach is in line with a culture as text or Geertzian (1979) symbolic model of culture that insists cultures must be *read* in a holistic fashion, not dissected into a handful of discrete variables. These differing theoretical perspectives have implications for the research outcomes associated with organizational study. The variable approach clearly has more practical goals in mind seeking to increase organizational effectiveness, most often from the managerial end, by helping organizations understand themselves and the specific issues that need to be addressed to affect change. The root metaphor approach is more oriented to the generation of holistic insight on the organization as a cultural entity.

Alvesson (1993) in a frequently cited work on cultural perspectives, provides an in depth examination as to the differences between the metaphorical and variable based approaches to organizational culture and the relative strengths and weaknesses of each. Citing the metaphor as a useful concept in allowing one object to be understood in relation to another object, Alvesson argues that "attention to the metaphor concept…might encourage a deeper, more skeptical and reflective perception of what people mean by culture" (1993:11). The applications of cultural metaphors to businesses and organizations in a less than rigorous manner is, however, a common practice in the literature and one that, in Alevesson's estimation, is problematic in several ways. The metaphorical approach should not be confused with the simple and easy use of metaphors in describing an organization. Metaphors can all too easily used in a rhetorical fashion or as a figure of speech more than a gestalt that accurately encapsulates the structure of the organization entity, such March and Olsen's "garbage can" metaphor for organizational decision making (1976). Theorists of work organizations and management are particularly notorious for inventing neologism after neologism and plentiful but vacuous metaphors, encouraged by their close affiliation with business consultants who are constantly seeking new labels under which to sell their services (Pyoria 2007: 16).

By contrast, Alvesson promotes the use of "root metaphors" that shed light on an organization in a holistic way. This stands in contrast to the popular use of multiple metaphorical expressions that, while catchy, oversimplify the object they are meant to describe. While Alvesson admits that even root metaphors reduce an object of study by highlighting only specific elements, he likens this process to the "theory/research-object" interface in general. Commonplace examples of using the metaphorical approach include

viewing culture as a control mechanism for regulating social reactions in such a way that

the need for direct monitoring of employee behavior is reduced as beliefs regarding the

importance and fairness of the labor exchange process are internalized (Wilkins and

Ouchi 1983); viewing culture as a "glue" or mechanism for social cohesion that reduces

conflict and facilitates consensus (Martin and Myerson 1988; Ray 1986); viewing culture

as an behavioral or emotional regulator that controlling and disciplining the expression of

employee emotions in the workplace (Van Maanen and Kunda 1989); viewing culture as

a system of rites imposed by management to impose order and control (Trice and Beyer

1985; Kunda 1992).

Examples from a culture as variable approach are immediately more practically

oriented. As Van Fleet and Griffen describe, "in general, theorists and researchers who

study behavior in organization direct their attention at how various individual or group

behaviors benefit and enhance organizations and the antecedent conditions associated

with those beneficial behaviors" (2006:699). The end goal of such a study is to determine

how the processes within an organization affect numerous variables which can be directly

acted upon such as job satisfaction, performance and motivation as well as organizational

fidelity and commitment. Again, works such as these are less likely to come out of

anthropology, and more likely to be the work of organizational psychologists and

business management disciplines. In extreme juxtaposition to the culture as metaphor

approach, the end results of such studies are often complex models of cause and effect

relationships between the identified variables that impact desired outcomes.

Organizational studies may be oriented to the study of positive, functional behaviors

within the workplace or, alternatively, to the understanding of dysfunctional behaviors in

the workplace such as time loss, theft, sabotage, social deviance, aggression, and even murder (Griffen and O'Leary Kelly 2004). The key is that the behaviors are operationalized for study and the desired outcome of the research is organizational change.

Not surprisingly, anthropologists are quick to critique the culture as variable approach and the application of quantitative survey methods as insufficient to encompass the depth of culture and dismissive of the work that anthropologists have done for decades to better elucidate how culture operates. (Denison: 1996). Other scholars also question this approach, arguing, as do Siehl and Martin (1990:274) that this kind of approach to cultural studies reduces culture to "just another variable in existing models of organizational performance."

As useful as holistic culture/cultural metaphor or variable/climate division may be, however, the reality is that some researchers of organizational culture take a middle ground position, hesitant on both ends to reduce culture to a variable as well as to conceive of the organization entity as a culture in a metaphorical or thickly descriptive sense. The relative strengths and weaknesses of either approach shed light as to why a researcher would choose to adopt a more eclectic approach to organizational culture studies. As Alvesson (1993) points out, the values, rites, and rituals of an organization are not elements that are especially suited for quantitative study and require a qualitative orientation, even among those who would prefer a more traditional epistemology and desire an outcome of prediction and control. On the other hand, a wholly metaphorical approach runs a greater risk of ignoring important material and economic elements as

well as ties to external systems and reduce the entire analysis to the symbolic—consequences that are not at all appealing to many anthropologists.

My position as a researcher of organizational culture, the orientation that grounds both the methods I have selected to study and guides my analysis, is decidedly eclectic. I will define culture as "assumptions, expectations, beliefs, social structures, and values guiding behavior" (Briody and Trotter 2012: 2), and I contend that InsightCorp has an organizational culture insofar as "a set of dynamic elements consisting of beliefs, values, and behaviors that organize the structure and provide a mental map of how to make the whole system work" can be studied and described (Briody and Trotter 2008:4). While my orientation is very much to be concerned with how members of the organization construct what it means to be an employee at InsightCorp, I am not prioritizing in my analysis the purely expressive and symbolic elements of InsightCorp culture nor am I interested in developing a metaphor thorough which the culture can be understood.

My goals for this research are, in this way, aligned with a traditionally applied anthropological approach. That is, I am explicitly concerned with identifying specific issues that might require change both for the organization that is the focus of my research and for other organizations that might suffer from similar problems as a result of a virtual structure. While I am skeptical of approaches that reduce culture to discrete variables because, quite simply, culture is a concept so encompassing that it does not lend itself well to reduction, I am receptive to the idea of operationalizing an abstract concept like culture in an effort to make it uniformly measurable by independent researchers studying different groups so that limited but viable comparisons can be made. My receptivity to such an approach places me on an extreme climate or variable end of the culture/climate

debate relative to most anthropologists, and my usage of two methods from the management sciences for this research project in combination with participant observation is highly atypical for an anthropologist. This is not to say I have abandoned a holistic approach to understanding culture. As will be detailed in chapter two, my primary method of data collection in this study is an extended period of participation observation. I have chosen this method because of my belief that the values, beliefs, behaviors, and structures that I am studying at InsightCorp must be understood as they are embedded in daily organizational life of its employees in order to provide an accurate and usable description of the organizational culture.

The Struggle for an Anthropology of Organizational Culture

Despite the strong trends that exist in the literature on the approaches to organizational culture that arise out of various disciplines, it is safe to say, however, that there is still a disconnect between a thoroughly anthropological orientation to organizational culture and those originating from other disciplines. Part of the explanation, as already discussed, has much to do with the unique anthropological emphasis on participant observation as a foundational methodology for doing studies on organizational culture. However, there are deeper, more problematic barriers to the cross disciplinary acceptance of an anthropological approach. One of these is the tricky fact that culture is simultaneously a product of the actions and beliefs of individuals, as well as an ambiguously external force that guides individual action. Culture is a slippery idea in this way and unappealing to many researchers outside of Anthropology who have more practical concerns and seek to operationalize the concept for their studies. Another problem is the limitless holism of the culture concept as used by anthropologists. It is so

broadly inclusive of any phenomenon related to the study site that it borders on unwieldy for research purposes. As a result, there is great variability in the way researchers focus attention in their studies (Denison 1996). Scholars who are concerned with explaining anthropology's failure to take the lead on directing approaches to a cross disciplinary approach to organizational culture cite these very reasons (Schwartzman 1993). Indeed, some argue that the promise of the integration of the culture concept into organizational behavior studies was a "false dawn" (Bates 1997:1149), in that a burst of interest in the contribution of culture shown in the bestselling business books of the early 1980s proved to fade out as its non-anthropological adopters found the concept ill-defined and impractical in terms of contributing toward effective organizational change. Hallet (2003: 128) summarizes: "perhaps the victim of the fray is the [culture] concept itself: as a management fad, studies of organizational culture have gone from popular to passé in the span of 25 years"

Conclusions: Anthropology and Organizational Culture

The multidisciplinary subfield of organizational culture owes its birth to an anthropological influence. However, unique methodological approaches as well as political and theoretical divisions with the discipline have prevented anthropology from being a guiding force in organizational culture studies. As a consequence, organizational culture is a subfield dominated by psychologists and business management scholars. Anthropologists have an expertise and unique understanding of the culture concept, however, that can contribute to the field. It is the responsibility of anthropologists working in organizational culture today to take an active role in guiding the use of the culture concept and to provide examples, through grounded research, of how it can be

applied to organizations in ways that have practical as well as scholarly utility. This research project attempts to unite standardized approaches to the study of organizational culture from the management sciences with a more holistic anthropological orientation in an effort to show the strengths and weaknesses of each method and suggest best practices for a multi-disciplinary approach the study of organizational culture.

Virtual Community

In attempting to understand InsightCorp as an organizational culture from an anthropological perspective and in light of the fact that a large body of literature in anthropology on the organizational culture of virtual enterprises simply does not exist, I review the multi-disciplinary literature on virtual communities for relevant themes and analytical threads that may be useful in an anthropological approach to the study of a virtual business. Computer supported social networks (CSSNs) exist in numerous forms on the internet including electronic mail (e-mail), bulletin boast systems (BBSs), Multi-User Dungeons (MUDs), newsgroups, and Internet Relay Chat (IRC), and host of social media outlets (such as Facebook). A fixed part of contemporary interaction for a significant number of humans on the planet today, the internet can be viewed, no doubt, as an important artifact of contemporary culture, that is, a material product of people given meaning by the cultural understanding of its creators and users (Woolgar 1996). Yet, from a processual standpoint, the internet is much more than an artifact. From its inception, online communication and its implications for societal organization have intrigued scholars and the public alike. Much of the earliest discussion surrounding the internet had to do with the positive or harmful impact that the technology is thought to have on human social relations, much in keeping with the way the telephone or

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automobile or any new technology, for that matter, was assimilated into wide use

(Fischer 1992). Just as immediate a focus of study related to online communication was a

questioning of the nature of the groups formed through this kind of interaction and a

whole host of issues to be explored:

> How does the internet affect the organization of social relationships in time and space? Is this different to the ways in which 'real life' is organized…is 'the virtual' experience as radically different from and separate from 'the real'? (Hine 2000:8)

The application of the term community to online forums was immediate, and the

tendency to make comparisons between internet communities and real ones was a natural

reaction of scholars. There are extreme opinions on both sides of the debate. Early studies

largely discounted the richness and depth of online interactions, but it was not long

before the fans of online communication were voicing their high opinions of the sociality

of the medium. Indeed, some authors even suggest that "virtual communities have led us

to a discourse and potential realty of what in the past had only been a utopian version of

community" (Renninger and Shumar 1994a:5). The issue is more complicated, however,

in that it simply cannot be taken for granted that there exists a traditional notion of

community to which online communities may be compared. In order to answer the

question of how virtual and real communities differ, one must first understand what a real

community is and then proceed to examine the characteristics of online communities that

are the same as well as those that are unique. My ultimate goal here will be to understand

the debate on virtual community for its application to an analysis of a virtual

organizational culture in chapter six.

"Real" Versus Online Community

Early studies of computer-mediated communication (CMC) concluded early that it was an "impoverished medium of communication," limited in terms of the social cues that could be effectively transmitted (Hine 2000:9). Early studies on the internet were mostly about what social elements were lost during the interaction, largely as a consequence of the paucity of visual cues (Sproull and Kiesler 1986; Hiltz and Turoff 1978; Rice and Love 1987). This type of research, taking place in the late 1980s and early 1990s when online interaction was in its very early development, was primarily experimental. A key example is a well-cited experimental study on technology based group decision making which concluded that the lack of vital social context cues resulted in considerable differences between 'virtual' and real group interaction (Sproull and Kiesler 1991). Almost immediately, however, these views of CMC were countered by other researchers who argued that computer mediated communication actually reinforced lived behavior patterns and that, moreover, online interaction could actually give rise to virtual communities (Rheingold 1993; Curtis 1992; Bruckman 1992). A critical area of focus quickly became the ways in which the feeling of community was created and sustained through online interaction and the cultural contexts in which those interactions were taking place (Jones 1995; Kollock and Smith 1999). By 1995, this view had become well-enough entrenched for Stone (1995:123) to remark that cyberspace was full of "researchers swarming over the virtual landscape, peering around the virtual natives and writing busily in their virtual field notes." For well over a decade now, forms of online interaction have been conceived by social scientist across disciplines—anthropology, sociology, political science, communication, psychology, etc.—as explicitly cultural.

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And for many researchers there is little to debate about the authenticity of online interaction. As Hines (2000:18) understands it, "a discursive and practice-oriented approach to online community offers up the possibility of seeing online phenomena as functional in a social sense." Researchers have focused on a whole host of online phenomenon that have social functions. Even forums that have stilted forms of discursive engagement, such as posting sites, show a number of working social mechanism such as signature files, header types, message styles that provide discrete and sustainable online identities among participants, quoting of previous messages to maintain a flow of interactive discussion, and shared practices such as the use of emoticons, codes and abbreviations (Fernback 1997; Donath 1999; Baym 1995). All of these mechanisms serve functional purposes in achieving shared meaning and collective identity and are viewed, at least by some scholars, as enabling cultural and community meaning. Even conflict has been examined for its contribution to insider-outsider identification and identification of community values, hierarchy formation, and the establishment of standards of conduct (Reid 1999; Franco et al 1995; Phillips 1996;McLaughlin et al 1995).

But are there other elements of "real" communities that can be sustained online (that is, if one entertains the notion that there is something tangible about real world communities upon which a comparison can be based)? Reciprocity and attachment are two characteristics commonly affiliated with communities—they are essential components of Durkheim's mechanical solidarity, for example. But can the same types of mutual networks of exchange and positive regard be fostered by online interaction? In the case of reciprocity, there are immediate complications to an online mutual give and take,

most notably the fact that exchanges only occur between people who have never met and are not bound by external social forces that obligate one to reciprocate exchanges. Some authors, such as Thorn and Connolly (1987), suggest that individuals are less motivated to reciprocate exchanges the further they are removed physically from each other. This does not bode well for internet exchanges. Yet if the level of attachment to the online group is strong enough, internet community members will feel the burden of wider cultural norms of reciprocity and will feel more compelled to provide assistance to others when it is requested, particularly when they themselves have received advice or assistance from that online source. Kollack and Smith (1996) describe this set of community based obligations:

> Whatever the goal of the newsgroup, its success depends on the active and ongoing contributions of those who choose to participate in it. If the goal of the newsgroup is to exchange information and answer questions about a particular topic, participants must be willing to answer questions raised by others, summarize and post replies to queries they have made themselves and pass along information that is relevant to the group.

Reciprocity is likely to be bound up in feelings of attachment to the community in question as people will generally feel compelled to comply with social obligations for mutual exchange and payback if they have positive feelings toward that community. What is seen in the reciprocal exchanges of internet forums is, in fact, the kind of reciprocity that characterizes social relationships among kin and the basis for exchange for traditional foraging societies, i.e. generalized reciprocity, in which one provides assistance to people within the community without the expectation that he will receive something in return from the person to whom she is providing assistance. Rheingold (1992:60), for example, in his discussion of his own participation in the WELL (Whole Earth 'Lectronic Link) community, a pioneer virtual community established in 1985

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about a host topics of interest, writes "the person I help may never be in a position to help me, but someone else might be." And when online communities are large, as indeed they often are given the ease with which new members can gain access to them, it is easy to maintain the flow of generalized reciprocity as "the accumulation of small, individual acts of assistance can sustain a large community because each act is seen by the entire group and helps perpetuate an image of generalized reciprocal and mutual aid (Wellman and Gulia 1999: 178). The available evidence suggests that "relationships people develop and maintain in cyberspace are much like most of the ones they develop in their real-life communities: intermittent, specialized, and varying in strength (Wellman and Gulia (1999: 1896). Sociologists Wellman and Gulia (1999:187) put it well:

> Pundits worry that virtual community may not truly be community. These worriers are confusing the pastoralist myth of community for the reality. Community ties are already geographically dispersed, sparsely knit, connected heavily by telecommunications (phone and fax), and specialized in content. There is so little community life in most neighborhoods in western cities that it is more useful to think of each person as having a virtual community: an individual's social network of informal personal ties, ranging from a half-dozen intimates to hundreds of weaker ties.

This is not to say, however, that scholars are in agreement that there are not important elements of social life that are lacking in online human relationships that negate the use of the term "community." Definitions of virtual communities necessarily are quite obviously critically dependent on the identification of shared social practices in lieu of physical interaction (Jones 1995; Watson 1997). There are obvious consequences to the lack of physical interaction on the internet, one being the loss of facial expression, voice intonation, and body language that provides cues and pragmatic meaning to communicative exchanges. Another critique lodged against the application of the community label to internet groups is based on the fact that many online communities are

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forged around a single topic of interest and that interest alone is not enough to qualify even the most interactive online forum as a community. This critique is based on the idea that there are a number of essential qualities to communities that virtual entities lack. These include the sharing of physical needs and resources, mutual interdependence, and complex social organization based on kinships, economics, and politics. The application of the term community to an organization that possess little to none of these features is something that many authors suggest renders the term less descriptive of the complex social organization that it really is (Shumar and Renninger 2004b). Virtual communities, by necessity, must rely on a higher degree of shared interest and intentionality than "real" communities that are organized in a way that is, as a rule, spatially and temporally grounded. The physical and temporal space that people in real communities share is part of the basis upon which people interact. Comparatively, electronic communities are temporally and spatially disjointed and conceptualized as entities founded on similarities of interest and/or lifestyle (Mitchell 1995; Rheingold 1998). The spaces that define and separates virtual communities, though tied to an interaction based on an internet geography, are wholly symbolic.

Beyond the consequences of a loss of spatial and temporal grounding, however, are other psychological deficits that can be argued to characterize online interaction. An obvious criticism of the use of the term "community" to describe online interaction is that members do not share the same level of intimacy and personal connection nor the same types of obligations and responsibilities that characterize real communities (Wellman and Gulia 1999). As Carroli (1997:359) asserts, "the notable traits of this space include the paucity of social context for information, the few widely shared norms governing its use,

the absence of regulating features, and social anonymity." The essential qualities upon which real communities are founded—namely consensus, rationality, and collectivity—do not "translate well" in a virtual environment. Further, just how much "community" can be ascribed to an online forum has much to do with the scope of the interests that draw the individuals together? Narrow ranges of interest—for example, an internet forum for recipes—do not lend themselves to the type of interaction that is engaged enough to merit any traditional use of the term (Kiesler 1997; Smith and Kollack 1999)

Though the points provide important reasons to hesitate to apply the term community to even the most structured and stable online social organization, apart from the earliest studies , the literature on virtual communities is much more focused on exploring the potential for rich communication and collaboration online than in defending the use of the community label. As already discussed, part of what is at issue for many authors is the impossibility of defining what community is in the real world if even a comparison is to be made. Indeed, while the debate about the authenticity of virtual communities is generally framed as a comparison to real ones, it has, to a large extent, died down in the most recent literature . Additionally, more often than not, the case against the use of the term community to describe even the most regular and personal of online interactions is through the use of romanticized views of traditional human communities that simply do not hold much weight for comparative purposes (Wellman and Gulia 1999). Moreover, if one accepts the community construct to be largely useful only as an imagined one in the real world, it is easy to make the leap to community online. As Renninger and Shumar (1994a:3) put it, "the forms of interaction that evolve [online] might best be understood as both symbols of participants' internalized images of

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possibilities for community." Indeed, a community view of online interaction simply requires a recognition of and shift away from a more traditional, romantic notion of community to one that is grounded on interaction and meaning creation between individuals. Raymond Williams, speaking about real—not online—community observes that "the process of communication is in fact the process of community: the sharing of common meanings, and thence common activities and purposes; the offering, reception and comparison of new meaning, leading to the tensions and achievements of growth and change" (in Watt 1991:62). These elements can be found online.

Consequently, much more typical in the literature are discussions by scholars who are not interested so much in comparing virtual spaces to real ones but rather in demonstrating that the virtual environment is a unique social space that defies classification as public or private (Carroli 1997). As Watson (1997) asserts, the debate regarding the authenticity of virtual communities in relation to their real counterparts can detract from the study of online human interactions as a whole, which, whether or not one feels comfortable with the term community, are no doubt important forums in which humans interact in contemporary society. In keeping with this view, on the other side of the argument are the number of authors who are less concerned with demonstrating the similarities between virtual and real communities, and more concerned with demonstrating that online interaction is giving rise to new forms of social interaction and identity construction. There is a wide range of social activity on the internet, all being constructed socially through very particular forms of interaction. So various are the types of interactions that occur online that it, as many scholars assert, defies even a unifying label or descriptor (Hakken 1999)

For example, conventional categories of human identity construction—gender, race, and sexuality—are discarded or manipulated online in ways that defy traditional ideas of personhood (Savicki et al 1996; Shaw 1997; Burkhalter 1999). Such novel developments in human identity construction and use merit study in their own right as do the properties of the kinds of online social organization in which they are deployed (Herring 1996; O'Brien 1999). These organizations can mirror real communities in a number of ways, but, perhaps more importantly, they deviate from them in ways that stretch or obviate the term community but are nonetheless important objects of study for social scientists (Jones 1998). Going even a step beyond this type of position, however, are the numerous authors who boldly argue that the internet is enhancing human social interaction as a consequence of the unique features of online communication. Shumar and Renninger (2004:2), for example, argue that the main distinctions between virtual and real communities are that virtual communities "can extend the range of community and individuals can tailor their personal communities," i.e., it is the enhanced control and increased flexibility of online communities that make them so unique. Many other authors (e.g., Herring and Martinson, 2004; Rellstab 2007) would echo this assertion citing such unique features the virtual environment as the ability of users to alter their images of themselves and control their level of interaction with others.

Taking a step back, many of the unique qualities in social interaction that are of interest to researchers of online communication relate to the many obvious practical advantages of the internet: it is inexpensive, instantaneous, and allows people to share a great deal of information over practically any distance on the globe. The information exchanged online is archiveable and thus usable for long after the actual communication

event (Kollack 1999). Some authors suggest that the archiving potential of the internet is more than just useful. Rather, it is a means for a limitless system of exchange and reciprocity of information that can be instantaneously be put to use to develop intimacy based on shared knowledge between two people online (Shumar and Renninger 2004a). And while some scholars question the legitimacy of online communities on the grounds that individuals generally spend time in multiple online environments and vary their level of participation in them as they so choose, others view this same phenomenon differently (Wellman and Gulia 1999). Such authors focus instead on the immense potential of the internet to expand networks through easily made and, more importantly, vastly extended social networks. Lea and Spears (1999), for example, argue that the internet, as a consequence, has fewer constraints on size as well as proximity, than physical communities. The ease with which previously disconnected people can be put into contact through forwarded email communications and invites allows for practically limitless and efficient expansions in community size.

Internet-based interactions may also very well represent a space where hierarchical structures and power positioning can be subverted. Whereas all discourses between individuals reflect and recreate social structure and either power equities or inequities between participants (Davis and Harre 1990), online interactions provide speakers with greater flexibility in both time and space to circumvent power positioning (Renninger and Shumar 2004). In this same vein, some authors (e.g., Garton and Wellman 1995; Hiltz and Turoff 1993) suggest that the relatively egalitarian context of the internet encourages responses to requests from others and, to at least a certain extent, side steps the host of conflictual issues that can rise between individuals on the basis of

gender, race, class, socioeconomic status, lifestyle, age, etc. as there are fewer social cues

that transmit this information directly between participants. Some suggest that it is in the

nature of the relatively weak ties of the internet allow people from different social

backgrounds to communicate in ways they may not have, if at all, in the physical world.

Constant et al (1996) for example, demonstrated that people were better able to solve a

problem at hand by utilizing suggestions from people from a broad range of social

backgrounds than when they only received advice from people with similar social

characteristics.

Additionally, many studies have begun to suggest that there is no loss of sociality

as a consequence of the loss of visual interaction and, taking the argument a step further,

asserting that internet communication can be, in some way, more social than real live

interaction (Joinson 2003; Rheingold 1993). Some authors, for example, suggest that

online interaction can lead to high level of affiliation as a consequence of idealization of

the other person (McKenna, Green and Gleasin 2003). A number of authors have

demonstrated that people have a "tendency to disclose more to a computer" (Wallace

1999:151) and be much more candid about the kinds of things they will reveal—and

progressing to that point much more quickly—when the communication is mediated by a

computer (Ferriter 1993; Robinson and West 1992). McKenna, Green, and Gleason

(2002) found that people report being better able to reveal their true selves on the internet

and frequently disclose information that might, in offline circumstances, be considered

socially unacceptable. Social identity theorists assert that visual anonymity increases

levels of group identification by accentuating the homogeneity of its members (Spears

and Lea 1992; Spears et al 2002). The internet represents a ripe opportunity for this type of identification.

Conclusions on Virtual Culture

It is safe to say that the heyday of academic discussion surrounding whether or not a virtual community can be likened to a real one occurred throughout the 1990s, as scholars of developing internet communications first cast doubt as to the social depth of online interaction and then proceeded towards a more positive assessment of the potential for rich and nuanced human relationships through the medium. At present, the literature is not marked by a strong debate regarding the authenticity of online communities. This is in large part due to the recognition that the community concept itself—as it is applied to real live human groups—is not without its problems and is better conceived as an imagined construction though which people give their lives structure and meaning. To compare online communities to real ones, in the minds of many scholars, is to engage in a fruitless exercise in which a romantically idealized notion is serving as the base for examination. Indeed, as Renninger and Shumar (2004a:9) state it, "the fluidity of boundaries and flexibility of how community is defined make it possible for participants to enact forms of community in the virtual world and extend the definition of community as a function of social imagination" As opposed to debates surrounding the application of the community label to online groups, the literature on virtual communication has moved forward, focusing instead on the unique characteristics of online communication that is transforming the way contemporary humans interact.

But what does this mean for the study of virtual organizations? While the treatment of virtual organizations in the anthropological literature is practically non-

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existent, certain questions from the academic debates regarding virtual communities are applicable to a research project that attempts to understand the culture of a virtual business organization. Is it advisable to compare virtual organizational cultures to brick and mortar organizations in understanding their strengths and weakness or does it make more sense to examine this form as an entirely new kind of workplace entity? Do employees of virtual organizations make these comparisons themselves or do they evaluate their virtual employer by a different set of standards in regards to how work is defined and how workers are treated? Do virtual workers experience unique freedoms in terms of how they project themselves to their employers and coworkers as employees and are unique forms of worker behavior apparent in a virtual enterprise? And does routine online interaction (and the lack of proximal contact) help or hinder the formation of a collective identity among employees of a virtual organization? Some of these questions are being answered, not by anthropologists, but most prominently by researchers in the management sciences. In the next section, I will situate virtual organizations in their historical context and then examine the existing literature on these specific forms.

Situating Organizational Culture in the Age of Globalization: The Virtual Organization

Levitt (1983) is attributed with popularizing the use of the word globalization in economics and business when he published an influential article in the Harvard Business Review titled "The Globalization of Markets." In this groundbreaking article, Levitt argued that technology would produce a standardized global market that would cause multinational companies to standardize their goods and services and would bring lower priced goods to consumers. Nearly thirty later, there is an immensity of the literature

related to globalization arising out of the disciplines of anthropology, sociology, geography, political science, and economics—among others—rendering it no simple matter to summarize how scholars have conceptualized this concept, which bears relevance to the particular organizational culture that is the subject of my research,

By way of general description, much of this cross disciplinary literature on globalization focuses on its more economic features, and definitions of the phenomenon include discussion of the proliferation of neoliberal policies on international trade and investment – the latest phase of global capitalism. Often globalization is regarded as a "justification of the inevitable victory of neoliberalism," an assertion that more critical analyses tend to contest (McBride and Wiseman 2000: 6). More comprehensive definitions incorporate some idea of "the increasing flow of trade, finance, culture, ideas, and people" that has resulted from the spread of neoliberal economic policies and advancements in communication and transportation technologies (Lewellen 2002: 7). Implicit in this process is the marked interconnectivity of human populations in a world in which the restrictions of time and space have shrunk.

Globalization has impacted the business structures of the largest and most transborder business in the world today. The greater ease with which goods, money, and ideas move around the work also makes it possible for very small firms and individuals to operate in global markets" (Smart and Smart 2005:2). To a certain extent, as some scholars would argue, globalization forces small companies to become globally operative themselves simply to avoid being beaten out by competitors who already do so provided they can deliver their products and services in a consistent manner anywhere else in the world. What is required of business today is "constant, fast, and efficient adaptation of

business systems to changing processes (Kern 2005:23). Flexible innovation and ability to adapt quickly to changes within the global economy is facilitated by a virtually organized and networked enterprise structure (Castells 2000). When clients demand shorter delivery times and last minute changes and when profits are dependent upon cutting operating costs, it is critical that superfluous business operations be removed from the system (Kern 2005:29). Speed and innovation become the hallmarks of a successful business model as "network age companies that have master virtual integration and melded business boundaries are recognized as having implemented a superior business model" (Nolan 2001:4).

But how can small companies compete with larger ones and what is the role of globalization in making this possible? One primary method is to take advantage of virtual business operations. Virtual markets refers to the "settings in which business transactions are conducted via open networks based on the fixed and wireless infrastructure" (Amit and Zott 2001:495). A key characteristic of the virtual market is near boundless reach and connectivity as a consequence of the disappearance of geographical boundaries. The impact of the improvements in the speed, quality, and extent of communications technology cannot be underestimated and has allowed even small companies to extend their reach globally with relatively little capital investment (Hagel and Armstrong 1997). The internet is one of the primary vehicles that enables small and new firms to compete with established ones—it is the electronic network that supports the emergence of virtual communities (Rasmussen and Wangel 2007). The internet makes virtual organizations and the virtual market possible primarily because it is so accessible and so inexpensive. No longer is it true that only large firms can afford the computers and technologies

required to compete domestically and globally. Telecommunications is the infrastructure that enables small companies to hold their own against larger ones. Information technology is what enables an organization to conduct and manage business at multiple locations across the globe, whether that company be large or small (Robertson 1992).

The internet allows the seamless extension of a business' products and services, new collaborations between organizations, and real time customization of those products and services. Transaction costs can be minimized and efficiency maximized through labor outsourcing that is set up to function in a virtual capacity (Amit and Zott 2001). In depth analysis of the value chain benefits of e-business has even been formally performed by several authors (e.g. Stabel and Fjeldstad 1999); Rayport and Sviokla 1994). The virtual value change for companies that that provide information services "includes a sequence of gathering, organization, selecting, and distributing information" (Amit and Zottt 2001:496). A resource based view of value creation examines the unique combination of resources and capabilities that a firm possesses that allows it to compete among similar firms in a given industry. Virtual organizations represent new sources of value creation in that they allow for the exploitation of new relational capabilities and complentarities among a firm's existing resources. Additionally, virtual organization allows for an easily expandable networking that not only increases the size of an organization at little cost but increased the depth of variation of individuals included in a network, the consequences of which are thought to be largely positive (Doz and Hamel 1998). Wider networks of interaction allow for greater access to greater quantities of information that is increasingly and beneficially heterogeneous. Additionally, they facilitate learning opportunities while simultaneously allowing for shared risks.

Networking facilitated by virtual organization can allow for greater speed in product and service delivery while "globalization provides opportunities for small business and individual entrepreneurs, empowering persons and social groups" (Kellner 2002: 288)

The internet has simply revolutionized the way that small businesses interact with their clients, or, more formally, their customer management strategies (CRM). Web pages are a vital component of any small business as they allow potential clients to acquire information about products and services any time of day and form any location in the world (Keindl 2001)). The internet can be viewed as an equalizing mechanism in that it allows even very small companies to project an image of quality, professionalism, and even larger size (Wilson 2002). It has enabled organizations increasingly use virtual organizing of their labor as an integral part of internationalizing their operations and lifting performance" (Lipnack and Stamps 1997; Venkatram and Henderson 1998).

The virtual enterprise is yet another novel business structure that been enable by globalization processes. Virtuality can be defined as "the ability of an enterprise to offer customers a complete product or service with the enterprise itself having a only a few proprietary competencies while the remaining competencies are achieved through cooperations" (Bremer et al 2001:213). Simply put, virtual partnerships allow independent business entities to share their resources, if only temporarily, for the productive gain of both parties. The effect of such partnering allows small companies to produce complex and customized goods and services through networks and consequently improve their ability to compete. In this way, the virtual enterprise can be defined as a cooperation network that allows small players to overcome deficiencies in capital as well as competencies (Eversheim et al 1996). Through cooperation, virtual enterprises are

able to offer products or services efficiently and at lower costs, surviving in both domestic and international competitions by switching from the "producer-focused to a customer-focused standard" (Bremer et al 2001: 214; Riethofer and Nager 1997)) Simply put, virtual enterprises enable small players to compete with larger ones because information technology has made possible easily established, flexible, and unprecedented partnering of resources.

Some argue that expectations for product and service innovation, support services, and immediacy have increased with the changes in business practices that have resulted from globalization. Virtual structures benefit from easy networking and the subsequent leveraging of capital investments made by various partners in the enterprise.

> "Customer focused companies create additional value for their customers by building value chains that identify, produce, deliver, and service customer needs. They often create multi-enterprise organization that integrate supply chain efficiencies with demand chain management processes that anticipate customer expectations and ensure the availability of products and services in the right place, at the right time, at the required level of service, and at the lowest possible supply chain cost" (Walters and Rainbird 2007:600)

Naisbitt puts it very simply "the bigger the world economy, the more powerful its smallest players" to the extent that, unlike in decades before, large companies must decentralize and reconstruct themselves as networks of entrepreneurs (Naisbitt 2001:12). Smaller players are faster, less weighed down by bureaucracy, and, consequently, more attentive to the needs of their customers. The formation of strategic alliances prevents a company from getting bigger, which allows them to maintain flexibility, reorganize and adapt efficiently. Small, client-oriented players are able to do today what would have been impossible a few decades ago. The facilitation of international communication and travel means that the world has shrunk for small businesses as well as large ones, who are

now more than ever better able to fulfill a customer's needs irrespective of location.

Globalization is different from mere internationalization of business not because a

globalized business can provide services outside of its headquartered location, but

because it provide services to practically any client *irrespective of location*. A globalized

company simply can make its services, products, or competencies available wherever a

client might require. In Korine and Gomez's terms (2002:22) a global business enjoys a

"compressive advantage" though building a "business without borders." This is distinct

from the mere multinational capacity to manage economic flows between countries that

companies have enjoyed since at least the turn of last century or the international capacity

to take advantage in differences in national productivity levels that has been in existence

since 17th century mercantilism. In this way, a global business not simply an extension of

previous forms but is distinct from an international or multinational business which have

been documented for well over a century (Ricardo 1817; Wolfe 1982). Globalization as

an economic forms is characterized not by trade relations between countries or

internalized coordination across borders but from the creation of business value without

borders (Korine and Gomez 2002). InsightCorp, the virtual company that is the subject of

this dissertation, is an entity that owes its existence to the technologies and possibilities

afforded by the age of globalization, and its organizational culture should be examined

with this context in mind.

But what kind of virtual organization is InsightCorp? The answer to this question

requires a brief examination of the definitions of virtual organization present in the

current literature. What is immediately apparent is the number of confusing terms

surrounding work that takes places outside of the confines of a traditional, brick and

mortar office and no discernibly universal definition exists (Colky and Young 2006). One

needs to be careful in the use of the term, "virtual corporation," "virtual enterprise" or

"virtual business" because such terms are used in different ways, but most often used to

describe networks of independent companies that use information technology to share

markets, skills, and expenses to accomplish temporary goals (Yogesh 2000; Byrne *et al*

2003; Bultje and van Wijk 1998). These conglomerations might also be referred to as

"virtual teams" although that term may also be applied to groups of individuals within the

same company who unite temporarily only for a specific project but are not located in the

same geographic space. In this way, the term virtual organization can refer to both

intraorganization forms as well as interorganization forms (Kasper-Fuehrer and Askanasy

2003). As a point of fact, InsightCorp, the organization that is at the heart of this

dissertation, participates in many virtual corporations because it often links up

temporarily with other companies, even sometimes its direct competitors, forming

temporary partnerships to advance short term business interests both domestically and

internationally. However, those organizations will not be the focus of my examination

here. Rather, I am focusing on the organization of the base company itself, which is also

"virtual" if I subscribe to a definition such as that offered by Travica (1997:2): "virtual

organization refers to a new organizational form which manifests itself as a temporary or

permanent collections of geographically dispersed individuals, groups, or organizational

unites—either belonging or not belong to the same organization—or entire organizations

that depend on electronic links in order to complete the production process." This is a

very broad definition but accepting geographic dispersal and the dependency on

electronic communication as the two primary criteria for virtuality, the company

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qualifies. InsightCorp is a permanent collection of geographically dispersed individuals that constitute an entire organization dependent on electronic links and as is a virtual organization for the purposes of this research (Gibson and Gibbs 2006).

This kind of organization is rare in the literature, and the vast majority of the literature on virtual organizations is focused on virtual organizations that are temporary networks of independent companies as these are viewed by many to represent an important, novel, and rapidly growing organizational form in the globalization age. But these distinct organizational forms share two critical traits that absolutely impact the dynamics of work: the geographic dispersion of the organizational units (including individuals) and the electronic linking of the production process (Travica 1997). However, I have to be very selective in my use of the literature as the difference between a temporary virtual organization and a permanent organization that is virtual can be critical when it comes to issues that impact corporate culture. Indeed, some authors go so far as to suggest temporary virtual organizations, because of their transient nature and specific short-term focus on product development and delivery, do not support the development (and really do not require) a corporate culture at all (Kasper-Fuehrer and Askanasy 2003).

Because of the rarity with which the kind of virtual organization that is the subject of this dissertation is treated in the literature, I also must selectively consult a different body of literature—one that examines issues related to telecommuting. "Telecommute," like virtual organization, is also a term that is defined in many different ways in the popular and academic literature. A basic definition is to work away from a centralized workplace though the use of communications technologies. Indeed, the consistent feature

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of most definitions of telework is an emphasis on electronic communications as the main mode of contact between the worker and the employing organization as the degree of remoteness of the work can be highly variable in that a worker may telecommute once a week, once a month, or every day and the percentage of employees within an organization who telecommute can vary as well (Cooper 1996).

Confounding definitions of virtual organization and telecommuting aside, the available literature can be explored for issues that are pertinent to a study of the organizational culture of a company in which nearly all of its employees work exclusively from home, as is the case for InsightCorp. A well-cited review article by Harpaz (2002) summarizes the proposed advantages and disadvantages of remote work for the employee, the employer, and society at large. Individual benefits include a feeling of autonomy and independence as a result of the absence of direct supervision, flexible working hours, improved time management as a result of fewer workplace distractions (such as water cooler talk), savings in travel time and expenses, flexibility in caring for family members (such as older family members or small children), and the professional flexibility of being able to consider work opportunities that might not otherwise be locally available. Disadvantages include an impaired feeling of belonging to a team, feelings of isolation or solitude, blurred separation between home and work spheres, the potential for "work addiction" when limits are not self-imposed by the worker, lack of professional support, limitations on career advancement due to lack of person to person interaction, "over availability syndrome" or the condition of finding oneself constantly badgered by colleagues outside of accepted working hours, and lack of clarity on legal matters such as sick leave or workplace injury compensation.

For the organization, advantages of telecommuting including increased productivity of e-workers at least partially resulting from reduced interpersonal friction and problem solving, increased pool of employable workers, decreased absenteeism, overhead savings on rent and property maintenance, increased worker motivation resulting from employee-perceived benefits of remote work, and the bolstering of a positive, progressive reputation for the company itself. Disadvantages for the employer include obstacles to centralized management or supervisory opportunities, investment in new training to prepare workers and managers on best practices for remote work arrangements, potential harm to organizational commitment or identification, transition costs, and legal questions. Oft-cited societal advantages to remote work include decreased traffic and related pollution, improved opportunities for special needs populations (such as persons with disabilities or parents of small children), and savings in infrastructure and energy costs. Suggested disadvantages relate to the encouragement of a detached society where individuals are isolated from one another and public institutions. As Baruch (2001:45) puts it:

> Teleworking might create and "Autistic Society" in which people are detached from each other and suffer from communication problems. The two main syndromes of autism are an en extreme isolation from human contact and anxiety for the surrounding physical environment to remain unchanged….These, in fact, characterize home-working as well—what is lacking in home-working is the human touch of relationships between people. A lot of information is delivered, but the vehicle used can deliver only part of the message. The body language, the gestures, all these ingredients of communication are not present. The feeling element is missing. As our whole society becomes more isolated, working from home can provide manifestation for this trend of our time.

As horrific as this prospect sounds, a general assessment of the literature surrounding remote work suggests the advantages outweigh the disadvantages although empirical evidence for that claim is glaringly absent (Harpaz 2002). On the surface, the

concept of remote work is widely appealing. In April of 2012, an online survey by Harris Interactive revealed that 62% of Americans believe most people want the option to telecommute (and more specifically that 5% of Americans would get a divorce in exchange for being able to work from home, 17% would give up raises, 15% would give up half of their vacation days, and 12% would give up a daily shower) (http://eon.businesswire.com/news/eon/20120214005605/en/TeamViewer-Survey-Americans-Telecommute [Accessed August 9, 2012].

The literature specifically on virtual organizations, which would be inclusive of interorganizational virtual entities, cites a similar set of advantages and disadvantages for workers in these arrangement, but with some notable differences arising largely from the tendency for all individuals within these virtual teams to work remotely (whereas in telework arrangements typically only a subset of employees work remotely). Jones *et al* (2005) argue that workers in virtual teams are more likely to be judged based on their results as opposed to the number of hours they spend sitting at their desks, contributing potentially to higher morale as a consequence of recognition of real effort put toward employee tasks. They also argue that virtual arrangements have, to some degree, the potential of level the playing field between men and women, and between workers in minority and majority groups, because cues about gender and ethnicity (and physical appearance in general) are less salient in phone and email communication relative to in person interaction.

More challenging relative to most telecommuting scenarios, virtual organizations need to consider implementing policies and strategies to mitigate the potentially negative outcomes of continuous virtual interaction. DeRosa and Lepsigner (2010) provide a

throughout treatment of these issues in their recent publication *Virtual Team Success: A Practical Guide for Working and Leading From a Distance.* Primary priorities in the management of virtual teams include 1) establishing clear roles and lines of communication to prevent confusion over responsibilities and leadership status, 2) putting systems in place to ensure accountability and proper recognition of individual effort and to mitigate against lack of engagement, and 3) ensuring routine meetings are effective and introduce new, usable information to team members lest participants become accustomed to multi-tasking and not paying attention to meeting content. A significant theme running throughout the literature on virtual organizations has to do with establishing effective and quality interpersonal relationships or bonds between members—including encouraging some degree of purely social, non-work related interaction (e.g. Fukuyama 1995; Handy 1995; Germain 2011; Schoemaker and Jonker, 2005). The relationships between team members are seen as integral to the development of the trust that increases the likelihood that individual tasks will be well executed and that team members will be able to work together efficiently and effectively. Interestingly, many authors recommend intermittent face to face contact among team members whenever possible to reduce potential problems encountered frequently by virtual teams (Handy 1995; Fiol and O'Connor 2005; Robert et al 2009; DeRosa and Lepsigner 2010).

While statistics concerning the number of companies with organizational structures like InsightCorp are not specifically available, there is pubic information available concerning the frequency of telework. At present, 20% of working adults participate in telework for an entire day at least once a month. Telework has been somewhat steadily been on the rise over the past decade given improvements in internet

communications technologies, although a small decrease in the total number of people who teleworked showed a decline in 2010 from 33.7 million in 2008 to 25.2 million in 2010. (WorldAtWork 2012). Thinking about how InsightCorp employees work, their situation is quite rare with only 2% of the U.S. employee workforce (not including the self-employed) considering home their primary place of work (Global Workplace Analytics 2012). The U.S. employment Policy Foundation, however, a nonprofit, public policy research and education foundation based in Washington, D.C. that focuses on workplace trends and policies, suggested over a decade ago that roughly 65% of jobs are amenable to teleworking (Wiesenfeld *et al* 2000). In short, work arrangements like those experienced by InsightCorp employees are not the norm, but they are envied and in demand, and most indicators suggest that virtual arrangements will increasingly impact a great many workers in the years to come.

Focusing the Research Lens on the Employee Experience

Because it is a goal of most corporate culture assessments to understand an organization's culture in such a way as to link those findings to organizational outcomes or effectiveness criteria, it is necessary for this research to identify its specific outcomes of interest. There are many ways to evaluate how effective a corporate organization is, depending upon what outcomes are given analytic priority, and, indeed, an analysis of the existing literature on organizational effectiveness or success is beyond the scope of both my research interests and subject matter competence. Instead, I take as a starting point for further refining my research focus an effectiveness classification scheme developed by Hartnell *et al* (2011) because it is recent and adequately integrates effectiveness criteria used in management science literature (e.g. Dyer & Reeves 1995; Hart and Quinn 1993;

and Kaplan and Norton 1992). The three criteria these authors postulate in an article summarizing their meta-analysis of a specific typology used to identify organizational culture (specifically, the organizational science typology employed in this research as will be discussed in chapter 3) and its connection to specific effectiveness outcomes are: employee attitudes, operational effectiveness, and financial effectiveness. Employee attitudes effectiveness criteria consist of employees' cognitions toward the organization, such as organizational commitment and job satisfaction. Operational effectiveness represent an organization's innovative products and processes as well as product service and quality. Financial effectiveness encapsulates an organization's pursuit of external measures of success, such as growth (increase in revenue and or number of employees) and profitability.

The corporate culture assessment portion of this investigation will focus on employee attitudes as effectiveness criteria for the existing organizational culture. My research interests and methodological access limitations at least partly justify this choice. That is, out of all these three effectiveness criteria, the experience of employees is of primary personal interest to me and it is the area to which my research methods and site access are best suited. As an employee and a researcher who interacts with all employees (as opposed to only leaders), this research presents tremendous opportunity to understand employee attitudes across all levels of the organization. On the other hand, given my lack of formal training in business, I am less qualified to assess how innovative InsightCorp's products are, and I am less privy to the financial details that would allow me to analyze its financial health. I am also sensitive to the fact that revealing too much about the company's product line or financial position poses significant ethnical concerns. I will,

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however, briefly present my assessment of both the operational and financial effectiveness of the company when I further elaborate on the research setting in chapter three.

Apart from methodological and ethical concerns, my focus here on employee attitudes is further justified because much of the literature demonstrates that employee attitudes directly relate to issues of loyalty, performance, and turnover that can (although not always) have direct consequences on operational and financial effectiveness (Igbaria and Guimares 1999; Tutuncu and Demir 2002; Eskildsen and Dahlgaard 2000; Zhao *et al.* 2004; Choi and Eboch 1998; Samson and Terziovski 1999; Anderson et al. 1995; Dow et al. 1999; Adam et al. 1997; Hendricks and Singhal 1997; Carr *et al* 2003). Further, an orientation that seeks to illuminate the perspectives of the worker (as opposed to the higher status corporate leader) is a point of differentiation for anthropological approaches to organizational culture studies that seek to avoid the over-simplistic "conflation of the company's culture with the organizational philosophy of a stakeholder group" that are characteristic of many of the studies found in the management science journals (deRoche 1998:63). In the section to follow, I will treat some key themes in the literature that will ground my analysis of the corporate culture of InsightCorp with a focus on employee attitudes.

Empirical studies attempting to link specific corporate cultural "types" and job satisfaction support a connection between higher job satisfaction and both innovative and supportive cultural types, or what would be termed adhocracy or clan dominated cultures in Cameron and Quinn's (2011) typology (for detail see discussion on the OCAI in chapter 3). Conversely, job satisfaction is lower in companies with cultures that are

dominated by hierarchical and market attributes (Cameron and Freeman1991; Quinn and

Spreitzer 1991; Zammuto and Krakower 1991;Goodman, Zammuto, and Gifford 2001;

Lund 2003; Zazzali et al. 2007). Market dominated cultures, that is, those who define

their primary mode of operating as oriented toward external competiveness and results or

profit, are viewed as particularly noxious for employee attitudes, in that work cultures

characterized by these qualities are permeated by competition and aggressiveness,

fostering distrust among organization members who learn to prioritize self interest in

favor of collaboration (Kirkman & Shapiro 2001).

 Also linked to job satisfaction is a concept known in organizational management

and organizational psychology circles as organizational or member identification.

Organizational identification is simply defined as "members' perception of belonging to

the organization (Ashforth and Mael 1989). The concept is derived from social identity

theory, a central tenet of which is that the basis of an individual's self-categorization and

personal identification with an organized is her perceived similarity to other members of

the group (Kramer 2006). To put it another way, identification is a person's sense of

belonging within a social category and with regard to an organization "represents the

social and psychological tie binding employees and the organization" (Wiesenfeld et al

1999:778). In numerous studies, the strength of member identification with a group has

been linked to higher job satisfaction, greater employee compliance, higher motivation,

stronger group cohesion, higher retention and lower in-group conflict (Kramer 1991).

 But what are the implications of fostering member identification in a company

that is wholly virtually organized? As has been already discussed in some detail, virtual

workers' separation from coworkers and supervisors has been shown to lead to feelings

of isolation, greater need for self-organization, and even greater stress (Nilles 1994) and

certainly the physical separation of workers presents a challenge for both controlling and

coordinating a workforce (Weisenfeld *et al* 1999). Indeed, researchers have demonstrated

links between the strength of an individual's identification with an organization and his

exposure to cues suggesting that he is a member of a true collective. In traditional

research settings, that is, brick and mortar workplaces, these cues notably include

artifacts, symbols, rituals and ceremonies, all of which have been positively related to

organizational identification (Dutton and Harquail 1994; Pratt 1998). But just as the

literature on virtual communities has called into question the assumption that proximity is

a requirement for fostering a sense a group cohesion, some of the literature on business

organizations has demonstrated that co-located teams do not necessarily feel close to each

other, and distantly located employees do not universally feel disassociated from each

other and from a collective (Wilson *et al* 2008; Cohen and Baily 1997). As a

consequence, researchers have begun to try to understand what factors predict

organizational identification in virtual organizations. Indeed, as Wiesenfeld *et a*l (2001:

215) note, the development of organizational identification may be even more important

in virtual organizations relative to traditional ones:

> By its nature, virtual work diminishes emphasis on the visible, tangible
> dimensions of organizations (e.g. offices, collocated employees) instead relying
> primarily on psychological dimensions (e.g. the perceptions of employees and
> others) to represent and organization. If an organization is to have meaning to
> individuals in a virtual work context, it will be because members feel that they are
> a part of the organization.

Other researchers echo this idea that mental bonds between a worker and the

employing organization are even more vital for virtual workplaces than brick and mortar

ones. Without an externalized bureaucratic structure, shared meanings, values, and

beliefs—that is, internalized cognitive structures for what it means to be a part of an organization—become especially critical (Alvesson and Robertson 2006; Ashforth and Mael 1989; Ashforth and Dutton 2000).

Organizational identification is postulated as a prerequisite for promoting a sense of togetherness in spite of an absence of physical contact (Pratt 2001). A key factor that is apparently related to the development of organizational identification in virtual settings may be perceived social support, which refers to the extent to which individuals perceive that they have positive social relationships with others in the workplace (Aspinwall & Taylor, 1992; Dormann & Zapf, 1999; Lim 1997; Wanberg & Banas, 2000). Specifically, the connection between social support and organizational identification is based on the assertion that when an employee perceives coworkers and superiors as socially supportive, the feeling of being valued, included, and respected is enhanced. As such, the employee makes the connection that his involvement in the organization is positive and attractive, which consequently increases the likelihood that this individual will be motivated to identify with the organization (Luhtanen & Crocker, 1992; Dutton et al 1994; Dutton and Harquail 1994). Further, social support is viewed as a reinforcing mechanism in that individuals who receive social support will be reciprocally motivated to return support to others (Gouldner 1960). Additionally, social support has also been shown to mitigate against individual variation in need for affiliation in that, when work based social support is high, organizational identification is facilitated, even among individuals with a low need for affiliation (Wiesenfeld et al 2001).

Related to the issue of social support is the concept of social capital, which has immense utility in trying to understand the possible obstacles confronting a virtually

organized business entity. Social capital, in addition to being a core concept of the social

sciences, has also been put to use in the business literature to considerable extent. Within

the literature on management and organizational sciences, organizational social capital is

defined in various but arguably harmonious ways. Cohen and Prusak (2011:510) describe

it as consisting "of the stock of active connections among people: the trust, mutual

understanding, and shared values and behaviors that bind members of human networks

and communities and make cooperative action possible." Fukuyama (1997:278) labels it

as a particular set of "informal values or norms shared among members of a group that

permit cooperation among them. Inkpen and Tsang (2005:151) define it as 'the aggregate

of resources embedded in, available through and derived from the network of

relationships." Whereas some researchers restrict their understanding of social support to

the amount of social support an individual *perceives*, those who employ the construct of

social capital are referencing a working *network of relationships* between people that

have benefits to both individuals and group members.

Davenport and Daellenback (2001:58) specifically link the concept of social

capital within organizations to organizational identity formation. Using a framework

adapted from Nahapier and Ghoshal (1998), the authors examine the links between three

dimensions of social capital in an organizational setting. These are structural, cognitive,

and relational. The structural dimension relates to the "configuration (density,

connectivity, hierarchy and appropriability) of the network of relationships. The cognitive

dimensions involves "shared cognition and includes representations, interpretations, and

systems of meaning as exhibited in common vocabulary and narratives. The relational

dimension refers to "the nature and quality of the relationships that have developed

through a history of interaction and plays out in behavioral attributes such as trustworthiness, share group norms, obligations, and identifications." In their study of the development and utility of social capital of a specific academic virtual organization, the authors demonstrate that all three forms of social capital are positively related to the strength of organizational identity formation. A central conclusion that the authors raise is that broad range of social capital forms are likely to operate at different stages and in different ways in a virtual organization and that more empirical studies are needed to flesh out these processes.

The importance of social capital development in an organization and its link to organizational effectiveness is strongly asserted in the organizational literature written from a sociological perspective. In the words of one group of theorists, "social capital potentially solves the problem of coordination in an organization, reduces transaction costs, and facilitates flow of information among organizational members (Bolino *et a*l 2002). Researchers suggest that social capital is related to an organization's ability to elicit the commitment of its employees via enhanced organizational identification. That is, the formation of social capital through group interaction is a process that links individuals though shared values and goals. This allows for corresponding benefits to both the individual and the collective in the advancement of those goals. Aligning with understandings of organizational identification formation as posited by social identity theory, social capital formation is inherently a process whereby individuals align themselves with an entity as a consequence of perceived shared identities. Quite clearly the processes of social capital formation and organizational identification are thought to reinforce each other as networks of shared values and goals foster an individual's sense

of belonging and as strong identification with a group "enhances ones concern for collective processes and outcomes" (Nahapiet and Ghosal 1998).

While the research supports the link between social capital and organizational identity as well as the link between organizational identity and job satisfaction, and while there has been some evidence of this process occurring successfully in virtual settings, scholars are quick to reaffirm the challenges that the virtual environment presents. Prusak and Cohen (1995: 87) call virtuality an "enem[y] of social capital." Simply put, it "erodes relationships," and managers must work to actively facilitate it and put an end to the things that destroy it. Social capital is an organic form of trust that takes time to develop. Social capital tends to be self-reinforcing and cumulative, but it is a time consuming process and one that cannot be brought about by superficial or insincere efforts toward employee trust-building (Nahapier and Ghoshal 1998). And while Prusak and Cohen offer helpful yet common sense "tips" for managers to help make the conditions for the development of social capital more favorable (such as "promote from within," "spill into personal lives in only positive ways," "increase transparency," "establish and follow rules," "show trust in subordinates" (1995:89)), these authors, and the organizational science literature in general, has only begun to understand the natural development of social capital in virtual settings. Beyond a firm belief that there is an explicit connection between social interaction, social capital formation, and organizational identification, there is a palpable absence of empirical studies of virtual organizations. This gap is one that ethnographic approaches to the study of organizational culture can help fill (Schoemaker and Jonker 2005; Davenport and Daellenback (2001).

Summary

To ground the collection, analysis, and interpretation of data for the research project that is the subject of this dissertation, I have reviewed key themes in the literature from anthropology and related disciplines. I have reviewed the concept of organizational culture and the history of its use. More importantly, I have provided evidence for how anthropologists have failed to contribute to the multidisciplinary debate on organizational culture to the extent they should, given that Anthropology's central culture concept is being employed. I have discussed both the variable/climate and holistic/metaphorical approaches to the study of organizational culture and argued that an eclectic approach is best suited to achieve a balance between the need for rich description and a problem focused, applied need to recommend courses of change. Because anthropological contributions to the study of virtual organizational culture are limited, I have examined the anthropological literature on virtual communities to establish how ethnography is a method uniquely suited for research on virtual entities and to provide background on a few relevant themes to my analysis such as group affiliation, reciprocity, and enhanced freedoms related to interpersonal identity in a virtual environment. The nature of the external material obligations faced by virtual business organizations make them very different in key ways from non-workplace related virtual communities, however, such that a review of the specific literature on the advantages and disadvantages of virtual organizations arising out of the management sciences is also necessary. Finally, I discuss the concepts of organizational identification and social capital as they relate to virtual organizations because these concepts will ground my interpretation of some of InsightCorp's main challenges.

Throughout my review of the literature, I have had to pull extensively from both the management sciences as well as applied psychology, not by choice, but because anthropologists have largely removed themselves from the academic discussion of organizational culture. The have also yet to focus on virtual business organizations as a subject worth studying (or at least worth publishing on). As more and more individuals across the globe become engaged in virtual work relationships, it is important to understand how companies who embrace those types of arrangements operate and how employees within those companies create meaning about their identity as virtual organizational members and workers generally. An anthropological perspective and the method of participant observation are the right tools for this endeavor. However, it is imperative that anthropologists make their work relevant, both in a practical, applied sense and in connecting what we do with the work coming out of other disciplines. In the case of the study of organizational culture, anthropologists have been quiet players in an academic debate that has their core concept (culture) at its very center. A prioritization for the ideational and symbolic aspects of culture, a distaste for operationalizing work cultures into measurable variables, and a lack of concern for developing models with explanatory power are the reasons why anthropologists are only on the fringe of a discussion at which they should be central. This research combines traditionally anthropological methods with tools developed in the management sciences. It attempts to bridge the gap in the hopes of showing the power of an anthropological approach while also demonstrating an appreciation of the utility of the more focused analytical tools from outside the discipline and an explicit desire to contribute to the production of transposable theoretical frameworks for the study of virtual organizations.

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Chapter Three

Methodology

Introduction

In this chapter, I will describe the objectives, setting, and methodology of my study of one corporate culture. I will first detail the setting in which the research took place. Next, I will review the objectives of the research. Finally, I will describe the methodologies employed to gather data during the study and justify the selection of each with reference to the existing literature from Anthropology and related disciplines. For all methods utilized, I will detail the sampling strategy, research participants, specific data collection techniques, data management procedures, and data analysis plan.

Research Setting

Organizational Background

InsightCorp is one of many U.S. market research firms that serves as a vendor to major retailers and manufacturers operated and owned both in the United States and internationally. InsightCorp's business is consumer research, i.e., research about the people who buy the products and shop the stores that its clients manufacture or own. It's specialization within the consumer research industry is commonly known as "shopper insights" in that InsightCorp projects generally have an objective of understanding the purchase decision making process as opposed to consumption processes. The company provides a wide range of research services from in-home ethnographies of shopper

behavior, in-store concept testing of products or displays, online surveying, and focus groups. The goal of any research conducted by InsightCorp is always, when reduced to its most essential element, the same: to help its client sell more products and make more money. The particular objectives of any specific project are customized and can range from behavioral questions of how customers of different types move and shop the store or shelf differently to more conceptual interests in the folk taxonomies, beliefs, and opinions about particular products and brands.

No matter the specific research question at hand, however, what InsightCorp does is help its client understand the shopper better so that her habits and opinions can be utilized or manipulated in such a way as to provide a competitive advantage. Usually, InsightCorp is in charge of all steps of the research process including: 1) refining the research questions that bring the client to its doors 2) designing the methods and instruments that will be used to collect the data 3) the analysis and interpretation of that data and 4) making specific recommendations for how those findings can best be put to use through changes in marketing, package design, store shelf design, store layout design, etc. InsightCorp's client list is private, but the company has worked for hundreds of the world's largest manufacturers of consumer package goods and major retail chains.

InsightCorp competes in the market research field as a small, niche establishment. Internally, there are less than 40 full time employees. The structure and personnel makeup of the company has shifted throughout the five years of this research. However, during the period when the bulk of my structured data was gathered (i.e., the Organizational Culture Assessment survey and focus groups to be discussed in detail below), roughly a third of the employees, including the owner and CEO of the business,

were engaged in sales and general client service roles. That is, their job was and is to maintain existing client relationships by soliciting and responding to requests for research proposals and to attract new business. Another third of the employees were engaged in primarily research management; these individuals generally interact with clients once the sale is made to design the research, oversee its execution, analyze the data, and present findings. The final third of the full time staff, called the operations team are dedicated to human resources and field management, which entails the actual scheduling of field days and management of the human and technical resources required to carry out the research.

Sales, Research, and Operations teams all interact with each other during differing stages of a project. Sales is most active during the initial part of a project, when it is still in its proposal stage or while it is being transferred over to the research and operations personnel who will execute it once a project sale is final. For any given project, one project director from the research team is assigned to handle all research related tasks (such as questionnaire design and data analysis), and a project field manage is appointed from the operations team to oversee management and scheduling of field resources, (including interviewers) needed to execute the project. The project director (PD) and the project field manager (PFM) each report to a separate Vice President (VP) in either the research or operations departments, respectively, and are parallel to each other in terms of rank. PFMs utilize the assistance of hourly external consultants to do the bulk of the scheduling, and PDs can seek out the assistance of external analytical consultants to help with research related tasks. Teams of PDs, PFMs, and VPs are not necessarily stable across all projects, each being assembled from a pool of individuals on a project by project basis. Vice Presidents of the research department, in addition to their oversight

roles in research are expected to spend a sizeable portion of their time spearheading or

assisting sales team members on research design and client outreach, and it is generally

acknowledged that clients are more likely to buy services when they can hear extensively

from a research person than a pure sales person. Research VPs may also be called upon to

function as project directors over particularly high profile projects. Human Resource VPs

do not have sales responsibilities, but they are typically involved in executive tasks

related to budget tracking and overall finance issues. At all levels within InsightCorp are

individuals with either business or research backgrounds, many of whom have a

background in Anthropology.
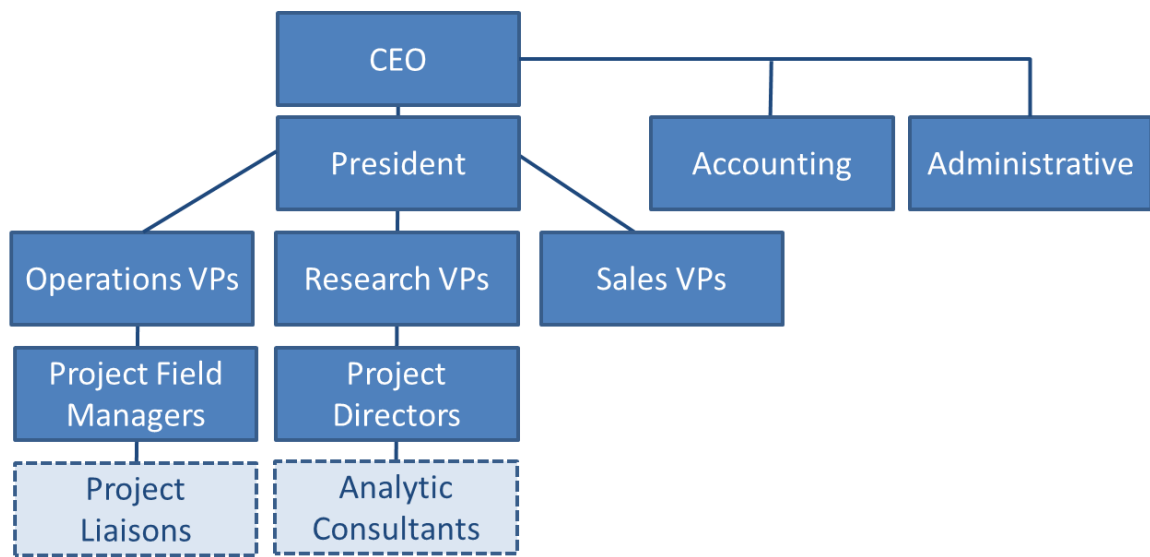
Figure 3.1. InsightCorp organizational chart (*dark boxes are salaried employees and light boxes are hourly consultants*)

Of critical importance is that InsightCorp is a virtual organization, that is, there is

no true physical company headquarters, at least not one where multiple employees work

together consistently on a day to day basis. All InsightCorp employees work from home

offices and communicate with other InsightCorp employees through email, web

conferencing, phone, and, very infrequently, in person when projects require travel that brings employees together temporarily for presentations and the like. It is on the extreme spectrum of remote work arrangements, representing a unique case of a truly virtual organization.

Researcher's Role in the Organization

I began working for InsightCorp as a field interviewer in 2004 as a means to supplement a graduate student income. The $20 plus an hour paid by the company was a tempting draw for me (as well as hundreds of others in my exact position) and was, admittedly, enough to justify my participation in the use of anthropological methods to advance corporate interests. Having an interest in studying elite cultures and intrigued by the practice of business anthropology, I entertained notions of studying the company even as I occupied a position too marginal to allow for it. However, through a slow combination of distinguishing myself as ethnographer and plain luck, I managed to obtain an intermediary consulting position hiring and staffing projects around the nation. Gradually, I was able to demonstrate an ability to design research and analyze data. Within six months of my promotion to field liaison, I was able to negotiate the higher level position of research manager. I accepted a full-time offer only on the condition that I could study the company for my doctoral research, a condition that was granted provided my published research protect all proprietary client information and do no harm to the company itself and that I attempt to use my research to improve the overall efficacy and efficiency of company operations.

Thus, my role within InsightCorp is twofold. One is as a salaried employee, having been promoted to the rank of Research Director in 2008, Vice President of

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Research in 2009 and as Senior Vice President of Shopper Insights in 2010. The other is as a researcher completing my doctoral work, having made arrangements with the CEO to use my employment as essentially an extended period of participant observation with permission to engage with InsightCorp employees and consultants in a way that serves the purposes of my own independent research. At the time of publication of this dissertation, I maintained my SVP title, although I had reduced my role and working hours to about 10 per week the semester I did the bulk of the writing. As a full time SVP, I help oversee the research arm of InsightCorp, assigning projects to directors and research associates and supervising the progress and deliverables on projects. Additionally, I am frequently called on to present findings to clients in person and accompany the CEO or other VPs on sales calls to support discussion of InsightCorp's research and analytical capabilities. My direct supervisor is the President of the company. I report principally to him about my work for the company but did not report to him regarding my own private research for the dissertation.

As a sponsoring agency, InsightCorp has no formalized expectations in terms of deliverables as outcomes of my research. However, because my research will reveal insights into the day to day workings of the company and ideally suggest avenues for making improvements of any kind, I have been encouraged to share the findings with the CEO and President. In short, it is known and accepted that my research is my work, but I am not primarily viewed as an outsider looking in. I am a fully entrenched member of the InsightCorp team.

Research Objectives

While an overarching goal of this research is to conduct a full, descriptive ethnography of one virtually organized corporate culture, there are several specific research goals that I aimed to achieve through mixed methodologies. These goals and related research questions within each are as follows:

- To conduct a "corporate culture assessment" on InsightCorp.

    o What is InsightCorp culture? What kind of corporation is InsightCorp? What are the explicit and implicit values that employees are both subject to as workers and participatory in the construction of through their daily practices?

    o What are the problems that are hindering productivity, worker morale, and quality of work and how can they be solved?

    o What are the strengths of the organization that can be accentuated and utilized to further the interests of the company and the wellbeing of its employees? Are company and employee interests aligned or do societal values conflict with IC profit goals?

    o How congruent are employees' perceptions of the organization? To what degree is there consensus on what kind of organization InsightCorp is and how employees should operate within it?

- To critically analyze the virtual nature of the organization, exploring various subtopics with an eye toward how they are distinct from traditional work environments

    o How are roles defined and redefined through virtual interactions? How does on the job learning take place?

- How are employee performance, compliance, and general behavior monitored and evaluated? How are worker bodies controlled in a virtual situation?

- Is worker freedom amplified or hindered by virtual organization? How are the delineations between work and home made by employees and to what extent do these coincide or conflict with the expectations of their superiors?

- To compare traditional anthropological methods of cultural description within organizations and those more typically utilized by practicing professionals of corporate culture assessment by applying each of these methods to the assessment of InsightCorp's corporate culture

   - How does the data gathered through these methods reveal a different picture of IC corporate culture?

   - What are the relative contributions and disadvantages of each method as applied in the context of this virtual organization?

Research Design

My research goals will be answered through the combined analysis of two bodies of data: 1) data gathered through the classically anthropological ethnographic approach of extensive participant observation 2) data gathered through methods employed by management science professionals in the field of corporate culture assessment. Within each of these approaches are both qualitative and quantitative methods of data collection and analysis.

Participant Observation

Online networks and communities, in the opinion of many scholars, are ideal research fodder for both quantitative and qualitative methodologies. Naturalistic studies

of online behavior followed almost immediately from the inception of the internet itself

because these methods are well suited to uncover the complex and novel uses of internet

technology and the creation of meaning in context and practice (BayaM995; Paccagnella

1997; Wynn and Katz 1997). From content analysis to discourse analysis to participant

observation, a number of qualitative as well as quantitative means are employed to

understand the development and practice of virtual communities (McLaughlin et al 1995;

Correll 1995; Thompson 1995) For anthropologists, one meta methodology, that is,

ethnography, is especially suited for research into the hows and whys of online

community existence. As Hine (2001:21) puts it, "ethnography holds particular appeal for

studying what people actually do with the technology. Once we think of cyberspace as a

place where people do things, we can start to study just exactly what it is they do and

why, in their terms, they do it" (Hine 2000:21). InsightCorp can no doubt be defined as

an online community in that the bulk of its daily operations occur only through the

interaction of individuals in geographically dispersed locations through cyberspace.

Simply put, without the internet, InsightCorp does not exist. The benefits of such an

ethnographic approach to the study of an online community are in the richness of

ethnographic description and the revelation of insights that only an approach so inductive

can provide (Hammersley and Atkinson 1995). It would be difficult if not impossible for

any researcher to fully understand how such a virtual organization operates without

becoming and engaged member of that community.

     Ethnographer participation in online activities is akin to classic participant

observation that characterizes anthropological fieldwork and provides the researcher with

firsthand experience of community membership and in the creation of meaning. As with

traditional field research, this allows the researcher to test hypotheses and interpretation by directly engaging her informants in the analysis. It allows and encourages a more reflexive approach to the research process and provides a better means by which being a member can be understood through her own experience of it (Markham 1998). Many researchers are emphatic that participant observation is a crucial part of the research plan if one is to truly understand what it means to be part of an online community. Kendall (1999: 57-58) states it plainly:

> I would never have the audacity to suggest that all social science research projects ought to include participant observation. Yet with regard to research on interactive online forums, I recommend just that …Reaching understanding of participants' sense of self and of the meanings they give their on-line participation requires spending time with participants to observe what they do on-line as well as what they say they do.

Other methods can be incorporated into a general ethnographic approach to the study of any online group or organization as was done for this research. Apart from the experiential data that can be obtained through participant observation, there is clearly a vast sum of data to be obtained in a strictly archival sense from the study of web based communications (such as email) utilizing content and text analysis. Generally, an online research project will adopt multiple research strategies to explore the various topics of the research through the appropriate methods both as a means to gather different types of data as well as to triangulate or corroborate specific findings with multiple data points (Burgess 1993; Reinharz 1992). Additionally, online research methods are often followed

up with offline and personal contact between the researcher and her informants (Cole 2000; Hodkinson 2000). This study uses mixed methods to serve the research goals.

In a very classic anthropological manner, the principal method for obtaining data about my research population is to engage as fully as possible with it in my daily experience, that is, to undertake an extended period of participant observation. Since 2007, my position at InsightCorp has been "full time," that is, 50 minimum hours of weekly engagement with the company, my coworkers, and clients. Every moment of my "work" has been a vital part of my research, contributing to the quantity as well as the validity of the data I collect in several important ways, all discussed by Bernard (1995) as key benefits derived from this uniquely anthropological methodology. First, my participation as an official member of the team has allowed me to witness firsthand the widest range of company operations. I have access and knowledge, although admittedly unevenly distributed, about every aspect of what our company does. In my tenure at InsightCorp, I have done everything from data collection to hiring to field operations to (predominately) research project management to sales. I have occupied every level of responsibility from entry to executive. Secondly, my participation has enabled me to generate the trust and rapport that has served to decrease the problem of reactivity among my informants. My extended period of participant observation has also served to help me formulate and modify my primary research questions over time as a result of pure inductive experience. As a truly participant observer, I have gained a unique perspective on what it means to be a corporate anthropologist and a member of a virtual community by having gone through the experience firsthand.

The participant interaction that generated data for this dissertation covers all of my daily connections with my coworkers from emails, to phone calls, to instant messages, to conference calls and staff and operations meetings, to online meetings, as well as face to face interaction at client meetings, work sessions, and presentations. I interact by phone and email with my coworkers seven days a week (although weekend activity is generally light). We have group meetings by conference call four to eight times a week. I utilize instant messaging to connect to coworkers on a one on one basis, and I utilize online conferencing software that enables us to work collaboratively by looking at the same visual stimulus on our computer screens. Additionally, and importantly, I engage with different groups of superiors and coworkers in person anywhere from one to four times a month by flying to locations in which client meetings are taking place.

Management Science Derived Methods

While my general objective is to produce a holistic, "thick" description of InsightCorp work culture through intensive and prolonged fieldwork, I also employed a pair of specific methodologies that come from the management sciences in an effort to supplement my own ethnographic approach as well as to explore the relative contributions of these disparate methodologies to an understanding of a virtual work culture.

Cameron and Quinn's Competing Values Framework

Given the plethora of cross disciplinary literature on organizational culture, there is no lack of typologies that can be utilized to classify any given organization. One of the most prominent is that of Kim Cameron and Robert Quinn and is called the Competing Values Framework. The framework was developed through research conducted on the

major indicators of effective organizations which have been statistically reduced to two major dimensions that organize the indicators into four main clusters. One dimension differentiates effectiveness criteria on a continuum of flexibility to stability, and the second differentiates effectiveness criteria on a continuum of internal integration and cohesion to separation and independence.

Cameron and Quinn assert strongly that "the Competing Values Framework has been found to have a high degree of congruence with well-known and well accepted categorical schemes that organize the way people think, their values and assumptions, and the ways they process information" (Cameron and Quinn 2006:33). For this research, I used Cameron and Quinn's Organizational Culture Assessment Instrument (OCAI), an instrument explicitly touted to diagnose an organization's culture that has been used, according to the authors, to study more than a thousand organizations. The instrument consists of two steps, the first providing a diagnostic of the culture from the perspective of its employees and the second helping to identify the culture that members would prefer. The structured instrument (see Appendix) consists of only six items and generally takes about 15 minutes per individual to administer. This provided a small, but powerful quantitative dataset that can be utilized for diagnostic purposes following the instructions of the authors but also as a dataset that can be used for other investigatory purposes. Used correctly, the OCAI enables the user to identify which of four culture types an organization falls under (Hierarchy, Market, Clan, or Adhocracy), the strength of that classification, and the congruence among its members both in terms of their present conceptions and future ideals.

The purpose of the instrument is to assess six dimensions of organizational culture as identified by the authors (Cameron and Quinn 1996). Each dimension is assessed by asking respondents to divide 100 points among four descriptive statements (A, B, C and D), each statement aligning with one of the four culture types. An average score is computed for each culture type by averaging the statements across all six dimensions aligned with it, and these scores are plotted along a diagonal axis in a four quadrant map. When the four points are connected, the resulting geometric shape shows how each of the four culture types contribute to the overall cultural picture. The respondent is asked to assign points in this same manner for the organization in terms of how they would like it to be in five years if that organization were to achieve a level of excellence that would make it a benchmark for the industry. As such, a plot of the organization as it is "now" can be compared to what would be "preferred."

The cultural profiles can be interpreted from several perspectives, as described by the authors. These are: 1) the *type* of culture that dominates the organization—clan, hierarchy, market, or adhocracy, 2) *discrepancies* between the current and preferred culture, 3) the *strength* of the culture type dominating the organization, 4) the *congruence* of the cultural profiles generated on different attributes and by different individuals, 5) a *comparison* of the studied organization's profile with the average profiles of the nearly 1000 organizations studied by the authors, and 6) *trends* identified by the authors in the two decades of work they have completed with the instrument.

<u>Schein's Model</u>

This research also used Edgar H. Schein's (1999) system for assessing corporate culture, perhaps the most well cited approach in the cross disciplinary literature on

organizational culture. Schein's method explicitly rejects survey techniques and one on one interview approaches, arguing instead "inasmuch as culture is a group phenomenon it is far easier to elicit information in groups by asking broad questions about different areas of organizational functioning and seeing there is obvious consensus among members of the groups" (Schein 1999:61). As such, Schein's basic approach rests on holding focus groups with one or more groups from within the organization to "measure culture." From a strictly applied perspective, Schein approves of a group methodology not only because it generates, in his estimation, more reliable data, but because it sends a message to employees that the organization itself stands behind a frank and open discussion of its ways of being. I hosted three separate focus groups within InsightCorp: the operations group that handles the field logistics and data collection, the research group that handles clients, designs research instruments, and analyzes the data to generate reports, and the client service group that is largely charged with selling the InsightCorp product and acquiring new business.

Schein's focus group procedure is clearly lined out in many of his publications and consists of five basic steps that I did attempt to follow while conducting my focus groups. These are 1) define the "business problem" or overall objective of the focus groups and research, i.e., understanding InsightCorp culture with an eye toward maximizing employee job satisfaction, 2) review the culture concept as defined by Schein, a tripartite model consisting of artifacts, espoused values, and shared tacit assumptions 3) identify artifacts, including dress codes, working hours, jargon, rites and rituals, how disagreements and conflicts are handled, balance between work and family, etc., 4) identify the organization's explicitly touted values, and 5) compare the espoused

values with the artifacts in those same areas. This last step is Schein's way of helping the

researcher identify the tacit assumptions of the organization through the inconsistencies

and conflicts between overt behaviors, policies, rules, and practices (artifacts) and the

espoused values communicated through mission statements, policies, and other

managerial communications. Each group lasted roughly 3 hours. A moderator's guide can

be found in the appendix.

Sampling

<u>Sampling of Respondents</u>

Because InsightCorp has fewer than 40 employees, a probability sample at the

95% confidence level would require that nearly all of them participate in the research in

order for my sample to be considered representative of the group. Specifically, 35

employees would have needed to agree to participate. As a general principle, it was my

goal not to obtain a sample at all but secure the participation of all salaried InsightCorp

employees. This goal seemed not only realistic but necessary, so that I could be assured

that each of my three main subgroups of interest (research, operations, and

sales/executive personnel) would be well represented.

Out of 39 employers who were asked to participate in the research, 33 provided

written consent to participant in at least one component of the research, 2 short of what

would be required for a true probabilistic sample. Of these, 30 provided full consent to

participate in all four proposed methods. Of the six individuals who opted to not

participate, four were part time employees who worked outside of the three central

departments (field operations, research, and executive/sales) in rather specialized and

compartmentalized roles. As such, near total participation from the three main groups of

focus—those who spend the most time working for InsightCorp and have the highest degree of interaction with their colleagues—was achieved for this study.

<u>Sampling of Email Conversations</u>

This analysis pulls from over 40 Gigabytes of email records gathered during my participant observation. A conservative estimate of 2500 sent and received emails per month brings the total sample of discrete and potentially analyzable emails to over 150,000.. With over a hundred thousand emails to choose from for analysis, it was certainly not possible for me to analyze each and every one (although I either authored or read all of them through the course of my employment). Given the specific objectives of this research, I determined that a probabilistic and random sample of my emails would be too inefficient even as such an approach could be useful for further investigations into the communication patterns in virtual workplaces. Moreover, while I feel that the body of emails to which I have access (because of my long standing history within the company and the variety of roles I have played in its various divisions) is more representative of companywide email communications than the archived inboxes of other InsightCorp employees might be, I cannot pretend that the email chains that I have been an active member of or privy to are a representative sample of all the email chains that circulate companywide. My own experience at InsightCorp is uniquely my own, and it is not appropriate to attempt a quantification of email trends just for the sake of appearing to use this body of data in an objective way.

As such, a *purposeful* or *judgment* sampling (Bernard 1995: 95) strategy was employed from the onset of this research. As Bernard puts it: "Purposive samples emerge from your experience in ethnographer research. You learn *in the field,* as you go along, to

select the units of analysis…that will provide the information you need." I set aside particular conversations for future analysis that clearly contributed to an understanding of the main goals and questions outlined in my three principle research objectives. While the bulk of the emails analyzed for this dissertation come from this pool of cataloged conversations, I also did additional dives into the email corpus by looking for specific conversations that provided additional sources of evidence for themes emerging during the course of writing up the results and discussion of this dissertation. This was another form of purposeful sampling of my email archives that was directed either by my specific recall of applicable emails chains (through memory or consultation of field notes) and by keyword searches for emails addressing particular topics.

Additionally, to examine a few specific issues related to overall communication patterns at InsightCorp, I selected random weeks to count instances of certain identifiable occurrences in order to quantify select phenomena (such as the percentage of emails received through a particular distribution list that was identified as problematic through my focus groups). To keep this analysis in line temporally with my focus group and survey data collection, I restricted these weeks to the same period of time in which those data were collected. This type of random sampling and counting was the only randomized sourcing of emails for analysis.

Data Management

<u>Participant Observation</u>

For the participant ethnography portion of this research project. A field journal and field notes by topic with references to dates, specific events, and locations (where applicable) were maintained. While my experiences as a participant in one-time and

recurring conferences calls were part of my general participant observation, all recurring

group conference calls to which I had access during the months between February and

May 2012 were audio recorded to facilitate more in depth analysis. These include but are

not limited to the following weekly held meetings: Strategic Planning for Senior

Operations and Research, Vice Presidents Project Management, and Sales and Revenue.

In total, 12 group conference calls were recorded. These calls were recorded using

company conference call software (standard practice for many company conference calls)

and transcribed by the researcher.

<u>Email Archives</u>

In addition to detailed field notes collected about my general activities as an

InsightCorp employee is the expansive warehouse of data that is my archived email

records starting with my first day of salaried employment in 2007. As a general practice,

my emails were archived in chronological files within Microsoft Outlook and stored on a

personal drive. However, whenever a given email chain treated a topic that connected

particularly well to any of my overall research goals or question, I would file those

conversations in a separate .pst file organized by thematic topic, some of which were

identified as soon as the research questions were formulated and others that were

identified as emergent patterns throughout the long course of the research.

<u>Focus Groups</u>

My three focus groups were recorded by the researcher using a personal recording

device and personally transcribed.

Structured survey results were collected from each 33 respondents through either direct mail or through scanned email attachments. The researcher maintains a hard copy of each respondent's completed survey and has also transferred these responses to an SPSS file for quantitative analysis.

Inclusion and Exclusion Criteria

A necessary part of the study of any online community is to determine the boundaries of that community. This decision, as Hine (2000:25) argues "enhances the perception of [an online group] as a coherent bounded entity." Online researchers must determine, at the very least for research purposes, the boundaries of their site, which, in online situations are both enacted symbolically and well as imposed by technology such as through specific shared online interfaces and email passwords. This is easier with an organization like InsightCorp relative to other kinds of online networks given that the company itself has marked categories of members including salaried and hourly employees, part time consultants in research and operations, a national network of field interviewers working on a project by project basis, clients, and other external contacts such as human resource firms, travel agents, payroll companies, and banks.

Again, as a general principle, it was my goal to be as inclusive as possible in obtaining a respondent base for this research so that my results and assertions could reliably describe how employees at InsightCorp think, feel, and act, as related to my overall research objectives. I did invite only true "employees" to participate, meaning that hourly consultants were purposely excluded from this research. This population would include all of the hundreds of field interviewers who work on a project by project basis as

well as a number of key individuals who work as part time consultants on both the operations and research sides. While both groups are critical in the functioning of InsightCorp in some manner and might have much to say about InsightCorp, I decided that these individuals for the most part were not connected to a sufficient number of colleagues nor exposed regularly enough to its ways of operating to be able to speak authoritatively about "what it's like" to work for the company in the same way that employees, as a collective, would.

Within the subgroup of true employees, however, the research was intended to be as inclusive as possible. I made the decision to exclude three individuals from the focus groups, however: the CEO and the two Presidents of the company. Although these individuals technically, given their various responsibilities, could have taken part in either the client service or research group sessions, I feel strongly that their presence would have hindered open discussion among their subordinates. I entertained the idea of hosting a fourth "executive" focus group, but quickly decided that the presence of the CEO would hinder the other two individuals from truthfully speaking their minds as well. The opinions and behaviors of this highest tier of executives are still present in my analysis in that I have survey data as well as email, conference call, and general participant observation data through my interactions with them.

Data Analysis

Participant Observation

My lengthy participant observation within Insight Corp is the backbone of the analysis that will be presented in this dissertation. The exercise of taking field notes helped to keep me grounded in my research goals and are a key part of my analysis.

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These notes consist of both descriptive and analytic notes prompted by activities or events related to my research questions as well as a personal diary to help me deal with my own emotions as a person with a highly stressful and demanding job and to help me better reflect on how my personal experiences as an InsightCorp employee could impact my interpretation of my data. My descriptive and analytic field notes were topically coded with the aid of NVivo software.

Email Archives

One of the remarkable benefits of online research for data collection is the abundance of text-based data that is not only easy to collect but demonstrable as primary evidence during discussion of analysis. Online material evades the persistent problem in ethnography where selective recordings and notes by the researcher come to stand for more than they should in describing a culture. As Stone (1995:243) puts it, online data can be the "ultimate field recorder," as it is, relative to the records kept by ethnographer alone, reassuringly non-selective. The upside of the temporal disadvantage of not being there when the activity takes place is the opportunity to view the entire record of interaction unmediated—almost akin to time travel. In this study, email becomes a massive analyzable record of my actual participation at InsightCorp as the sender or recipient of any given email. In addition to providing a record of events during my fieldwork, email is additionally usable as body of data suitable for analysis of content and usage.

Moreover, there is great potential for the use of traditional discourse analysis in the naturalistic setting of online communication where the goal is to understand how participants are expressing and constructing social meaning through ordinary, naturally

occurring online speech (Schwandt 1997). There are numerous examples of the kind of rich understanding that can be obtained through online discourse analysis. Denzin (1999), for example, utilized discourse analysis to study the construction of gender through self-narratives in an online alcoholism recovery newsgroup. Similarly, Rodino (1997) has analyzed the way gender is performed on internet chat boxes. At the heart of these types of analyses is an effort to understand how social meaning is created though the daily experience of mundane discourse (Mann and Stewart 2000). As in traditional discourse analysis, online discourse can be deeply read to shed light on how meaning is created by participants and dissected into the various components of the linguistic interaction that connect to the context in which the dialogue is taking place in much the same way that the "ethnography of speaking" in done by traditional researchers (Hymes 1962). I use discourse analysis as well in this descriptive study of one virtual organization.

The amount of email data that is potentially analyzable for the purposes of this dissertation is immense. However, because of my practice of sorting emails into subfolders by topics related to my research questions and goals, I essentially produced throughout the course of my fieldwork a system of coded subfolders for analysis. The overall size of this subfolder is, relative to the total subfolder, roughly 2 Gigabyte of data, representing roughly 7500 emails. While still a considerable quantity of data, the organization of the files enabled me to perform content analysis on a topic by topic basis As previously discussed additional searches for pertinent emails through either keyword searches or direct searches for specifically recalled emails were also conducted and those emails subjected as well to analysis.

The three focus groups conducted for this research were transcribed by the researcher and imported into NVivo for topical coding and analysis.

Structured Surveys

In contrast to and as a complement of the data just discussed that was subjected to qualitative analysis, the survey results from the OCAI were analyzed in a quantitative fashion. All completed surveys were entered into SPSS software. Part of the analysis depended on graphically plotting various data points both as proscribed by the authors of the instrument and in additional ways that I determined to be informative. Basic counts of particular response patterns were performed as well as univariate testing of statistical differences between subgroups of respondents.

Protection of Human Subjects

This research was approved by the University of South Florida Institutional Review Board. I obtained permission to study the company from its President and CEO, who both have academic backgrounds and are well aware of the imperative of publication in academia and the protections afforded by informed consent. As such, this research started out with transparent negotiations between myself and my research population.

My role as both researcher and employee was announced to all staff and routinely reiterated as new employees joined the company. When formal structured data collection began, an invitation to participate in the research was sent by email through an email distribution list to all InsightCorp employees (see Appendix for recruitment letter). Immediately following this letter of introduction, a second email with the informed consent form and the Organizational Culture Assessment Instrument was sent out to this

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same group. It was made clear in the letter that participation in the research was voluntary. There would be no benefits as a result of participation other than the ability to express one's own opinion about the company, and there would be no consequences for those wishing to decline participation.

Respondents were given three weeks to sign the informed consent form and encouraged to ask questions about the process both when it was sent initially and again during the start of the focus groups. No incentives were offered for participation, and respondents were asked to designate in which components of the research they would agree to participate. Individuals could opt out of either or both the focus group and the structured survey. Additionally, individuals had to provide written consent to allow for the use of email chains and conference call recordings in which they participated in as a function of their jobs. I elected to not ask permission to use email conversations between only myself and the respondent, so that those agreeing to allow my use of email chains were asked to agree only to the use of group conversations. Any subject who declined permission to use emails was informed that no email in which they actively participated would be used in the analysis but email chains in which they were simply copied could be. Those who declined permission for use of conference call data were informed that the researcher would not utilize any portions of the conversation that derived from or directly responded to that subject but that the rest of the call could be used.

All data collected as a result of this study will remain confidential and accessible only by me, my committee, and as specified by the IRB. The company as well as all informants will be referred to with pseudonymns to protect rights to confidentiality. While the risk that the identity of any particular individual contributing to this study

could be identified from information contained in this dissertation is slim, it is not outside the realm of possibility that the identity of the specific company under study be discovered by those doing minimal investigation. This possibility was made transparent to the CEO, who required my willing commitment to not publicize any findings that could reveal the identity of InsightCorp clients or any data that we gather for them as a contracted vendor. This would not only violate the rights of those clients with whom we have signed agreements of non-disclosure but it would damage the company's relationship with those clients and thus the company as a whole and the livelihood of its employees.

Part of my goals for this research, also, was to provide insights and recommendations to my superiors that will improve overall operations of the company. This dissertation has been written with sensitivity to the danger of exposing the ideas of behaviors of my coworkers that could draw negative attention toward them. I have sought to provide feedback to my employers in such a way as to do no harm to any key informants. Additionally, my analysis is intended not to expose any specific negative practices that might be unique to InsightCorp and consequently be damaging to its reputation. Rather, this research is intended as an investigation of one virtual company in an effort to uncover findings that will shed light on issues likely to be experienced by any virtual organization and provide recommendations for how to best overcome them.

<center>**Chapter Four**</center>

<center>**Data Analysis: Organizational Culture Assessment Instrument**</center>

Introduction

In this chapter, I present the high-level quantitative results from the Organizational Culture Assessment Instrument (OCAI) followed by an extended analytical breakdown of those results. I am choosing to show these results prior to the more nuanced, elaborated findings derived from my other methods because they provide a succinct and accurate (if general) picture of the organizational culture of InsightCorp and, more importantly, a meta-framework for the organization of my participant observation and focus group findings through the identification of two key problem areas.

Overall Results From the Organizational Culture Assessment Instrument

All InsightCorp employees were invited to participate in the Organizational Culture Assessment Survey using Cameron and Quinn's standard instrument. Of 39 employees, six declined participation, resulting in 33 completed surveys.

I began my analysis by plotting each individual's survey, as is recommended by Cameron and Quinn, in order to be able to approach my analysis in the most inductive way possible. However, individual plots, for the most part, will not be the central focus of this analysis both because an aggregate view is more revealing of overall trends and because such an analysis might jeopardize the confidentiality of individual respondents.

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Consequently, much of the analysis to follow will look at average scores across the various dimensions of interest and their resulting plots.

The Dominant Organizational Culture

Aggregate Culture Plot

Figure A is a plot of the aggregated average scores of all survey respondents across the four domains for both perceived and preferred company structure. The aggregate characterization of the company is clearly that of a market-dominated organization with moderate and generally even representation in each of the remaining three quadrants. The group "preferred" plot, is a picture of a company that retains its market dominance, but sacrifices a portion of that competitive spirit for a greater share of the clan culture.
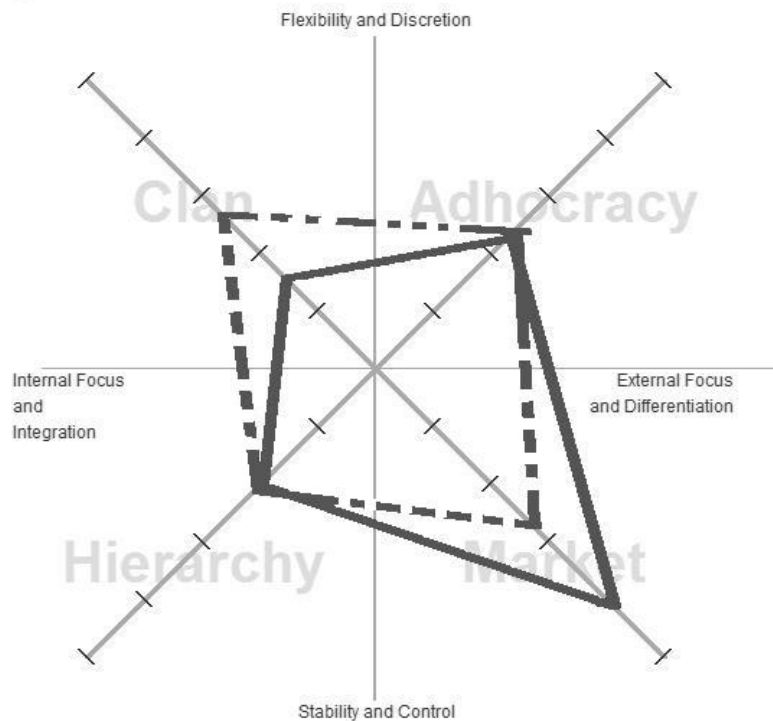
Figure 4.1. Plot of perceived (solid) and preferred (dotted) average scores for each of the four cultural type, total sample.

<u>Discrepancies Between Perceived and Preferred Culture</u>

The discrepancies between the preferred and perceived market and clan scores deserve a good deal of analytic attention. Cameron and Quinn recommend focusing on the widest differences between preferred versus perceived, but they suggest that gaps wider than ten points are substantial and necessitate due consideration as to what should and could be done to close the gaps if the organizational agenda is to initiate change. In InsightCorp's case, as laid out in Figure 4.1, both the clan and market gaps for the aggregate analysis pass the ten point mark. The overall plot shows an 11 point deficit in the clan attribute when the "preferred" score is subtracted from the "now" score. Conversely, the market attribute shows nearly a 14 point overage.

Table 4.1. Average gap between perceived and preferred score.

	Clan	**Adhocracy**	**Market**	**Hierarchy**
Gap	-11.0	-1.2	13.9	-.86

Congruence of Cultural Domains

As six independent dimensions are rated on the OCAI, it is worthwhile to present the results of each of these domains by themselves in order to see which ones do and do not fit the overall aggregate pattern. Figure 4.2 below shows the plots of each of these dimensions (dominant characteristics, organizational leadership, management of employees, organizational glue, strategic emphasis, and criteria of success) while Table 4.2 shows the gap between the preferred and perceived organizational type scores. The "Dominant Characteristics" plot stands out as showing, in addition to the perceived clan gap, a moderate gap in favor of desired adhocracy traits. This results from a slight spike

in preference specifically for the statement: "The organization is a very dynamic entrepreneurial place. People are willing to stick their necks out and take risks."
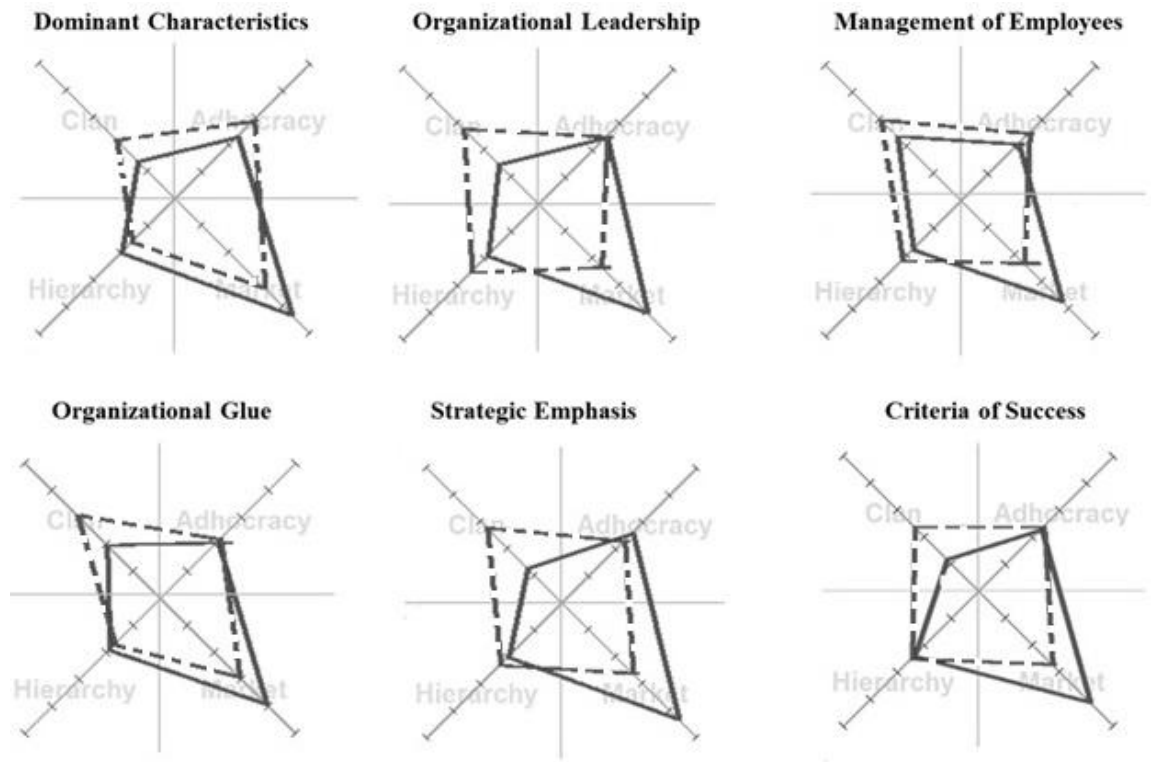
Figure 4.2. Plot of perceived (solid) and preferred (dotted) average scores for each of the cultural domains, total sample.

Table 4.2. Average gap between perceived and preferred score within each cultural domain.

	Clan	Adhocracy	Market	Hierarchy
Overall	-11.0	-1.2	13.9	-.86
Dominant Characteristics	-8.9	-5.2	10.2	3.8
Organizational Leadership	-12.8	.6	17.5	-5.9
Management of Employees	-6.2	-3.4	14.2	-4.7
Organizational Glue	-10.8	-1.3	10.3	1.7
Strategic Emphasis	-15.0	3.0	16.8	-3.6
Criteria of Success	-11.9	-.7	14.3	-1.6

While this statement is descriptive of the adhocracy culture, it can easily be seen

to work well in a primarily market style organization, particularly one that is a small

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business seeking to differentiate itself from other competitors. The organizational leadership plot stands out as showing, again in addition to the perceived clan gap, a moderate gap (-5.9) reflecting the desire for more hierarchical traits under the organizational leadership dimension. This stems from a spike in preference for the statement: "the leadership in the organization is generally considered to exemplify coordinating, organizing, or smooth running efficiency." As such, a deficit in organizational efficiency is an identifiable as problem at InsightCorp.

Otherwise, the pattern of gaps between preferred and perceived traits across the various dimensions is quite consistent with the overall pattern. By far, the strongest pattern is that where employees view the organization as more market dominated than it needs to be, as each of the six dimensions shows a gap of more than ten points. When each of the individual scores are indexed to the overall score for each organization type (see table 4.3 below), it is clear where the gaps are more or less dramatic. When scores are indexed, the standard is to view scores of 80 or below as significantly lower than the base score and scores of 120 or higher to be significantly elevated relative to the average. Looking at the differences between perceived and preferred clan scores, management of employees is the area with the smallest gap, (still a healthy -6.2 in comparison to the overall gap of -11.0), signaling a smaller than average gap between the "now" and "preferred" degree to which: "the management style in the organization is characterized by teamwork, consensus, and participation" relative to clan statements in other domains. The clan gap is most strongly felt in the domain of strategic emphasis, identified by the largest gap (-15) for the statement: "the organization emphasizes human development. High trust, openness, and participation persist." While not quite hitting the 120 mark, the

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indexed gap of 116 for the point allotment to the statement "the leadership in the

organization is generally considered to exemplify mentoring, facilitating, or nurturing"

also deserves notice.

Table 4.3. Indexed scores of average gap between perceived and preferred plot by
cultural domain.

	Clan	**Market**
Overall Gap	-11.0	13.9
Dominant Characteristics	81	**73**
Organizational Leadership	116	**126**
Management of Employees	**56**	102
Organizational Glue	98	**74**
Strategic Emphasis	**136**	**121**
Criteria of Success	108	103

Looking at market gaps, all statements hit the ten point gap, but I can still use

indexes to see where the gaps are smallest. The areas with the most strongly felt

overemphasis of the market trait are in organizational leadership and strategic emphasis,

respectively defined by the statements, "the leadership in the organization is generally

considered to exemplify a no-nonsense, aggressive, results-oriented focus" and "the

organization emphasizes competitive actions and achievement. Hitting stretch targets and

winning in the marketplace are dominant."

Congruence Between Individuals

While the aggregate results are telling, it is important to look at individual plots in

order to understand the within sample variability on the OCAI measures and to identify

differences between groups. Overall, there is surprisingly little variation in the survey

results for different InsightCorp employees. Focusing on the clan and market domains,

Figure 4.3, below, shows a plot of the gaps between the perceived and preferred scores

with the clan gap plotted along the x axis and the market gaps plotted along the y. What

this graph is intended to show is just how many individuals conform to the overall pattern

of desiring more clan attributes and less market attributes relative to how the company is

now. Diamonds mark regular employees' scores, triangles mark the scores of the

President and CEO, and the square marks the overall company average. What is

immediately visible is that all but 7 of the surveyed respondents land within the upper left

quadrant reflecting the overall aggregate pattern. Also of note is that the 7 individuals

who do not fall within the overall pattern all show relatively small gaps between the

perceived and preferred scores as evidenced by the proximity to the origin, i.e., they think

the status quo is generally satisfactory. Interestingly, four of those individuals think there

is just a bit too much "clanness" at InsightCorp—just the opposite of the majority view.

Also notable is the fact that plots of the two most chief officers of the company do not

reflect the shared view.
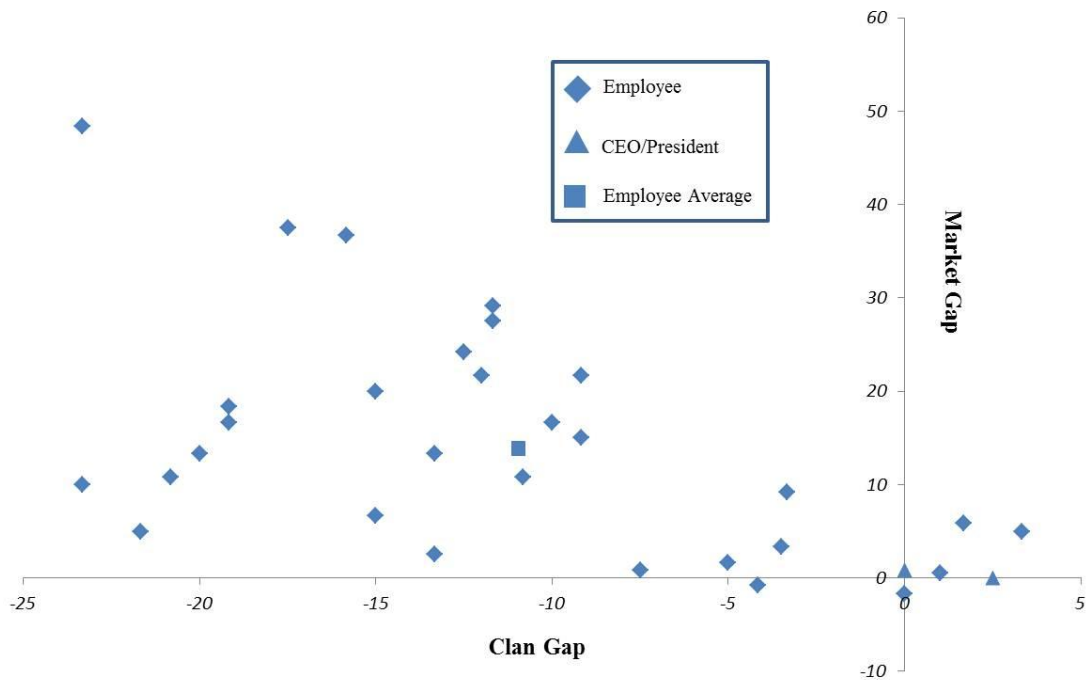
Figure 4.3. Plot of individual clan and market gap scores.

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Continuing this focus on the clan and market gaps, the specific areas that contribute to the largest discrepancies between perceived and preferred company culture are apparent in a rank ordering of these gaps for each of the six statements that combine to product the composite clan and market scores. These rankings are shown in table 4.4a and 4.4b.

Table 4.5 shows some simple counts of how employee responses fall out. Out of 33 employees, 28 prefer more clan relative to present, 28 prefer less market relative to present, and 25 meet both these criteria simultaneously. In order to exemplify the aggregate pattern of the group analysis, individuals would have to meet these described criteria but should also believe that the company should be more market than clan in the ideal scenario. 13 individuals, slightly less than half, match the group pattern. Not surprisingly, this is the most common pattern. The next common pattern is for individuals to prefer more clan and less market than present and to believe that the company should ideally have a higher clan score relative to market. I am calling this the "clan dominant pattern," and 12 individuals show it.

The remaining 8 employees do not follow any single pattern except insofar as they do not show particularly large gaps between perceived and preferred scores in any quadrant. I am calling this the "No Change" pattern. Figure D, below, shows two examples of each of these patterns, taken directly from particular individual's scores.

Statistical testing on the gap scores for each of the quadrants validates the separation of these three groups. There is no statistical difference between the Aggregate, Clan Dominant, and No Change groups for the gaps in the hierarchy and adhocracy quadrants, further justifying the focus in this analysis on the clan and market dimensions.

There are statistically significant differences for the clan and market gaps at the .05 level

with the No Change group showing a much smaller gap than the other two groups.

Table 4.4a. Gaps for each clan statement.

Statement	Gap
The organization emphasizes human development. High trust, openness, and participation persist.	-14.4
The leadership in the organization is generally considered to exemplify mentoring, facilitating, or nurturing.	-12.4
The organization defines success on the basis of the development of human resources, teamwork, employee commitment, and concern for people.	-11.6
The glue that holds the organization together is loyalty and mutual trust. Commitment to this organization runs high.	-10.5
The organization is a very personal place. It is like an extended family. People seem to share a lot of themselves	-8.3
The management style in the organization is characterized by teamwork, consensus, and participation.	-5.7

Table 4.4b. Gaps for each market statement.

Statement	Gap
The organization emphasizes competitive actions and achievement. Hitting stretch targets and winning in the marketplace are dominant.	16.3
The leadership in the organization is generally considered to exemplify a no-nonsense, aggressive, results-oriented focus.	16.2
The organization defines success on the basis of winning in the marketplace and outpacing the competition. Competitive market leadership is key.	13.8
The management style in the organization is characterized by hard-driving competitiveness, high demands, and achievement.	13.1
The organization is very results-oriented. A major concern is with getting the job done. People are very competitive and achievement-oriented.	9.7
The glue that holds the organization together is the emphasis on achievement and goal accomplishment.	9.6

There is a statistically significant difference at the 0.1 level between the

Aggregate and Clan Dominant group for the clan gap, with the latter viewing the deficit

to be larger. Tables 4.6b and 4.6c show how each of these groups differ for each of the

six statements that make up the composite clan and market scores.

Table 4.5. Count of Score Patterns.

1. Preferred clan score is higher than perceived	26
2. Preferred market score is lower than perceived	29
3. Meet criteria 1 and 2 above	25
4. Prefer a higher market score relative to clan	17
5. Meet criteria 3 and 4 above (AGGREGATE PATTERN)	13
6. Prefer a higher clan score relative to market	12
7. Meet criteria 3 and 6 above (CLAN DOMINANT PATTERN)	12
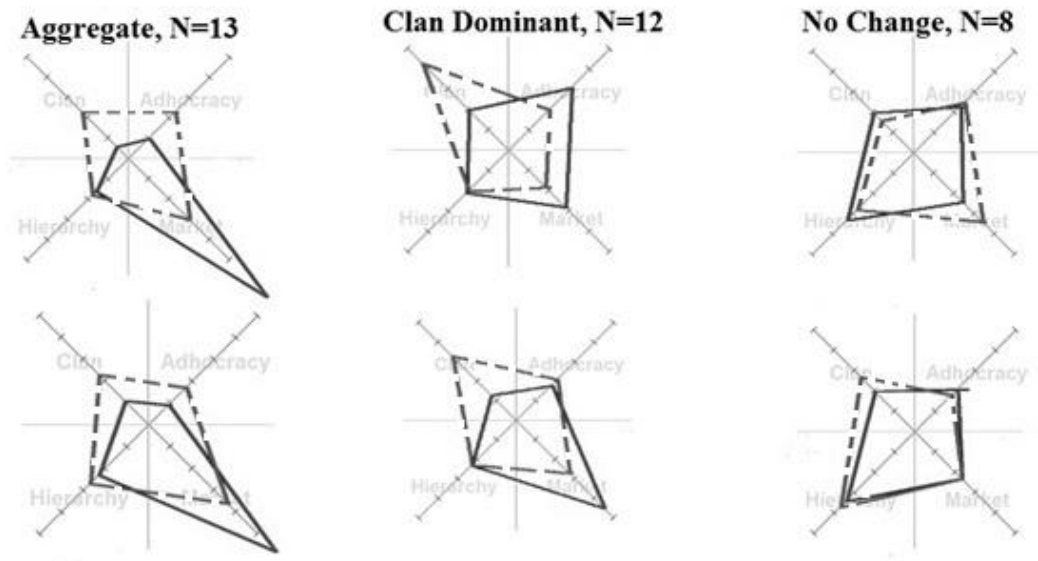
Figure 4.4. Examples of the three main score patterns

Looking at the overall consistency of individual scores, the preceding presentation

of results shows that, while there may be some variation across the group, the basic

pattern calling for more clan and less market attributes relative to present is descriptive of

the vast majority of surveyed employees. The fact that more a full two thirds of those

individuals whose plots do not strongly mirror the overall group plot are those who are

particularly sensitive to the clan deficit is further indicative of the importance of

analyzing this gap

Table 4.6a. Gap differences and significance testing between proposed groups

	Clan	**Adhocracy**	**Market**	**Hierarchy**
Aggregate	-11.5^{NC,cd}	-1.2	18.5 ^{NC}	-3.69
Clan Dominant	-16.2^{NC,a}	-2.3	15.1 ^{NC}	2.99
No Change	1.2$^{, A,CD}$	0.69	-0.17 ^{A,CD}	-1.24

*A= significant at the .05 level; a=significant at the .1 level

Table 4.6b. Gaps and statistical testing for each clan statement by plot pattern

Statement	Aggregate Pattern	No Change Pattern	Clan Dominant Pattern	Total
The organization is a very personal place. It is like an extended family. People seem to share a lot of themselves	-6.7 $_{NC,CD}$	4.7 $_{A, CD}$	-17.8 $_{A, NC}$	-8.3
The leadership in the organization is generally considered to exemplify mentoring, facilitating, or nurturing.	-14.6 $_{NC}$	-.9 $_{A,CD}$	-16.7 $_{NC}$	-12.4
The management style in the organization is characterized by teamwork, consensus, and participation.	-8.5 $_{NC}$	4.6 $_{A,CD}$	-8.8 $_{NC}$	-5.7
The glue that holds the organization together is loyalty and mutual trust. Commitment to this organization runs high.	-12.3 $_{NC}$	3.6 $_{A,CD}$	-16.7 $_{NC}$	-10.5
The organization emphasizes human development. High trust, openness, and participation persist.	-13.1	-5.4 $_{CD}$	-21.1 $_{NC}$	-14.4
The organization defines success on the basis of the development of human resources, teamwork, employee commitment, and concern for people.	-13.8 $_{NC}$	.7 $_{A,CD}$	-16.3 $_{NC}$	-11.6

*A= significant at the .05 level

Table 4.6c. Gaps and statistical testing for each market statement by plot pattern

Statement	Aggregate Pattern	No Change Pattern	Clan Dominant Pattern	Total
The organization is very results-oriented. A major concern is with getting the job done. People are very competitive and achievement-oriented.	8.8	-2.1 CD	17.5 NC	9.7
The leadership in the organization is generally considered to exemplify a no-nonsense, aggressive, results-oriented focus.	25.4 NC	2.6 A	14.2	16.2
The management style in the organization is characterized by hard-driving competitiveness, high demands, and achievement.	19.6 NC	-2.1 A,CD	15.0 NC	13.1
The glue that holds the organization together is the emphasis on achievement and goal accomplishment.	16.2 NC	-1.0 A	8.8	9.6
The organization emphasizes competitive actions and achievement. Hitting stretch targets and winning in the marketplace are dominant.	21.9 NC	.7 A	19.2	16.3
The organization defines success on the basis of winning in the marketplace and outpacing the competition. Competitive market leadership is key.	18.8 NC	1.0 A	15.8	13.8

*A= significant at the .05 level

Also telling is the plots of three former InsightCorp employees who I asked to complete the survey but are not included in the aggregate analysis. The plots of these three individuals, each of whom resigned from InsightCorp within two years prior to the collection of the OCAI data, appear in figure 4.5, below. Quite clearly, the perception of insufficient clan attributes and overemphasized market attributes is the pattern, with two individuals showing the overall aggregate pattern and one individual showing an extreme clan dominant pattern.
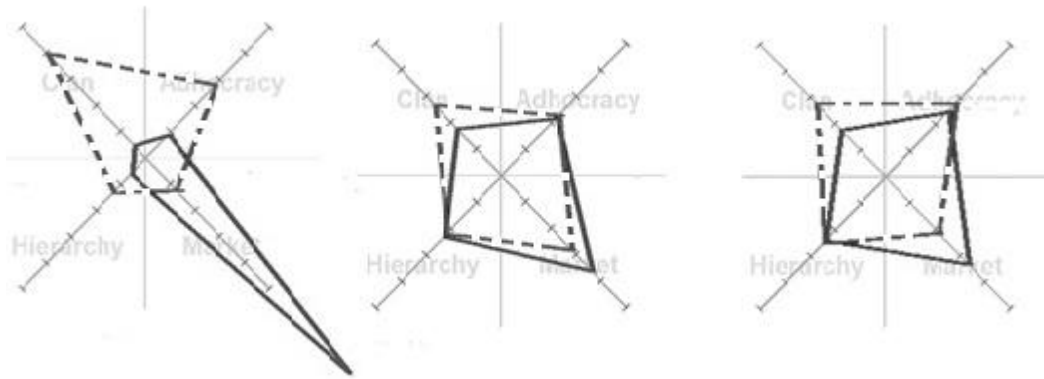
Figure 4.5. Plots of former InsightCorp employees OCAI scores

It is also notable that the overall plots look very consistent when I look at the scores of males versus females, the scores of the primary departmental divisions at InsightCorp, and the scores of employees having worked for InsightCorp for various lengths of time (See figures 4.6, 4.7, and 4.8 below). When the gap scores for each major dimension are computed for these groups (see tables 4.6, 4.7, and 4.8, below), the only statistical difference that emerges is between the client service group and both operations and research for the clan gap variable (See chapter three for a review of the organizational structure of InsightCorp). In sum, the client service group views the clan deficit to be significantly larger than both employees in research and in operations. But overall, the plots for these groups are strikingly similar.
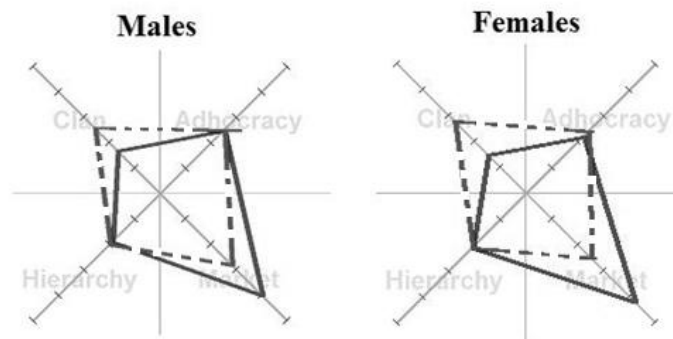
Figure 4.6. Plots of male and female scores.

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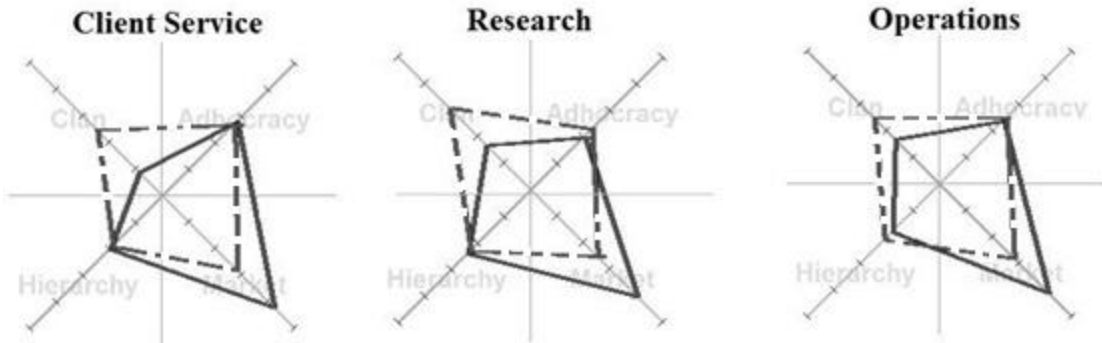
Figure 4.7. Plots of departmental scores.
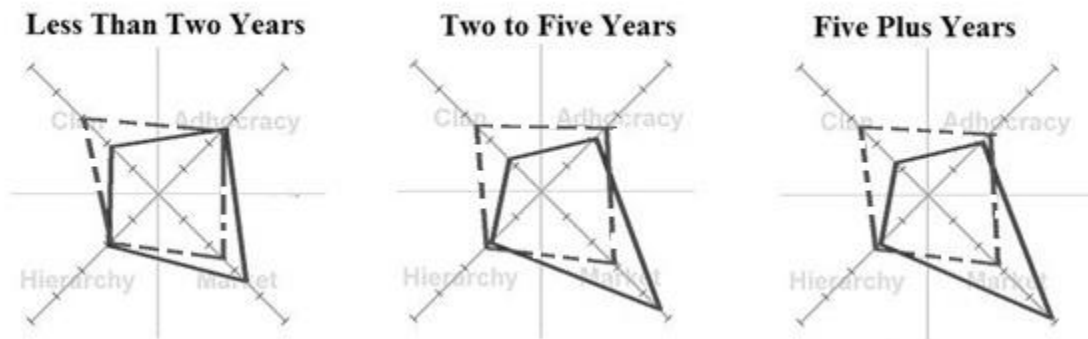
Figure 4.8. Plots of scores by tenure with InsightCorp.

Table 4.7. Gap scores by gender with statistical testing.

	Clan	**Adhocracy**	**Market**	**Hierarchy**
Male	-9.2	-.4	11.9	-1.4
Female	-13.4	-2.2	16.6	-.2

Table 4.8. Gap scores by department with statistical testing.

	Clan	**Adhocracy**	**Market**	**Hierarchy**
Client Service	-15.8^{R,O}	1.1	14.0	1.3
Research	-14.2^{CS}	-2.9	14.6	1.3
Operations	-7.6^{CS}	-.9	13.4	-2.8

*A= significant at the .05 level;

Table 4.9. Gap scores by tenure with statistical testing.

	Clan	**Adhocracy**	**Market**	**Hierarchy**
Less than 2 years	-10.8	1.2	9.4	1.3
2-5 years	-13.1	-3.4	17.5	-1.9
More than 5 years	-10.4	-3.0	20.0	-3.9

Analysis of the OCAI Survey

Aggregate Results

The overall aggregate preferred and perceived plots among all InsightCorp employees responding to the OCAI are quite telling. The market dominance of both the perceived and preferred plot of the aggregate sample makes sense given the context in which InsightCorp operates. As Cameron and Quinn (1996) assert, within a market dominated culture, "organizational success depends on the extent to which your organization's culture matches the demands of the competitive environment." Indeed, InsightCorp operates in an aggressive marketplace in which the vast majority of its projects are hard won through a competitive proposal process. There are many large companies that do similar, if not the same, work as InsightCorp as well as many smaller, more niche companies and independent consultants who compete with InsightCorp for the same research dollars. Any structure other than one dominated by the market type of organizational culture would likely not succeed for long in this particular industry. The aggregate plot, combined with the fact that slightly over half (51%) of respondents think InsightCorp should be more market dominant relative to clan, suggests that, as a whole, the market dominance of the InsightCorp culture is accepted as a necessary condition of company success by its employees. However, even as InsightCorp employees on the whole accept this reality, the large discrepancy between the extent to which market should dominate the company culture compared to how much it actually does is the clear cause for concern.

Simply put, InsightCorp employees view this company as one that, while a market dominated culture is preferred, is in clear need of scaling back the external outlook and

general competitiveness and taking steps to foster greater internal cohesion. Overall, employees view an aggressive, competitive, market-dominated organization as the one that is the best fit for what they do. However, there is a clear call for substantial reduction of this cultural trait in favor of greater concern with internal cohesion and building a more humane working environment. The most direly needed perceived changes have to do with increasing the overall level of "emphasis of human development where high openness, trust, and participation among employees" and with increasing the amount of "mentoring, nurturing and facilitating," as evidenced by the individual clan statements that show the largest gaps. Nearly as large is the gap reflecting a perceived lack of importance placed on "development of human resources, teamwork, employee commitment, and concern for people." Quite clearly, the expressed critique is largely on management and the steps taken (or not taken) to develop and invest in its human resources in a way that nurtures trust, teamwork, and overall commitment. Of note is that two statements on the clan scale show gaps less than 10 points. Those are: "the organization is a very personal place. It is like and extended family. People seem to share a lot of themselves" and "the management style is the organization is characterized by teamwork, consensus, and participation." As a whole, InsightCorp employees are not calling so vocally for a heightened interpersonal culture at work as they are for one where employees are trusted and mentored to do their best work.

In terms of the perceived over-dominance of market attributes, the organizational emphasis on "competitive actions and achievement…hitting stretch targets and winning in the marketplace" and the perceived tendency of its leadership to "exemplify a no nonsense, aggressive, results oriented focus" are the market attributes considered to be

especially overdeveloped. Gaps smaller than 10 points are seen in agreement with the statements: "people are very competitive and achievement oriented" and "the glue that holds the organization together is the emphasis on achievement and goal accomplishment." Again, it is the leadership at Insight Corp that is being called out for placing too much importance on certain domains. The leadership operates on principles that are not necessarily those of the bulk of the employees. Taking the most pressing clan and market gaps together, a picture of InsightCorp emerges where employees must cope with high expectations to achieve results in the absence of effective mentoring to help them get to that place.

The fact that the plot for all six dimensions of the company culture mirror this exact pattern suggests that this issue is one that, in employee's minds, pervades every major aspect of company operations. Further, the marked similarity of the aggregate plot between males and females, between all three departments, and among employees at all levels of tenure with the company confirm that this perception is not unique to any particular pocket of employees at InsightCorp. The uniformity of the OCAI results across the various ways that they can be looked at is a clear indicator that any culture change initiative that seeks to address the lack of clan and, even more importantly, the overemphasis on market traits within this company, would resonate strongly among a majority of InsightCorp employees.

Differences Between Groups

As monolithic as the outcomes of the survey seem to be, it is important to pay attention to and critically analyze the differences seen between particular groups of employees at InsightCorp. The three distinct patterns of response plots deserve careful

attention because they show that a substantial number of Insight Corp employees agree

certainly that the company is too market-driven but, unlike the aggregate view, they feel

that, in the ideal world, the market attributes of the company would be outweighed by a

stronger clan culture. Interestingly, at the time this dissertation was written, 4 out of the

12 individuals (or 30%) were voluntarily no longer working at InsightCorp. On top of

this, two out of the three of the resigned employees plotted on Figure 4.5, also show the

Clan Dominant Pattern. It could be hypothesized that dissatisfaction with the state of the

company caused these individuals to exaggerate the degree to which the lack of clan-ness

was really a problem. Looking at these individuals' discrete clan statement gaps,

however, they stand out apart from the aggregate pattern group strongest because of their

expressed desire to have the organization be "a very personal place… [where] it is like an

extended family [and] people seem to share a lot of themselves." Unlike the group as a

whole, these individuals do cry out for a more interpersonally connected culture at work.

This suggests that these individuals really do differ from the aggregate based on a real

unmet need and that they are not some constellation of respondents so disgruntled as to

make exaggerated claims in their surveys as to what is wrong with the company.

Moreover, this is not the group that has suffered the heaviest losses in terms of

worker attrition. Out of 13 individuals showing the Aggregate Pattern, 6 (46%) had

voluntarily resigned by the time this dissertation was written. Compared to the No

Change group, where only 1 member had voluntarily left the company (13%), the

Aggregate Pattern group emerges clearly as one with just as much if not more

dissatisfaction as the Clan Dominant group. What makes the Aggregate Pattern group

stand out from others is not their larger gaps on clan statements. Rather, these individuals

show unusually large market gaps for the statements: "the leadership in the organization is generally considered to exemplify a no-nonsense, aggressive, results oriented focus" and "the glue that holds this organization together is the emphasis on achievement and goal accomplishment." These are the statements with the most pronounced gaps between the Aggregate group and the other two groups. However, the Aggregate group differs from the No Change group for five out of six of the statement gaps for the market score. Comparatively, there are only two statistically significant differences between the Clan Dominant and the No Change group for the market gaps. As such the defining characteristic of the Aggregate Pattern group is an intense feeling that market attributes are over emphasized. Compared to the Clan Dominant group, which shows higher than average market gaps only for the statement "the organization is very results oriented. A major concern is with getting the job done. People are very competitive and achievement oriented," the Aggregate Pattern group seems more like a cluster of individuals who have determined that the leadership of the company is responsible for the over-emphasis on market and that the resulting competitiveness is the central bond that holds the organization together.

In summary, there are three groups at InsightCorp as far as the perceived gaps between how the company is and how it should be. One, the No Change group, the minority, thinks things are just fine and shows small gaps between current and desired emphasis on both clan or market attributes. The second, the Clan Dominant group, thinks there is too much emphasis on market but is more concerned about the lack of emphasis on clan. The final aggregate group, think there is too little clan emphasis but is much more concerned about the current heavy emphasis on market. Recommendations to alter

the company culture must take into account the fact that there is not a one size fits all

solution to the major issue of the market and clan gaps because they are clearly

experienced by different members of the group in different ways.

How does the makeup of these groups allow for the development of hypotheses as

to why individuals feel the way they do? Unlike traditional researchers who might put the

OCAI into use for a company evaluation, this author has detailed knowledge about the

vast majority of respondents, including their history with the company, general

demographics, and even to some extent their general personality characteristics. While a

quantitative breakdown of these variables is not possible here, I can propose a number of

hypotheses as to how the characteristics of the group members themselves might be

feeding into the patterns seen for the overall sample.

A key area to better understand is the difference between the Aggregate Pattern

group and the Clan Dominant group. What makes these groups different? One interesting

thing that makes the Clan Dominant group stand out is that for half of them (6 out of 12),

InsightCorp is their first job in the market research industry. Three others are only at the

beginnings of their careers, having worked for only one other company for only brief

periods of time. Compare this to the Aggregate Group, where 7 out of 13 members are

senior level employees with multiple years of experience in the field of market research.

Is it possible that workers just entering the workforce might have expectations that an

employer, even one in field as competitive as market research, place greater emphasis on

the clan attributes of his organization than the market ones? Likewise, are those who have

been entrenched in this field for years more accepting that any business will generally

place greater priority on the external, competitive aims than on building internal cohesion?

Cameron and Quinn (2011:90) provide average profile plots from the various types of organizations included in their research with the OCAI instrument so that users can compare their companies with others in the same or similar industries. The aggregate plot for various industry groups appears as figure 4.9, below. Of note is that most of these aggregate plots of perceived cultural type are kite-shaped figures showing differing degrees of market dominance. Because InsightCorp is a highly client-centric organization competing for its consumers' business in a competitive marketplace, the industry closest to it is "Retailer and Wholesale" trade. The market dominant kite reflecting the current state of that industry is almost a mirror image of what InsightCorp is perceived to be by its employees.

What is revealing about this image is that InsightCorp's perceived culture, at the aggregate view, and certainly among those in the Aggregate Pattern group, looks exactly as one might predict from the literature. This does not necessarily mean, of course, that this is the way these corporations should be. Simply, it is the way they are. Cameron and Quinn (2011: 91) intend that users of their instrument use these comparative images to gain insights for changing organizational culture "in a way that boosts organizational effectiveness." A match or mismatch with one's industry is not necessarily good or bad, according to the authors, but should be interpreted in the context how that company operates. InsightCorp, according to its employees, does and should behave like other companies in this and similar industries. Looking at the group aggregate result and certainly for those in the Aggregate Pattern group, the general cultural type of

InsightCorp is not necessarily off the mark. The number of years that Aggregate Pattern group members have spent inside the market research industry may help to explain why they do not expect InsightCorp, even in the ideal state, to ever be a culture where market attributes come second to clan ones.

But what of the individuals who are content with the status quo? The main characteristic of this group, again, is that they, unlike the majority of IC employees, do not perceive sizeable gaps between the way the company currently is and how it should be. But this does not mean that their specific viewpoints on what the company is/should be like are exactly the same. Six out of eight of these individual's diagrams (see figure 4.10 below) show a fairly boxy cultural plot for both the perceived and preferred cultural types, and of course, the difference between the now and the ideal are very small. Some individuals show slight dominance in one of the four quadrants, producing a sort of boxy kite image, but there is a good deal of idiosyncrasy in terms of which quadrant is favored. In general, what most of these respondents see and want in their company is a culture that is more or less evenly distributed in terms of elements of each of the four culture types. That is, they see and desire a company that has a roughly equal share of clan, market, adhocracy, and hierarchy components to its cultural makeup.

In terms of group composition, as noted before, this group shows considerable variability. Four were very new to the company at the time of the survey, having been with InsightCorp in a full time, salaried capacity less than six months. Two occupied rather marginal administrative roles that do not require a great deal of interaction with other employees or clients. I hypothesize that the bulk of these individuals probably have not gained sufficient experience within the company to have formed a stronger opinion than a

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box more or less evenly distributed across all quadrants with small or no gaps between

perceived and preferred traits. They have not seen enough to perceive an under or over

emphasis on any one quadrant nor have they been around long enough to think that the
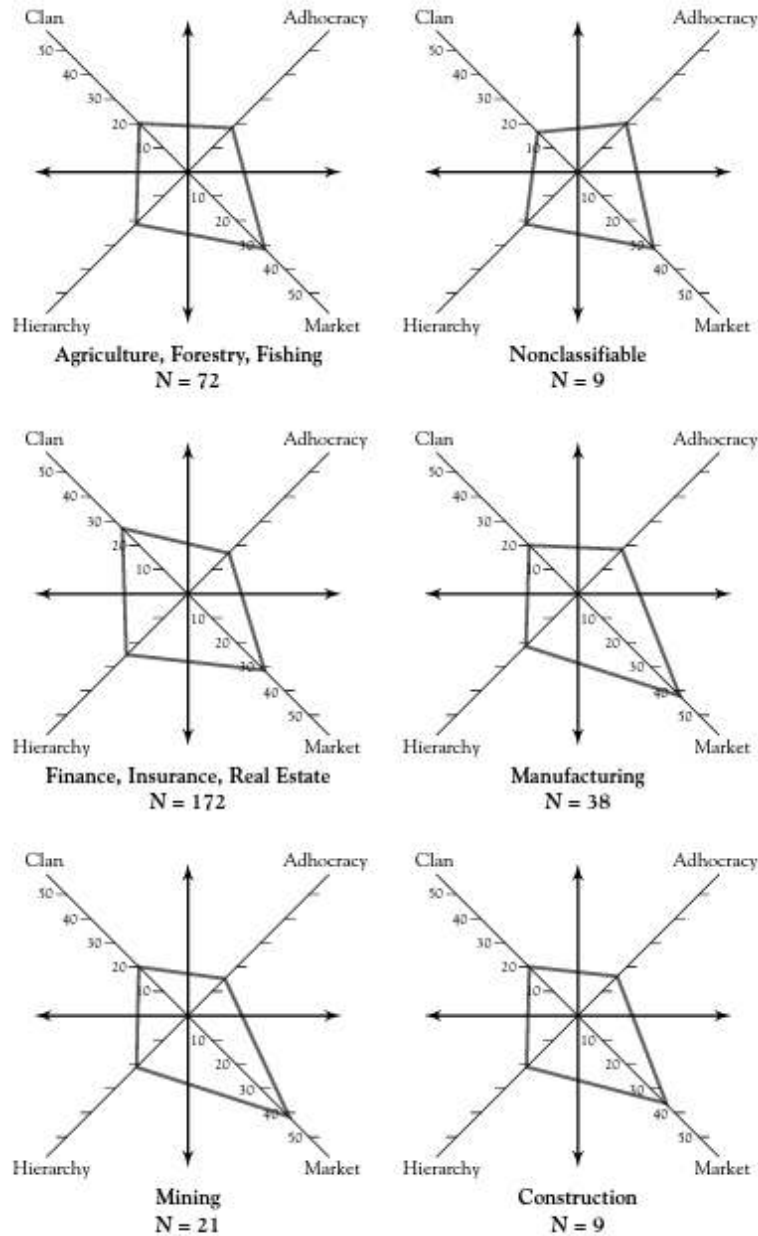
Figure 4.9. Average culture profile for various industry groups[1]

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[1] Figure 4.9 used with permission obtained on June 9, 2012 by the Copyright Clearance Center of John Wiley and Sons (see Appendix One)

Clan   Adhocracy   Clan   Adhocracy

50   40   30   20   10   10   20   30   40   50

Hierarchy   Market   Hierarchy   Market

Public Administration
N = 43

Services
N = 7

Clan   Adhocracy   Clan   Adhocracy

50   40   30   20   10   10   20   30   40   50

Hierarchy   Market   Hierarchy   Market

Retail and Wholesale Trade
N = 44

Transportation, Communications,
Electric, Gas, and Sanitary
N = 127
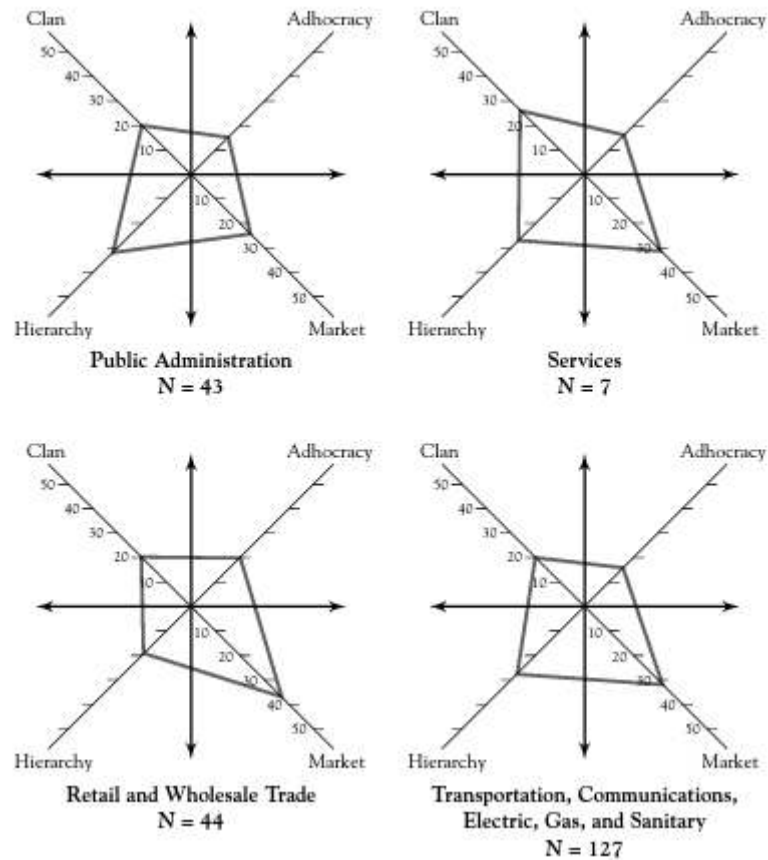
Figure 4.9. Average Culture Profile for Various Industry Groups, continued.

company is different from what they want it to be. Cameron and Quinn assert (2011:94)

that "sometimes square cultural profiles simply indicate that the organization really does

not have a good sense of its own culture, strengths or unique capabilities. Sometimes, it

simply means that the culture is well developed in each quadrant." Given how firmly the

majority of employees believe that the InsightCorp culture is overdeveloped in a

particular quadrant, I argue here that it is more likely that the members of the No Change

group have not yet had the opportunity to develop a richer perspective on the company.

This would be almost uniformly true if two of the members of the No Change Pattern

were not the senior most executives at InsightCorp.

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One very notable exception to this group No Change pattern is seen in the bottom, right plot of Figure 4.10. This individual is part of the No Change Pattern group because the gaps between the perceived and preferred culture are quite slim. Indeed, the two plots almost entirely overlap. While the lack of gaps makes this individual a member of the No Change Pattern group, his specific pattern makes him very unique. This pattern is almost identical to the aggregate perceived pattern of the entire InsightCorp respondent base. In short, this individual sees the company the way the other employees, as a whole, see it. What makes him unique is that he also prefers it this way. This individual is the InsightCorp CEO, who will be referred to here as Mr. Smith.

As already discussed in chapter two, there is much in the literature in regards to how company leaders set the tone and even determine company culture. The CEO at InsightCorp is indeed a quite involved figure in many of the day to day operations of the company, particularly when client contact is intense. While his main activities are in the sales arena, where he both oversees the work of others on the sales force and works to make sales himself, Mr. Smith also functions as primary or shared client contact on a number of accounts after projects have been sold. As such, he has considerable direct contact with members of both the sales and research departments and has ample opportunity to impose his desires for how the company should operate both through corporate policy as well as through his daily interaction with all of his subordinates.

Operating almost parallel to the CEO is the President of InsightCorp, an individual who is technically subordinate to Mr. Smith but is generally acknowledged as more of a partner (indeed, he is part owner of the company). The President, who I will
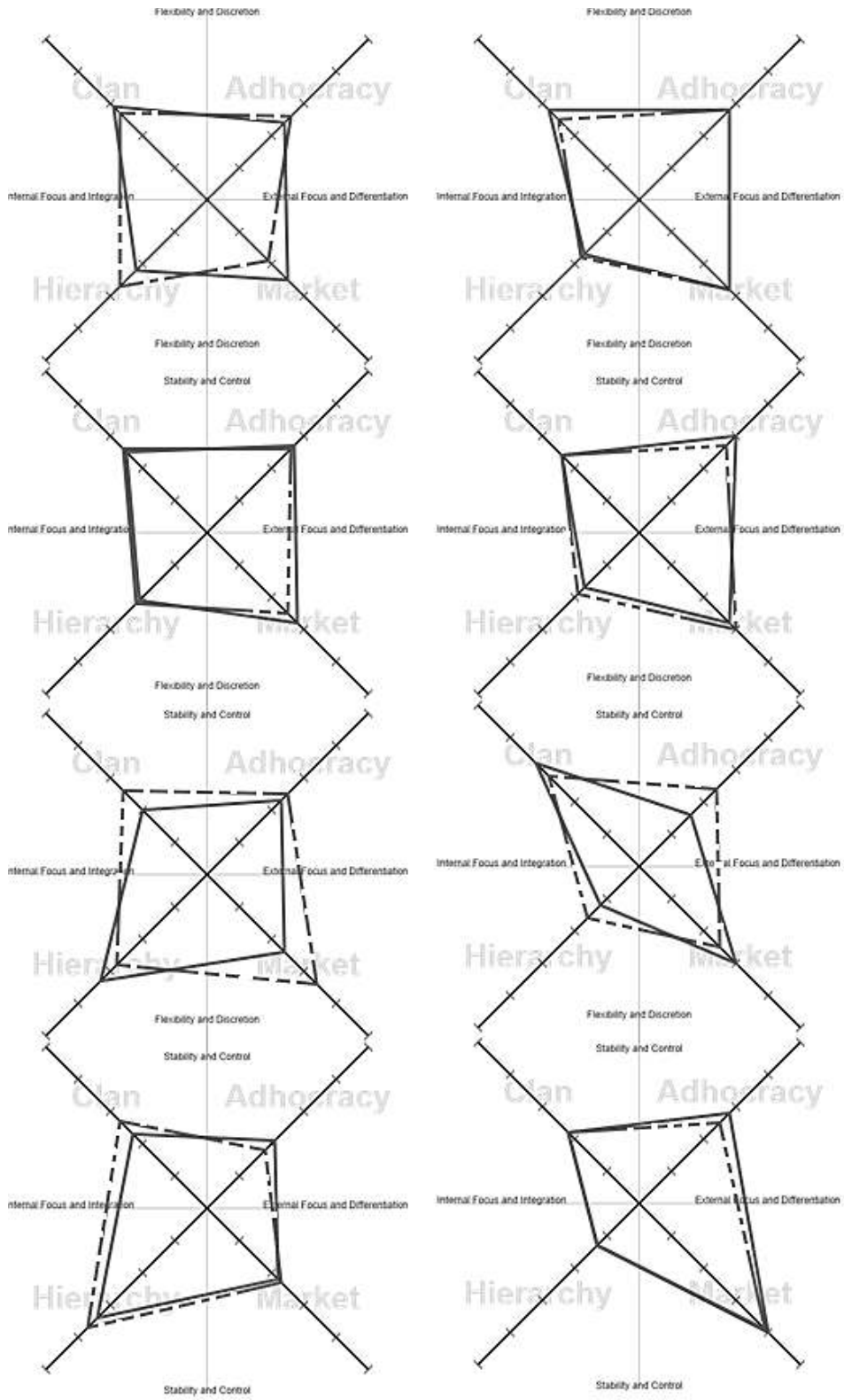
Figure 4.10. Individual plots of no change group

call Mr. Johnson, has even broader and deeper contact with InsightCorp employees from all departments,functioning both as the senior-most person over the sales and research sides apart from the CEO. The President's daily contact with members from the sales, research, and operation teams at least equals if not exceeds that of the CEO. His plot, however, is nothing like the Mr. Smith's. Below Mr. Smith and Mr. Johnson's s preferred cultures are plotted with dashed lines against the aggregate company view of the InsightCorp culture the way it is at present (plotted with solid lines). Remember, for both of these individuals, the gap between their perceived and preferred cultures were quite small. Their individual perceived and preferred plots can be seen in figure 4.10 (Mr. Johnson's is the top right figure and Mr. Smith's is, again, bottom right). The two figures below are meant to provide a comparison between the views of these two senior most executives and the company as a whole.

Notably, Mr. Smith's plot is astonishingly similar to the company aggregate view. He actually desires a little more clan and less hierarchy than what employees as a whole view the current state to be, although he himself perceives no such gap as evidenced in his individual plot. Mr. Johnson, on the other hand, has a perspective that differs remarkably from the company aggregate. He desires more hierarchy and less market than the total sample perceives as existing now, although, again, he perceives no such gap himself (the only gap he perceives is a slight one suggesting too much clan exists compared to what would be ideal).

These two individuals, who work together on all major decisions that affect the company, could hardly view things more differently. And what do their viewpoints mean

for others who report to them? On the one hand is an individual, Mr. Smith, who sees

exactly what other see but, unlike other employees, believes this state is ideal where

others see large gaps representing a clan deficit and a market over-presence. On the other

hand is Mr. Johnson, who, while being a highly educated and intelligent individual, is

hardly in a position to empathize with his employees given how differently he views the

company. Upon seeing these graphs, it became immediately apparent to me that I had my

work cut out for me if my goal is to convince either of these two individual to consider

any recommendations for change that derive from the aggregate view of InsightCorp

employees.
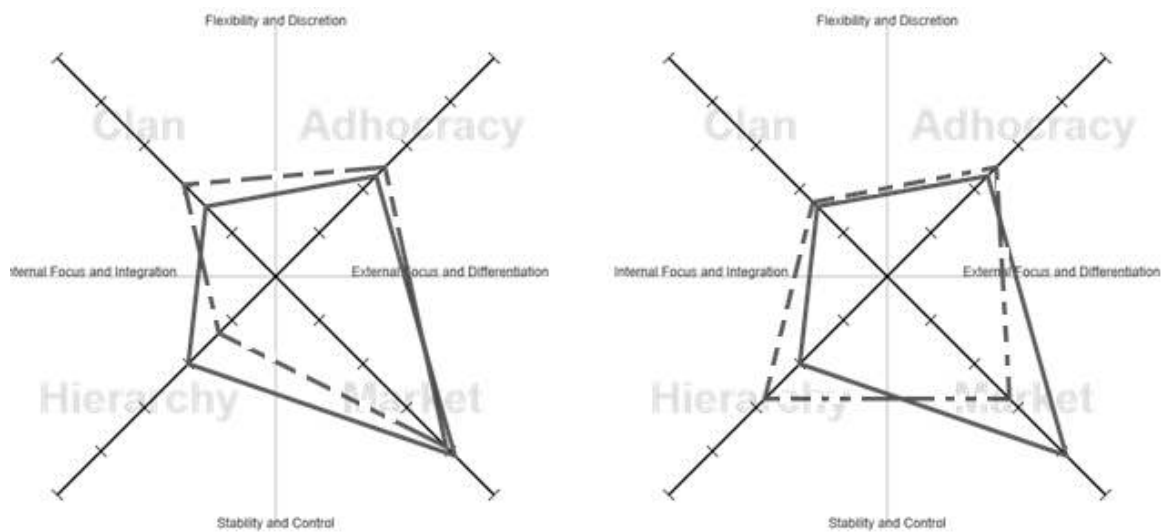
Figure 4.11. Plots of CEO, Mr. Smith (left) and President, Mr. Johnson (right) preferred
types (dotted lines) plotted against company aggregate perceived plot

That difficulty aside, the viewpoints of these two key InsightCorp leaders may

themselves factor into differences seen in the attitudes expressed by Aggregate Pattern

group relative to the Clan Dominant group. As has been discussed, one thing that might

explain the differing views of these groups may be the relative amount of experience each represents in the market research industry. Just as important as experience, however, is looking at just how these individuals actually function within the organization, with whom do they interact, and to whom do they report. Within, the Clan Dominant group, only 3 out of 12 members report directly to the President or CEO. The remaining 9 report directly to a middle manager who himself reports to the President or CEO. In general, the contact that these individuals have with the most senior executives are frequently mediated by a lesser executive. By contrast, 10 out of the 13 members of the Aggregate Pattern group report directly to the President and have significant daily interaction with the CEO. The gaps for the Aggregate Pattern group, again, are almost pinpointed to statements suggesting the management over exemplifies a market focus and that goal accomplishment and achievement is the glue that holds the company together. I would hypothesize that many of these individuals feel that the senior level commitment to market values is so strong and so definitive of the company as a whole that little could be done to modify the current state. This may have something to do with the highest levels of attrition being seen in this group. By comparison, the Clan Dominant group does not focus the critique of too much market and too little clan on the senior leadership but show more concern with a general lack of interpersonal sharing as well as trust and human development that is more pervasive. As I will show in the next chapter, these are themes that emerge clearly from the focus groups and my ethnographic experience within InsightCorp.

Chapter Five

Data Analysis: Participant Observation and Focus Groups

Introduction

In this chapter, I present an analysis of the data obtained through my extended

period of participant observation and focus groups I will be using the clan and market

gaps as major thematic divisions in the following discussion and in order to show the

reader that the findings in the previous chapter have been explicitly validated by the

research participants. I will start this chapter with a brief synopsis of the last part of the

focus group discussions, that pertaining to the group reaction to the OCAI results. From

that point onward, I organize findings not by method but by topical subtheme within the

two major themes of clan and market gaps. Within each section, I present data from the

focus groups but this data is meant always to be contextualized by my ethnographic

experiences, including my participant in email conversations, some of which are

explicitly analyzed here. It is my goal that this chapter read as an ethnography and, while

I am using my quantitative results as a framework for the ethnography and presenting

copious amounts of direct quotes from my focus groups, it not my intention to privilege

the survey and focus group results over my own ethnographic experience. Rather, I hope

to show in this chapter how ethnography is a method that not only complements more

structured data gathering techniques but provides a foundational base upon which those

data can be presented and understood

For summary purposes, I end the chapter with a table of key findings organized by my major themes and distinguishing the findings that I contend are related to the fact that InsightCorp is a virtual organization from others that I have determined to be more specifically related to unique policies and practices at InsightCorp or to attitudes and beliefs of specific InsightCorp personnel. The separation of these causal components in my analysis will continue throughout my summary discussion of all my results in chapter six and to chapter seven, where I will make recommendations for specific changes at InsightCorp as well as recommendations that are more generalizable to any organization that conducts a sizeable portion of its operations virtually.

Response to the Aggregate OCAI Results

I did not share the OCAI results with the focus groups members until the end of the groups intentionally because I wanted to avoid any influence that seeing those data would have on the natural discussion of the cultural components of InsightCorp as defined in Schein's methodology. That being said, I will use the discussion of these results as a framework for organizing the various themes that emerged from the groups because I have found the links between the basic quantitative findings of the OCAI and the qualitative detail obtained through the focus groups and the other ethnographic methods I employed to be quite strong.

The members of all three focus groups agreed that the results of the OCAI survey were very accurate about the state of InsightCorp's corporate culture. Not a single individual objected to the overall view. This includes even those whose patterns are most dissimilar to the aggregate viewpoint, i.e. members of the No Change group, although being the minority, it is possible that those individuals might not have felt comfortable

identifying themselves and disputing the findings in the presence of other employees. In general, the response reflected an almost complete lack of surprise and seemed a convenient summary of focus group discussion preceding my presenting the OCAI information. As one respondent in the sales group noted, "I don't think it's all that surprising. I think the clan nature that people are calling out for really goes along with a lot of the underlying issues we talked about today." Members of the research and operations group responded to my graphs simply and directly. "It looks how our company is" and "it backs up what a lot of us feel."

Clan Gaps

As discussed previously, the two most strongly felt gaps companywide on clan scale measures related to three statements: 1) the organization emphasizes human development. High trust, openness, and participation exist, 2) the leadership in the organization is generally considered to exemplify mentoring, facilitating, and nurturing and 3) the organization defines success on the basis of the development of human resources, teamwork, employee commitment, and concern for people. Practices that do not facilitate or are counter to human development abound at InsightCorp

Individual and Team Job Responsibilities

When any InsightCorp employee is hired, she signs a contract that specifies the tasks for which she is to be held accountable. However, this portion of the contract is typically less than a page long and any position at InsightCorp entails a multitude of daily tasks that are not specifically outlined on that contract. As a result, there exists a good deal of confusion as to who is responsible for the many tasks that do not get specifically outlined. No doubt this is the case for any employee at any company, as few jobs are so

simple as to not require at least some degree of on the job training or clarification of specific tasks. But at InsightCorp, this natural process is obstructed by the virtual environment itself. Opportunities to learn by watching others or to ask casual questions during in person group activities simply do not exist. Participation in conference calls and email discussions, of course, provide some opportunity but in ways that are scattered and superficial. Newcomers interrupting routine or task based conference calls to ask clarifying questions stilt the progress of meetings already stilted by lack of face to face interaction and soon learn to table their questions for a more opportune moment that might not ever come.

Routinely, my colleagues and subordinates ask me if InsightCorp has a "handbook" or some other manual that could list out all the various components of a project and standard practices for dealing with all various nuances of project tasks. On a number of occasions, both I and other well-meaning employees have endeavored to put together how-to instructional documents for various procedures and process. I cannot recall a single occasion when the construction of such documents was ever mandated by a superior in the case of internal instructions, although the production of instructions and guidelines and even thorough training programs for external ethnographers have been in place to varying degrees since I first starting working at the company. The lack of formalized, written instructions for internal operations has led on several occasions to voluntary production of such instruments, such is the felt need for formal guidance within the company. Senior management, while never attempting to prevent this grassroots production of training materials, has uniformly expressed to me that such tools are really unnecessary and that the only way to learn at InsightCorp is to "learn by doing." While

personally I have come to believe that experiential learning is most critical but that some procedures and policies are well suited to being formally communicated by writing, I am establishing here that employees at InsightCorp perceive the training resources available to them to be insufficient.

Responding to this perceived sense of chaos, however, the executives at InsightCorp at one point supported the hire of a senior level executive who would specializes in human resource issues such as these. Ultimately, this individual would resign amicably after a period of two years when company revenue could no longer support the salary of someone who did not directly contribute to "production." As such, the role was indeed considered a kind of luxury. Nonetheless, this hire was an attempt to satisfy the clear call for formalized procedures and order. One of the first orders of business of this new VP was the construction of a Responsibility Assignment Matrix, also known as a RACI matrix (Jacka and Keller 2009), a popular instrument used in project management circles to clarify the roles and responsibilities of individuals working in cross functional teams. This VP, who I will call Laura, introduced RACI to all InsightCorp employees at the first and only in person company meeting held in November of 2008. I recall the lesson being a particularly awkward one in that Laura attempted to take us through the process in a participatory way only to be met with mostly blank stares and averted eyes as a substantial number of the individuals present chose to work on their laptops on pressing project deliverables in the middle of the workshop. This introduction characterized well Laura's tenure at InsightCorp. She was at once performing a role that everyone acknowledged was desperately needed and yet she was met at almost every turn with resistance or, minimally, apathy. Part of this was no

doubt because Laura herself had a certain managerial formality about her that was perceived as excessive, like an overzealous school principal. Part of this was because Laura was an outsider who was brought into solve problems that employees were aware of and had strong opinions about, yet she herself did little to solicit feedback from individuals at various ranks and stations about what those problems were or how they might be solved. We can see how some of this surfaces in the focus group discussions revolving around one of her most ambitious endeavors, the implementation of the RACI system.

The RACI process involved the outlining of the various tasks that make up the work of a project and then clarifying the various roles and responsibilities that are related to them. The term itself is an acronym for the four responsibilities outlined in the system as they relate to any task: *responsible, accountable, consulted*, and *informed*. The person responsible for a task is the one who actually does the work or delegates the work to be done as needed. The person accountable for a task is the one who ultimately answers for the completed task and approves the work done by the responsible party. An individual who is consulted should have his opinions solicited because he can offer expert assistance, and individuals who are informed are just kept up to date on project progress.

Laura worked with the various research and operations VPs, myself included, over a period of several weeks to outline all project tasks and assign roles for each of the personnel that typically play a part in an InsightCorp project. As such, RACI had immediate top down buy in and carried with it the authority of those who had been working for the company directly on projects for some time, even if Laura was relatively new. RACI was introduced one Monday on a recurring group conference call of the

research and operations groups and was thereafter supposed to be adhered to by all and

reinforced by management. During the focus groups, individuals clearly expressed a

general approval of the system's intent:

> OP6: I mean there's so many things that come up at IC on a daily basis that there are definitely things that fall through the cracks and then hopefully there is somebody there to kind of keep an eye out and catch those things that fall through the cracks in terms of the teamwork part of it. That's what it comes down to.

> OP3: That's the whole thing behind RACI that we can all check to see that everything gets done on a project even if you aren't responsible for it. Everything is mapped out, things that happen on a project and whose responsibility is each thing and who's accountable and who should be informed so I've never seen it mapped out in a format that was accessible to us. I think that before it was a presentation and was out there but on certain projects I know before this I would say, "Who is responsible for this while I'm on this project?" I don't think RACI answers all of those questions. It depends on your level of…like it depends on the client. It depends on the history. But it answers a lot of questions about whose role it is to do z, y, or z.

In spite of the support of the system, overt doubts as to RACI's effectiveness,

however, were immediately apparent to all as a result of the caveat, as expressed by

Laura when she presented the details of the RACI system to the research and operations

teams, that, even though you may not have an "R" for "responsible" under your name for

a particular task, you still had to pay attention to make sure that the person who is

responsible for the task was doing the needful. This detail was immediately confounding

to many, and is here clearly expressed as individuals from the operations group discuss

the pros and cons of the RACI system.

> OP2: All I know is that [RACI] scares me a little bit that now not only do we have so many responsibilities as project managers throughout the process but now if we don't say, "Hey! The project director didn't do this" and if you don't call them out on it, then you are going to be called out on it, too.

> M: So RACI makes it worse or better?

OP2: You know I think it makes us responsible for at least making sure that other people are responsible and make sure things they are responsible for are done.

OP4: It makes you think about the entire team and if things should be happening you know who to go to. I think it helps further define our roles. I know I've worked on projects where I have a very central role and I've worked on projects where I've not been copied and it's hard to know what you are supposed to be doing specifically when every project is different and every team is different. So hopefully when everybody knows what everybody else should be doing we can hold each other more accountable and we can be more effective.

Overall, the effort to implement the RACI system, the most concerted effort to clarify project roles and specific procedures in InsightCorp history, was only moderately successful. It provided what almost all employees request shortly after they started with company--a formal, written document specifying who is supposed to do what. But by making every individual technically responsible for making sure every other person is doing his or her job, it was an instrument that ultimately could not be wielded effectively by anyone. It is routinely emphasized that operations and research are parallel departments, meaning that a project director on the research side does not have authority over a project field manager on the same project on the operations side. In order to call out a team member for not doing his job, an employee has two options 1) directly confront the individual or 2) report that individual to his supervisor so that she can look into the issue. Both options are unsavory to most employees who tend to avoid confrontation and typically do not want to "rat out" each other. The obvious solution to the problem would be for the supervisors of employees neglecting their assigned tasks to perceive and handle correction of those employees personally. In fact, RACI generally specifies a supervising executive, such as myself, to be "Accountable" for responsibilities

of their subordinates. But what the RACI experiment showed was that putting the rules

down on paper did not actually compel individuals to do their jobs as outlined.

While the failure of the RACI system seemed to some to stem from the vague diffusion

of responsibility noted by the operations group, ultimately the problem reflects a general

lack of trust in others to actually perform the duties assigned to them. If others could be

trusted to do whatever tasks had an "R" by their names, then the prospect of having to

keep an eye out for those things that you were only supposed to be informed about might

not be so disconcerting. This lack of trust reflects a concern not only that individuals who

are parallel to you but working in another department won't do their jobs but also that

whoever is managing those individuals (and likely has an Accountability "A" next to

their name) is not going to make sure that the task gets done either. Some members of the

research group pinpoint the source of this lack of trust specifically to the limitations

imposed by the virtual environment:

> R6: Not to sound hokey or cliché or anything but there is an element of trust and being able to trust and rely on somebody to get the job done and know that if you have a problem. Like a personal relationship and not just a business relationship. I feel like you need to have that to know that this is going to get done. Because without it, then they don't realize "Hey we're a team. This is a relationship." They don't want to let me down and I don't want to let them down and I don't really know that that exists all that much. I want to be able to say this person is going to do it because not only do they want to do it for IC and for the client but also for the team—like for me. And that is one of the things missing at InsightCorp. Just familiarity and just talking and just being familiar is the thing. It's something that has to be worked on because it's hard in a virtual company.

> M: So is there an issue with trust? Can you trust people to do their jobs?

> RP4: It's not an issue that you can't trust them to do certain things. It's how you refer to them in the situation. If you know somebody personally and you have an idea like "Hey I can trust this person and I know this person" in a way you might not be able to know them virtually.

The problem of role clarity at InsightCorp is not one caused by a failure to specify project task responsibilities. Rather, it is a failure of a group of individuals to achieve a network of mutual obligation and trust that ensures tasks get done properly. The situation is exacerbated by an absence of supervisory enforcement.

Obstacles to the Communication of Information

Another common set of problems in the clan domain are weaknesses of practices in place for distributing information among team members at InsightCorp. Unlike many other companies who are virtually structured, InsightCorp has never utilized and has no plans to use a VPN (virtual private network), that is, it does not use a secured, encrypted private network linking all employees and allowing for the storage of documents on one shared space. InsightCorp employees are connected through the internet primarily through the use of a Hosted Microsoft Exchange, a more affordable way to manage email, calendars, and contacts through Microsoft Outlook. For the most part, documents are exchanged (not shared) thorough attachment to email. This decision is unique to InsightCorp, and personal communications to me by Mr. Johnson and Mr. Smith explained the choice as one arising both out of the need to find the most affordable networking solution for the company at its inception combined with a general lack of knowledge of VPNs on the part of its founders. While several employees have recommended conversion to VPN throughout the years, including Laura, the Human Resources VP, it was determined to be too costly and senior management did not view current practices as so dysfunctional as to necessitate the transition.

However, InsightCorp has adopted, out of necessity, other, less extensive ways to support file sharing that, in combination with the use of Outlook, can accomplish the

same goals as a VPN to a good degree, although with an exertion of greater effort required as files must be uploaded as an action separate to saving them on the creator's computer hard drive. During my tenure, several attempts have been made at InsightCorp to implement a protocol whereby documents that were needed by multiple parties could be housed on these shared websites and accessed at any time of day. While such a system might have very well served to reduce email clutter and establish a storehouse of accessible reference data on how to run various aspects of projects, it never succeeded in taking strong roots among all departments at InsightCorp. When asked to list the artifacts at InsightCorp, members of the operations groups were quick to mention some of these file sharing systems because this group had historically been the greatest champions of their use:

> M: What other artifacts do we have?

> OP2: We have Sharefile; Sharepoint…that kind of stuff.

> M: What are those?

> OP3: Sharefile is a system that we use to house deliverables that are from fielding. Things like post project reports, pictures, store maps, and stuff that ethnographers collect. It's an external secure hard drive in cyberspace that can be accessed. It's basically like a computer hard drive that we can all access. We have SharePoint, too. It checks documents in and out so a lot of people can work on the document at the same time. So it's a file sharing system. It's like the library. You check out and check back in.

> OP6: And nobody knows the difference between them and the names are similar. They are so similar that people get confused as soon as they encounter them, and so there's like a few people and probably really only the people on this call can tell you the difference.

Indeed, members of the Research focus group volunteered limited discussion of these file sharing programs when listing company artifacts, and members of the client service group did not mention them at all. But as clearly expressed by the operations

group, confusion and inefficiencies arise when people are unsure they are working with the right documents. This portion of the operations focus groups reveals why this department feels adherence to such a system is so necessary.

> OP6. We want to do this so we never have to worry, "Did I get the right version? Am I looking in the right place? Oh wait, Dave did this pricing but then Neal did the pricing but I don't remember that Dave threw in this random revised pricing." So I just look under Neal [in his email archives], so I throw that into an HQ sheet and I think we're good to go and turns out three months later there was half the money we thought in the budget because Neal got a hold of it and re-priced the thing. But if the thing just lives online somewhere then that would never happen.

> OP2. You do get confused. There's always ten different versions of something and you are always in this situation where you fall on copy then fall off copy. We need this.

For the operations group, the key problem appeared to be not the failure of the system itself but the failure of individuals within the system to effectively embrace its utility. For some, this resulted from a failure of senior management to adopt the system and enforce its use: As one respondent put it, "If the culture of InsightCorp when the first [Sharepoint] linked happened…if the powers that be had said, 'This is the greatest thing since sliced bread,' that's what we'd be doing now, and we wouldn't be having the this conversation. So we are where we are." Indeed, senior management is frequently witness to the inefficiencies that arise because InsightCorp lacks an organized storehouse of information but typically pushes for quick fix solutions to immediate information needs, prioritizing today's urgencies over tomorrow's efficiencies. In the following email conversation where a sales executive is seeking a non-disclosure agreement, or NDA, for a specific client, Mr. Johnson's response exemplifies this short term perspective:

> **From:** Vince Sellers
> **To:** Proposed (proposed@insightcorp.com)
> **Subject: NDA Needed Client A**

NDA Alert re: Client A!

Can anyone tell me if we have a signed and NDA with Client A? Do we have a place where we house the NDAs…Stanley, Mary, others????

Vince

From: Mr. Johnson
To: Vince Sellers; Proposed (proposed@insightcorp.com)
Subject: RE: NDA Needed [Client A]

I'm sure we do, but let's just ask him for the document so we can sign it.

We have too many moving parts to find it if we have it. We'll get that sorted out, but let's not wait to do so.

This email conversation, just one of dozens demonstrating the same general trend, reveals a number of InsightCorp customs when it comes to internal information seeking. Vince, a senior executive having served the company for four years at the time of this email, addresses his inquiry to the entire Proposed@InsightCorp.com email distribution list to which almost all InsightCorp employees subscribe, signaling a specific decision to not circulate the request first among a smaller pool of employees more likely to have an answer to his question (such as Stanley or Mary). The situation itself bears scrutiny. In this case, client A is one of the most important clients for InsightCorp. It is a huge Fortune 500 company that is not only one of the leading product manufacturers in its industry but has done literally dozens of projects with InsightCorp over the last several years. A non-disclosure agreement is a standard confidentiality agreement signed between two parties, such as a research vendor and client, which enables them to share material, knowledge, and other data so long as access is not granted to outside parties. InsightCorp does indeed have a signed NDA with Client A, and yet no one knows where it is. Mr. Johnson, eager to make sure we take the quickest course of action to keep an

impending sale moving, addresses briefly the larger need to solve this information

problem ("we'll get that sorted out") but suggests a quicker avenue to resolution, i.e.

asking the client to find use their own copy of the NDA. As far as I know, nothing has

been done since this conversation to warehouse NDAs on a shared drive that would make

them accessible to all parties who could use them.

The client service group engages in this type of exchange weekly at InsightCorp,

and yet these individuals did not even mention the current shared file services used at

InsightCorp among its artifacts during the focus groups, suggesting the barest

understanding of how these systems could be used for everyone's benefit. My discussion

with the research group revealed a deeper awareness of the current systems but also that

its members did not really view the system as useful. Discussion of Sharepoint occurred

only during the initial group outlay of company artifacts, and it reveals not only the

skepticism with which the tools are regarded but the internal confusion as to the policies

about their use.

> M: What other tools, rituals do we have?
>
> RP7: There's like that Sharefile and Sharepoint. We don't use it for much.
>
> RP1: Its storage is limited and most of the stuff we have is so big it can't go there.
>
> M: What do we put there?
>
> RP2: Any project I'm on I always upload parts of it to Sharefile because I'm always worried about what happens if I'm not around. Who's going to pick this up? There were a couple projects that I started working on after somebody who is no longer here was working on them. And Marvin had to go back to a hard drive to find an old version of a report and it was just really a pain. So at the end of a project, I just upload the final deliverables and the project plan to Sharefile.
>
> M: Is that a policy?

RP2: I think it's a policy. At first I thought we were supposed to upload to Sharepoint so that's when I started doing that at first and then I was told, "No it's uploaded to Sharefile so I switched and so it's just something that I think we are supposed to do. So I started doing it.

M: Is Jay the only guy doing this?

RP4: I've been doing it but only recently.

RP6: I've only done it once.

M: Who told us to do it?

RP7: Laura made the directive several times. She started reinforcing it more recently on the weekly operations research call. It's also like a check box on Marvin's form.

RP2: When you start, they tell you to do that. It's part of your new hire training.

RP3: They teach you about Sharepoint and Sharefile and 42,000 other things at the same time and then nobody ever talks about it ever again.

RP6: I don't really think of Sharefile as a centralized network. When you need to find a document you have to send out an email to see who has it because basically it's cumbersome to look for something yourself. So now I'm looking for a flow counting grid for something I'm working on but to go through Sharefile would be an absolute nightmare. So it's easier to do a search with my email network. We have to use email as an alternative to Sharefile because Sharefile is so inefficient at like locating documents.

M: So would you say we have an effective way to share documents?

RP6: No!

RP4: No. And we lose that collective knowledge because if we were physically all in one location, either you would have a physical storage area, like a library, or you would have people that you could walk into their office and say "Hey." I think it's much more difficult because we don't know each other and it's all through email and there's no apparent collective knowledge base.

One thing is consistent in the way that research and operations talk about the use

of shared web based systems: each department thinks of it as a place where a person

should be able to go and get the information he needs to do his job correctly. The

palpable difference is that research is more focused on locating examples from past projects for research design and analysis *guidance* while operations is focused on simply getting the basic information that is *required* to execute a project in field now. There is no discussion on the research side about uploading the documents that operations routinely has to seek out from research staff so that no one has to explicitly ask for them, such as questionnaires that must be provided to ethnographers who will field the project. Research members seem completely oblivious to the fact that operations requires information from them and from the client service side as well and that this information could be routinely updated within the remote storage systems. Further adding to the confusion, a routine practice among research members at InsightCorp is to exclude operations staff from client discussions related to the questionnaire design and fielding protocols that are developed though the life of a project. As such, operations staff often are completely unaware of what the status is on those documents until the first official day of fielding of a project is on the very near horizon. And generally, operations staff must ask for the documents to ensure that they have them or, at best, that they have the most recent versions. Undoubtedly, this situation in which operations staff feels that they must chase down research personnel for needed information is part of the reason they express doubts about the RACI system. The system cannot work if the people within it cannot be trusted to do their jobs. The act of having to pester coworkers for documents makes the pesterer feel that those who she is pestering are not responsible team members.

There is a larger consequence to this issue of disorganized central storage facilities at InsightCorp: it is a direct assault on each employee's attempt to construct in his own mind an idea of InsightCorp as a company to which they can psychologically

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attach. Newcomers, particularly those in the research area, are dumbfounded, for example, that InsightCorp does not have a centralized database containing all quantitative data that is consistent across projects for the purposes of cross category comparisons. I have had the same conversation countless times with employees seeking to use data from past projects for current purposes. *"Where is the data?" "You mean nobody is working to aggregate all this information in a useable way?" "The only way I can find out about this project from the past is to ask the person who worked on it who isn't here anymore?"* What it feels like when one discovers how little effort has been made to create usable, physical records of the work that has been done by a company over a ten year time frame is that you are not working as part of a larger entity but that you are operating in a void across which individuals sporadically communicate.

The common tale I hear from employees I have witnessed come into InsightCorp and leave (almost always because they resign) is the same. Each one enters eager to become part of the InsightCorp team and learn the InsightCorp way of doing things. As your attempts to acquire necessary information are thwarted, you begin to understand how disorganized the company really is and how difficult it is get others to do what you think they should do and get the information you think you need to do your job correctly. Over time, employees retreat from these attempts to connect, isolating themselves and adopting individual survival strategies that seem to work and make them less dependent on others. This creates a cycle as newcomers become the cynical vets who either leave when they find more appealing alternatives or teach new employees, through their own limited outward communication practices, that they will find only the weakest collective

structures at InsightCorp, both in terms of the physical artifacts of past work and the networks of relationships between employees.

Training and Mentoring Deficits

Linked to the difficulty of obtaining an explicit understanding of what tasks are your responsibility to carry out and of trusting others to do their jobs is a lack of clarity on how that task should ultimately be done. In the ideal, RACI outlines exactly who should be doing what. However, RACI does not outline how it should be done. Again, the lack of guidelines, manuals, and operating procedures were frequently lamented during my time at InsightCorp. During the focus groups, I challenged participants to tell me how one learns to do one's job. One research respondent's reply encapsulates the commonly heard answer: "You do it wrong and somebody points it out. The largest proportion of what I've learned at InsightCorp is when I've done something wrong or not maximized something that could have been done better. I think it's partly because I really feel like I'm working in isolation." What the discussion of the potential uses of Sharefile-type systems reveals is the desire for a storage warehouse of information that could provide guidance on what do to for a given project. The system does not have the right capacity or organizational structure to assist employees (in the research department at least) and, therefore, it is not useful and they do not use it to build such an archive for themselves much less to contribute to a warehouse of information currently needed by others in operations.

But why does the research staff desire such a library anyway? Simply put, they feel the need to seek out examples of what they need to do so they can replicate past, presumably successful projects. The implied uncertainty about what exactly one should

do in a given project situation is exemplified in this conversation among research staff

about how to know when you are doing what you are supposed to be doing.

> M: How do you track whether or not your questionnaire is answering project objectives?

> RP4: You literally go back and you open up the project objectives and you print them out. And you basically cross them off as you go through the QNR. That takes a boatload of time then you are under pressure to get the revision back to the client. You are under pressure to get it into the field. You've got 19 million other things going on and you've got to spend an hour going through again trying to double and triple check because you've been through so many iterations.

> RP1: And you better know your stuff, too.

> RP3: Yeah.

> M: What do you mean?

> P1: Well I mean it's the same process. What are the objectives and what are the questions that are answering these objectives and what's your plan for analysis and will this work out and all of that. If you don't know your stuff…

> M: Do we feel like we can write QNRs that can do what we need to do? Do we feel like we know how to write QNRs in a way that will satisfy the objectives?

> RP2: Generally what I do is go back and look at other projects that I think are similar and see what they did they and look at the old questionnaires, and I keep all the old QNRs that I've worked on or seen in a file so that I can refer back to that. And if it's something that I haven't worked on before or something that I'm kind of curious about then I might talk to someone or you know come up with my best shot and then look for feedback on that.

> M: Here's a specific example. A proposal says, you are supposed to provide the client with a decision tree. Do you feel good about knowing what you are going to have to do?

> *[Pause, group laughter]*

> P6: I'm going to find a past foundational study and I'm going to take as much from it as I can and then I'm gonna come up with two or three more good questions and I'm gonna add that in, too. At InsightCorp, that's what we do.

What is revealed in this conversation is that the research department is often not at all sure how to go about delivering on the goals InsightCorp has sold to a client on a new project. Individuals learn to adopt a survival strategy of collecting examples of this or that to refer to and seeking out examples on a case by case basis. While certainly some degree of on the job learning is natural and necessary, this lack of confidence in how to deliver on sold promises is certainly not what InsightCorp clients think they are buying when they sign a contract. And what is suggested also by this conversation is a failure by senior mentors to properly educate project directors in a systemic way about how to deliver on core research objectives. While each project director has a senior VP whom he reports to generally and for each specific project to which they are assigned, it is not the job of the VP to conduct training sessions on any particular tasks when that employee starts with the company. Rather, VPs are supposed to help project directors learn the ropes over time, through opportune guidance during direct project work. VPs at InsightCorp, having both independent project and sales demands of their own, often neglect these training responsibilities. Newcomers resort to seeking out information, usually through directed email queries, from whomever might be kind enough to provide it. I have provided, for example, training sessions in our statistical software packages to employees who do not report to me because they have come seeking out my help when their direct supervisor would not provide it. Newcomers also try to locate within-department peers who can help them learn various tasks, but they quickly realize that most employees do not have much time to help . Soon, requests for basic training are made with a clear expression of guilt for occupying the trainer's time. This is the

consequence of unclear policy as to who is in charge of making sure employees know

what they need to know to do their jobs.

This systemic confusion about the right way to do things is further illustrated by

this portion of the research focus group elaborating on "decision trees," which are

deliverables that are touted as one of InsightCorp's core products:

> RP4: As someone who is relatively new to InsightCorp, the decision tree is one of
> the topics… it's actually a perfect case in point. There are best practices at
> InsightCorp, and I am only now after 8 months becoming aware of. So again I
> think it comes back to that collective knowledge and the dissemination of
> information that yeah I've done decision trees here at InsightCorp but I did not
> maximize what I could have delivered to the client because there are things that I
> didn't know that are kind of par for the course or the way we do it at here. I didn't
> know. I didn't completely blow it and I delivered things to the client that were
> useful but they could have been a heck of a lot better had I known.

> M: So we have best practices?

> RP6: Not that I'm aware of. [*laughs*]

> RP2: I don't know. When I started doing it, my approach was, you know, come
> up with a story and figure out what the data will allow us to do and you know just
> being prepared to stand behind it, defend it and believe in it is the approach that I
> took.

> RP1: To me, there seems like there are a lot of different ways you can do things.
> The problem is there are a few different kinds of decision trees and with the data I
> collect I can't construct every kind of decision tree and it's only after the fact and
> like so here's a preliminary report and then the client is all "Hey we want the
> decision tree." then I'm like "Oh lord I didn't have that." To me that calls for a
> method and in the absence of that I can even convince them that they are seeing [a
> decision tree] by doing all these crazy things or I hope to usher them into a very
> simple hierarchical decision tree that I don't necessarily believe in myself to kind
> of scratch their decision tree itch. Smoke and mirrors. So what I tend to want to
> do is when this gets added on to the project sort of after the fact as a deliverable is
> find out "Ok what is the expectation and how much of that expectation been
> influenced by what is in our sales deck?

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M: So a proposal says we are going to do a decision tree for two product categories. Do you have to go to the client and figure out what they want in a decision tree?

RP1: I'm going to go to the sales guy and see what he told them a decision tree is. He might refer to a deck and if that's what's going on I'm not really worried about it because I have a chance then to put together whatever they want and I can wrap my mind around it and the client. Yeah. I'm going to talk to them about what are their goals. So that I know what the point of the decision tree is for them so that I can make a decision tree that answers to that and that directly relates then to the method I go with in field.

RP7: For me there are a number of different ways you can go about decision trees and I think some of the ways I go about it depends on the client.

What is potentially disturbing about this conversation is not really that project directors feel a need to consult with their clients and understand what expectations their clients might have for a decision tree before the research project has gone past a point of being able to modify data collection details, but that there is so little indication that the group believes an authoritative method for decision trees exists for InsightCorp projects. The InsightCorp sales force most definitely sells decision trees as a core deliverable and certainly does not do so with the implication that what might constitute a decision tree is so very mutable and context dependent. At the very least, if differing ways of doing decision trees exist (and in fact, InsightCorp has several decision tree methods that are suitable in different situations), then the conversation about what kind of decision tree end product the client needs should not occur first between the client and a research director after the project has been sold. Rather, this conversation should have occurred during the sales process and those expectations should be clearly communicated from sales to research. The common situation at InsightCorp to which this conversation alludes is equivalent to a car salesmen quoting a price and completing a transaction for a car and

only then asking the car buyer, "So what kind of car do you want?" Simply put, this decision tree conversation reveals a number of issues at InsightCorp that directly related to confusion about core deliverables that stem from both a lack of consistent internal training as well as an accepted vagueness in the sales process that is left to a more junior research employee to clarify.

Also revealed during this conversation is the sense of singular responsibility and general isolation project directors often feel when faced with delivering on the objectives of a sold research project. A common thread in these discourses about how a research employee figures out what she is going to do is that of individual struggle and search, as opposed to a mix of individual effort and consultation with other employees who might be able to provide guidance or clarification. While employees express a general belief that the emphasis at InsightCorp on individual rather than team responsibility is a natural consequence of the virtual structure insofar as employees must work in physical spaces far removed from each other, there is also a belief that more could be done to strengthen team support structures in spite of the obstacles presented by the virtual environment.

Internal Support Issues

The lack of an internal support structure at InsightCorp was revealed as a key problem by focus group participants and throughout the course of my ethnography. The feeling that one bears a disproportionate burden for assuring the success of a project but that the tools and resources required to do a satisfactory job are not available is prevalent, as one portion of the research focus group illustrates:

> RP4: Most times I'm the only person that touches stuff, so if I write a QNR and, yeah, it might go through the VP but a lot of times—like I work with Joan a lot and she's so busy that she kind of gives it a cursory look and then it's out the

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door. In my case—it might be different from other people—I find that other people are so busy so there's not as much time to collaborate as I might like. I don't have a set team that I'm working in or a consistent analytical support person that I can always loop in in the development process so a lot of times I'm just kind of charting stuff out. Like I said, it might be going through the VP but it's not really a collaborative process per se. At least not so far.

M: Is that the same with all companies like ours or is something different going on here?

RP3: It is different. I've worked at one company and really two because of an acquisition in the middle and I feel on the ropes much more here than I have been at other places.

RP6: It really has everything to do with the project structure. Say I'm working on these projects right now and I'm the project director and I'm the analytical support and all that. I'm the one who is supposed to deal with the data and all the research and stuff like that. But then when the client calls and needs something done immediately I'm more than likely the one who has to step up because somebody senior is not going to have time to take care of it. Then we don't have sort of a dedicated group of analysts that we can turn to take care of those tasks. So it's like we have to take care of every little request that comes through the door when we are working.

The struggles these research members are experiencing relate directly to how

project teams are assembled at InsightCorp. On a typical project, a research lead is

appointed to take charge of (ideally) most client interactions and (always) drafting all

project instruments and revisions as well as doing data analysis and producing report

drafts for review by a senior research VP. This senior VP may or may not have been the

person who sold the project to the client but regardless is technically accountable for all

project deliverables as she needs to approve all major products and direct appropriate

changes before they go to the client. If the VP is not the sales person, then a sales

executive may be on the project as well but his role is usually much reduced after the sale

has been made. The research VP oversees numerous (usually 8 to 10) projects at any time

and, as already stated, generally has additional responsibilities that should not but tend to distract from supervision of project directors on sold projects, primarily the meeting of sales goals as well as, in some cases, running her own projects without the aid of project director. On the operations side, a project field manager handles all fielding logistics and generally utilizes the assistance of hourly consultants do to the bulk of the fieldwork scheduling so she can focus on tasks more directly related to putting the project successfully into field such as handling client interaction regarding field logistics and preparing appropriate project training documents.

Research directors generally lead anywhere from four to eight projects at a single time, all in varying stages of completion. They are appointed no internal support for any of their activities, and supervising VPs, while expected to review all documents and provide instructions for modifications, are generally not expected to have to do a direct labor themselves on project deliverables nor do they have to deal directly with data management or analytical tasks of any kind. As such, InsightCorp research personnel, in a very real sense, are primarily responsible for most research related tasks on a project and this is further defined by RACI. As far as internal resources for direct labor on research tasks goes, there is no system in which employees function to support each other. Rather, research directors are encouraged to use the help of external hourly consultants, often conscripted from the ethnographer ranks, as they are able so long as they are attentive to the analytical budgets on their projects. A certain amount of dollars are generally allotted to seeking external support but there is no guarantee that an external will be available when needed nor do externals receive extensive training on the

particularities of typical InsightCorp analytical operations. The shortcomings of the

external analytical support system are clearly expressed by the research group:

> RP2: Finding an analyst who has got time available is a problem. They are not all dedicated to InsightCorp and other people at InsightCorp are using them as well and there definitely are some who are better equipped to do certain tasks, so those are the ones who are less often available.

> M: Do we know which analysts can do what?

> RP4: Not always.

> RP2: I know from working with certain analysts, "oh so and so is really good at doing this task," so I trust them to do this task but I don't know if this other person very well so I don't trust them to do this other part of the analysis because when they get done at the end of it what is it going to look like?

> M: What about your VP? Is that person supposed to provide assistance?

> RP6: According to the roles and responsibilities, yes. But I can tell you, most often, they don't have time. So most often, it's on you. And as far as analysts go, most of the time what are you going to do? Just pay the analyst to be on that project the whole time and have them charge the project on an hourly basis like sitting on calls and doing all these little things? I just don't think that would fly.

> RP7: And generally, the case is you write a questionnaire and you really don't get feedback from anyone.

> RP4: I don't know if anyone besides me feels a little scared by that sometimes especially when you are in your fifth or sixth round of revisions and you have no idea anymore if you have covered off on all the critical components that you are supposed to cover off on because you have been through so many iterations and there have been so many things deleted and added and moved around and you are five minutes over and you have to cut and nobody is looking at it but me. I don't know it freaks me out a little bit.

> P3. Yeah. It's not until three weeks later and you are writing the report and you find out something's not in there.

Research members express a clear sense of isolation and uncertainty in doing their

jobs. There is a felt paucity of direct labor support to keep up with project tasks and it's

generally acknowledged that supervising VPs are "too busy" to provide consistently supportive feedback or to confirm that the project is on track to deliver what is required. Project directors are encouraged to use external analysts, but there is only so much budgeted for their use. There is not enough money budgeted to keep analysts consistently in the loop on all project communications that inform the analysis, so project directors, in order to use externals within budgetary restrictions, must parcel out tasks that can be successfully tackled by a person without intimate knowledge of the project itself. This limits the kinds of tasks that can be assigned to them, especially when there is the perception that the timeline for the tasks does not allow for training the external on the particularities that would be required for in depth, substantive work on any particular item. In addition to this, externals are not all the same. Most have been selected for work because they expressed an interest in doing more than data collection and have some minimal skills related to data analysis or reporting. Most do not excel in the use of the statistical software packages used by InsightCorp research internals nor do most have access to this very expensive software even if they could be trained. Almost all of them come with little to no experience, apart from doing fieldwork for InsightCorp, in market research.

How did such a system that is clearly not satisfying the needs for research support come into being at InsightCorp and why does it persist? As a small company that recruits its field interviewers almost exclusively from graduate programs in Anthropology and other social sciences and whose original project directors all had PhDs not in business fields but in Anthropology, there has historically been high receptivity toward bringing ethnographers up the ladder into other kinds of InsightCorp work outside of data

collection. This receptivity is the exact reason why I was able to move into and up

through the ranks of the company in spite of my total lack of business training. This has

worked particularly well when ethnographers have been brought on to assist with project

scheduling but has been less successful on the analytics side. I, as well as Mr. Johnson

himself, am routinely cited as a model case for the system, but in actuality, in the six

years I have worked at InsightCorp full time, there have been only four individuals other

than myself who have managed to secure full time jobs on the research side after starting

as a field interviewer. In all that time, there have been more than 25 individuals who have

served as quantitative analytical external consultants during my tenure. Of those, three

were offered full time positions. These three people never performed the duties of

ethnographers but were introduced to InsightCorp though other contacts. Since 2008, the

majority of individuals working full time on the research side have been hired from

outside of the company even though the external consultant pool was developed with the

specific intent of not only providing support to current salaried employees but with

recruiting new talent for eventual hire. Simply put, although it remains an ideal,

InsightCorp has largely failed to hire and develop its research personnel from within. If

the external consultant system had been more effective, this would not likely be the case.

     And this is not to say that little energy or expense has been put into developing

the external consultant pool. As both a former project director who could have benefitted

from research support on occasions too numerous to count and as a VP who recognizes

that the project directors who report to me often feel overburdened, I have taken it upon

myself (meaning the duty was not assigned to me by my supervisor) to attempt to make

the external consultant system more effective over the years. I have accepted the premise

that, as a small company that is hard hit by even modest fluctuations in revenue, it is not feasible for InsightCorp to hire as many project directors as might be needed to distribute present project load in a way that does not overburden its employees. This is because there is no guarantee that future project load might not cover the expenses of all that payroll. Historically for InsightCorp, as most senior executives have expressed to me, the right balance of incoming project load to personnel has always been difficult to strike. As such, I have voluntarily tried to strengthen InsightCorp's external consultant pool throughout the years by recruiting new individuals, training groups of interested consultants on the basics of data management and analysis, and by attempting to function as a communication hub connecting externals interested in work with project directors in need of assistance. I have provided counsel to project directors on how to use the externals in ways that meet both long and short term project needs, discussed potential uses of externals with them each week in an attempt to plot out how they could be utilized in the short, long, and medium term. I have urged project directors to employ a strategy in which they invest time in training one or two select externals on how to do things the way that would be most helpful to them, a strategy that seemed intelligent to me based on my own experience and on an assessment of what characterized the most effective external relationships as far as I could tell. It is not my place to access whether or not the failures of the external consultant system can be mostly attributed to my management. But I can say for certain that the shortcomings of the system had been identified prior to this research and measures had been taken to attempt to improve it. What is also certain is that the system most definitely has not resulted in a consistent and reliable source of support for the research team.

At the same time that there is frequent acknowledgement of internal support issues and sympathy regarding both the resulting heavy workloads and difficulty in taking time off, formal communications at InsightCorp often have the unfortunate effect of downplaying these very real issues, further contributing to an employee's frustration and sense of isolation and helplessness. For example, the following email conversation shows an immediate senior level reaction to a requested day off by a research member:

From: Greg Sampson
To: Laura Turner; Jack Johnson
Cc: Mr. Johnson; Jennifer Avery; Susan Wright
Subject: Request for Personal Day: October 1, 2010

Laura,

I would like to request a personal day for October 1st to attend a memorial service for my major professor from grad school who recently passed.

Thanks, Greg

From: Laura Turner
To: Greg Sampson; Susan Wright
Cc: Mr. Johnson; Jennifer Avery; Jack Samuels
Subject: RE: Request for Personal Day: October 1, 2010

David/Susan,

Calendar conflict check shows that Lucas will also be out on Oct. 1 – certainly not saying that Greg cannot take a Personal Day to attend a funeral, rather just pointing out that Lucas will not be able to help provide coverage.

What is needed at this point is a project-by-project status/plan – where will each project be by Oct. 1, what tasks/milestones will be affected, which of those can be shifted (done early, picked up on upon return) and which need covered in Greg's absence, who can cover in his absence, etc.

I will put the date on the Planned Absences calendar as 'tentative' until a coverage plan is provided.

Laura

My own personal reaction to Laura's email at the time was one of slight anger at what I perceived to be some insensitivity to Greg's loss. That being said, there is nothing unprofessional or incorrect about her response. Whenever InsightCorp employees anticipate being off, they are required to submit a coverage plan detailing how projects will be handled in their absence. Laura is reminding Greg and his immediate superior of this obligation and pointing out that another employee cannot be part of that coverage plan because he has a previously scheduled absence that day. However, while all the above might be practical, it is easier said than done. From personal communication with Greg, I know he was also angered by this response on three fronts: 1) because of its rather insensitive tone 2) because as a responsible project director, he felt he did not need to be reminded that arrangements should be made to the extent possible to make sure his absence had negligible impact on clients and 3) because Laura's rhetoric suggests that an elaborate and detailed coverage plan was even possible to arrange, as if a secondary person could be trained on short notice (or already existed) to handle all potential issues for all of Greg's accounts for this one day. While Laura herself, as a VP who had engaged with numerous discussion with myself and other VPs about our workload and coverage difficulties, had at least some degree of knowledge of the internal support issues at InsightCorp, the body and tone of her email elides them.

Similarly, formal communications through email circulation also serve to create a dialogue suggesting that the external analysts system functions better than it actually does. Once I volunteered to attempt to strength the system, Laura agreed to help conscript new consultants from our networks and ethnographer pools for training and trial in the program. I conveyed my intentions to strengthen the system to all project directors,

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hoping to enlist their support in establishing productive relationships with the consultants

as I believed that this would be vital to an effective system. Almost immediately, emails

such as the one below from Mr. Johnson began to circulate:

> **From:** Mr. Johnson
> **To:** Jennifer Avery; Taylor Pickford; Raymond Banner
> **Subject:** [Project Name Withheld] Data Labeling
>
> Taylor, Jen and Raymond
>
> We're one week from being done with [project name withheld] fielding. You know me. I like to get a jump on things.
>
> Taylor is flat out this week but I'd like to have a consultant clean, label and run a first banner on the data.
>
> We'll need variables that identify test 1, test 2 and control stores and see the cuts by those independent variables.
>
> Be good to get results for:
>
> 1) In aisle
> 2) Exits
>
> Also be good to have this consultant get familiar with:
>
> 3) Shopper observations
> 4) Flow counts
>
> So we can start mapping how to use that information.
>
> Jen, who can do this?
>
> Raymond, can you pull and send the datasets?
>
> Thanks
>
> Mr. Johnson

In this email, Mr. Johnson acknowledges that Taylor, the project director who

would ideally be responsible for all the tasks he outlined, is overburdened with too many

projects and in need of assistance. I am asked to bring on a consultant who can do a

number of fairly complex data management procedures and to generally become intimate with the data in a way that is only vaguely defined by Mr. Johnson. At the time, I had no external analysts who could do everything that was outlined in this request. Indeed, not all of the salaried project directors at the time had received training on how to do all these tasks. In short, the request assumes the existence of an external analyst whose skills and availability to become immersed in the data is equivalent to a full time, fully trained employee. Ultimately, I attempted to bring on a consultant with some of the skills, hopeful that Taylor might be able to provide the guidance necessary to complete all the tasks. This was only minimally effective for all the reasons discussed in the focus groups above, and Taylor eventually did most of this work himself in spite of his heavy load. However, emails such as this one continued to surface as we worked to improve the consultant system, referring to the consultant system as stronger and more effective than it was at the time or ever became, as if talking about the system as if it were already functioning would make it come into being. Project directors tended to be more realistic about the capabilities and availability of this variable pool of consultant analysts, typically thinking about using them for more discrete tasks. For example, in the following email, Steve discusses the timing of a multi-site project so complex that we made the rare decision at the time to assign a salaried employee as an analytical assist, Lucas, to the primary project director, Steve. The project is so complex and Steve and Lucas are both working on several other projects independently that Steve recognizes the potential for an external analyst to help on some of the tasks that are repetitive and therefore good tasks for farming out to analysts tangential to the internal project team.

> **From:** Steve Barnes;
> **To:** Mr. Johnson; Lucas Hastings

Cc: Jennifer Avery;
Subject: [Project Name Withheld] Update

As you may have noted from Jerry's latest email, we have completed 173/300 interviews in Vietnam. We should be on track to wrap-up in Vietnam by this coming Sunday, 9/12.

Lucas will be preparing the report on French data for delivery on Thursday, 9/9. We'll likely need to follow-up with retailer decks by Wednesday, 9/15.

Re: Vietnam reporting – I'd like to be able to send out the total deck on Monday, 9/20 with retailer decks going out Friday, 9/24.

At that point, we'll need to start rolling all findings into a Final Report that includes total level data across all countries with country as primary banner break. I think Friday, 10/1 is a good goal to shoot for.

For ease of reference:

French deck	Thursday, September 9
Complete Vietnam fielding	Sunday, September 12
French retailer decks	Wednesday, September 15
Vietnam deck	Monday, September 20
Vietnam retailer decks	Friday, September 24
Final Report	Friday, October 1

I think this is a conservative schedule, so we may get some pushback. Lucas, let me know where you think we can tighten this up (perhaps around French retailer decks and Vietnam), and we can adjust accordingly. Also, if you think it's appropriate, we can consider pulling in some external help to work on some of the retailer decks (why I've cc'd Jen here). We would likely just need to make sure all of our expectations are clearly communicated and break out the slides that are most appropriate for consultant build vs. those that would be better left to you.

Thanks,

Steve

From: Mr. Johnson
To: Steve Barnes; Lucas Hastings
Cc: Jennifer Avery
Subject: [Project Name Withheld] Update

Steve, this is just the type of planning and leadership that is needed.

Jen, let's definitely get an analyst on this team to support David and Lucas.

Thanks

Mr. Johnson

Steve, who has worked with the consultants and knows what kinds of tasks they are most capable of performing accurately on this type of tight timeline, wants to keep things simple and have the external work on reproducing multiple copies of retailer specific reports, mechanically replacing data on existing report templates. Mr. Johnson is clearly happy to see Steve showing sound leadership on this project and good instincts on using analysts. But his exact phrasing speaks volumes about how he views the system, which at this point, had been in place for less than a month. First, he reiterates to me that I'm to locate appropriate external support, and he refers to this as yet unidentified person as part of the "team" who will not just execute tasks that can be realistically parceled out but provide "support." In this way, Mr. Johnson authoritatively conveys that the external consultant system is up and running to the extent that I can locate adequate non-salaried support to execute reports on these tight timelines and that this person is not simply a cog to which basic tasks can be farmed out, but a member of an analytic team, integrated intellectually with the nuances of the project. I am not arguing that there is anything wrong with what Mr. Johnson wants to see. Rather, I am illustrating an event, one of dozens of similar emails, in which the strength of an analytical support system is overstated by a senior executive.

Again, this is not to say the external system was not and is not useful. Both myself and the project directors put a lot of effort into getting consultants involved in project

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tasks, knowing that we would ultimately benefit from nurturing these individuals. One of

the many problems with the system, in addition to those that have already been

enumerated in the focus group analysis, was that some consultants became more sought

after than others, both because they did tasks better and because they were more regularly

available. The following email chain demonstrates how project directs struggle to access

the same resources and ultimately come back to me for alternatives:

> **From:** Taylor Pickford
> **To:** Alice Stevens; Jennifer Avery; Susan Wright
> **Cc:** Jennifer Avery
> **Subject:** James T.
>
> Have you guys been able to communicate with James via email the past few days? I've sent a number of emails but haven't heard back from him.
>
> Thanks
>
> Taylor
>
> **From:** Alice Stevens
> **To:** Taylor Pickford; Jennifer Avery; Susan Wright
> **Subject: RE:** James T.
>
> Yes, he and I were emailing back and forth this weekend—he did tell me this morning that he would be in a meeting today "for a few hours."
>
> I'm using him for [Project name withheld]. Do you need him back? ☺
>
> **From:** Alice Stevens
> **To:** Taylor Pickford; Jennifer Avery; Susan Wright
> **Subject: RE:** James T
>
> Not desperately (yet) but I don't want to assume he's working on stuff only to find out my emails aren't getting through!
>
> **From:** Susan Wright
> **To:** Taylor Pickford; Jennifer Avery; Alice Stevens
> **Subject: RE:** James T
>
> Hey Taylor,

I need to use James for a day to do significance testing. We were supposed to get some results to [Client name withheld] last week & it did not get done. Steve is going over what is needed with James this afternoon. I hope he will only take a day with this.

Thanks,

Susan

From: Taylor Pickford
To: Alice Steven; Jennifer Avery; Susan Wright
Subject: Contractor help this week[2]

Jen,

What kind of contractor help is available for me to use this week and possibly next? I'm getting pretty worried I'm going to start falling behind on projects as it seems something new pops up every hour. Basically lost today to 6 hours of phone time, for example.

Basically, my focus this week needs to be on [Client 1 name withheld] and [Client 2 name withheld] as much as possible. If I can get someone to create and populate slides for [Client 3 name withheld] (James has helped with this already), it would be a huge help.

This email chain demonstrates two of the key problems with the external consultant system: the inconsistent availability of externals who are not obligated by any means to be in constant contact during normal working hours and the tendency for internal salaried individuals to wrestle for those that distinguish themselves as being competent to perform tasks. As much as I attempted to monitor and distribute available resources in my spare time (as my primary work obligations at this time were supervising project directors on active projects, serving as a project director over large accounts personally, and assisting client service with proposal development and sales calls), my control was limited by the fact that we made no specific commitment of consistent work

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[2] This is one email chain. Taylor has altered the subject line on the last email in the chain to redirect the query to me

to any of the consultants, many of whom were not comfortable with a system where they

might be asked to do 40 hours of work one week, 20 the next, and none the next. I

witnessed many able consultants come and go through the system, expressing their

regrets to me that they were unable to maintain a working relationship with InsightCorp

without some kind of firm commitment so that they could make decisions such as putting

their kids in childcare or turning down other consultant work from other companies or

forestalling the search for a full time job (which was definitely on the agenda for many of

the individuals who consented to take on part time work from InsightCorp). And yet the

expectation that a system of reliable, engaged consultant assistants could be built from a

pool of individuals expected to have excellent data management and reporting skills and

also a great deal of flexibility in terms of the amount of work they required to make the

relationship workable continued. In the following email chain concerning a piece of work

being contracted out to a consultant Kelly, Mr. Johnson makes his expectations of the

system quite clear:

> **From:** Jennifer Avery
> **To:** Greg Sampson; Susan Wright
> **Cc:** Mr. Johnson, Kelly Brown
> **Subject:** Kelly Brown
>
> Greg and Susan:
>
> I am having some email connection issues and can't access my stored files. I can't access the QNRs you wanted me to send to Kelly to work on. Can you forward the [Project A name withheld] and the [Project B name withheld] qnrs directly to Kelly?
>
> Kelly, as we discussed yesterday, the Project B qnr will be very helpful to you as a base to develop the Project A qnr.
>
> Thanks,
>
> Jen

From: Greg Sampson
To: Jennifer Avery; Susan Wright
Cc: Mr. Johnson
Subject: RE: Kelly Brown

Jen

Hopefully, we won't be in competition over Kelly, but [Project C name withheld] is heating up again (finally), so I'll be sending lots of stuff Kelly's way.

Thanks,

Greg

From: Mr. Johnson
To: Greg Sampson; Jennifer Avery; Susan Wright
Subject: RE: Kelly Brown

Kelly Brown won't be running numbers for Project C for some time. She will be writing questionnaires and will be engaged on this project. It is her chance to show what she has.

That said, I see lots of CRS [external research support] people with no hours. Everyone should have backup people attached to them. If Kelly was attached to Greg's project from the get go, she should stay there.

This email conversation, again, shows the weaknesses of the external consultant system. A initial email by me trying to get a consultant working on a project to which I was in no other way affiliated turns into a squabble over resources and then a reprimand by my own boss suggesting that many potential externals are not being used while we fight over a few. For my part, I replied to Mr. Johnson privately to try to communicate my own thoughts as to why the system might not be working optimally. But that is not the point here. The critical thing to note from this chain is Mr. Johnson's expectation that a "backup" external consultant be assigned to every project from the start. I will not continue to detail how difficult it was to secure the paid hourly engagement of an external

over the life of a project, lasting anywhere from unpredictable three to 12 months

depending on how project events evolved, when the hours that would be required of them

week to week would be highly variable. However, I can examine the results when one of

our project directors, Jane, who had come from another market research firm and was

used to having full time internal analytical support at that company, actually succeeded in

using an external in a consistent and truly engaged way during the course of one project

as recommended by Mr. Johnson. This meant that the external analyst was present on

start-up calls and all subsequent meetings, was copied on all email chains, and was asked

to produce first drafts of all project deliverables—charging by the hour for all of this

work. This individual was a highly skilled market researcher, recently laid off from her

last place of employment, and eager to demonstrate her commitment to InsightCorp in

order to secure a full time offer. In short, because of her skill level and availability, she

was an ideal candidate for consultant work but not a typical one. When her hours began

to pile up on the project to which she had been assigned as "backup," Jane, the project

director, was reprimanded for going above the budget for external hours. A few months

later this external was brought on as a salaried project director. Shortly after that, Jane

was fired.

Jane became a cautionary tale among project directors at InsightCorp. While there

were other reasons that certainly justified her dismissal beyond this one issue, the entire

research department knew that Jane had been reprimanded for too much external analyst

use, and her reprimand was followed by a reminder on a subsequent operations calls for

all project directors to be mindful of their analytic budgets. In sum, there are conflicting

messages sent to research personnel at InsightCorp about always having a backup and

engaging that backup fully so that she can do more than ad hoc tasks, yet budgets do not support such consistent presence of an external. The result of the Jane incident is that project directors did not stop using externals but they have not since attempted to use them in a way that is as involved as has been prescribed by Mr. Johnson. When faced with conflicting orders, they have chosen the option perceived to be more protective of their jobs over the one that would reduce their workload.

I have spent a good deal of time analyzing the failures of the external support system largely because it has been viewed by management, and continues to be at present, as the solution that would alleviate perceived workload and internal support problems. I also have focused on it to such a degree because I hypothesize that this "solution," which both because of my own personal experience and because of the data I gathered directly from my respondents I do not feel is ultimately productive, is one whose weaknesses are harder to perceive in a virtual environment. Working for a virtual company, as I can personally attest, is a rather strange phenomenon. To the average onlooker, viewing, for example, my typical workday, I might appear to be a secluded, perhaps agoraphobic, hermit. During my most productive years at InsightCorp, I worked an average of 14 hours per day, sitting at a computer in my home office wearing clothing that might be described as "pajama-like" and occasionally communicating with another human being by phone. From an external viewpoint, my day did not look like what might be expected of a Senior Vice President of Shopper Insights for a major market research firm. But my own sense of the hustle and bustle of the business world was and is very real. And yet, I am visually witness only to my own experience of busyness. I do not physically see my colleagues working diligently from sunrise until sunset as they surely

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do, even if my brain can do the calculation between the time of their first email of the day to their last.

I hypothesize that the inability to actually see employees working-- really physically *see* them--poses considerable risks to virtual enterprises. Had Mr. Johnson, for example, been able to see physically see that there never was a large, steady body of external consultants "in the building" to assist the research team, he might not have made such immediate assumptions as to the strength of the external consultant system as expressed in his emails. Likewise, had he been witness to the amount of time, so much more salient when one sees a physical body in the office, that Jane's external consultant dedicated to the project that would end ultimately end with Jane's dismissal, it might have occurred to him that his suggestion that externals be engaged in a project from start to finish would be in conflict with the budgetary constraints on their use. The virtual environment, in short, obstructed an accurate assessment of the analytic support system.

During my focus groups, the research team offered some perspective on what kind of support structure they felt could work better given the amount of projects they are typically running. All agreed that a simple cap on the number of projects any one person could handle would not necessarily solve the problem (even if senior management was willing to stop selling projects when that cap was reached, which they are not). The amount of work facing an individual is not necessarily proportional to the number of project she runs but is dependent on a multitude of other factors:

> RP4: It also depends on where you are at each project. Because if you happen to be getting ready to do that topline or final report at the same time you are have a QNR due, you are pretty much up a creek.

RP1: I think it's pretty much the people that you have that are working members of the team, not executive members but people who do like… real work. Like throw some labor into it. That's the problem. That's the time consuming stuff, the labor. If you have one man who is only person who does the labor, and you have some assistant that doesn't have the capacity to think though this stuff because they don't know enough about the project then of course that one guy is going to have to do all that stuff. But, for me, like I live by the fact that I have somebody beside me on each and every one of these projects that knows as much about the projects as I do.

M: Can the rest of you have that? That kind of team situation going on?

[*Group laughs*]

RP3: Absolutely not.

RP6: I would say there is no support structure at all.

RP4: Ditto.

RP6: We have this analytical staff, but I'll say it's undeveloped. It's sort of independent contractors. It's not somebody that we can reliably turn to.

M: Is that typical for this kind of job? Stanley, you have worked at other companies. Is this so different?

RP6: The thing is we had multiple analysts, and we worked as a team. Like we had a static team and we all knew what we were doing at any moment and what we were capable of doing at any moment. So I was known as the data geek guy and I knew all the day to day stuff on this project so if somebody needed help they know that they could turn to me and they knew my technical skills and my availability. I think we do a really poor job of cross project management. I think we sort of understand the dynamics of how to manage individual projects but when it comes to working and managing eight projects that's when it gets to be really burdensome because at that point it becomes: who can I turn to for this and who can I turn to for that? And then how do I manage these other things? And because you don't have that really established structure you can't even take a vacation.

During my focus groups and whenever speaking to my coworkers about their

work troubles, I challenge individuals to think about whether not their experience at

InsightCorp was the same or different than it might be at a brick and mortar, or non-

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virtually organized company. I specifically wanted people to reflect and comment on whether a given situation was the result of structural decisions within InsightCorp, an unavoidable consequence of being virtual, or both. What is revealed in this passage is that the perceived solution to the internal support structure problem is to build a support structure that actually is internal, meaning, the people who work on projects work on them from the beginning and have a high level of involvement and deep project knowledge. RP1, who stands apart in this conversation, is actually a unique individual who works mostly on projects that utilize exclusively qualitative methods whereas most of the others in this group deal almost entirely with close ended survey data that is subject to quantitative analysis. For some time, she was the only full time person deemed able to manage qualitative projects and soon found herself in a position of having to pull external workers into projects because she could not run them all herself. As such, her externals were different from the externals used by the quantitative research directors. They did not move in and out of the project when they could be useful. Rather, they adopted a static role on the project and performed that role from beginning to end. They were a true member of a project team. While this was an effective system for delivering good project deliverables, it was costly, and RP1 was routinely reprimanded for exceeded her project budgets.

RP6 (also called "Steve" here) talks about a similar system in his former company, which did use quantitative methods almost exclusively. His opinion is, like RP1's, that a true support structure must be consistent and cannot rely on individuals who do not have in depth project knowledge and are not compelled by their very job descriptions to keep abreast on projects that, at any given time, they may need to lend a

hand on. I go on further to challenge how his company could have had such a system and still generate a profit:

M: So at your other company there are interchangeable people who do the same thing?

RP6: Yeah. They were pretty much interchangeable and because we were in an office together, we always knew what we were working on. I am always working with these people. They are always my analytical support so I know what he is working on. He is a dedicated analyst, and I know what he's working on at any given moment and I can be like "Hey as these things come down the pipeline, I can give these things to you."

M: Was this a subordinate?

RP6: I wouldn't say subordinate. He was a different role. He was permanent different role if that makes sense.

M: And this was a small company?

RP6: There were like three analysts and then we had like one guy who would go between different projects but we all could do that. We all had an understanding of the projects that were going on like we would all take time at the beginning of the project to understand the objectives on a real sort of update call on what's going on would happen each week. Not just how many completes are you getting. Like understanding objectives and solutions and research design. More so than just the parameters of the research.

M: How could they afford to have all those people working on single projects?

RP6 Well, for one thing, we didn't have nearly as many projects. The workload wasn't like it is here.

M: So you had fewer projects—less revenue coming in—and you still could afford this?

RP6: Oh yes, far less. We are talking very sort of entry level people. People that were are able to bring in fresh out of college or an undergrad program and be like, "Hey we are going to train you how to do this." It was really a feeder system. It was understood that people come and go and if you train your own analysts, they can eventually become project directors when the opportunity arises.

M: Isn't that what we hope of do with our externals?

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RP6: Yeah, but you have to pay them. Regularly. You have to train them on your own.

One of the interesting things about the comparison of InsightCorp with another competitor in the market research industry is that few of these difference truly stem from the virtual organization of the company. While it might be more challenging given that co-workers at InsightCorp are not "in an office together," a structural reorganization that would build project teams with interchangeable members, and have a built in training function for more affordable, lower level employees, is conceivable for the InsightCorp research department. Steve's comments and experiences echo many of the comment made by other participants in the focus groups who have worked at other places.

RP3: In other positions I've had, when it became clear that somebody was just completely overloaded, it was the norm for other people to put aside their projects if they could spare their projects for a day or two, and everybody would just chip in, and it would suck but you know we'd get everything done. So within research, it's kind of the whole idea of somebody having your back when things get really screwed up. And let me be clear. It's not like we are actively not having each other's back. It's just not like the norm to do it and we don't.

M: So do we in research have people's backs?

P2: I don't think so.

P4: We are all so overloaded that even if we wanted to, there's not much more that we could give up to help somebody.

P3: That's totally true. Yep.

P6: If you are not like familiar with the project at all then you have to familiarize yourself with it so that you can have their back and if you don't really know anything about the project beforehand you are going to be kind of limited as to what help you can provide.

Being privy to, and moreover an active member of, the decision making committee on new hires for the research department, I can confirm that it simply did not

occur to us to restructure the department in such a way that all projects had multiple, salaried research members who could play an active role in the project and provide support to one other. While I documented a few conservations among management personnel about instituting a buddy system to support the taking of time off, these conversations did not go very far. Senior management, including myself, when discussing the structure and functioning of research teams tended to fixate on the need for more senior, experienced project directors who could run projects well with minimal guidance from research VPs as well as the hiring of more research VPs who could help shoulder the burden of the current executive staff so that individuals (like myself) could give more individualized attention to the junior project directors and ensure better deliverables. In other words, we focused on improving a system built on the assumption that a hierarchical supervision and training structure was optimally effective, as opposed to one that sought, in addition, to strengthen project directors through peer to peer collaboration and support. It is not one of the specific objectives of this research to determine whether a more top-down leadership structure or a more participatory and distributed team structure is ideal.. However, I will assert that senior management in this organization failed to consider salaried team-based structures within the research division as a viable solution to perceived support problems. I hypothesize that this may be related to the virtual nature of the organization. What intrigues me here is not that we elected against such a system but that we did not even consider it. I hypothesize that a truly virtually organization, such as InsightCorp, has a natural inclination to privilege the individual as the unit of responsibility and support a hierarchical structure in which work is executed by one individual and then approved by another in a linear fashion that is inherently amendable

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to a situation where those individuals are not co-located and connect on a shared project primarily as the baton of responsibility is passed through the stages of execution and then review. In the case of InsightCorp, I am arguing that our virtual structures blinds senior management as to the potential merits of a more collaborative structure within the research department.

Workload and the Work-Home Divide

As may already be apparent, another aspect of InsightCorp culture related to perceived clan gaps has to do with just the sheer amount of work facing InsightCorp employees and the perception that the quantity of individual workload is an obstacle to the natural development of an internal team support structure. I can honestly say that I have never worked harder (or at least longer) during any point of my life than I worked during my first three years at InsightCorp when I was trying to prove myself and gain as much access to company operations as I could. At the time, it was not unusual for me to work 70 hours a week for weeks and weeks on end. I did not volunteer for extra work assignments but, while I was somewhat vocal about the oppressiveness of my project load, I did not refuse project assignments. The result was that new projects would be added onto my plate faster than I could complete the old ones, the lifespan of InsightCorp projects being highly variably. I spent literally years in a kind of work coma, waking up to spend a short breakfast with my husband before retiring to my office on the third floor of our condominium. I would come down maybe once or twice a day to grab something bring back up to my desk and eat, and I routinely ate my dinner alone while I worked as well. Eventually, I adopted the habit of buying protein bars to keep in my desk drawer because I had so much to do that I would find myself not having eaten for lunch by 3pm.

I would stop working late in the evening, occasionally spend a brief amount of time with my husband and dog, take a shower, go to bed, and typically dream about the work I had to do before waking up to do it all again. It was, in short, a fairly miserable experience and I seriously considered resigning on more than one occasion.

My experience, however, is not at all unique. I know from informal and formal conversations on the topic (such as during exit interviews of resigning employees), that the experience becoming so focused on the job that there is little time left in the day for almost anything else is a common problem at InsightCorp. Employee "burnout" is a routine phenomenon. Turnover is high and an acknowledged problem, particularly for the research department. At the time this dissertation was written, I am the longest standing employee at InsightCorp (with the exception of the CEO, the President, and one administrative assistant in the "No Change" group) by at least three years. The perceived inability to control and cope with one's workload is the number one reasons (as expressed to me personally) that employees give for leaving InsightCorp.

Indeed, workload was a topic that was specifically treated during each the focus groups. All three groups reacted similarly to the basic prompt to describe the expected workweek and workload of a InsightCorp employee. For the client service group, this discussion turned almost immediately to the lack of boundaries that allow an employee to protect their home sphere from being infringed upon by their work.

M: How many hours a day are you supposed to be available to do your jobs?

CSP5: I'd say 18 hours

CSP6: I think you are expected to manage your workload and in a lot of cases it's more than can be expected of one person and you're expected to be available 24/7.

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CSP1: That includes while you're out with your family on a Sunday and your phone rings and Mr. Smith asks you where you are. And I'm like, "I'm out with my family." "Well, can you go home because I need you to do something?

[*group laughs*]

CSP1: I just started turning my phone off so….

CSP5: Hey Jen, He was looking for you but he called you literally when you were on your way to labor!

M: Ok. But is there a rule that says you are supposed to have your phone on all the time?

CSP1: No. But that's the thing. We just have no boundaries. There are no boundaries. We have boundaries with each other but as a corporate culture there are no boundaries.

Quite obviously, the client service group, who reports directly to the president and CEO, locate the cause of the home-life divide issue as the lack of respect that the CEO has for these boundaries. The conversation continues:

CSP1: But we are never off and I guess that's the thing. You are never off so whether you are on vacation or flat on your back having a baby, you are never really off.

CSP5: That's true. Yes. Yes. Yes

[*group laughs*]

CSP2: Unless you are out of cell phone range and have no access to wifi!

CSP1: And then you freak out because you know you are going to get in trouble when you get back on.

CSP4: There's no such thing as being on vacation and being unavailable.

M: So that is overtly stated policy then?

P4: Here's a good quote from Mr. Smith: "An InsightCorp vacation is only working 8 hours a day instead of 12."

My own experience working under the CEO of InsightCorp does coincide with

the understanding that, while it is certainly not an overt or enforced policy that one must

be available on a Sunday afternoon, Mr. Smith has a tendency to ignore customarily

respected personal boundaries. But Mr. Smith, while an important person, is only one

person and client service members were not alone in expressing dissatisfaction with the

expectations for working hours at InsightCorp. An excerpt from the research group shows

a similar pattern, without reference to Mr. Smith's particular habits:

> M: Ok so let's say this is my first week at InsightCorp. What are my working hours?

> RP7: Say goodbye to family life. Ha ha.

> RP3: I'm glad you said it. I was thinking it.

> M: How many hours am I supposed to work?

> RP1: Until everything is done. You do what you have to do.

> M: Is that policy?

> RP1: No. The official policy is 50 hours, but that's not an option. You can't stop working at 50 hours unless everything is done. I mean just what if you sent an email and said, "I'm sorry guys [*laughs*] 50 hours is up!"

> M: Is working more than 50 hours the rule or the exception? Does it average out?

> RP6: I don't know if it's done this way, but in my offer letter it says that you are going to average 50 hours a week, and so the understanding per this agreement if you've worked 60 hours this week, you can work 40 hours the next week. I mean…but you never get those hours back. Never. I've traveled on a holiday and they say ok you worked on a holiday you can take those hours next week. But you don't.

> M:: Why don't you get those hours back?

> RP6: I don't know. There's always something to do.

> RP4: It's because you are never caught up. It's not like when there's a crunch time. It's like it's always a crunch time so if you are 60 hours one week, the next

week it's like you got 60 hours because there's something else you are crunching on.

These perceptions are quite obviously linked to the felt lack of a support structure at InsightCorp, a feeling that is not isolated to the research group as evidenced by this portion of the operations focus group:

M: What about time off, vacations? Can you remain out of contact on a vacation?

OP2: It depends on if you have a project or not and it really depends on you and what kind of coverage you have.

OP1: Personally, I try not to take vacations so I don't get behind. Unless it's an emergency.

OP2: Because then you get really behind.

OP1: If you don't have anybody to cover your workload. I don't want to have to play catch up.

OP2: I think one of the issues is, it's that when you are managing a project you become so immersed in it, it's hard to pass everything off. There's a lot going on. When I take a vacation I usually allot a certain amount of time to delete emails, sort emails and flag emails.

OP3: I do the same.

OP2: It's all part of the balance. It has to be a structured thing. I'm not going to be tied to my computer the whole time because I don't want to feel like I got cheated out of a vacation, but if I can say it's no big deal for me every couple of days to spend an hour…whatever. I've got the time.

Both members of the research and operations group feel that there are structural impediments to taking a true vacation, specifically, the difficulty in appointing others to take care of tasks that need to completed while you are away. While attempts might be made to schedule time off during "down times," the influx of new business at InsightCorp is constant, and new assignments are made every week as other projects appear to be nearing a close. One strategy for coping is simply accepting that part of

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requested time off will need to be sacrificed in order to stay on top of things. This applies to vacation time most clearly, but even needs to be applied to manage the felt expectation that one be available for more hours a day than he is technically supposed to work:

M: Let's talk about work hours. How much do we work?

OP2: Technically, 10 hours a day Monday through Friday. Whether it actually turns out to be that, depends.

OP4: I've never really said, "I work from 8 am to 6 pm every day." I feel that most people are working between the hours of 7am and 7pm and if I'm not going to be available during a good chunk of that, I let somebody know, but I always have my phone on me and I'm checking email.

OP3. It depends. When I have projects running I feel like I'm expected to be available every day of the week. But even when it's not in field, I'm still getting requests internally.

M Can you ignore those emails and reply on Monday?

OP4: It depends on the urgency. I know a lot of people will spend a couple hours on the weekend taking care of non-urgent things, but then there are some things that the client needs that must be taken care of by Monday or first thing on Monday. There's definitely times of day when I don't look at email, such as in the evening, but not a day goes by where I'm not in tune with what's going on.

OP3: I would have a panic attack on Monday morning if I hadn't checked my email over the weekend.

What is revealed here is that employees must submit to working more hours per week than expected because they have to be available during a requisite working day Monday through Friday but feel pressure to keep up with things even over the weekend and late into the evening. And because InsightCorp is virtual and has employees in all U.S. time zones, employees know that the ten hour blocked worked by somebody on the east coast is not likely to coincide with the ten hour block of somebody working on the west. As such, there's somewhat of a pressure to extend one's hours of availability to 12

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or more hours. While individuals may not be glued to the computer during this time, it amounts to an inability to turn work "off" when one is not actively working, which ultimately amounts to a workload far out of keeping with one's job description. What is particularly interesting about this process is that constant vigilance is not imposed top-down through formal policy. Employees are "encouraged" to keep an average of 50 hours a week, but expectations for availability are subtly conveyed that compel workers to go beyond it. Certainly, these issues have not escaped the attention of management, who themselves fall prey to the very same system, but the advice given on how to alleviate the problem is muddle at best:

> OP2. When I've had this conversation with Dan and Laura [her immediate supervisors] in the past about a year ago this, I would consider what they said a double edged sword. They said, "we want you to have your personal life. We want you to work five days a week." But it's not possible. So that's what leads me to say, it's up to us to strike a good work life balance if possible. If you are a new employee, you are told you are going to work 50 hours a week, and most of those hours, if not all, should take place Monday through Friday. And that's what the company's message is I think. That's what I'm hearing from somebody higher than me: "We want you to have a balance with a personal life. We want you to work 50 hours a week and the rest is your time." So that's the message. But the reality is different in that I can't picture not checking my email every evening before I go to sleep because there are always things. That's where the balance comes in. I'm not going to forgo going out to dinner because there are time sensitive things at work that I could do. Things can wait but at the same time you have to be reactive.

As both a subordinate to my own boss and a manger of others, I have been on both sides of this conversation, and my experience has been fairly equivalent. When I've complained about my own workload and the infringement of that work upon my personal life, the response from my superiors has always been one of sympathy, concern, and an assurance that the company as a whole is working towards a solution. I myself have

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responded likewise to those reporting in to me, motivated both by the lack of any real constructive solution to offer and the hope that things will improve as a result of whatever changes we are implementing at the time. And certainly at InsightCorp, as with any company, we are always in a constant process of adjusting and streamlining processes and procedures, hopeful that improved efficiencies will have a trickledown effect on working hours. For the purposes of putting the theme of workload into context here, however, it is an adequate summary to say that InsightCorp has suffered from this issue throughout the course of my employment. It has always been on the radar as a problem that would be alleviated ideally by management, but enduring solutions have not been implemented.

The impact that these issues have on employee morale cannot be overstated. Whether an employee is working when he should be taking earned time off because his workload is excessive or because co-workers or (more likely) superiors are making demands on his time outside of standard working hours, the net result is the same: unhappy, resentful employees. I recall sadly inquiring of one of the research directors who reported to me as to how his vacation went upon his first day returning to work. He responded by sending me, through email, a cartoon of a man on the beach with his family, a worried expression on his face and thought balloon with "WORK" printed inside it. Another of my executive peers expressed to me considerable anger when she had to put off a European vacation with her husband to celebrate their 35 year wedding anniversary because of project demands. She would ultimately go on this vacation, indicating she had a wonderful time, but I witnessed her checking in by email at least every several days. Another colleague of mine learned after a few failed vacations that

the real key to her time off success was traveling to locations (like camping in Yosemite) where internet and phone was not available or at least not reliable. As an executive, she had achieved a level of autonomy that would allow push her obligations for a week while she vacationed, but she still needed to remove the possibility of contact to maintain her space. Employees in lower level positions without that kind of autonomy often do not have that luxury.

One summer when I occupied the position as project director at InsightCorp, I angered my entire family when I spent a considerable chunk of a group vacation to San Francisco and Napa Valley working. During those five days, I routinely woke up at 3 am so I could put in at least a five hour workday on east coast time before my family woke up. I sat out family lunches so I could stay in the car and attend conference calls with clients. I walked through the streets, trailing my visibly angry husband and mother, on my cell phone. I was ruining their vacation but, at the time, I remember thinking, "*This is not my fault. Why are they so mad at me? I am more miserable than they are. What's wrong with these people?*" My superiors knew I was going on vacation, and even though I expressed concern that there were projects for which I did not have coverage that would require attending while I was away, no real support was made available to me. Years later, after having two kids and only barely escaping a divorce, I learned how to be more assertive with my boundaries and not allow the structure of InsightCorp to passively erode my own hard won work-home divide. But I only felt capable of assertively drawing these lines because I had achieved an atypical level of status within the company and had adopted a somewhat confrontational mentality that almost begged my superiors to challenge me for not being available on weekends, evenings, or while on vacation. I

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learned to do what others routinely do not do—make the real lack of a support structure that allows for vacation time transparent. While I have seen a few others somewhat successfully adopt this strategy and sort of apathetically refuse to concern themselves when projects experience problems when they have to be away, the more common pattern at InsightCorp is to accept the unreasonable encroachments on personal time as normative because the stress that results when things go wrong is not psychologically tolerable for most.

The Virtual Factor and Employee Coping Strategies

General Advantages and Disadvantages of a Virtual Environment

The virtual environment is something that all InsightCorp employees must learn to navigate when they join the company. For most, at least when they start, the virtual aspect of the job is immensely appealing. Employees are especially glad to avoid a lengthy commute as well as uncomfortable professional attire. While presence during regular working hours is absolutely expected for most employees, most employees take advantage of some of the flexibility of not having to be tied to an office. Employees might stop to eat lunch with their spouses and/or children, for example, or take a break to drop off or pick up their children at school. I have known some employees who try to squeeze in a workout mid-day if schedules permit, and certainly going to medical appointments and the like do not typically require giving advanced noticed or making time off arrangements. One of the greatest advantages to be a virtual worker, at least for InsightCorp, is the flexibility in regards to these "little things." Employees quickly realize that being out of touch for any considerable portion of the day or failing to respond promptly to direct phone calls or emails queries, at least on a routine basis, will not work

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well for their clients or superiors. But the increased flexibility for taking small breaks from work to accomplish personal goals is a surprisingly powerful advantage that compensates for many the disadvantages of virtual work. Over the years, numerous employees who have expressed frustration to me about other aspects of their jobs have indicated that the virtual factor was the number one reason compelling them to stay at InsightCorp.

Employees benefit in others ways from the virtual environment. As might be predicted from an examination of the literature on virtual communities, there is a striking lack of salience at InsightCorp on interpersonal characteristics such as gender, ethnicity, and even general appearance. While the two chief executives of the company, for example, are male, four out of the five of the senior vice presidents below them are female. The gender split companywide is 51% female and 49% male, an almost even split. Salaries at InsightCorp are individually varied based on perceived qualifications upon the time of hiring, but the most highly paid individuals within each of the three departments, are, in fact, women and, in general, woman do not make less than men at InsightCorp. Sexual harassment complaints are nonexistent, at least so far, and women generally do not feel that they are at any particular disadvantage. This is not to say there is absolutely no sexism at InsightCorp. I have personally experienced, and many of my female key informants have corroborated, the subtle feeling that my communication style or reaction to certain stressful situation was "overly emotional." My experience having two babies while working for InsightCorp has resulted in a few memorable moments as well. The highlight was when my CEO told me casually, after having come back to work after having my first child and not yet pregnant with my second, that women seemed to

do "alright" at work after a first child but that "things seemed to start going downhill" after a second child. I obviously did not heed this sage advice, and when I reduced my working hours after my second child, he offered to raise my salary so that I could afford a nanny if that would mean increasing my time commitment at work. I politely declined the offer, and can honestly say that I do not feel I have been punished in any way, monetarily or otherwise, for drawing more rigid boundaries since I became a mother even as I know my superiors would prefer I act otherwise. Any female at InsightCorp with whom I've spoken to about this issue has had similar experiences that reflect the CEO's somewhat traditional views on women in the workplace. That being said, and not to downplay the significance of this very real problem in many workplaces, sexism is not a problem at InsightCorp. Aside from these two experiences I personally cite, and I know of no graver account from any other female, I cannot recall a single episode where an employee's gender was at issue.

Age is less salient as well. I, for example, have managed to get promoted to a position that, frankly, I am arguably under qualified for--at least in terms of experience typical for someone with my title. The fact that my age (I was in my late twenties to early-thirties during my tenure at InsightCorp) is not really visible through phone and email communication has surely aided me in climbing the corporate ladder faster than I might have done otherwise. Even as my superiors were aware of my age, they were not reminded daily of it through in person interaction with me. I have seen clients, whom I've had only phone and email contact and who have come to trust and respect my work, react with visible shock upon seeing me in person, having expected someone older. Likewise, many of InsightCorp's most senior executives are in their late fifties, and most of them

have expressed to me frustration with their former companies that have adopted subtle ageist hiring policies. While there is definitely a strong correlation between rank and age at InsightCorp as would be seen with most any company, there are many instances in which older junior employees report to younger senior employees yet I have witnessed almost zero conflict that might be expected to result from that kind of situation. This is not to say that age, or any interpersonal qualities, do not matter at InsightCorp, but my own experience and what I have seen and heard from other employees does suggest that it is less important in a virtual environment. Likewise, ethnicity and sexual orientation are also downplayed at InsightCorp. Admittedly InsightCorp is made up of predominately white and heterosexual employees (as far as I know) but the company is also very small. Two out of its three most senior executives are non-white, and the few individuals who have expressed their homosexuality openly have produced zero controversy. I have been on hiring committees for multiple positions and cannot recall a single instance where I felt interpersonal characteristics of any kind (apart from personality) were even discussed. As a general trend, and one that most employees attribute to the virtual environment, there is an astonishing lack of office politics of any kind at InsightCorp. While this seems like a good thing (and indeed it is in many ways), as I will discuss later, the virtual environment at InsightCorp in a very real way has stripped employees of qualities that identify them as human beings.

Contrasting the perceived positives, the disadvantages of a virtual environment are many. As has already been discussed, the virtual environment poses serious challenges for enculturating new employees, for making roles and responsibilities transparent, and for facilitating nurturing and peer-to-peer cooperation. InsightCorp has

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lost several employees who have cited the virtual environment as at least part of their reason for wanting to leave. I have personally been part of the hiring process for four separate project directors in the research department who resigned within six months (and in three cases within only two months) because of the felt lack of humanity at InsightCorp that was attributed to the combination of the virtual working environment and heavy workloads. While the virtual environment is not the number one reason most employees resign, there is a subset of employees who just simply dislike the arrangement and look for a job where they can interact with people in a more involved way. These employees, and employees generally for that matter, frequently cite the virtual environment as one that is difficult to navigate, at least partly because there is so little physical evidence of the company and the people within it. During my focus groups, for example, the first two exercises asking respondents to list out the artifacts and explicit values held by the company were quite telling. This is generally, according to the author of the methodology, the easiest part of the focus group. But my respondents found it to be very challenging, as so many of InsightCorp's artifacts are digital and so few values are explicitly documented. In the case of values, InsightCorp has no mission statement, no statement regarding its corporate culture or hiring practices, and few explicit written statements of policy regarding work. While this might be somewhat unique to InsightCorp as its leaders, as has been expressed to me, see little value in those kinds of policies, it is surely something more likely to happen in a virtual environment. In fact, only two overtly stated values were listed by respondents in my focus groups. Those were the catchphrase adopted by the CEO in his personal email communications (*Meet and Exceed Expectations)* and the company slogan (*Know Where the Purchase Decision is*

Made), both statements about InsightCorp's products and services, not its human resource policies.

<u>Coping with Email</u>

Email is universally accepted as the primary means of communication at InsightCorp. Email functions both as a way to avoid direct phone conversations and the greater degree of intimacy and involvement that comes with them when one feels he should not be working but also as a way to keep participating in the company dialogue at all times. This is true whether one actively engages in email conversion or whether one is just reading emails, say on an evening or a weekend, to keep up with events and assure themselves that no immediate action steps need to be taken that would require more intense involvement. Email is both a way to minimize how much one is investing in between direct communications and the instrument that makes it possible for work life to intrude so effectively into the home sphere. As one member of the client service team hyperbolically puts it, "Because we work 24 hours a day, and we don't want to bother people at two in the morning when most of us are still working, we tend to rely on email."

Indeed, one particularly controversial topic, at least among the operations group, has to do with which employees are deemed important enough to be furnished with smartphones as opposed to phones that do not allow for email communication while one is away from their computer. As smartphones became part of working culture, a technological transition that occurred during my employment with the company, InsightCorp initially only provided smartphones to members of the client service team. The rationale for this decision had to do with the amount of time these employees travel

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for sales calls and conferences, which is considerable. I was provided a smartphone and,

at the time, it's utility in keeping me in the loop on all the comings and goings at

InsightCorp when it was not always possible to be at a computer was immediately

apparent to me. Truly, as soon as I could use my smartphone to keep on top of things,

business travel, apart from the times I had to spend in meetings or in airplanes, etc.

almost ceased to become travel as the sense that I was "away from the office"

disappeared so long as I had my phone. It did not occur to decision makers at

InsightCorp, the senior executives, that smartphones could be equally useful to operations

personnel. Because a substantial percentage of project related data collection occurs on

weekends, when store traffic is highest, operations employees are obligated (although, as

demonstrated, the policy is intentionally vague on this matter) to be somewhat available

to respond to issues in the field. In this passage from the operation focus group,

employees discuss the perceived inequity of smartphone allotment:

> OP2: Some of us [at InsightCorp] have smartphones which makes their lives easier. The sales guys have them. Some VPs have them. Some research people have them. Lots of people have them. But not us.

> M: Why is that?

> OP2: I think it has to do with the nature of InsightCorp growing versus how it started. They realized that being able to be mobile is important. It's an important quality of life issue. Some people need that more than others and the organization is a little bit split on that so it might be a point of contention. A smart phone makes your quality of life better.

> OP3: There are two arguments for quality of life. One is that it allows us to leave our computers at home on evenings and weekends and still be able to access information. So I guess that's one argument. Instead of feeling tied like if you leave you are going to miss something… I would say that's one argument. That would be my argument. It allows me to be more available without being tied. The opposing view is that then you can never leave work which I would say is ok so I

can sit at home and never leave work because if we get an update and I'm not standing next to my computer then everyone is sending 10 emails "Where's Janet? Where's Janet? Where's Janet? Well, it's a Sunday. You know? Whereas if I have my phone on me I can check in 15 times a day and it only takes a few minutes out of my day.

Being able to check one's email away from a computer is simultaneously liberating and enslaving. But because many InsightCorp employees might be called upon to make decisions outside of the "normal" Monday through Friday workweek, they represent a means to stay up to speed on pressing concerns. The alternatives of being trapped next to one's computer seven days a week or risking being called out for lack of vigilance are so unattractive to most that employees will voluntarily submit to being fitted with a device that allows them be almost constantly plugged in.

Another consequence of the primacy of email communication at InsightCorp is that employees spend an enormous part of their day reading and filtering through emails. Email, the communicative glue that holds the organization together, also plays a role as the biggest wrench in the works of accomplishing tasks. Employees express frustration at how email intrudes with doing "actual work." Some learn over time to develop ways of dealing with the influx, but others are not clear on what kind of email management is even permitted:

> RP5: I think [our workload issues] have so much to do with how heavily we rely on email. At times, I turn off my email notifications that pop up so I don't keep focusing on the emails as they come immediately. And that allows me to take the time to focus on one thing and get a lot more done. But if I know I have a lot of emails coming in and I'm constantly checking and that shifting gears takes a lot more time than you think sometimes.

> RP4: Because you are constantly having to put something aside and starting back up and that constant being in different places just eats up a lot more time than you

think. At times I look at the time sheet and I have no idea what I spent time on because I encountered this project 200 times this week

RP3: And that sometimes is the biggest problem for me a as a project director…trying to figure out time to think about something. And I've talked to Mr. Johnson about that and I don't know what the norms are. Like can I just go somewhere for a morning and turn my email off, so I can get away from it and do a report? And he didn't say "no" but he basically said "I can work on something and check my email at the same time. So you can get used to looking at something and figuring out if it's something you have to deal with right away or is it something you can put off." So he didn't absolutely say "don't do that" but it was kind of like a) why would you need to do that? and b) that doesn't seem like such a good idea.

As apparent in this passage, RP3 is confounded by her boss's vague acceptance of her proposal to shut down the noise of her email for a few hours on a given morning in order to concentrate on a task that requires concentration, such as crafting a questionnaire or writing a report. He belittles her dilemma because he finds himself able to check emails and do work simultaneously, likely not considering the fact that, because he is superior to nearly everyone else in the company, he has more freedom to decide that emails, even if he attends to their existence as they arrive, do not actually require his immediate response. RP3, who receives emails from a number of supervisors as well as clients daily may not have a similar facility at sorting out what can wait from what cannot. The result is a paucity of non-interrupted think time for a person whose job success ultimately depends on producing thoughtful reports for clients.

There exists at InsightCorp no specific policy that mandates that employees have to man their email inboxes at all times during the working day. And, indeed, email has become a means of communication that is both a blessing and a curse for businesses, even those who do not participate in any form of remote work arrangements. But at InsightCorp , the organizational culture that has evolved along with adopting email as the

primary means of communication is one that does not customarily punctuate the delivery

of important information though phone or in person meetings. That is, when someone has

something important to convey, it typically does not occur to them to organize a phone

conference to convey this information to the relevant parties nor to delay communication

of that information until the next recurring group meeting, even if the information doesn't

necessarily require immediate action and thus necessitate urgent conveyance. And

because InsightCorp is not a brick and mortar organization, there is no option to walk

down the hall and speak with a coworker about an urgent matter, and in the process mark

the matter as urgent through the exertion of effort it takes physically move oneself over to

the information recipient. While phone calls are certainly seen as an appropriate means to

communicate very urgent business, as I shall discuss in the next section, phone calls do

not have the benefit of creating a physical record of a communication and, as such, are

not necessarily preferred at InsightCorp even when urgencies arise. Simply put, because

InsightCorp culture uses email to communicate almost all information, big and small,

there is no way to predict whether the next email that comes through your inbox will be

something minor that can be ignored or at least put off or something critical that requires

immediate attention. As such, employees have two choices: 1) pay attention to all emails

as they come in and suffer the consequences to productivity that constant interruption

entails or 2) remain out of contact for brief periods of time and risk missing an email

from a client or superior that likely will require your immediate action and minimally

your acknowledgement of receipt. A third alternative exists, and that is to perform tasks

that require concentration during "off" hours, which, as I have already discussed, poses

the clear risk of expanding the work day well beyond one's contractual obligations.

Related to this theme are issues of the virtual environment, trust and surveillance of employee activity. At InsightCorp, email is the means by which employees can most effectively show others that they are working—and working all the time—as demonstrated by how fast an employee responds upon receipt of an email and in the creation of a written record of work through this response. During one portion of their focus group, the client service team shows how, although they wish they could use the phone more often, there is a perceived pressure to communicate (and over communicate) by email to show evidence that one has done their assigned tasks:

> CSP1: I think we don't internally talk enough. I think we rely on email for internal company correspondence when a phone call would probably be nicer depending on what we are talking about. And we rarely call.

> CSP3: Exactly right. I would agree with you wholeheartedly.

> CSP2: I think we just default to email most of the time, and I don't think I have seen any policies about phone calls. All of them seem to be about emails. Most of the direction I'm seeing are protocols for internal emails and any emails that go to clients the focus is on who you copy as opposed to what you say or what you are saying.

> CSP6: I think one of the crucial aspects of email is that it is used to create a paper trial. If an email is sent to a client then you've got a record of it. So you can always look back and see when we contacted someone for follow up reasons—all those kinds of things. But it also has a negative connotation to it, too. I know there have been many instances where people get in trouble for not copying someone or sending something without, you know, including people. There's certainly a negative connotation to that paper trail which again I think is sort of interesting. It's sort of a double edged sword with the whole email thing.

> CSP1: It's kind of like we are emailing out of fear.

The use of email to create a paper trail is not a phenomenon limited to the client service group, but they are the most vocal about it. Admittedly, Mr. Smith, their boss, has

issued direct mandates to the client service team to routinely copy an email distribution list called "Proposed" on nearly all client communications of import. The distribution list was originally created for a simple purpose, that is, to copy all relevant parties on both client requests for proposals and proposals officially submitted to clients for consideration. The distribution list was at first inclusive only of client service team members, including the executives, as well as myself and other research VPs who needed to be aware of projects that may be coming down the pipeline and who also likely helped craft some of the proposals by assisting with research design. The distribution list was intended to be a clearing house to help the client service team keep abreast of what items were on the potential sales board and also to foster intergroup collaboration and sharing so that individuals could benefit from seeing the proposals built by others in response to specific client needs. Initially, only milestone communications were supposed to be blind copied or forwarded to the "proposed" list, such as response to receipt of a request for proposal, the submission of a proposal or an important revision to a proposal, or client acceptance of a proposal. However, almost immediately upon its creation, the proposed distributions list began to be used in a way that was not prescribed by its principal creator, Laura, the VP of Human Resources. The following email chain, occurring only two weeks after the creation of the distribution list, demonstrates how quickly and naturally individuals at InsightCorp put themselves in a position to receive literally thousands of emails that might not directly involve them, succumbing to the forces of the culture of over communication at InsightCorp and further cementing this kind of behavior as accepted practice. In this conversation, Mr. Johnson announces a successful project sale and begins discussion of role assignments by emailing the proposed distribution list.

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In response, Jerry, the individual in charge of assigning a project field manager, replies to

Mr. Johnson himself and the affected parties. Jerry, appropriately, does not reply to the

distribution list, knowing that this would involve many more people than need to be

engaged in this ongoing conversation. In the process, Alice, who has been assigned the

role of project director, realizes that she did not receive the initial communication sent to

"proposed" and inquires as to how she can get on this list, which was not originally

intended for a person in her role. However, she correctly identifies an information gap if

Mr. Johnson is going to use the proposed list in this manner. Jerry, in an effort to be

helpful, directs the inquiry to the appropriate parties who control membership on the

distribution lists (Marvin and Samantha). Marvin, in turn, informs Laura and Mr. Johnson

of the addition of Alice on the same email chain, adjusting the subject line to reflect his

action but also preserving the email history beneath his message that prompted the action.

Laura, in turn, recopies myself (as I had been removed from the chain) and also copies

other relevant parties to remind us all of the intended use of the list.

> **From:** Mr. Johnson
> **To:** Proposed (proposed@insightcorp.com)
> **Subject: FW:** Client B Shopper Insights Revised Proposal
>
> All,
>
> I just spoke to Melanie and we got this project (option 1). Proposal and pricing
> attached. This is a small project but will lead to several others.
>
> Assignments:
> 1) Alice, I'd like you to PD, but with one of the consultants writing the
>   QNR/running the numbers, etc.
>   a. Jen and Susan, please help with that assignment
>   b. This is a very small and simple project and therefore perfectly suited to
>   wean someone in
> 2) Jerry, who should be the project manager?
>   a. Schnucks is the retailer
> 3) Next steps

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a. We'll set up a start up call next week
b. Fielding end of February
c. We'll need to get phone numbers of respondents to do a follow up call interview.

Thanks

Mr. Johnson

From: Jerry Trainor
To: Mr. Johnson
Cc: Alice Stevens; Jennifer Avery; Susan Wright
Subject: RE: Client B Shopper Insights Revised Proposal

Dear all,

I will be the PM and Serge will be the PL.

Serge and I can definitely help one of the new RA's (Research Analyst?) get a sense of InsightCorp.

Cheers,

Jerry

From: Alice Stevens
To: Jerry Trainer; Mr. Johnson
Cc: Jennifer Avery; Susan Wright
Subject: RE: Client B Shopper Insights Revised Proposal

Hi

Who do I need to speak to in order to get my name on the Proposed Contracts list? I did not receive Mr. Johnson's email.

Thanks

Alice

From: Jerry Trainor
To: Marvin Jones; Samantha Fogel
Cc: Alice Stevens: Mr. Johnson
Subject: RE: Client B Shopper Insights Revised Proposal

Dear Marvin and Samantha,

Can you add Alice Stevens to the distro list on Proposed Contracts?

Thanks!

Cheers,

Jerry Trainor

From: Marvin Jones;
To: Laura Turner; Samantha Fogel
Cc: Mr. Johnson
Subject: Proposed Distribution List members

Alice Stevens has now been added to the list.

From: Laura Turner
To: Mr. Johnson, Jerry Trainor, Stu Hanson; Jennifer Avery; Susan Wright
Cc: Samantha Fogel; Marvin Jones
Subject: RE: Proposed Distribution List members

All,

A note of caution. Let's be careful not to start using the "proposed" account as a conduit for info sharing on projects once they are sold and the relevant team members identified. At that time, a project-specific distro list should be created with each individual team member creating/copying that list into their own Outlook files (until such time as we have the technology/infrastructure in place to have centralized Outlook contacts).

Otherwise, we are going to swamp our Inboxes with too much volume (thinking of the hefty attachments) and either have to archive every week or double (again) the size (and corresponding cost) of our Outlook storage. Additionally, more and more individuals not directly involved in a given project will have more and more "noise" in their Inboxes, decreasing their ability to read and respond in a timely manner to those messages that do pertain to them.

Make sense?

Laura

Clearly, Laura has a premonition of the havoc that could result from improper use of the distribution list. Yet, in spite of her warnings, I can confirm that not only did the proposed distribution list continue to be used in this manner, but the problem got worse

as more and more employees requested to be placed on the list. At present, all members of sales, research, and operations are on the list and most of these individuals specifically requested to be placed on the list in order to not be left off of critical communications. While Laura did attempt to police the system at first, she eventually had to tolerate the distribution list being used out of scope of her initial plan because powers higher than herself, both Mr. Johnson and Mr. Smith, resisted her prescribed practices. This is not to say that Mr. Johnson and Mr. Smith alone used the list "incorrectly." Simply, it is to establish that there did not exist an individual powerful enough to stop the evolution of the use of the proposed distribution list to synch up with the communication culture of InsightCorp, that is, a culture of over-communication.

While at first, use of proposed list for purposes beyond its original intention appeared in idiosyncratic ways depending upon whomever was authoring the email, what each individual interpreted the intention of the list to be, and what and to whom he wanted to communicate, over time consistent patterns began to emerge as those in lower positions began to emulate the practices of their superiors. It was not, at least in the beginning, formal policy to copy "proposed" on generally any communication that was considered important. But over time, pressure to demonstrate proactive sales activity came down from Mr. Smith, who in turn evolved a practice of copying "proposed" on client emails that most would deem too minor to merit widespread distribution. The result has been a flurry of daily emails submitted to "Proposed," by Mr. Smith and others following in tow, and a corresponding fear of being reprimanded if one does not engage in the practice as well as annoyance at receiving a mass of emails that do not actually merit one's attention. As one client service member puts it bluntly, "it clogs up our email

so if you travel, by the time you get on your plane and get to where you are going, your email has shut down because you are not sitting on your ass at your desk deleting all these messages that are coming in and that don't pertain to you. But he [Mr. Smith] gets on us all the time if we don't copy the world on stuff."

Indeed, while I cannot quantify the impact of the proposed distribution list among employees generally at InsightCorp, I can look at my own inbox to provide a sense of just how much and what kind of email I receive through "proposed." For illustrative purposes here, I selected a random three week period in June 2011 of my archived inbox. During this time, I received 2246 emails, roughly 750 emails per week, a typical amount for me (and over twice the global business average for a work email account [Radicati 2011]). Of these, 28 percent came to me through the proposed distribution list. Seven percent of my total emails came from Mr. Smith, and 85% of these came through the proposed distribution list. Of the emails that came from Mr. Smith through "proposed" to me, a full 92% contained information that did not require my action nor contain information that I needed to be informed about in order to do my job, thus calling into question the effectiveness of such a list if it requires that so much of my time be spent reading emails that do not directly related to the activities I need to perform. A good number of these emails, however, were the kind of informational messages about possible sales, the communication of which, to the executive team at least, was determined to be beneficial for all. An example would be an email such as the following:

From: Mr. Smith
To: Client Name Withheld
Bcc (blind copied): Proposed@InsightCorp.com
Subject: InsightCorp Proposal for Hispanic Research

Amy,

Attached are the proposals for understanding the Hispanic shopper in Stomach Remedies Category, Toothpaste Category and Smoking Control Category categories.

We've created a unified proposal with a methodology that we believe will meet all learning objectives and provide the richest insights: Home to Store Shopalongs combined with quantitative in-aisle observations, interviews, and flow counting. The methodologies are described in detail in the attached proposal.

We've also provided three separate pricing sheets with options for each of the three categories. There are minor variations in the pricing due to incidence rates.

Please let us know if you would like to schedule a call with you to discuss further. We would be happy to co-present with you to your client.

Thanks again for thinking of us for these great projects.

Thanks,

Mr. Smith

This email, which I received through "proposed," did not require any action from me. I was not involved in the research design or the writing of this proposal nor was I slated to work on the project if it were to be sold nor supervise the person who might direct it. However, as a member of the executive team, it behooves me (according to management) to be informed about impending sales such as these. I will not attempt to argue whether the amount of email I receive that fits this profile is justified. However, because Mr. Smith has adopted a practice of blind copying or forwarding to "proposed" nearly all of his client communications (as assumed by the number of emails I get with information that is of no discernible use to me, even insofar as informing me of impending sales), I am in receipt, through "proposed," of an email like the following, detailing information about the writing of a questionnaire.

From: Mr. Smith
To: Client Name Withheld
Cc: Tom Link; Susan Wright; Jerry Trainor

Bcc (blind copied): Proposed@InsightCorp.com
Subject: Client Name C Spain: InsightCorp Proposal

Linda,

Thanks for sending. We will incorporate these changes.

Thanks,

Mr. Smith

From: Client Name Withheld (Linda)

To: Mr. Smith
Cc: Tom Link; Susan Wright; Jerry Trainor
Bcc (blind copied): Proposed@InsightCorp.com
Subject: Client Name C Spain: InsightCorp Proposal

Other thoughts to include in your revised questionnaire:

1) Updated competitive set (Q1) to include BK, KFC, mcDs, Subway, Maxims, Café de Corral, Fairwood.
2) Q5 add brkfst menu products, add soft serve ice cream cone, change "large shake" to just "shakes"
3) Q11 easy to order, change to "easy or difficult to decide what to order instead?" thoughts??? We are debating and can use a POV
4) Q20 we are debating whether we should include something like "overall experience"?

Thanks!

Linda

I am in receipt of this email and yet I have no role whatsoever in this project. Mr. Smith appropriately copies all project team members but also blind copies "proposed," consequently sending his message to nearly all other employees at InsightCorp. This email, however, admittedly seals the deal on a sale for which InsightCorp submitted a questionnaire in advance of closing the sale, so Mr. Smith could just be copying proposed in order to communicate that the deal is done. But what would be the purpose of copying the distribution list on an email such as the following?:

From: Mr. Smith
To: Margaret Chompsky@USATravel.com
Cc: Nat Murphy; Ryan Ruiz; Kate Fenson
Bcc (blind copied): Proposed@InsightCorp.com
Subject: RE: Managing and Organizing Topline Ethnographic Report

Maggie,

We need to book:
- 3 rooms at the same hotel we stayed at last time in Milford – believe it was the Sheraton Milford
- Nat and Kate will get to you regarding their requirements
- I will drive from NY

Thanks,

Mr. Smith

From: Client Name Withheld (Tom)
To: Mr. Smith; Nat Murphy; Ryan Ruiz; Kate Fenson
Subject: Managing and Organizing Topline Ethnographic Report

Thanks Mr. Smith,

I'll read the topline over the weekend. I have time for a call next week on Tuesday afternoon from 3:00pm and on Wednesday between 10:00am and 1:00pm

Thanks,

Tom

I can assert confidently that I have no reason to be included in Mr. Smith's conversations regarding his travel arrangements, and yet I receive this email and hundreds like it as member of the proposed distribution list. While my position on the executive team justifies my membership on the list (but not necessarily my receipt of emails such as these), the vast majority of the individuals who are also on the list are even less directly impacted by the content of Mr. Smith's emails. Therefore, they, are in receipt of even

higher percentages than me of emails that should be read (unless an employee feels it is acceptable to ignore an email sent by the CEO) but that in no way concern them.

The preceding discussion is not intended principally as criticism of Mr. Smith's particular email habits. Rather, I am more concerned with suggesting that his habits, which produce a considerable amount of non-vital email reading on the part of his employees, establish, both by example and by direct mandate a company-wide practice of executive sales members to copy the proposed distribution list on their emails. And while no one member of the sales force copies the list on emails detailing quite the level of minutia that Mr. Smith does, their emails to "proposed" still count for a fifth of my inbox and presumably a similarly sizeable portion for other employees. More critical perhaps than the reduction in productivity resulting company-wide from the time spent reading low priority emails are both the impact that this kind of behavior has on the respect employees feel toward senior level executives who make such odd communicative decisions and the example that is set for engaging in similar practices in order to create email records of every ounce of labor exerted.

Client service team members, indeed, are not the only InsightCorp employees who feel pressured to communicate primarily by email and, more importantly, to over communicate through email. While respondents in both the operations and research groups both expressed that email was the preferred medium of communication because it is efficient and less intrusive, particularly when communicating with superiors, they also acknowledge the felt pressure of using email to create a record of one's labor. In the passage below, members of the research team discuss the use of email at InsightCorp:

> RP1: I think it's related to the need for a record. The email things we are dealing with are decisions and ultimately who is making them and if it was mandated or

this or that so ultimately you have a record of if it was asked. Whereas if you have somebody calling you, you can deny that you ever told them anything and there's a loss of record there. And a loss of responsibility through that loss of record perhaps.

RP2: It's different here. You almost feel like you have to cover yourself at all times. You know when you work in an office with other people you go to lunch with those people and you get to know them on a personal level more than we do and you develop a level of trust where you don't feel like you are always having to cover yourself.

RP3 I will agree with that. As somebody who came fairly recently from an office environment yeah I've experienced that.

M: Are these underlying assumptions…that you have to create a record…or is that a policy?

RP1: When something isn't done—and I'm not saying that it should be the case— but it is the case because it's an email that is held up as evidence for a decision that wasn't acted upon or so you know the why didn't this come done and it comes right to you in a forward showing clearly that it didn't get done. Here's you saying, "I was gonna do this." And it didn't get done and everybody saw it and it becomes a record. Whether it should be a record I don't know, but it is.

RP3: I feel like I have to justify myself and follow up and provide trails of things at this company that I have not been asked to do in the past

M: Anybody else feel the same way or differently?

Group: Yeah. [*laughs*]

RP4: When something goes wrong it's those trails showing you made the right decision at some point and you know "it wasn't you" kind of thing.

Again, it is difficult to separate out exactly how much of this pressure stems from overt or covert policy at InsightCorp and how much is a consequence of working at a virtual organization where the kind of trust that is generated from proximal contact is difficult if not impossible to achieve. But what I will assert is that because a virtually organized company is likely at risk for adopting email as a primary means of

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communication, the chances that workers will experience some of these negative

consequences of excessive email usage are heightened.

I hypothesize that the heavy reliance on email at InsightCorp has resulted in

another phenomenon that not only contributes to inbox clutter and wasted time but also

on perceived workload and subsequent worker stress. This is the tendency that certain

employees have to solicit the consultation of others and to include specific individuals in

email conversations or meeting invites that have no immediate relevance to their current

project assignments. I am not arguing that it is a bad practice to seek the input of

employees on various points of discussion. Indeed, I know from personal communication

from my subordinates that they have appreciated opportunities to voice their opinions on

matters outside of their current project roster, such as receiving an invite to weigh in on

potential methodologies that are suited to specific requests for proposals and the like.

However, at InsightCorp, this is a practice that is used excessively and with potentially

detrimental consequences. The email below is a typical example:

> **From:** Mr. Johnson
> **To:** Jennifer Avery; Bruce Davis; Paul Rudder
> **Subject:** I invited you to the QNR review call but you three to not need to attend
>
> I just like everyone to know what's going on
>
> And I don't know how to make some people optional

This is a rather informal email from my boss which upon initial read indicates I can

ignore a meeting invite he has just sent to me and two others. The interesting thing about

this invite is that it is to a conference call for a project to which I have not been assigned.

And while the two others on copy are more directly related to the project in that they

helped sell the project or oversee some portion of the field management, there is really no

need to include either on a routine review of a written questionnaire with a client—as non-researchers, neither of them contribute either directly or indirectly in this process. What this email reveals is Mr. Johnson's particular proclivity to want to be inclusive on project matters because he "likes everyone to know what's going on." On the one hand, this might be seen as a good thing: inclusive, transparent, and informative. It was the kind of operation that worked well for the company when it was smaller, when I first came on board and essentially me and three others, led by Mr. Johnson, made up the entire research and operations division of InsightCorp. As a small group of researchers with a much lighter project load who were developing what would become the products that a larger and more complex InsightCorp would sell as its core capabilities one day down the road, habits of broad communication made sense and worked well. But at the time of this particular email, InsightCorp had grown in size by at least five times, and the sales, research, and operations departments had become separated. I contend that it was no longer feasible, given the level of stratification that had been achieved coupled with the increased workloads carried by individual members of all departments for "everyone to know what's going on" about things that really do not relate to their specific tasks.

Further, the response to an email such as this one depends upon the individual, and depending on that response, carries with it risks for that individual. Speaking for myself, had I received this email from Mr. Johnson during my first couple of years in the company, when I was working very hard to gain access and advancement both for my career and this research, I would have likely attended the meeting even if I could not spare the time. At the time of this email, I was a senior executive who had seen many such invites and had learned not to take up more tasks than I could realistically handle. I

also had achieved a status within the company such that I did not fear that I would be judged by Mr. Johnson for not attending or be otherwise negatively impacted. I know from personal communications that other employees have responded in kind when motivated to demonstrate one's commitment to the company and when they did not feel secure to draw lines to keep one's task load executable.

Requests like this one are a common occurrence at InsightCorp, however, and I have seen many well-meaning employees, generally those who are new, overextend themselves by accepting too many invites or providing feedback on too many group solicitations, leaving insufficient time to accomplish their own assignments. And while Mr. Johnson and Mr. Smith, as the two highest executives of the company, encourage a practice over inclusion and over communication, I would also hypothesize that the nature of the company, as a virtual entity, would put any similar company at risk of overworking and stressing its employees. Email is a communication medium that is dangerously easy to use. When all it takes to solicit the input of others, even others who likely cannot spare the time and from whom you really do not require feedback, is typing of a few lines and the pushing the "send" button, the risk of adding to the to-do lists of those individuals with a genuine drive to be most participatory is high. On the opposite end of the spectrum, after employees have suffered the personal consequences of over-extending themselves, another attitude evolves—one that presents the equal risk of exacerbating isolation. As expressed by one long-time employee when talking about internal communication habits at InsightCorp, "I just want to be left alone in my cave with my data and that's the way I feel sometimes. Just leave me alone and let me get my work done here. I'll be much more productive that way."

Market Gaps

As already shown, the over-dominance of market attributes at InsightCorp is perceived to be a larger concern than even the insufficiency of clan attributes, judged by the respective gaps between perceived and preferred company culture. And again, the organizational emphasis on "competitive actions and achievement…hitting stretch targets and winning in the marketplace" and the perceived tendency of its leadership to "exemplify a no nonsense, aggressive, results oriented focus" are the market attributes considered to be particularly overdeveloped. But when employees suggest that too much emphasis is placed on these qualities, what specifically about the present state are they referring to and what do they envision the alternatives to be? What the preceding discussion of topics related to clan gaps reveals is that, in a very real sense, the overemphasis of market traits at InsightCorp is really just another way of saying that company priorities are so fixated on generating business and profit that insufficient care is taken to maximize employee participation, mentor or nurture workers, and generally exhibit a concern for individual well-being. While the authors of the OCAI do not claim that clan and market traits are necessarily opposing attributes, whereby an increase in one side must only come at the expense of the other, it is easy to see that InsightCorp employees feel that their respective superiors are so focused on the bottom line, that all other concerns, even if those concerns ultimately have ramifications for the bottom line (in terms of employee morale, productivity, and attrition), fall lower in the ranking of priorities. That being acknowledged, the over emphasis on market is framed by InsightCorp employees as more than just the opposite of a preferred clan state.

The focus groups were especially helpful in revealing that the over emphasis on market is also understood as the inefficient use of employee labor in the pursuit of achievement and results as opposed to any specific, anti-capitalist opposition to maximizing corporate profits.

Unproductive Group Meetings

. Recurring conference call meetings at InsightCorp are notoriously unproductive and not even remotely social or enjoyable. When thinking about all of the difficulties caused by the use of email as a primary communication mechanism combined with the clearly expressed dissatisfaction with the amount cooperative teamwork, one might expect InsightCorp employees to welcome and enjoy the standing phone meetings in which large groups of employees finally come together. This is not the case. Overwhelming, group conference calls are seen as time consuming, unproductive, and ultimately a forum used by misguided superiors to promote an ill-defined agenda of hitting targets and achieving results.

The client service group is especially critical of the Revenue Call, a weekly meeting the purpose of which is to discuss the sales board as well as cover off on administrative and marketing concerns that impact the team or require their input. The main problem with the meeting, quite simply, is that it grossly inefficient:

M: Tell me about the Revenue call.

CSP1: It's weekly. Friday.

M: How is it run? What is the tone like? What is the agenda?

CSP2: [*laughs*]

CSP3: It's loooong.

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Group: [*laughs*]

CSP5: Well there is a structured agenda. Like the first thing is we talk about is who came on or off and when.

CSP3: Yeah, comings and goings, then the sales board and then…

CSP1: Proposals and travel, yeah.

CSP3: Travel and marketing.

CSP4. And it's repeated every week.

CSP1: In detail. The same thing.

CSP4: [overlapping] The same information gets reported every week

CSP5: If you wrote a proposal in 2009, it's on there. We may talk about it.

M: So there are some inefficiencies maybe?

CSP1: Yeah, little bit.

CSP6. That might be the biggest understatement of the decade.

One of the central issues with the meeting has to do with how the sales board is covered. At any given time at InsightCorp, there are proposals being finalized and generally dozens of proposals that have been sent and are awaiting feedback or decision by the potential client. It is the job of any client service member to actively follow up with clients after a proposal is sent, as opposed to passively sitting back and waiting for a decision. This, of course, establishes InsightCorp's keen interest in getting the work and a willingness to obtain feedback and perhaps modify the proposal or pricing if we get indicators that making certain chances might increase the chance of a successful sale. As might be expected, the CEO and President, as well as the those involved in managing company finances, are keenly interested in the status of potential sales so that revenue projections can be made and monitored. InsightCorp is a small company and does not

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necessarily have bountiful cash reserves or credit lines to allow it to float easily through

down sales cycles. Simply put, the likelihood of a sale is information that the most senior

executives need to know about, and this meeting is a forum to obtain that information and

allow for discussion and collaboration. The client service team does not discount the need

for such a meeting. In fact, they consider it to be a perfectly normal meeting that any

company like InsightCorp should have:

> CSP3: I would like to say something nice about those meetings. I know when I joined InsightCorp, we didn't really have this type of meetings and so folks didn't know that much about what was going on the revenue side and the ops team had their meetings so we knew what was going on that side, so the fact that we have it now is a positive because, at least before when I started here, we didn't have those meetings and some of us were talking about how do we structure this, how do we talk about putting this together so we are more informed? So we can badmouth it, but at some level it informs us.

> CSP1: Yeah right but most companies have gone from weekly to monthly or bimonthly. You know every two weeks or…and you know it's just overkill. I agree with what you are saying but to do it weekly is like pulling your toenails out.

> CSP3: Actually I don't think it would be bad if Mr. Johnson ran it weekly.

> CSP2: You guys, I don't personally think there's a problem with having it weekly if things move pretty fast. I think the key is that it's repetitive. I think everyone would agree that it could be run a bit differently so that it's not so repetitive and that it's a lot more informative because I do think there are reasons for having a weekly touch base

> CSP1: Sure there is. The only thing I would like to interject here is you need to consider this that if we ran it in an hour instead of two hours the cost of people on the phone. It's astronomical. When you looks at the value of the people on the phone that could be doing something else. So you have to look at that. If Mr. Johnson and Mr. Smith looked at it from the cost factor and how much is invested in this meeting taking two hours out of everybody's Friday, it won't pay out and I think they would restructure it based on that.

As is revealed later in the discussion, and something that I can corroborate as a weekly participant at this meeting, one of the key problems at the meeting is that the sales board covered is too deep, that is, it contains as items to be discussed, even if only briefly, proposals that have been in the clients hands for months and even, rarely, years. Clients do not necessarily provide feedback on all proposal, generally receiving submissions from multiple vendors. It is not uncommon for potential clients to go with another vendor and not provide notice to others who submitted, even when those vendors follow up on the status by phone and email. Potential projects might also be in a state of flux as funding sources or stakeholder interests change, and vendors often get strung along in the process as clients internally debate the nature of the requested research and whether or not they even need to complete the work. As a result, the sales board can easily pile up with many proposals that are quite dead. However, each client service person is required to touch on the status of all the proposals on the board. During the focus group, several individuals noted that they themselves had suggested to Mr. Smith and Mr. Johnson that the meetings could be more efficient if the board was cleaned up of these kind of items. But as can be seen in the following passage, everyone simultaneously has a motivation to keep the board clogged:

> CSP5: I suggested to Mr. Johnson once that every time we put a project on there we put a date by it on the board so we can see the stuff is like so dead so we can keep moving but Mr. Smith just wants to keep it
>
> CSP1: Well like Sally has about ten on there that have been there since I started and she talks about them because they make her but she don't want to talk about them. There's nothing going on.
>
> CSP2: I think it makes him [*Mr. Smith*] feel better to see more and more stuff on the board. I really do.

CSP5: That's true. There is a cultural thing where people feel pressured to put more stuff on the board or make things look rosier than they might be. One of the things you might love to do is just hack away at it and get rid of the stuff that's been there forever. But you feel a little hesitant because them it's like your pipeline looks worse. There's that underlying. It makes you look and show all the activity you are doing

CP2: It seems like a "justify your existence" board in a way.

CSP3: It lacks substance.

CSP2: Instead of a revenue board— like are these real opportunities or are they just people trying to look busy? When I think of other people like those lists… my lists look kind of small, and I think, "Wow I put I a lot of hours and I'm really busy. Sometimes you do feel sort of stupid and I don't actually know why because but I feel like my board is the shortest

CSP3: No mine is the shortest!

Group: [*laughs*]

While other complaints surfaced regarding the weekly Revenue call, including an inordinate amount of time being spent on discussion of Mr. Smith's travel schedule and the somewhat frequent occurrence of an individual being publicly reprimanded for failing to copy the group on some communication, the sales board was the most clearly identified problem in that it was not a productive use of time and, moreover, that it created a situation in which individuals felt pressured to exaggerate potential sales opportunities lest they be exposed as failing to be as aggressive as is expected of them. This is the kind of instance that prompts InsightCorp employees, at least members of its sales force, to indicate that market traits are over emphasized as reflected in their plot gaps. It is not necessarily that there is pressure to sell more projects than any one salesperson feels he could reasonably sell. It is that a message of competiveness and achievement is sent by a superior whose drives are satiated by a performance of sales

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activity as opposed to real activity. As a weekly participant, the Revenue call is for me a comical display where intelligent individuals, week after week, say the same things about the status of a project that has not changed nor is likely to change. It is almost like a scripted play. Individuals feign sufficient enthusiasm to keep the performance going weekly and very rarely does anybody outright say, "This project is dead. Let's just take this off the board." The Revenue meeting, what would be an accepted and important operating procedure in a company, becomes a weekly event that undermines employee confidence in the company and its leader as it is currently structured.

This perception is exacerbated by another kind of meeting that members of the sales force are periodically (but generally weekly) required to attend: proposal calls. These are calls organized as group work sessions to finalize proposals. Again, Mr. Smith tends to lead the meetings and the group typically views his computer screen or the screen of a person appointed to do the editing using web conferencing software while he writes and edits proposals in varying stages of completion. As with the Revenue call, the sales group finds these meetings to be comically painful:

M: Tell me about proposal writing meetings.

CSP1: Mr. Smith is usually the one that facilitates. "I'm pulling this together. We need to do this as a group." It's probably the most painful meeting I have ever been on..

CSP5: Ha ha ha ha ha

Group: [*laughs*]

M: What happens at the meetings exactly?

CSP3: Mr. Smith is a detail oriented person and he goes through excruciating detail to put together whatever vision he believes to be in the proposal.

CSP1: Whether it's based in reality or not.

CSP6: It's literally producing it slide by slide and writing it while everybody is on the call.

CSP1: If he typed 100 words a minute we'd be ok with that but…

CSP6: What ends up happening is that everyone kind of just sits there and listens to him dictate. Usually it's to Cherie or whatever marketing person is actually doing the composing. He actually dictates the slide and what he wants it to say and if anyone chimes in with an edit or two maybe change this word or that word or whatever and that's really it. It's crafting slides and editing slides and creating slides from scratch with Mr. Smith sort of dictating to the group.

CSP1: But it sucks the time and the life out of me. I'm just gonna say I do everything I can to avoid these. Everything. I can't take it.

Given the attitude that the sales team has toward this meeting, it is another example where a weekly ritual at InsightCorp has a consequence of dampening employee morale and damaging the respect felt for the CEO. It is, for most of the participants, an unproductive meeting in that their participation in the proposal writing process is never full, each attendee doing other tasks in the background and generally only paying attention when their name is called. As a strategy to reduce the amount of time spent on these meetings, sales personnel, time permitting, do their best to write the proposals that they are responsible for in advance of the call in the hopes that the editing of that draft will be faster than collectively composing it from scratch. This would be the preferred method of doing proposals by the vast majority of sales personnel, that is, writing drafts themselves, alone, to be submitted to their supervisor for feedback. The group review sessions have the unfortunate effect as well of depriving important executives of a sense of autonomy over what they are trying to sell. The collective editing process also makes it more difficult for them to take credit for the sale once it has occurred because Mr. Smith has "helped" them finalize the proposal. While this might not necessarily be negative, in

the case of sales executives, who must justify their existence by accumulating the credit for successful sales, a meeting that ultimately results in shared credit in the absence of the feeling that the process has necessarily improved the proposal itself should be reassessed for its return on investment for company operations as a whole.

The sales team is not alone in questioning the productivity of the weekly meetings that it is expected to attend. The operations and research teams, who are required to attend a weekly Operations Call, are similarly critical of this meeting. Almost tragically, these meetings represent the only occasions where large groups of InsightCorp employees come together on a single call and thusly one of few opportunities to combat the isolation and solitariness that is felt by many InsightCorp employees as a result of its virtual structure. The operations call is a standing weekly call with all members of the research and operations teams in attendance. Senior research VPs, such as myself, are not required to attend, but I and one other typically do as schedules permit. Sales team members are optionally invited to the call, upon a request made at one point by the sales team in an attempt to increase cross functional visibility. While a few sales team members came to the call regularly at the time of the request, which was made sincerely with the desire to understand how research and operations actually work, this practice was short lived, as sales' participation voluntarily dwindled. The purpose of the call is to provide status updates on active projects.

As only a handful of the actual attendees of either the sales or operations calls are aware, these two calls were once a single call that was held when I first began my career at InsightCorp, when it was a smaller company both in terms of size and annual revenue than it is today. At that time, the purposes of the calls were the same. It was the one and

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only time each week all key staff members came together to provide and receive

information on active and potentially upcoming projects. As InsightCorp grew in both

size and complexity, and as a substantially more hierarchical structure evolved as a result,

this one call was divided into two separate calls. Along with the division, however, an

important aspect of the calls was lost, that is, the call ceased to become a forum where

executives could hear about project progress and provide guidance if any problems had

arisen and one where junior employees could obtain visibility of potentially upcoming

projects that might impact their workload and generally learn about higher level

operations of the company. In short, cross functional transparency was sacrificed when

the calls were separated. I am not making an argument that the calls should have

remained one. Indeed, both calls separately are each as long as the original unified call

ever was. A single call is no longer fitting with the size and structure of the company as it

currently exists. But the history of the call helps illuminates why the current operations

call is so unproductive for those who attend it and, arguably, for the company as a whole.

What happens on the operations call is reflected in the following passage from the

research focus group:

M: What is the purpose of the weekly operations call on Monday?

RP5: It's where we all get together on the phone and discuss where our projects
are at.

M: Describe that meeting to me. What's it like?

RP1: I would change "discuss" to "tell" a few key people where we are
individually on our projects. Like I don't know. I'm not thinking about what Dave
is saying about his projects except that I can see he's got this number of
interviews and that's not that interesting. Do you know what I mean?

RP5: It's basically where we give project updates to Marvin.

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RP6: It's either the least efficient use of my week or the most efficient because I multi-task through the duration of the two hours.

Indeed, as a regular attendee of the call, I can confirm that what happens on it is Marvin updates a database he maintains on all active projects, either pre field, fielding, or in reporting. Projects are divided up into these three groups and Marvin calls upon a representative for each project form either the operations or research team depending upon what phase it's in to provide a status update. Marvin records the information and moves on to the next project, in alphabetical order. The call is not a social one and few interruptions to the project by project check occur. When Marvin calls out the name of a project, there is always generally a long pause as the group waits for the person linked to that project to provide the status update. Because most attendees are multi-tasking in the background and not paying attention, Marvin typically has to follow by calling out these individuals by name, at which time you can audibly hear that person mentally check back in to the call and try to orient himself to provide the correct information. During the focus group, I probed to see what the attendees view the purpose of the call to be:

M: Is it informative?

Group: No!

RP6: We might learn about some new policies at the beginning but never anything earth shattering.

M: So why do we have it?

RP5: I didn't think it was optional.

Group: [*laughs*]

RP1: It's more convenient to the people taking the information on the call.

M: Who uses the information? Marvin and Laura?

RP1: Mr. Smith?

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RP6: Yeah like Mr. Smith and Mr. Johnson. It's probably the least efficient way of collecting this information.. When Dave or Ryan or Susan or Sammy are giving their updates, I'm not listening. I'm waiting for a keyword, Hey! This is a project you are working on" to update.

RP3: When I was first invited to that call it was made clear to me by two different people that this was not a place to discuss the projects in detail. Any specific share backs that could be actually useful to the group—this was not like that.

Interestingly, call attendees think the information being gathered is put to use by senior leadership. As far as I know, this is not the case, although the notes are circulated companywide such that anybody who was curious as to the status of any project could view them. The call does accomplish the goal of creating a database, albeit one that nobody actively uses, that is a more or less accurate log of where projects currently stand and this does help finance submit invoices when appropriate milestones have been reached. From my perspective, however, this could be accomplished in more efficient ways. The call has lost its original purpose, which was to communicate this information in a forum where members across departments could hear it and perhaps provide input as needed. In the past, the updates were much more problem focused, unless no serious concerns were apparent. At present, the call ritualistically gathers this same information but into a format that is devoid of context or evidence of issues that require senior guidance, and few individuals actually consult the document for any specific purposes. It is a vestigial organ, and one that, just as the sales call does, cast doubt among employees as to senior management's ability to assess what is a productive use of employee time and energy.

What is likely more important than the information obtained during the call itself is the general assumptions that non attendees make about the call. I know from personal

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communications that Mr. Johnson and Mr. Smith think the call allows an opportunity for

VPs to identify and assist with potential problems and concerns on any specific project.

As most VPs do not even attend the call, a fact that is publicized weekly as the circulated

notes list all attendees, this is certainly not the case. The fast moving nature of the call

does not really allow for in depth discussion anyway. But this does not necessarily deter

non attending individuals from thinking the call does more than it does. Here a research

team member discusses what her supervising VP thought the call was about. She learns

the truth during a discussion intended to crack down on the unrestricted use of external

analysts during reporting:

> RP4: I just had a conversation with Joan and we were tracking the time externals were spending on a project and Joan said to me, "Well, that's discussed on the ops call. You guys get on there and discuss how much time you are devoting to the project, how much time the externals are spending, look that the pricing sheet.". And I'm like, "What's ops call are you talking about?" I'm saying there are different perceptions. Like Joan had no idea that this wasn't kind of a collaboration point. She didn't realize that it was just a fact finding mission and we had our one minute to talk about the project and we're done.

During the focus groups, some attendees did admit that the call has the infrequent

but important benefit of reminding them to do something because someone else

references a task when discussing their own project. Some of the newer employees

revealed that they had learned about some procedures or processes, either internal or

external, that they had not been informed about (or that they had heard enough about a

policy to know that a policy existed of which they were not aware, prompting them to

seek out more information about this policy from another source). However, the

transmission of new information during the call was not the norm nor is it the call's

specific intent.

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The structure of the current operations call did not evolve without senior leadership. Indeed, Laura, the former human resources VP, developed the format and database with Marvin, the Director of Project Fulfillment, Data Processing, and Corporate Systems. The format was approved and encouraged by Mr. Johnson, who expressed a need to have a written record of project status and who never personally attends the meeting. What this analysis suggests is not that there is no need for such a record, but that a group format for communication in which members of the group receive few to no direct benefits as a result of the group forum should be reconsidered.

Other Efficiency Issues

A host of other issues related to inefficiencies are frequent informal conversation topics at InsightCorp and certainly arose both throughout the focus groups and specifically when participants were asked to expound on the market gaps show by the OCAI results. Again, a central theme here is not that employees feel, for the most part, that the company operates in overly aggressive or competitive manner in the marketplace such that a scale back of incoming projects is the obvious answer. Employees generally express an understanding that work is good. That is, new projects mean stable jobs for all of them. It is the manner in which project related tasks are handled internally that results in employees feeling that time and money are wasted all the while a strong message is being sent by management that hitting target goals is paramount.

Spreadsheets and Internal Documents

There is general dissatisfaction and, sometimes, outright animosity toward some of the record keeping procedures in place at InsightCorp. Like any company, InsightCorp attempts to record and track information relative to projects, mostly in spreadsheet form,

in order to gauge all of the critical elements of this kind of work including payroll, pricing formulas for projects, potential and current revenue, project status, workload, employee compliance with procedure, and budget. When asked to list company artifacts, one member of the client service focus group responded enthusiastically, "Spreadsheets! Spreadsheets! Spreadsheets!" The general consensus is not that spreadsheets themselves are not important but that too many different spreadsheets exist and that a good number of them are not terribly useful and require a great deal of time to fill out. I have already treated the Revenue call and the perceived abundance of expired entries on the accompanying project tracker spreadsheet that houses all of the items treated during the call. The key finding related to spreadsheets from the client service group was that its members largely feel that the spreadsheets they fill out do not function to improve communication or efficiency at InsightCorp, but really are a means to monitor or at least threaten the possible surveillance of worker activity and output. The more inputs one has on the proposal writing spreadsheet or the meeting schedule spreadsheet or the travel spreadsheet or the account management spreadsheet, the busier that person appears even if that information isn't necessarily being put to use by anyone other than that person (or even that person). Another key issue is the lack of integration between the spreadsheets themselves, which contain both repetitive information and information that could benefit from being linked across spreadsheets:

> CSP1: One thing they haven't done is integrate the spreadsheets. They are not integrated. You have to do it a million times. So like the pricing spreadsheet should be connected to the budget sheet and also to the purchase orders we're supposed to be generating. Should all somehow interconnect.

> CSP3: I think the long term Mr. Smith's vision is to have a system that kind of connects everything together but I think right now he really doesn't believe that a

lot of the data we have is accurate and a lot of it is painstaking-- trying to get to you know all the detail and minutia. You know he's not feeling comfortable with some of the data we have so that's why he's reluctant to integrate a lot of this.

The idea that the spreadsheet tools being used at InsightCorp are simultaneously cumbersome and yet ineffective in providing an accurate picture of what is actually going on at the company extends to other departments as well. The research group expressed similar frustrations with the project plan document that they are supposed to utilize as a project record keeping device, their comments revealing that it is perceived as both time consuming and lacking in utility. In this portion of their focus group, the operation teams discusses their primary data keeping spreadsheet:

> OP2: We're not effectively getting a good clean picture of how the project is operating and how we are doing with respect to budget so we are redoing the HQ sheet so it's more effective and easier to manage on a macro level and a micro level.
>
> OP4: We're getting there.
>
> OP2: You have to know where to look but it's not a quick fix there. If you screw something up, you screw the whole thing up.
>
> OP1: Or if the project is not straightforward. I mean, it's one of the things some of the people are working on. The HQ is great if you just have a project that is quantitative in nature but if you throw in qualitative shop alongs or focus groups or other things you might be doing with the project there is not really a great way to account.

<u>Lack of Key Account Strategy and Boundaries</u>

While it is not within the scope of this dissertation to analyze the business plan or general profitability of InsightCorp, it is important to demonstrate that employees believe that specific cultural norms at InsightCorp do result in negative outcomes to the bottom line. The client service team is unanimous in criticizing the way about which InsightCorp prioritizes business opportunities:

CSP1: I think we just don't turn anything [*requests for proposals*] down. Even if it's the most stupid asinine piece of crap or something that we are never ever gonna ever get, we still spend hours and hours on it.

CSP5: We respond to everything. Everything.

CSP1: It will cost the company money if I get up and out of bed for under $30,000. I start touching stuff and you need to consider that and what you are worth to the company and what your dollar volume is generating. So if a project for me isn't $200,000 it's not worth me working on it because they are spending more money than they are making based on the time.

CSP2: We have to be more strategic.

CSP5 You have to have a plan. You have to have a key account strategy. We have parts of it.

CSP2: There has to be a reason. Either it's for profit or its to enhance our position as a thought leader.

CSP6: When I worked at another business, we actually had a scorecard that we would use to help evaluate business opportunities. There were three areas to evaluation one was revenue. "Ok. This one is a big opportunity." The other one: is it a portfolio builder? Are we doing something unique that will help us build our portfolio so are we doing a new method? And the last one was branding. Are we gonna get a lot of publicity or are we gonna work with a company like apple and that would be huge because everybody knows that brand and wants to work with them? So we developed a score card and pulled it out for each opportunity. And we had to have a minimum score to move on it. And we didn't adhere to it strictly but it got everybody in the right frame of mind about evaluating an opportunity and whether it was worth going after.

CSP2: I really like that and I don't think we look at our opportunities like that at all.

The operations team had their own criticisms as to how InsightCorp goes after business and prices out projects from the point of view of the people who inherit a sold project that they now must execute:

OP5: There's this very big separation between departments. I know I think sometimes, "Where did they come up with these numbers when they sold this

project?" Had I been consulted or had the operations team been consulted, we would have said, "This is going to be a difficult goal to achieve." I don't think there is a lot of emphasis placed with understanding operations and how it intertwines with what is sold.

OP3: It's always continuing. They are always selling projects out of left field. We always have to double the days. Or projects that don't have a travel budget—you end up having to ship people there.

OP2: Same thing. There's a certain amount of pressure for us to be keeping an eye on projects when a lot of that is out of our hands and is based on expectations when the project is sold, so I don't know. I feel like there are not many pow wows where sales gets to pick the brains of ops and say, "Let's look at these categories and historical examples where we've worked in x, y, or z category" but usually feel a lot more pressure than I think sales does. When I think an unreasonable project has been sold—and I'm not saying we can always provide the answers—I'm just saying there is very little communication and I feel like the project is always sold and then dropped on us.

The criticism of poor understanding of project profitability that the operations team is lodging against sales is a valid one. Generally speaking, sales personnel do not consult historical records of project profitability to price out projects. They use the "pricing sheet," a formula dense excel spreadsheet that calculates project costs and profits at various margins that itself was created by Mr. Johnson, who according to self-report, modifies those formulas based on what is learned from past projects. Client service members are aware, however, that operations and research personnel often believe that the parameters client service is using to price a project do not necessarily synch realistically with the actual resources that will be needed to execute the project, but they are caught in a bind of their own. As one client service respondent puts it:

CSP6: What happens is, from a client service perspective, you have a situation because you have everyone crying for more hours [in the budget]. So you price yourself out of it, so you have to cut there and here. So what Mr. Johnson says to do is leave the hours as they should be and just take a lower margin. If you do too many of those, they say, "Why are you selling at all this stuff at such a low

margin for?" If you mess with the hours to get the margin right then the research team comes back and says, "Why'd you only put this many hours in here? We need double that. So you know, right? Or you don't sell it. So it's a no win situation for almost everybody.

Again, it is not my goal to evaluate the successes or failures of the InsightCorp pricing structure, but what is key for this analysis is that respondents show a lack of confidence is the key tools that are supposed to help them generate profit and, therefore, success. In the case of client service personnel, the fault lies with the pricing sheet and the executives who have not cracked the formula of how to budget a project that is both competitive from a sales standpoint and executable from an operations standpoint. In the case of operations personnel, the fault lies with client service personnel who are ignorant of what it really takes to run a project. The research team lodged a similar complaint against the sales and research executive teams in regards to deviating from the timelines and expected deliverables that are sold in an effort to please clients.

> RP4: The problem is the projects. There is an unreasonable expectation of how quickly we are going to be able to do things because—I mean—I would say that 75% of the time, the clients don't come through with whatever they are supposed to come through with on time. When do we push back? When they have sort of drop dead dates. And then what happens is you get these retailers who are staggered so you end up reporting for each retailer that comes through, So it's like "Hey I'm going to go ahead and write a Meijer report for you so you have something and then two weeks later I'm going to write another report for you for Walmart while we field Safeway." I'd say that's more the rule than the exception.

> RP1: I agree with that very much so which is why all of a sudden the workload for that project just quadruples and you have to write four reports then integrate a report. That's a huge budget problem too.

> M: Isn't this the same as other companies…this kind of scope creep?

> RP7: I'll just say I try to resist those types of requests if at all possible. In extreme cases, I will provide an early report. For example, in the [*client name withheld*] project, we fielded two of the retailers very early and one just last

March. It was an extreme case. I usually say, "It's going to be better to wait for all the data to complete your custom analysis."

RP6: I would say it's never my decision to deliver early. It's not like I say, "Oh yeah what a great idea." It's an edict from above. Internal edict from above. The client request comes in and somebody above says, "Yes! We can do this for you." When you have executive sales people, they are the ones who are overpromising.

Group. ["*yes" in agreement*]

M: Do you feel like you have the ability to be firm with clients on timelines?

RP5: I feel like often times the person who is above us will respond to the client before we even have a chance.

RP6: I feel like setting some type of expectation on this interim reporting is key. Like if the sales people would say, "Yes. You can have that but it's going to cost you an additional $5000." Most clients would say, "That's pretty steep. I'm just going to wait. Unless they say yes and then at least it's worth our while.

Again, my purpose here is not to dissect and authoritatively speak on what the best method for corporate profitability is when it comes to acquiescing without proposing additional costs to client requests (or demands) that are not in keeping with original proposed specifications of a project. What is at issue here is how junior research employees *feel* about the customs of their senior managers. What is clear is that junior research staff feel that senior executives give in to out of scope client demands because 1) they hope to win client favor by going above and beyond, thus securing future projects and revenue and 2) because they do not have to do any of the "real work" themselves to meet these demands. In an environment in which employees already feel like their workloads are excessive and internal support systems are weak, giving in to client demands that are out of scope is not viewed as a policy that makes sense. At the very least, they want to see the company earning extra revenue to compensate for the extra work—this would make "scope creep" tolerable even though it negatively impacts their

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work load, such is their strong belief that profits justify even unfavorable work conditions. Like their counterparts in operations and client service, research employers do not express thoughts that are counter to a basic belief that making a profit, and even exploiting worker labor to some degree to advance corporate interests, is not acceptable as the end game for a corporation.

What I have seen throughout my years with the company is that new employees typically enter the company with a strong positive assessment of the organization. That is, they see the company, from what they have been able to determine through their job search and interview process, as one that is healthy, stable, and productive. As these positive general assessments are challenged by the daily gathering of experiential evidence suggesting weak human resource development, general organizational disorder, and the persistence state of employees being overworked, individuals begin to express both fear and anger to their co-workers about the state of the company. Long time employees almost universally come to a singular and strongly felt conclusion: the company is just not being run right. InsightCorp employees proudly express themselves to be hard workers and committed to contributing to a successful, profitable company. Their perceived market gaps all have to do with the forced exertion of time and energies, justified as the correct path of an appropriately competitive and aggressive company, when individual assessments of the outcomes of those exertions are that they are wasteful.

Employee Recommendations for Change

The final portion of each of my three focus groups, after presentation and discussion of the OCAI survey results, was an invited discussion of changes that

participants felt would help InsightCorp close the gaps perceived by its employees and generally alleviate any of the issues that were brought to light during the course of the discussion. Respondents offered a number of solutions that, when analyzed, shed more light on the corporate culture of InsightCorp

Closing the Clan Gap

Throughout this discussion, I have analyzed a number of both organizational customs and beliefs that, although not directly identified by workers as such, help explain the specific clan gaps that I identified thought the use of the OCAI. When asked directly about clan gaps, however, InsightCorp employees had a number of immediate recommendations following my discussion of the clan gap and presentation of the OCAI results that bear consideration. Interestingly, while none of the three focus groups naturally produced much discussion about the need for increased interaction between employees on non-work related matters prior to discussion of the survey results, their recommendations for shrinking the clan gap were very obviously related making things a bit more personal at InsightCorp. While this is likely the case because the cursory lecture I gave on the clan trait is most immediately understood in these terms, it is still telling that employees were largely supportive of a more person-centered as opposed to worker-centered environment at InsightCorp even as the survey results did not suggest this as the area of highest priority.

Non Work-Based Employee Interaction

All three focus groups mentioned at least one of the two most overt attempts made by InsightCorp employees to bring coworkers together over a non work related topic that I have witnessed during my tenure. Again, this relates back to the results from the OCAI,

as the two events discussed here were both initiated by individuals classified as belonging to the Clan Dominant Pattern group, the only group that perceived significant gaps along the clan dimension of: "the organization is a very personal place. It is like an extended family. People seem to share a lot of themselves." However, participation in the two events featured a broad mix of individuals from all there groups. The first event, started by a member of the operations group, was a call for companywide participation in the NCAA "March Madness" annual college basketball playoffs. Utilizing a free software program offered by the ESPN sports cable network, employees were invited to sign up and submit their brackets for each of the playoff rounds. The ESPN website allowed for a quick and easy way to enter a bracket and see the current rankings of all persons within a group as the series progressed. The March Madness employee bracket competition has occurred at InsightCorp for three years prior to the writing of this dissertation, each year managed by the same operations employee. While Mr. Johnson did provide approval for this activity, and thusly sanction it in a very real way, neither he, nor did the vast majority of senior executives, participate. This fact has not gone unnoticed by lower level employees:

> OP3: I love that some people don't even want to be on the thread for March Madness. I think that there needs to be… that's what I mean… and that's what the survey shows. Where there needs to be a more relaxed environment when we're participating. When you are a leader, sometimes you need to walk with your people and sometimes you need to walk ahead of then so that when you walk ahead of them they want to follow you. You know what I mean? So when we have a chance to be social with each other being in this virtual environment, when we have things that are team building exercises that could be fun and relax the very high tension and stress that we work under like March Madness, it really should be like an event and if you not going to participate in you can at least cheer somebody on.

M: Is upper management antagonistic toward these things or just indifferent?

OP6: I think that people get antagonistic like, you know, it's not something serious so I really don't want to know about it. Just as an example because I'm looking at the list of people that participated this year, there's not one member of senior management.

OP2: And, Jerry, you personally organized this. If I had personally organized this, I would be offended. Unless somebody had come up to you on the side and said, "Hey I'm not really interested in this sport, but I'm gonna follow you anyway" You know? It would be a little bit of a cheerleader and be like "I'm betting on this person." You know what I mean?

OP4: I guess it's not overt but I think that it might not kill Mr. Johnson who actually does know something about basketball or Mr. Smith. Just like two minutes.

OP5: Didn't Barrack Obama fill his out in the middle of some war?

OP2: Just even to say, "Hey, listen. I see you organizing something for the team that's great" or "Listen. I'm not gonna participate this year, but I'm rooting for you. I'll watch." I'm just saying.

The research team shows a similar attitude toward the March Madness and the other purely social event on record, a pumpkin carving contest initiated by another member of operations. This individual took it upon herself to invite all employees to submit pictures of their carved pumpkins during one Halloween. She orchestrated a secret online ballot whereby all employees could vote for their favorite jack o' lantern. Both of these events as viewed as opportunities that help coworkers see each other as people:

RP3: I really like the March Madness thing.

RP1: I like it, too. I mean, not that particular example. I mean, I don't really care about sports or anything. But as far as like remember when Janet did that pumpkin carving contest? Like I didn't participate, but I like to see everybody else's pumpkins. Anything that is another way of expressing your personhood aside from on the phone or in an email that is project related.

RP3: Crap. I'd just like to see pictures of what people look like for God's sake.

RP4: Yeah.

RP1: Yeah and like their office their surroundings. Just to see like: *this is where everybody works*." You know? A collage of workspace, you know, like your pets and your family. Getting something put together quick but where you can see a representation of other people and their lives, so it feels less isolating.

RP6: I was going to say but kind of like a bigger picture view of this conversation because it has implications for InsightCorp. And it might be somewhat inflammatory, but I will say it took me a good nine months to a year to feel any kind of personal relationship to InsightCorp. Nine months to a year to feel like, you know, if I had to quit I wouldn't feel any remorse.

While the research group does not express the same frustration with management for not participating in these kinds of social activities, they do express a general exasperation with the company for failing to recognize the obvious need to know people beyond their working relationship. When asked about how to solve clan gaps, the lack of these kinds of activities, particularly in the context of a virtual organization where most employees have not and likely will not have a chance to ever meet most of their fellow employees in person and where the majority of the group activities that do exist (that is, weekly conference calls) are viewed as both non-social and unproductive, surfaces as a clear issue that could easily be addressed by management if so willing.

Additionally, all groups mentioned that it would be nice to increase the number of in person meetings, and most employees are aware that only one all-company, in person meeting has been held during the history of InsightCorp. Interestingly, when the need for more in person meetings was suggested, the justifications generally do not have anything to do with fulfilling a work agenda of any type. Rather, the InsightCorp employees seem to agree that in-person contact would quite simply provide interactive benefits, such is the belief that having a connection beyond phone and email contact is required to truly know

someone as a person. One employee summarized the consequences of the lack of face to face interaction in a way that suggest a large obstacle that virtual organizations would do well to recognize:

> RP6: When I left my last company I felt bad about it. Like I had I won't say I grieved over it, but I felt bad. People were friends. And I felt bad about it after a pretty short period of time. But at InsightCorp it took a lot longer for me to get to that points, so I'm just saying as far as retention and stuff like that these are important things because I would have had no beef if I were to have walked out the door so to speak.

InsightCorp employees are quite cognizant that the virtual structure of the organization and the limits that structure places on the possibility of face to face contact could have direct impacts on the strength of coworker relationships—on the amount of both trust and loyalty one feels to colleagues. They are also well as aware that these loose ties ultimately do not foster a sense of loyalty to the company as a whole. This is, unfortunately, counter to what most employees expect when they join the company. That is, because the company is small and because the obstacle posed by the virtual arrangement are yet unknown to them, new employees generally expect to be joining a tight knit group of working colleagues.

Increased Cross Departmental Interaction and Participation

On a more general note, all groups also expressed receptivity towards initiatives that would foster engagement and interaction between individuals, both within and between departments, on work related matters as well. For the client service group, this surfaced principally as a need to know more about the details and outcomes of the work that people in other departments do at InsightCorp. They discussed a sporadic meeting, called the "Topline Meeting," one of the only forums in which presentations of project outcomes were made to a company wide audience:

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CSP6: The topline meeting is kind of an interesting topic because the whole goal of it is to sort of socialize. This is the best attempt I think I've seen from InsightCorp at being able to socialize what it is that we do. so that everybody in the organization has an idea of what we do well and what the work we are doing with what clients and that kind of thing. But I find it interesting that more often than not, it gets cancelled for whatever reason because somebody can be there or some key member of the team has got a client call or something. I mean we have a few of these things. We have these topline office hours meetings scheduled regularly on a Friday afternoon or at least for the last six months and I think that I can count on two hands the number of actual meetings we've had. They just don't happen that often. I find that interesting.

CSP1: Lots of different process but because we are virtual we never share them. We could actually change this meeting to actually promote it a little better internally. Based on the type of research that we did and this is what you can expect to learn kind of overview.

CSP2: I think it's a really valid point personally I think the reason the topline call gets cancelled is because we do spend so much time in the morning [on the Revenue call] and then everybody has to scramble to get stuff done in the afternoon.

CSP5: I think then it just kind of goes back to a real clue to our corporate culture when you think about it.

Interestingly, the client service group has interpreted the purpose of the topline call to be the socialization of research practices and outcomes when in actuality this was only a sub goal of the meeting which was developed as an opportunity to all for feedback on preliminary (or "topline") report drafts in preparation for final report delivery. But it is telling that they have understood this as a sharing practice and also that they are highly receptive to it, especially given the judgment that other departments have shown toward client service both as being ignorant of what is really needed to execute projects and as not actually having to do any "real work."

The operations group expressed their need for more cross departmental interaction and visibility mostly as cry out for the demonstration of appreciation for the work they actually perform. A clear feeling of being under-valued arose from this group:

OP2: I'm not sure if this is called team building or what. I'd call it a culture of kindness. Out of the couple dozen projects we have going, how many times does anybody get emails when a project is over saying, "The project is done. Thanks for a successful project". I've never heard like even on the hardest, most difficult to manage project—not even on the ops call. And it's like, "Ok this project is completed. Moving on!" The only feedback is negative.

OP5: If there is positive feedback like from a client. Mr. Johnson will forward it but there's never there's any credit given to us.

OP3: This isn't anything like, "boo hoo." You know? I am self-motivated. I don't need anyone to say, you know, "Oh, you're doing such a good job." But It's really nice and I think it goes a long way toward satisfaction with a job and feeling like you are an integral part of the company. I mean we're managing very lucrative projects that contribute a lot to a larger whole. And when like sales has a success, you see something in the mail. "Look at this everyone, Maxine just sold another project. Woo hoo!" [*group laughs*]. And the person that put like 100s of hours into the project gets not a single email that says, "You carried it out." That's ok. I feel my face getting hot, this is stressful.

OP3: Just because it's your job. There's no thank you for doing your job.

OP2: But it's sales jobs to sell projects and they get, you know…

OP4: I think that the there is more value placed on research and sales. Those roles. Despite what I consider… I mean we're not just…we're part of a larger whole. It's not being ignored cause someone's keeping their eyes on everything that's going on and if something goes wrong it certainly is pointed out. But it's not like we're just doing our little thing. We're moving the boat but the value of it is not recognized. So someone's paying attention and we're moving the boat [*laughs*].

OP2: The thing is a lot of times you get a "thank you" from the internal team like a supervisor thank you. A lot of times the project director will realize what hoops you went through to pull it off and I've gotten that appreciation. I mean you get that rush at the end of a project that was really difficult, but then its picked apart.

Instead of "You really did a great job. Now let's look at things we can improve for next time."

Operations perceives themselves to be in a position where credit and customary congratulations are overlooked. Indeed, there is generally a good deal of email fanfare when a sales team member sells a project. The following email is a typical example:

From: Client Name Withheld (William)
To: Susan Wright
Subject: Approved Client C projects

Susan,

We have approval to begin work on two Client C projects. The signed SOW's are attached. Please counter sign and return to me. Since we had such a positive experience when we worked directly with Joanna last year, we would like to repeat that process. We are requesting a member of the IC team work again with Joanna on both Client C projects. Ideally, we would like to work with Jay but you need to let us know if that works. The same person should work on both projects.

We look forward to partnering with you on these two exciting projects.

Bill

From: Susan Wright
To: Proposed@InsightCorp.com
Subject: FW: Approved Client C projects

FYI. Two more [Company Name Withheld] projects. This time for Client C!

From: Rufus George
To: Susan Wright; Proposed@InsightCorp
Subject: RE: Approved Client C projects

WAY TO GO SUSAN! YOU'RE ON FIIIIREE!

From: Cynthia Walker;
To: Rufus George; Susan Wright; Proposed@InsightCorp
Subject: RE: Approved Client C projects

Ditto!!!! Congratulations!

In addition to email chains celebrating successful sales, there is frequent circulation of positive client feedback when a good report is delivered, with that credit going generally to the research team. And while selling projects and delivering good reports are in the exact job descriptions of sales and research, respectively, operations almost never receives any credit for fulfilling their duties, which are to execute and oversee the logistics of actual fieldwork, a feat that often require excessive investment of time and resources. Quite clearly, the end products of intellectual (research) and profit generating (sales) labor, have inherently more cultural capital and this type of situation might not be unique to InsightCorp as such. Regardless, it is an employee morale issue to which management can attend.

Operations also expressed some exasperation with research team members, as has been previously discussed, for failure to provide critical pieces of information on time and handle all their responsibilities in a timely manner. Several individuals hypothesized that some forum for real interaction between departments, outside of email communications and the ineffective operations call, might mitigate against these issues. Research team members, in turn, had their own gripes to lodge against operations members, as can be seen in this portion of the focus group interview

> RP2: I feel like our ultimate goal is to satisfy clients and make money and all be happy in the end and sometimes I feel as though when I'm trying to get things done I get so much push back from operations and pointing the finger and stuff and all this "You are doing it wrong." It turns me off. Honestly, it turns me off and I don't want to work with them and, I do anything I can not to have to talk to them.

> M: Does anybody else feel this way about the operations side?

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RP4: I have a couple of times. If there is a challenge it's not "Hey what can we do to solve this problem or get over this challenge?" It's very us versus them. Kind of like. I have definitely felt that.

M: What creates the conflict?

RP2: If there are timeline pressures or if something that causes or is challenging for them to get done, it's like "Oh we have got to get this fielding done in four days?" And we get push back like "Oh you can't ask us to get ethnographers to do that." It's almost like we have to beg ethnographers to work for us and then we don't want to change their schedules. And it's like I'm not doing it just to be a jerk here you know? There is a reason I'm asking you to do this. I feel like I often get the response of "You just need to go back to the client and push back because we are not going to do change it." There needs to be a team focused end goal in mind.

RP3: I think a lot of times if we put our heads together we could be more creative about how we overcome challenges or break down roadblocks but I would have to agree that I don't see a lot of "Hey, let's put our heads together." I hear a lot of "Go back to the client and tell them 'No.'" And that doesn't always work.

What is clearly evident here is a real failure by individuals on both sides of the operations and research fences to empathize with the difficulties and pressures that come with each set of responsibilities. Having worked myself as both a project field manager in operations and as a project director in research, I am one of few in the unique position of having not just empathy but direct experience on both sides. Indeed, I know what it is like to be a project director who receives a request by a client to compress a field window or make a last minute change to store location that is communicated as quite vital to the project's interests (or at least is something that a client really wants). Clients, and even InsightCorp project directors, are removed from the nuts and bolts of the scheduling process. They tend to assume, as RP2's comment about "begging" ethnographers to work suggests, that it should be easy to make last minute changes. Operations personnel, on the other hand, know intimately that last minute changes are not always accommodated

easily. Ethnographers, who are consultants—not employees—have other jobs and school obligations that limit their flexibility. There is never a limitless pool of qualified field workers to substitute when changes are made. And any and all changes, no matter how minor, will typically result in late nights waiting for confirmation that scheduling changes have been accepted in order to move field materials and organize training for newly scheduled individuals. The lack of real communication between departments--the fact that individuals do not really understand the pressures facing a coworker from an outside department—is an obstacle to true collaboration and compromise. And while each side is not sure why the other acts the way is does, each minimally understands that more engagement between departments might be a solution to persistent problems.

<u>Closing the Market Gaps</u>

Explicit employee recommendations for narrowing the market gaps identified from the OCAI survey hit directly upon the inefficiencies just discussed in the my broader analysis of market gaps. Their recommendations for fixing the clan gaps targeted interpersonal connection issues that were not identified as a primary cause for concern during earlier portions of the focus groups. By contrast, the theme of inefficiencies that limit the impact of potential profit but that are treated by management as appropriately competitive strategies was consistently mentioned during the focus groups and when I explicitly asked individuals to discuss ways to shrink market gaps. The sales team had both the highest number and most elaborately thought out recommendations for changes. This is not surprising, given that it is in their very job description to sell projects that make money and, as a result, are more likely to be cognizant of the impediment to achieving those goals. They are also the group that has the most contact with the CEO,

who presses upon them almost daily how important it is for them to bring in business and who they identify as spearheading the policies and customs that, while promulgated in the name of driving results, are felt to impede optimal success.

> M: What is the best way to close the market side gap?

> CSP6: This makes sense, too . This goes along with how we are talking about how we chase every revenue dollar whether it makes sense to do it. Chasing every penny we can for revenue and we are doing that at the expense of people's personal time but also at the expense of profit..

> CSP5: We need to analyze the financial data again because that will give us some clues as to how you begin to structure a scorecard. We need to look at all the jobs where we've lost money. Where we've taken on weird stuff.

Operations and research individuals were less sure of how to treat the market side equation specifically. Again, this would make sense insofar as these individuals, while they must be mindful of project budgets, are not privy to any rationale behind how proposals and client are prioritized or even how projects are priced. It is not their job to understand why InsightCorp makes the business decisions it does. It is their job to execute projects. Even still, they understand that the problem lives not necessarily in the mere selling of too many projects to handle but in how projects are handled. This vague but certain understanding is well expressed by one research participant:

> M: How can we improve the market gap?

> P1: Anything that would increase our efficiencies as workers would be a move toward that. Like email and not being able to get things done during the day because of other problems and processes. We need to critically think about time and what we are doing would be the thing. I don't have an idea I just have an idea about how to have an idea.

An interesting and concerning undercurrent of suspicion is present through the discussion of the market side gaps, with each group casting doubt on the knowledge and

practices of those operating senior to them. The operations groups suspects, as has already been covered, that the sales force does not really know what they are doing when they sell projects that are so clearly misaligned with the realities of execution. They believe the research staff does not have a clear understanding of how giving in to client demands and deviating from proposed project specifications adds up to unanticipated costs. The research team suspects that its direct managers and superiors do not really do any real work and, as such, haplessly acquiesce to client demands that impact the quality of the product that research staff, in turn, have to produce and do more damage than good in the long run. The sales team suspects its senior leadership of not being savvy when it comes to prioritizing the clearest profit generators and not really understanding what kinds of projects make money and why. It is a situation that ultimately interlocks with issues of trust and respect and the consequential eroding of loyalty to the company as whole.

Summary

The preceding chapter has presented an analysis of the data gathered in the process of conducting a corporate culture assessment of one virtually organized market research firm. In conducting this analysis, I have attempted to distinguish between customs, behaviors and beliefs that I hypothesize to have evolved as a consequence of virtual organization from those that might pertain to business entities in general or specifically to this entity as a result of the particular practices and individuals that collectively define it. In the next chapter, I discuss my results as they relate specifically to the explicit objectives of this research project.

Table 5.1. Summary of findings, all methods

Response the OCAI Results
Overall Summary
1. All three focus groups demonstrated agreement with the outcome of the quantitative survey findings
2. Respondents generally showed a lack of surprise at the findings and expressed that the results validated their previously held beliefs about InsightCorp
Clan Gaps
The clan themes outlined below reflect employee perceptions regarding gaps between perceived and desired practices as related to human development (participation, mentoring, teamwork, commitment and concern for people)
 Individual and Team Job Responsibilities *Findings Related to Being Virtually Organized*
1. Identifying the specific tasks that make up an employee's job responsibilities is more difficult in a virtual environment because opportunities to learn by "watching" others exist in ways that are limited (participation in conference calls and email chains) and are perceived as scattered and superficial
2. Trust that individuals will perform their jobs correctly is hindered by the absence of personal, face to face contact that is believed to more quickly nurture feelings of obligation to others and team membership in a non-virtual organization
Findings Related to InsightCorp Policies, Practices, and Personnel
1. Availability of resources for understanding core tasks associated with job responsibilities are scarce
2. Senior management privileges on the job learning to the exclusion of formal written guidelines and is not sensitive to employee perceptions that incoming job training is insufficient
3. Cross functional teams show distrust that members of other departments will perform all their assigned tasks
 Obstacles to the Communication of Information *Findings Related to Being Virtually Organized*
1. The lack of an accessible, physical storage space for hardcopies of documents is a perceived barrier to amassing a collective knowledge base
2. Cross functional teams are more susceptible to a weak shared understanding of the informational needs of members of outside departments relative to non-virtual organizations
Findings Related to InsightCorp Policies, Practices, and Personnel
1. Management has failed to implement the use of a virtual private network (VPN), instead relying on a combination of network services that are less efficient
2. Insufficient communication and enforcement of policies regarding sharing of documents by management persists at InsightCorp
 Training and Mentoring Deficits *Findings Related to Being Virtually Organized*

1. Lack of physical proximity to colleagues and mentors inhibits deep training on the how-to details of complex project tasks

Findings Related to InsightCorp Policies, Practices, and Personnel
1. Failure by senior management to provide comprehensive training on core InsightCorp deliverables erodes employee confidence and leads to inconsistent product production among various employees
2. Failure by InsightCorp sales force to adequately clarify project objectives and goals with client before a project is sold results in undue burdens being placed on junior research and operations staff

Internal Support Issues

Findings Related to Being Virtually Organized
1. The virtual environment privileges the individual as the unit of responsibility and supports a hierarchical structure in which work is executed by one individual and then approved by another in a linear fashion that is inherently amenable to a situation where those individuals are not co-located
2. The virtual environment is less amenable to team structures as a result of geographic distance between co-workers. High risk of employee feelings of disproportionate project responsibility and isolation results.

Findings Related to InsightCorp Policies, Practices, and Personnel
1. Reliance on an external consultant support structure for analysis has failed to assist project directs with aspects of reporting beyond basic tasks.
2. More engaged use of external consultants throughout the life of the project is encouraged by senior management but is consequently the cause of reprisals when consultant hours exceed allotted project budgets

Workload and the Work-Home Divide

Findings Related to Being Virtually Organized
1. The primacy of email as a communicative mechanism for all worker relations allows and encourages employees to be plugged in, if they submit to it, 24 hours a day
2. Employees working across multiple time zones encourages many to extend their hours of availability, thus infringing on personal time and blurring the separation of personal time from work time

Findings Related to InsightCorp Policies, Practices, and Personnel
1. Field research on weekends demands vigilance beyond the Monday through Friday workweek for research and operations personnel even as policy mandates a Monday through Friday workweek. Management has made only weak efforts to clarify how employees should deal with these conflicting expectations, resulting in employees consistently extending their own work week above contracted hours
2. The InsightCorp CEO fails to respect customary work and home boundaries (e.g. calls late at night, on weekends, or during vacations)
3. Senior management sympathizes with but fails to enact solutions to keep working hours reasonable.

The Virtual Factor and Employee Coping Strategies

Findings Related to Being Virtually Organized
1. In order to avoid falling behind, employees voluntarily submit to expanding their work day by requesting Smartphones that enable them to check email during off hours, further contributing to home/work divide problems
2. The influx of email is so constant that employees adopt various, generally unsuccessful coping strategies to set aside time for concentrated thinking and work

Findings Related to InsightCorp Policies, Practices, and Personnel
1. Employees perceive inequities related to the distribution of technologies (e.g. Smartphones) that are believed to allow one the freedom to escape the office
2. Management provides no explicit policy or counsel on how to best deal with an overabundance of email in spite of this being a considerable problem for both employee morale and productivity.

Virtuality, Trust, and Paranoia

Findings Related to Being Virtually Organized
1. Employees feel compelled to respond immediately upon receipt of an email to demonstrate that they are always working
2. Employees feel compelled to over-rely on email in order to create "paper trails" of evidence of their work
3. The ease of communication by email coupled with the use of email as a primary mechanism of communication at a virtual company puts employees at risk of having to attend to emails that do not really require their input and detract from accomplishing assigned tasks

Findings Related to InsightCorp Policies, Practices, and Personnel
1. The "Proposed" email distribution list at InsightCorp has resulted in the creation of significant email clutter for the majority of employees
2. The CEO and President exacerbate the problem by encouraging through example and by direct mandate other senior executives to over communicate company-wide on issues that do not merit mass communication

Market Gaps

The market gaps outlined below are areas where employees identified inefficient use of employee time and energies in the purported pursuit of management-defined achievement and results

Unproductive Group Meeting

Findings Related to Being Virtually Organized
1. Employees welcome opportunities to engage with coworkers outside of email communication but conference calls tend to be structured with individual turn taking in such a way that conversation and collaboration are prohibited
2. Employee feelings of isolation are cemented through the practice of multi-tasking through what should be opportunities for engagement

Findings Related to InsightCorp Policies, Practices, and Personnel
1. Perceived inefficiencies of group conference call meetings lead employees to question the judgment of senior leadership regarding the best use of time and energy in spite of frequent proclamations made during the meetings regarding

achieving targets and competing effectively in the industry

Other Efficiency Issues

Findings Related to Being Virtually Organized

1. Spreadsheets are viewed as a thinly veiled means to monitor worker productivity without providing benefits to those who fill them out
2. Lack of interdepartmental communication about shared issues causes members of each department to view others as lacking competence and endangering project profitability

Findings Related to InsightCorp Policies, Practices, and Personnel

1. InsightCorp spreadsheets are not integrated optimally to maximize employee productivity
2. Sales personnel believe the lack of a "key account strategy" leads to lower revenues in the long run

Employee Recommendations for Change

1. Increase opportunities for face to face employee interaction
2. Increase opportunities for non-work related employee interaction and increase participation by senior management in these kinds of activities
3. Strategically increase interdepartmental contact and sharing to minimize conflict and maximize revenue through improved research design
4. Support demonstrations of appreciation for employee accomplishments, particular for lower level employees
5. Implement a scorecard to evaluate return on investment of client requests for proposals instead of responding to nearly all requests
6. Critically assess employee time management concerns, particularly as they relate to the use of email

<center>**Chapter Six**</center>

<center>**Discussion**</center>

Introduction

In this chapter, I will synthesize and interpret the results detailed in chapters four and five with respect to the research questions outlined in chapter three. I will follow with a final chapter containing my conclusions and implications for anthropology and related disciplines as well as recommendations for the sponsoring agency, for readers seeking to implement virtual work arrangements generally, and for future research in this area.

Research Objectives and Questions

Research Objective One: A Corporate Culture Assessment

The primary applied goal of this dissertation was to conduct a "corporate culture" assessment on a virtually organized market research firm. In doing so, I proposed to answer a number of specific questions: What is the corporate culture of InsightCorp? How congruent are employees' perceptions of the organization?; To what degree is there consensus on what kind of organization InsightCorp is and how employees should operate? What are the explicit and implicit values that employees are both subject to as workers and participatory in the construction of through their daily practices?; What are the problems that are hindering productivity, worker morale, and quality of work?; Are company and employee interests aligned or do societal values conflict with InsightCorp profit goals; operate within it? What are the strengths of the organization that can be

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accentuated and utilized to further the interests of the company and the wellbeing of its employees?

As elaborated in the preceding chapter, InsightCorp culture is viewed by the vast majority of its members in astonishingly similar ways. This is most readily apparent through the quantitative results obtained through the use of Cameron and Quinn's (2011) Organizational Culture Assessment Instrument. InsightCorp's cultural type is one that is market dominated. This dominance of the market attribute is typical of organizations in retail and sales industries. Using the criteria established by the authors, the culture of InsightCorp is "strong" in that the points awarded to the market considerably outweigh those allotted to other quadrants. In general, Cameron and Quinn construe organizational culture strength as a positive quality, claiming that "research has revealed that strong cultures are associated with homogeneity of effort, clear focus, and higher performance in environments where unity and common vision are required" (2011:83). The culture can be seen as particularly "strong" in light of the congruence of six plots for the various dimensions of culture (i.e., strategy, leadership style, reward system, approach to managing employees, and dominant characteristics). However, the strength of InsightCorp is moderated considerably by an analysis of the discrepancy between what employees perceive and what they prefer. Cameron and Quinn assert that the "discrepancy data may be the most powerful of all the data provided by your culture profile if your agenda is to initiate change." And, indeed, for this analysis, the discrepancies seen in the clan and market quadrants have been put to use as the structural framework for the presentation of my other ethnographic data because they provide an accurate, if undetailed, picture of the corporate culture at InsightCorp. In broad summary,

it is a culture marked by a glaring lack of mentoring and nurturing, teamwork, support structure, general concern for people, and a strongly felt over-emphasis on goal attainment at the cost of both profits and employee morale.

The use of Schein's focus group approach, in a similarly structured fashion, shed light on the explicitly and implicitly shared assumption of which InsightCorp's culture consists. One very clear finding is the widespread perception that InsightCorp culture, insofar as it is decipherable through its overt artifacts (material resources, jargon, rituals, practices, norms, etc.) and explicitly espoused values, is tremendously difficult for a newcomer to learn. Part of this is undoubtedly related to the relative lack of artifacts--the visible and tangible structures and processes--at InsightCorp compared to a brick and mortar company. Because the company is virtual, it simply just does not have as much "stuff" that employees can see and interpret as being definitive of the corporate culture. There is no building. There are no uniforms or dress codes or cubicles. There is only one's personal office space that is never seen by another employee and a company-supplied computer that transmits what few tangible artifacts do exist, largely reducible to documents, spreadsheets and email messages. As a general summary, employees express a belief that InsightCorp culture, at least in terms of its physical artifacts, is underdeveloped because it simply does not have much with which an employee can interact.

Yet even if there is absolutely fewer artifacts at InsightCorp, the ones that the group does have speak volumes about InsightCorp culture. Group storehouses for documents and other electronic items are insufficient and underutilized. Commonly used spreadsheets and documents used to record project facts are seen as cumbersome and

largely useless. Group meetings are seen as repetitive and serving the questionable

informational needs of a select few at the expense of participants' valuable time. Emails,

the lifeline of company-wide communication, are a broad mix of vital messages and a

deluge of personally irrelevant yet resource consuming missives.

Espoused beliefs and values are another troublesome area. Employees who

participated in the focus groups had an even harder time listing overt statements of values

related to ideal company functioning. In the focus groups, only two overt values were

listed by any group members. The first is a catchphrase used routinely by the company

CEO (*Meet and Exceed Expectations*) and the second is a selling statement to potential

clients that summarizes the main rationale for buying in-store shopper insights work

(*Know Where the Purchase Decision is Made*). A couple other salient expressed policies

were uncovered. These include 1) ensure project profitability by staying within budget

and 2) err on the side of over-communication, particularly to superiors. A key problem

employees face is uncertainly as to how to best resolve the apparent conflict between the

mandate to exceed client expectations, which often requires accommodations outside of

budgeted specifications, and the mandate to protect profit margins. The company has no

formal mission statement and no other published description of its espoused beliefs

regarding the sourcing or treatment of its personnel. Combined with the limited number

of identified artifacts, what is revealed through the focus groups using Schein's method is

the perceived *absence of culture* at InsightCorp, particularly as it relates to internal

operations. Usage of Schein's (1991: 248) own conception of "strong" versus "weak"

cultures could lead this researcher to make the same conclusions:

> If there is no consensus or if there is conflict or if things are ambiguous, then, by
> definition, that group does not have a culture in regard to those things. The

concept of sharing or consensus is core to the definition, not something about which we have an empirical choice.

Admittedly, I cannot agree with Schein regarding an assessment of a culture as weak versus strong given my level of comfort with a concept of culture that allows for contestation and ambiguity. That disagreement aside, it is important to note that, at least one of the most influential thinkers on organizational culture in the management sciences would likely characterize the InsightCorp culture as weak, and consequently, problematic (Schein 1991).

The overt elements of "culture" as defined by Schein may be lacking in comparison to other work environments where physical manifestations of the corporate being are more numerous and corporate policies more explicitly outlined. However, there are a healthy number of implicit assumptions that, while never overtly stated, InsightCorp employees slowly come to understand and, for the most part, accept. These unstated assumptions contribute to a fairly cohesive description of what being an InsightCorp employee involves. These include: 1) work obligations supersede contractual limits on work time 2) the workday stretches beyond any 10 hour period in a U.S. time zone because employees and clients are located all across the country 3) personal time can be infringed upon if work demands necessitate ("necessary" variably defined by whomever does the infringing, and 4) for the most part, working at InsightCorp means "going it alone" and grappling with an unsettling reality that both team members as well as superiors are an unreliable source of the support that is necessary to accomplish the most successful projects

In summation, the corporate culture assessment using Schein and Cameron and Quinn's method grounded in a larger project of participant observation reveals a clear

need for intervention. It is an organization characterized most saliently by a decisive lack of agreement between senior management and employees about how the company is versus how it should be. The key contributing factor to the division is employees perception that management has failed to prioritize critical human development concerns in regard job clarity, training and mentoring, internal support, and respect for the individual particularly as it pertains to the work/home divide. At the same time, a relentless external focus on obtaining and maintaining business contributes to employee evaluation of the company and its leaders as inefficient, wasteful, and even foolish at times. And even as employees feel justified in these harsh critiques, they simultaneously participate in the very practices they condemn out of fear of losing their jobs. All of this contributes deleteriously to productivity, morale, and overall work quality. Meanwhile, key strengths that could be used to maximize employee well-being and productivity (e.g., employee appreciation for the flexibility and autonomy that a virtual workplace provides, the generally held conviction that most InsightCorp employees are hardworking and capable of good work, and employee receptivity to being a part of a small company stemming from a belief that a small company is less restricted in its operations by a larger, older, more bureaucratic firm and is ripe for the development of strong bonds between coworkers) are being underutilized.

My findings confirm many assertions made by researchers examining virtual work structures, whether that means telecommuting or virtually integrated but independent companies. The many difficulties enumerated by these authors (e.g., Harpaz (2002), Jones et al (2005) Fukuyama (1995); Handy (1995); Germain (2011); Schoemaker and Jonker, (2005), Fiol and O'Connor (2005); Robert et al (2009); DeRosa

and Lepsigner (2010) that are readily apparent at InsightCorp include underdeveloped organizational identification, lack of role clarity, ineffective meetings that encourage multi-tasking, generally poor quality human interactions, and difficulties in maintaining a work/life balance.

Further, my findings corroborate discussions in the literature connecting social support, or more complexly, social capital, to organizational identification. The felt lack of visible, tangible dimensions of a work culture do indeed seem to shift the burden of organizational identification almost completely to the interactions between members (Wisenfield et al 2001). The assertion that a cyclical process whereby individuals who feel valued, included, and respected as a product of perceived social support are motivated to identify with the organization and subsequently reciprocate so that others feel valued, included and respected (Luhtanen & Crocker, 1992; Dutton et al 1994; Dutton and Harquail 1994) is most is most apparent at InsightCorp as a kind of negative alternative to this process. Employees at InsightCorp feel undervalued, excluded, and disrespected. Feelings of identification with the organization itself are consequently tenuous and only sporadic efforts are made by individuals to connect with their coworkers in substantive ways.

Using the concepts present in the literature that speak to social capital (as opposed to simply perceived social support), InsightCorp can be characterized by lack of relational capital as defined by "the nature and quality of the relationships that have developed through a history of interaction which plays out in behavioral attributes such as trustworthiness, shared group norms, and identifications" (Nahapier and Ghoshal (1998). The introduction of social capital into the analysis is particularly useful because it

elucidates how the poor quality of the network of relationships between coworkers at InsightCorp contributes to poor work outcomes and employee attitudes. Sales members build proposals that either have unacceptable profit margins or saddle the research and operations teams with unrealistic specifications. Operations members construe themselves as residing in vacuum of information, unable to get from other departments the data they need to do their jobs and unable to effectively transmit the valuable information they know to research and sales. Research team members feel a lack of support from operations, from management, and from each other and routinely grapple with situations in which they feel their best quality work is not being produced for want of necessary resources. The lack of social capital, as the "'the aggregate of resources embedded in, available through and derived from the network of relationships," marks the lived experience of the InsightCorp employee (Inkpen and Tsang 2005:151)

On a related note, an analysis of working within a virtual organization routinely begs the question of how does that experience compare with working for a brick and mortar organization, and here the larger academic discussion surrounding virtual communities has some relevance. The focus groups as well as numerous informal communications that I've had with employees throughout my tenure at InsightCorp confirm that when working continually with others through virtual means, a sense of mutual belonging, sharing, and interdependency is lacking. Two critical areas in which this sense of community in an organizational culture show deficits mirrored the discussion of "real" versus "online" communities going two decades back in the literature are reciprocity and attachment. At InsightCorp, individuals show low motivation to help others in ways where obligations have not been codified, supporting assertions by

researchers of virtual communities (Kollack and Smith 1996; Rheingold 1993) that levels of attachment to a group must be strong enough to ensure that members feel compelled to provide assistance and to engage in generalized reciprocity where individuals act to aid others without the expectation that they will get something back from the person they are aiding.

And while the debate on whether online communities are real communities has moved on (particularly in light of the persistent, parallel debate on what defined a real community anyway) and authors in this space are now more focused on understanding the virtual environment as a unique social space, a debate comparing virtual organizations to brick and mortar organizations should not end so abruptly (and indeed it has hardly begun). A key reason for this is because virtual organizations are real business entities. The contracts that employees sign subject them to obligations that are, relative to those in virtual communities, legally mandatory. Virtual workers may operate with a degree of freedom from traditional categories of human identity construction such as gender, race, and sexuality insofar as these categories become less salient for everyday activities than when the observable components of these features are readily apparent. But the virtual worker (unlike the virtual community member (Savicki et al 1996; Shaw 1997; Burkhalter 1999) cannot enjoy too much experimentation with traditional identity norms. His/her behavior is subject to the same rules as traditional work environments, especially in regards to how he communicates with external clients and fellow employees.

Additionally, although face to face meetings are rare (at least in InsightCorp's case) they occur frequently enough such that individuals are subject to the same standards

of appearance that they would be if they worked in physical proximity to the rest of the organizational members. While hierarchical structures and power positioning can be subverted in many online communities (Davis and Harre 1990; Garton and Wellman 1995; Hiltz and Turoff 1993), a virtual organization like InsightCorp brings in new members at explicit levels in the hierarchy and reinforces that hierarchy each and every day. Researchers of online communities have touted the high degree of sociality that can be seen among virtual community members and suggested that person to person bonding can occur more frequently because individuals are likely to disclose more about themselves to a computer than to another person directly (Wallace 1999). At InsightCorp, however, there is the constant reminder that the person to whom you are communicating has a real identity in the real world that aligns completely with the virtual representation being shown to you through online interaction. Although infrequent, obligations requiring in-person interaction with coworkers and clients do arise, and one's real and the virtual persona must align in an acceptably professional way. Based on this research, I would argue that many of the unique attributes of online communities that are described by researchers in this field simply do not apply to virtual organizations and that researchers of virtual work and telecommuting are well served to be highly critical of romanticized notions of worker freedom in such environments.

The link between InsightCorp's virtual structure, however, and some of its key problems is readily apparent. Notably lacking at InsightCorp are policies and practices implemented with specific consideration given to the fact that InsightCorp is a virtual company. InsightCorp, for example, does not suffer from increased costs due to training to prepare worker and managers for the virtual environment, a negative cited in the

virtual organization literature because *it does not offer such training* (Harpaz 2002). It simply has not occurred to management to actively problematize the virtual environment when it devises solutions to any of its perceived problems. It is important that InsightCorp management understand that many of challenges the company faces are directly related to its virtual structure. These are problems experienced by other virtual organizations, there is a growing body of literature on best practices for virtual organizations, and no benefits from this information can be had unless the likely (but avoidable or at least mitigable) consequences of virtuality are recognized. I will return to this theme when I lay out my specific recommendations for the leaders of InsightCorp later in this chapter.

Research Objective Two: Virtual Organization Processes

Related to this first objective of this study to conduct a corporate culture assessment is objective two: to critically analyze the virtual nature of the organization, exploring various subtopics with an eye toward how they are distinct from traditional work environments. It was my goal to distinguish as clearly as possible findings that were related to the fact that InsightCorp is virtually organized from findings that are unique to this specific business entity, its employees, and its leaders. This distinction is not easily made and, in many ways, is artificial as there is constant interaction between the virtual component of the company and all other variables. However, the attempt to tease them out is vital. This distinction is important not only so that any recommendations for change take into account the source of any particular problem but also so that this research can make contributions to the existing body of academic knowledge and theory about virtual organizations. For the latter aim, my specific questions included: How are

roles defined and redefined through virtual interactions? How does on the job learning take place? How are employee performance, compliance, and general behavior monitored and evaluated? How are worker bodies controlled in a virtual situation? Is worker freedom amplified or hindered by virtual organization? How are the delineations between work and home made by employees and to what extent do these coincide or conflict with the expectations of their superiors? Many of these questions touch on topics that have already been discussed, but it is my intent in this section to elaborate on the processes by which some of the problems that have been identified at InsightCorp (and likely to occur at any similarly organized virtual entity) come about.

Learning in a Virtual Organization

Role definition and on the job learning are two issues that become apparent as problems almost as soon as an employee starts at InsightCorp. While each employee signs a contract that outlines many specific responsibilities associated with their job title, the detailed tasks that of which those responsibilities are composed have to be learned. The natural tendencies for humans to learn from watching others is thwarted by the virtual environment from the start. A virtual worker has limited opportunities for causal learning because face to face contact is minimized or absent. New employees seek out those who seem receptive to imparting information and often employ a strategy of requesting clarification or bits and pieces of information with frequent emails that soon begin to feel like an imposition as the realization of the heaviness of others' workloads becomes clear.

Learning opportunities for complex tasks often have to be more formally arranged through a planned conference call using screen sharing software, and newcomers

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frequently express extreme gratitude and guilt in even asking for these sessions. New

employees consistently ask about archives or electronic storage locations, hoping to find

a reservoir of project documents that they can use to fill out the gaps of what they need to

do. In sum, enculturation at a virtual company, if InsightCorp experiences are typical, is a

painfully lengthy process. Employees learn their roles and tasks very slowly, obtaining

information from distributed sources and generally feeling overwhelmed and confused. I

assert that the lack of face to face contact has tremendous deleterious impacts on

incoming employees as evidenced most clearly by the consistent feeling that one is

"new" to InsightCorp even after being with the company for over a year. In InsightCorp's

case, the palpable lack of formal training materials, structured apprentice relationships,

and unclear identification of who is responsible for ensuring that new employees know

what they need to know are also significant contributors to this phenomenon. However,

the main argument here is that a virtual environment is likely to deprive individuals of

causal, naturally occurring learning opportunities when the majority of person to person

interaction occurs through the stilted medium of email exchange. If culture is a process of

continual change and if a virtual environment does not have the same opportunities for

the sharing and testing of information between individuals that is more characteristics of

offices where coworkers mingle face to face, then mentoring and training in a virtual

environment is a task that requires inputs of energy that exceed that of traditional

working environments.

Control and Freedom in a Virtual Environment

Like on the job learning, if InsightCorp is typical of other virtual organizations,

the processes whereby worker bodies and outputs are monitored and directed, are

astonishingly decentralized. InsightCorp has no formal monitoring systems for measuring and timing employee outputs or ensuring that employees are working when they are supposed to work. Such measures are unnecessary. Workers in virtual settings will subject themselves to longer than contracted work hours and near constant vigilance for external communications when no express policies mandate they do so. Email as a primary means of communication produces a panopticon-like effect, in keeping with Foucualt's interpretation of Bentham's concept. Employees feel pressure to respond to each and every email promptly in an effort to demonstrate that they are, in fact, working. The assumption that one's labor is always being monitored and evaluated by email response time, even though no one can be sure they are really being monitored, is an immensely successful disciplinary mechanism (Foucault 1972; Brignall 2002). Employees will specifically request Smartphones so that they can have an active presence on evenings and weekends, ironically citing their personal need for freedom as justification. That is, a cell phone that connects you to work 24/7 is a tool of liberation. Employees will religiously check in during vacations, with each interaction whittling away at the demarcation between work time and vacation time so that they can stay "caught up."

What is at work here, plainly, is hegemony. Hegemony, as defined by Gramsci, who is most famously associated with the concept, is "a conception of the world that is implicitly manifest in art, in law, in economic activity and in all manifestations of individual and collective life." (Gramsci 1971:328). One well cited, more elaborated definition is "that order of signs and practices, relations and distinctions, images and epistemologies – drawn from a historically situated cultural field – that come to be taken-

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for-granted as the natural and received shape of the world and everything that inhabits it" (Comaroff and Comaroff 1991:23). I argue that at InsightCorp, and likely at other virtual organizations unless specific actions are taken by either management or employees to mitigate it, the idea that work concerns take priority over personal concerns is so pervasive that employees in a virtual company will unconsciously submit to this logic, voluntarily blurring the lines between their work and home lives.

As shown in chapter four, employees readily admit there are no policies in place that force one to be always available on evenings and weekends or on vacations. This is the power of hegemony, a system in which individuals take certain ideas for granted— ideas that ultimately serve those in positions of power. InsightCorp routinely benefits from the extraction of labor of its employees well beyond the stated 50 hours a week in any individual's contract. No overt policies to this effect have to be promulgated. In fact, the absence of policy (*Am I supposed to work Monday through Friday? Am I supposed to be available from 8 am to 5pm on the East Coast or from 7am to 7pm to accommodate both U.S coasts?*) produces sufficient ambiguity that employees are left to decide how to cope. They consistently err on the side of working more than they think they should. An operations person answering her Smartphone on a Saturday at 10:00 in the evening does not question whether she really has to attend to that call. An executive on "vacation" getting up at 3:00 in the morning to put in a five hour workday before her family wakes up does not even think about alternatives. If the practices at InsightCorp are typical, the control of worker bodies is not something that management need to be unduly concerned about. So long as individuals are tasked with the production of explicit deliverables, and the hours needed to complete these deliverables is information that management

accurately possesses, employees know that they cannot really "slack" at work--at least not too much or too often. They will soon be discovered by the quality and level of completion of the tasks they are assigned. And InsightCorp routinely assigns more tasks than one person can reasonably complete. So long as this condition is met, workers will take care to accomplish their own subjugation without further imposition of formalized supervision or policy. This is not to say that employees do not challenge or resist these hegemonic forces at times. As would be expected, InsightCorp employees universally support an ideology that separates home space from work space and these strongly held convictions sometimes butt up against the more insidious submission to the prioritization of work tasks above competing desires and demands. Sometimes we turn off the phone or pretend to not see an email that has come through. However, at InsightCorp at least, these moments are largely insufficient to challenge the system that ensures that an inordinate amount of labor is easy enough to extract from the virtual worker.

The above discussion is not intended to oversimplify how InsightCorp successfully extracts labor from its employees and controls their daily doings. This phenomenon is not reducible to the operation of mysterious superstructural forces above the consciousness of the everyday employee. There are practical reasons why employees attend to tasks while on vacation. That is, they feel like if they do not, an emergency situation will occur for that project. As any given employee is unlikely to have a comprehensive support structure in place for coverage, each arrives at the logical conclusion that if they do not do some work even when they have a right to be off, they will fail at some part of their job and consequently, their job may be at risk. These are valid concerns. Problems that have occurred when an employee was on vacation are still

blamed on that employee, even as management has sympathy for the difficult situation. The hegemonic part of the control apparatus at this virtual company is not that employees do not recognize that their superiors have not adequately developed a support structure that projects personal time. The hegemony is most salient in the acceptance that there is nothing anyone can do to totally alleviate the situation and employee acceptance certain infringements into their personal time are inevitable. The alternatives to demand full coverage or to "go completely dark" to work during personal time are generally not recognized as alternatives.

Research Objective Three: Comparing Methods of Investigating Organizational Culture

A final major objective of this research project was to compare traditional anthropological methods of cultural description within organizations and those more typically utilized by practicing professionals of corporate culture assessment by applying each of these methods to the assessment of InsightCorp's corporate culture. Specifically, I wanted to investigate: How does the data gathered through each method reveal a different picture of InsightCorp corporate culture; and, what are the relative contributions and disadvantages of each method as applied in the context of this virtual organization?

I chose three distinct methods for this study, two from the management sciences and a participant observer approach in the anthropological tradition. I chose Cameron and Quinn's Organizational Cultural Assessment Instrument because of its prevalence in the organizational culture literature and because it was a clear cut organizational typology with strong similarities to other prominent typologies. I also chose the instrument knowing that a "quantitative" tool, particularly one that had been used in the assessment

of thousands of companies, would likely bring a sort of legitimacy to my study in the eyes of the executives to whom I would ultimately be presenting recommendations

I chose Edgar Schein's approach to organizational culture assessment because his method seemed to me to represent a middle ground approach between organizational scientists and anthropologists in that he expressly recognizes the reductive nature of typologies for the understanding of an abstraction like culture and is critical of their exclusive reliance on employee perceptions to generate the cultural classification. At the same time, Schein (generally) shows a nuanced grasp of culture as a concept and is keenly focused on those elements of culture that operate outside the consciousness of individual members. I chose participant observation as method because, as an anthropologist, I am firmly committed to the idea that extended periods of field experience are crucial to obtaining kinds of nuanced data that reliance on only structured measures cannot provide.

All three methods, in this researcher's estimation, have yielded different, yet complementary findings. While admittedly skeptical of the utility of Cameron and Quinn's OCAI at first, I was impressed immediately as I began crunching the numbers and charting out individual and group plots. By breaking up the results into pre-existing categories (departmental division, gender, tenure, etc.) and by looking at the results across all of Cameron and Quinn's specific organizational dimensions, I gained confidence that, at least in broad strokes, there was a good deal of consensus about what was wrong and right about InsightCorp in the eyes of its employees. The deeper I looked into the data, the more I realized that the seemingly simple findings that InsightCorp was a culture marked by "too much market" and "too little clan" were surprisingly nuanced,

and I was able to identify clusters of individuals with distinct response patterns and look beyond the aggregate results. Because the authors have published the plots of portions of their sample, I was able to gain some degree of comparative perspective even though my study is limited to only this one group. The instrument was incredibly amenable to the virtual environment, easily administered and collected through a combination of email, faxes, and snail mail. None of the items in the instrument focused on tangible elements of a company culture that are largely nonexistent at a virtual company nor do any of the measures necessarily presume frequent face to face contact between employees. Moreover, it became immediately apparent to me, as I organized my own ethnographic findings that the OCAI provided a useful structural framework for treating more detailed themes.

The only critique I have of the method (and it is a serious critique) is that greatly oversimplifies InsightCorp culture. The instrument reduces a complex network of behaviors, values, and shared meanings and assumptions between an evolving group of individuals to four meta variables. The reality of the lived experience of being an InsightCorp employee is absolutely not reducible to a score on four components and, as such, the results, by themselves, surely cannot be held to accurately describe InsightCorp culture. The results provides nothing in the way of understanding why or how the culture came to be the way it is and it provides almost no detail as to what, in InsightCorp's case, "too little clan" or "too much market" really mean. In sum, the reductiveness of the insights made possible by the use of the OCAI is both its greatest strength and its greatest weakness. It provides a simple, clear, and accurate view of what is going, but this view is undetailed and not particularly usable in the absence of additional data detail.

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The use of Schein's tripartite focus group approach provided some of this needed detail. I also found this method to be quite productive. First, the reliance on focus groups was particularly appropriate in my situation. A method that was not at all employed during this research was semi-structured interviewing. I chose not to formally interview each and every employee to obtain individual perspectives on the organizational culture at InsightCorp largely because I felt my position in the company, specifically my seniority as a mid-level executive, would be a barrier to obtaining truthful responses to open ended interview queries. The focus group method, in my particular case, allowed (at least it seemed to me) individuals to feel more comfortable expressing their thoughts, bolstered as others expressed their opinions. Like all focus groups, respondents were shy at first. Schein's methodology has an almost built in ice breaker in that it starts off the line of questioning by asking employees to numerate artifacts, a task that is cognitively much simpler (and less threatening) than listing out its espoused values. This focus group approach was perhaps not ideal in a virtual organization in that, admittedly, at least relative to a brick and mortar firm, a virtual company does not have as many physical artifacts and observable behaviors, and some respondents seemed to have difficulty overcoming this fact. Overall, I would also say that the Schein's concept of identifying "underlying shared assumptions" is challenging for people, even as they are supposed to reveal themselves through contradictions between behavioral artifacts and espoused values. The process is not seamless to be sure, and admittedly my limited experience as a moderator (and complete and total lack of experience in performing Schein's method) could have played a role. This also makes it more difficult for me to thoroughly challenge Schein's specific method. However, regardless of whether or not the method was

executed expertly, the focus groups did provide respondents with a neutral way to first describe processes and policies at InsightCorp (or lack thereof) which led naturally to respondents offering their own valuations and judgments on those policies. Given that this corporate culture assessment was problem focused, I did want to be sure that employees provided clear opinions about the aspects of InsightCorp that needed improvement for both morale and productivity purposes. While Schein's method is not overtly problem-focused, it is set up in such a way that a thorough discussion of issues evolves without undue force on the part of the moderator.

The limitations of Schein's method in some ways mirror those of the OCAI. Schein's approach, while a more expansive definition of culture, is still very much a reduction of culture into three discrete categories It attempts to deeply treat all aspects of an organizational culture, even if they are operationalized into three domains, with a few hours of focus group discussion. The likelihood that the method can do all it purports to do in such a limited amount of time defies an anthropological understanding of culture as a complex process embedded in context.

As an anthropologist, I have learned through my graduate training to advocate for prolonged periods of participatory fieldwork when possible and applicable to a given set of research objectives. The productive benefits of participant observation are well cited by anthropologists and readily apparent (I hope) in this dissertation. First, participant observation is the primary reason why I have acquired the access to InsightCorp that would allow me to implement the other two methodologies just covered. As discussed in chapter two, one of the primary difficulties in "studying up" is obtaining access to a field site and a wide variety of respondents. I can say with assurance that my experience at

InsightCorp, as I have moved up the corporate ladder, has given me wide access at various levels, and I have been restricted only from the highest level meetings between the CEO and President (most notably meetings that cover finance issues). I have, through this process, reduced reactivity among my informants and been able to formulate and refine my research aims over time--testing and refining my hypotheses and interpretations along the process. Most importantly, I have truly benefitted from the firsthand experience of being a virtual worker and can speak with confidence about what it means to be an employee of InsightCorp specifically and at a virtual organization same generally and better comprehend what my informants tell me because we share those experiences.

Further, this methodological approach is ideal for research in a virtual setting. When a research site entails a near absence of physical contact with one's informants, knowledge discovery feels very much like groping around in the dark as bits and pieces of information come to me at intervals through cyberspace. When it comes to a virtual company, I question whether any corporate culture assessment could be done in the absence of at least some degree of a somewhat prolonged and truly participatory observational period. I would predict that any investigator looking to do observation alone in a virtual organizational setting would find herself stricken from email chains both purposefully and haphazardly and would have difficulty even identifying what she was not able to witness. Without an active role in the organization, certainly insight into the lived experience of being a virtual business worker would be impossible (or at least very difficult) to attain and the contextual data required to flesh out any other methodologies employed would be superficial.

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At the same time, participant observation, just like the OCAI or Schein's approach, is not a method that can stand on its own for corporate culture assessment. I have been lucky to have been granted such relatively unrestricted access to my field site but I would not think my experience typical. I came aboard the company at a time when the it was just only beginning to expand and the opportunities to cross departments and move up were easier to take advantage of than they are now. And as broad as my access is, I still do not see everything there is to see at InsightCorp. I am limited to the email chains I am privy to and my interaction with some departments (such as research and sales) is heavier than my interaction with others (such as operations).

Moreover, the intensive nature of my participant observation presented considerable obstacles in my goal to stay objective about what I was seeing. It is not my goal here to get involved in a discussion about problematizing objectivity. I will state plainly my belief that objectivity is an idealized state to which an anthropologist can only aspire. But an anthropologist can aspire to it and make every effort to try to understand what she is seeing not only from the perspective of her informants but from the perspective of an outsider better equipped to dispassionately evaluate her data. This is not to denigrate the value of my own experience. It is vital, but, after five years as a full time employee, there have been many occasions when I was tired, frustrated, embarrassed, livid, elated, etc. I have seriously considered resigning on more than one occasion and there have been times when I was so engrossed in what I was doing for my job that I have lost sight of my position as an outsider. While I have worked hard to fight against the pull of going "native" (keeping my field notes religiously, talking to people outside the company about my experiences, taking breaks from my job during fielding (including

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two maternity leaves and the sabbatical I took to write this dissertation), the deep

involvement that comes with such a prolonged period of ethnographic fieldwork

(admittedly, perhaps too long) is a methodological and analytical challenge that cannot be

ignored. I will return to a discussion of these challenges and the integration of my

methods in the section in next chapter on my research limitations and we contributions to

anthropological theory, applied anthropology, and the management sciences.

Summary

This chapter has provided a summary discussion of the results obtained through

three distinct methodologies (participant observation, focus groups, and a structured

survey instrument) in an attempt to perform a corporate culture assessment on a specific

virtual organization. In addition to the pragmatic, applied goal of describing the culture of

InsightCorp with an orientation towards identifying issues impacting employee attitudes

and morale, this discussion also serves the larger goals of highlighting key themes that

may be generalizable to other virtual business organizations and virtual employees as

well as examining the contributions of different methodological approaches to the study

of organizational culture in a virtual setting.

Chapter Seven

Recommendations and Conclusions

Introduction

This research contributes to Anthropology through an explication of the link

between organizational culture and employees' attitudes and behaviors related to their

work, their managers, their coworkers, and the organization itself. As detailed in the

preceding chapter, this project has generated findings that both validate and enhance the

existing literature on this issue as it specifically applies to virtual organizational culture. I

found that when serious discrepancies exist between how employees perceive and prefer

their company culture to be, an organization is likely to face considerable challenges to

worker satisfaction, retention, and performance (Schein 1991; Cameron and Quinn 2011).

My research corroborates many of the negative outcomes to employees associated with

remote work (Harpaz 2002). I have shown how the weak physical ties between virtual

employees must be counteracted by strong virtual ones lest organizational identification

and reciprocity between coworkers be hindered (Weisenfeld et al 2001; Davenport and

Daellenback 2011). While these ideas were present in the literature already, I uniquely

show how the weak social capital that may characterize the relationships between virtual

co-workers is exacerbated when a lack of formal managerial policy regarding working

hours results in employees passively accepting the prioritization of work concerns over

personal ones. In this final concluding chapter, I will also more broadly summarize the

contributions of this research to Applied Anthropology and anthropological theory and

method, discuss some limitation of the research, suggest directions for future research, and provide recommendations for change to the sponsoring agency.

Contributions to Applied Anthropology and Anthropological Theory and Method

This research has served to validate in detail a theme that is present but not central in the literature on remote work, i.e., virtual employees are at considerable risk of having to negotiate work environments in which human development concerns are deprioritized as simple consequence of the geographic distribution of organizational members. The combination of methodological approaches from Anthropology and the management sciences used here is rare, if not novel, and the reliance on extended participant observation to produce empirical data about the lived experience of working for a virtual company is unique. Research on organizational culture has been at a point of stagnation in Anthropology now for more than a decade—when once it appeared to be a bourgeoning area for the discipline, ripe for our contribution of a holistic understanding of culture. It is my hope that this dissertation, and other research of this type, helps re-engage the anthropological conversation on organizational culture.

The specific contribution of this work to the field of Applied Anthropology, is as a thorough case study of an organizational culture, and specifically an understudied type of organizational culture that is new product of the age of globalization, (a virtual organization). I hope that my extensive period of participant observation, combined with methods borrowed from the management sciences, has produced an elaborated description of what it is really like to work for this organization, one that has experienced a great deal of employee attrition and continues to struggle currently to achieve the appropriate procedures and personnel to achieve its aims of becoming a respected and

profitable global market research firm. Moreover, I have offered several recommendations for management to consider as it moves to address some of the problems uncovered through this research, while capitalizing on its many existing strengths. This study is a contribution to anthropological case studies of organizational culture and virtual organizations and an anthropological corporate culture assessment.

At a theoretical level, this study contributes to anthropological understandings of workplace interactions, specifically those of a virtual workplace. It supports theoretical assertions about the importance of social capital in the identification of employees with the organization employing them and contributes new evidence showing how workers willfully participate in their own exploitation in a virtual context where boundaries of time and space are blurred, particularly in an environment where policies are intentionally left vague. It provides data showing that, in spite of the ease with which virtual companies can now be formed,, the challenges to instilling in employees the sense that they belong to something larger than themselves are many. It affirms, as discussed by researchers of online communities, the important link between individual attachment to an organization and generalized reciprocity among co-workers. It has also shown that virtual organizations, because of their more salient links to the "real world," do not allow for the kinds of freedoms and flexibility in regards to personal identity that uniquely characterize virtual communities.

However, one of the most critical contributions of this research is that is as an example of a mixed methodological approach that attempts to link the best of what divergent disciplines have to offer. I have already enumerated what each of the three main methodological approaches has contributed to my body of data and my analysis.

But what I have not yet discussed is how effective the combination of these methodologies were in providing complementary pieces of information and, more importantly, different ways of understanding the same phenomenon. The OCAI, as simplistic a representation of culture as it may be, provided an parsimonious, quantified picture of InsightCorp culture, one that was useful as a basic framework upon which the more nuanced contributions of the other methodologies could be built. Schein's focus group methodology efficiently revealed not only the overt values, behaviors and beliefs of InsightCorp employees, but also the much more subtle underlying, unarticulated assumptions that are hugely descriptive of the organization. My participant observation allowed me to situate all this in the historical context of InsightCorp's evolution during my tenure and provided detail that is incomparable in its richness to the other two methodologies. Further, it enabled me to live as a virtual worker, better equipping me to interpret the data I gathered from my respondents. Taken together, the three methodologies allowed me to check my own ethnographic interpretations against independent data sources, helping me identify what perspectives I share with others and what are uniquely my own. Both are valid points of data, but it is important to me to be able to confidently assess if my singular observations represent unique, usable insights or if they should be examined in a flexible manner as evidence of personal bias. After having gone through the experience of collecting and analyzing my data, I am an even stronger advocate for mixed methodological approaches, particularly those that combine traditionally anthropological approaches with those from other disciplines.

It is not common for anthropologists to express such a high opinion of the tools that the management sciences have to offer. In a classic anthropological text on

organizational culture, Susan Wright (1994:4) laments how researchers and practitioners outside the discipline have corrupted anthropology's central concept: "culture has turned from something an organization *is* into something an organization *has*, and from being a process embedded in context to an objectified tool of management control." I argue that statements of this type are inaccurate simplifications of the way organizational scientists understand the culture concept. Consider a discussion of organizational culture by Cameron and Quinn (2011:36) just prior to their explication of their Competing Values Framework:

> Organizational culture is extremely broad and inclusive in scope. It comprises a complex, interrelated, comprehensive, and ambiguous set of factors. Consequently, we can never include very relevant factor in diagnosing and assessing organizational culture. One more element can always be argued to be relevant. To determine the most important dimensions on which to focus, therefore, it is important to use an underlying framework—a theoretical foundation that can narrow and focus the search for key cultural dimensions. No one framework is comprehensive, of course, and no one framework can be argued to be right while others are wrong. Rather, the most appropriate frameworks should be based on empirical evidence and should capture accurately the reality being described (in other words, it should be valid).

These are not authors who are operating under a delusion that culture is less complex or comprehensive that it really is. Rather, they are practitioners who are prioritizing problem solving and cross-organizational comparisons. They accept the information loss that comes when abstract concepts are operationalized. They are intent on developing theoretical frameworks that necessarily reduce the culture concept, but in a way that increases one's ability to claim that the resulting data accurately (but never totally) describe the phenomenon that is being described. Anthropologists do not make themselves more relevant to the academic discussion on organizational culture by privileging our ability to challenge other disciplinary perspectives on culture above our ability to

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contribute knowledge of cross-organizational cultural patterns. We do not help ourselves by ignoring the potential contributions that empirically based typologies can make to our own studies of organizational culture, particularly when those typologies are so easy to administer in the field as a supplement to a more holistic ethnographic approach. Given that most applied research projects related to solving problems in corporate settings do not generally allow for a year or more of participant observation, it behooves anthropologists to add to their toolkits methodologies that can help guide and corroborate a rapid ethnographic assessment.

Recommendations for Sponsoring Agency

I will return to the principal applied objective of this research project, that is, to provide recommendations for change to the sponsoring agency upon which I conducted a corporate cultural assessment. I strongly assert that InsightCorp, insofar as its employee morale and productivity are concerned, could benefit from intervention. While these recommendations are intended for a specific audience, they might also be of interest to practitioners or researchers working for or with other virtual organizations.

Recommendation One: Hear Your Employees

Recently, I spent an evening with my CEO while we both awaited delayed flights at Chicago O'Hare airport, having just completed an in person meeting with a client on a project we were working on together. He asked me how my research was going and I took the opportunity to present him some initial results from the OCAI inventory. When I pointed out the large clan and market gaps perceived by his employees, he asked to see his own plot. I obliged, showed it to him, and interpreted it for him as I have done in chapter four. He seemed pleased with his own plot and the fact that he had "got it right"

in that he saw the company as his employees saw it. When I asked him to interpret why his employees showed large gaps between what they saw and what they preferred whereas he did not, he politely trivialized their reaction claiming that he was "focused on building the foundation" while the rest of us were thinking more about "decorating the house." In other words, on the hierarchy of priorities, assuring profits and stability comes before (and is unrelated to) meeting employees' interpersonal needs. This is not to say he was wholly insensitive to the data. He suggested that I should re-do the survey in a few months' time. He felt that his attendance on weekly conference call held by a recently established committee, put together with the goal to improve processes, efficiencies, and profit margins of qualitative projects, might improve matters. Having firsthand knowledge from committee participants (who are mostly junior research and operations staff) that these meetings were regarded as perhaps even more painful than some of the standing InsightCorp team meetings I have already described,, I knew that they were only further cementing the status quo. The fact that the CEO felt that his participation on this one meeting, however, might be enough to reverse the trends I was showing, is telling.

One critical result from the OCAI plots was the clear demonstration that the two chief executives of the company ultimately do not see InsightCorp culture the same way as do the bulk of the employees do nor do they share similar preferences for the company culture in general. It is imperative if the executives wish to enact changes to the company culture to bolster employee satisfaction and productivity that they take the time to try to understand the company as their employees do, a task that might not be so easy given how very different these perspectives are. The alternative would be to start fresh with all new employees who show some indication that they are more inclined to think as do the

chief executives.. However, the general link between clan environments and higher

employee satisfaction is clearly demonstrated in the literature (e.g. Cameron and

Freeman1991; Quinn and Spreitzer 1991; Zammuto and Krakower 1991a; Nystrom

1993;Goodman, Zammuto, and Gifford 2001; Lund 2003; Zazzali et al. 2007). As such,

locating employees who can tolerate low clan work cultures would present a significant

challenge. Consequently, I urge the sponsor of this research to take these findings

seriously.

Recommendation Two: Use Email as a Critical Business Tool

The findings of this research suggest that email, as the principal source of

communication at InsightCorp and as currently utilized in the company, is a hindrance to

worker productivity and efficiency as well as to employee esteem for company leaders. I

am not advocating stopping using email as a main mode of communication—that would

be impractical and silly. Email is a highly effective way to transmit information between

employees in many instances. However, I assert that InsightCorp employees are suffering

from "email overload" defined as "the situation where possible business disruption due to

email use may significantly harm the well- being of users and impair their productivity"

(Sumecki et all 2011: 408). This phenomenon is one that is thoroughly established in the

management sciences literature. Interventions typically include implementing

organizational guidelines for reducing email clutter, introducing technological tools to

help employees manage email, and providing behavioral training for employees on email

management (Dabbish & Kraut, 2006; Ducheneaut & Bellotti, 2001; Ingham, 2003;

Schuff et al.). A recent study by Sumecki et al's (2011) demonstrates the link between

email overload and the failure of organizations to implement protocols and establish an

email culture that clarifies how and when email should be used and, through this process, firmly establish email to be a business critical tool. While InsightCorp should consider any tools and training that can help individuals manage their inboxes, the clearest starting point for alleviating the problem is to critically assess how email is used at InsightCorp. The company's leaders must ask the question of what messages are going to whom and for what purpose and determine which information truly needs to be shared and what does not. Beyond a general value of "overcommunication is better than under," InsightCorp needs to better define and manage the use of email for the purposes of group communication.

Recommendation Three: Implement a VPN (Virtual Private Network)

One way email traffic could be reduced would be through the implementation of a virtual private network at InsightCorp, that is, the use of a secured, remote computer network which all employees would access. Not only would a VPN enhance the security with which sensitive documents are shared, but it would allow for a readily accessible, virtually automatically shared storehouse for InsightCorp documents that are produced by individuals in specific departments for use by individuals in other departments. A significant financial investment would need to be made and effort exerted to establish policies and practices for use of the VPN, but I feel that the overall enhanced security and communicative efficiency are considerable returns. I would hypothesize as well that the use of such a shared network would enhance a collective sense of "we-ness" at InsightCorp and do much to help eliminate employee perceptions of the company as disorganized and inefficient.

Recommendation Four: Seek Professional Guidance for Company Structural

Modifications

Project team structures at InsightCorp are failing in three key ways 1) within

departments, employees do not have a dependable source of backup support needed to

complete project tasks effectively and efficiently and to enjoy earned time off 2) between

departments, communication breakdowns are frequent and each has a tendency to view

the other as uncooperative and 3) junior level employees receive insufficient supervision

and mentoring from mangers. I do not pretend to be an expert on best practices on

organizational structures, and I am unqualified to proscribe for InsightCorp ideal

company and project team structures. However, I will assert the need for some

professional guidance on this matter, and InsightCorp should to seek out the help of

organizational development consultants in further defining the issues that have been

identified during this research and recommending alternative approaches. While I will not

make such specific recommendations, my data suggests a few ideas for consideration:

1. Instead of teams being defined on a project by project basis, I suggest that stable

   teams of employees on the research and operations sides be formed to handle

   incoming projects. The current staff at InsightCorp could be divided into possibly

   two or three such teams. Teams should meet by conference call once or twice

   weekly to discuss both research and operations issues, and to outline all pending

   tasks and collectively designate responsibilities on all projects to better ensure

   cross functional communication and understanding of current challenges. Teams

   can identify one person to handle client communications for each project to avoid

   confusion, but all team members should be well versed in the details of every

project (in their assigned domain of research and operations). This ensures true coverage in the event of days off and vacations, and team members will work collectively to determine and seek approval for planned time off. It further ensures optimum flexibility for dealing with unanticipated client follow ups or unforeseen complications that require more time that expect to be allotted to specific tasks. Having more than one working member of each department intimately connected to project details on a full time basis allows for maximum individual flexibility in an environment of team support.

2. In addition to two established research and operations members on each team, inexpensive, junior level hires should be made in research and operations for each team. These individuals will be full time, hired for entry level positions, and need only to have just completed their bachelor's or Master's degrees in related fields.. Senior research and operations members will be responsible for their training and development along the way through the practice of running a project. Ideally, these individuals are promoted to senior team members in time and new teams formed as the company expands. But their main purpose be to provide consistent stable support and a prolonged training period for individuals joining InsightCorp.

3. Executive senior management's place in this system requires evaluation on return of investments. Currently, senior executives in operations and research are tasked with executive responsibilities outside the domain of project execution (such as sales and accounting) such that oversight and development of sold projects and junior staff become secondary priorities, and projects and personnel are neglected. With up to four senior executives assigned (typically three and minimally two)

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on each project, there is an excessive amount of (largely absentee) senior leadership on each project. Consider specialization of senior executives into specific domains (sales or project management and oversight or human resource development) to focus senior attention on individually prioritized task domains to enhance performance as well as to improve sightlines on executive accountability. These executives can also more easily be tasked with non-project related special tasks within their assigned domains (such as development of training materials and new policy or evaluation guidelines) as these new tasks will be viewed as highly pertinent to their area of specialty.

Recommendation Five: Restructure Team Calls

Team calls at InsightCorp, as they are currently structured, are not a good use of individuals' time and generally contribute to weaker feelings of attachment over time as the repetitious nature of seemingly unproductive events are construed as meaningless ritual. The information that is gathered on the Operations Call may be more efficiently maintained through an electronic update from each project director, providing research and operations team members extra time to meet with each other about the specific projects they are working on together. The Revenue Call should be held biweekly or substituted by shorter, individual meetings between the CEO, the president, and each client service executive team member. In either case, the meeting should be stripped of all topics that do not impact the group (such as travel schedule discussions) and extraneous proposals that are not active should be removed from the project topic list.

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Recommendation Six: Show Executive Level Support for Non Work-Related Employee

Interaction

The connection between developing organizational identification and trust and quality work and non-work interaction between employees is clear. InsightCorp employees desire interaction that helps them see their coworkers as people. Management's failure to participate in the few non work interactive events in InsightCorp's history have reflected poorly on them and represent missed opportunities to more firmly establish outward signs of group work culture. Not only should management participate when these events arise naturally, but they should directly encourage these kinds of activities on occasion to relieve employee stress and create a friendlier environment. A few ideas include:

1. Periodically ask employees to circulate photos to the group on specific themes, for example, a photo of themselves in typical work wear (even if that means pajamas), a photo of their office, a photo of their spouse, kids, or pets, a photo of their lunch, etc. One person can be in charge of receiving and organizing all photos into a single document for distribution among all employees and storage on a shared, accessible web space.

2. Have occasionally fun contests that employees can opt to participate in. The Halloween pumpkin carving contest is a good example, but other ideas include recipe contests, best mother's day gift ideas, ugliest coffee mug, or even workplace trivia contests.

3. Organize an employee "fun" committee, rotating members and placing this committee (which should include rotating members of management) in charge of coming up with the next group activity.

Recommendation Seven: Make Policies Explicit and Transparent

A major finding of this study is that the result of InsightCorp's practice of not defining policies, especially those that pertain to how employees need to manage their hours and availability, is that employees will typically will overextend themselves, leading to resentment and attrition of good workers and retention of burned out ones. While in the short run, InsightCorp is getting "more than it pays for" out of its employees, in the long run, the loss of workers in whom much has been invested and the constant deficit of senior level research and operations staff who are familiar with the job and deft at InsightCorp specific tasks is costly both monetarily and psychologically. While I cannot necessarily recommend exactly what the policies should be, I will list out a few of the tough questions that InsightCorp management needs to answer for the sake of its employees. The exercise of having to directly address these issues is a productive one, even minimally, in forcing InsightCorp leaders to actively think about how they would ultimately like to describe their corporate culture.

1. If an employee routinely works more than the contracted 50 hours per week, what system needs to be put in place to ensure that employees are either compensated for that work time or reimbursed with additional time off?

2. How many days a week are employees expected to be available by phone and email? If an employee is required to be available on weekends, how should their weekday hours be reduced to compensate for the overage?

3. Monday through Friday, between what hours should employees be working across all U.S. time zones?

4. If employees are entitled to time off, what systems are in place to ensure that project tasks can be handed off to a responsible party and retain client comfort and confidence in the project team?

Limitations and Directions for Future Research

The limitations of the present study are several. First, it is a study that suggests patterns that may be generalizable to other virtually organized business entities but only provides empirical data from one such company. Secondly, while my period of participant observation was extensive, my interpretations of InsightCorp culture are impacted and limited by the particular positions I have held within the company. As already stated, I have had more access to members of the sales and research teams, relative to the operations team and the small, administrative team. My own experience as a member of the research team, the department where InsightCorp has suffered the most attrition over the years, has certainly produced some degree of bias in my own interpretations, which I have struggled over the years to mitigate. Further, this study has an explicit focus on employee attitudes toward and perceptions of the company, and I have targeted my cultural change agenda (as delineated in my recommendations for change to the sponsoring agency) to this domain. I have not attempted to do a thorough financial analysis of company operations or profitability, and I have not sought to

understand InsightCorp's advantages or disadvantages relative to its competitors in regards to its product offerings. Ideally, a description of an organization's culture and recommendations for changing it would be more inclusive of these contextual factors that situate the company within its market and impact its overall success.

That being said, my focus on employee attitudes for this study was purposeful, given both my research interests and the limitations on my research imposed by the sponsoring agency. More empirical studies of virtual business organizations, particularly those that employ participant observation as a key methodology, are needed to contribute to a multidisciplinary understanding of this kind of work arrangement and its impacts on employees. While broadly focused ethnographic studies such as this one help fill that gap and provide usable accounts of the lived experience of being a virtual worker, more focused studies on priority issues related to worker rights should be of key concern for applied researchers. The blurred boundaries of the home-work divide that characterize the experience of virtual workers have potential legal ramifications as well as societal implications as communicative technologies allow for the encroachment of work time onto personal time in unprecedented ways. Given the ease and speed with which virtual work arrangements can be formed, it is likely that many small business entrepreneurs who build new virtual companies will be unaware of the risks that a virtual company is likely to bring. It is important not only that research on this topic be done, but that it be publicized both to help optimize virtual business performance, ensure sufficient legal oversight over virtual work, and encourage employee awareness of their own rights as virtual workers.

Summary

This dissertation has presented the analysis and discussion of data obtained in the process of conducting a corporate cultural assessment on a rarely studied business entity in the cross disciplinary literature on organizational culture, a completely virtually organized firm. I provide a number of empirically based recommendations to the sponsors of the research for addressing problems that relate directly to worker morale and performance and which, consequently, impact the company's overall potential for success. Some of these problems are unique to this particular company and are of interest only to the sponsoring agency. Other issues that have been identified here, such as weak organizational identification among employees, loose networks of social capital between co-workers, employee training and nurturing deficits, email overload and its impact on productivity and employee regard for organizational leaders, and the encroachment of work on personal time, are problems likely to be encountered by members of other virtual work organizations. As such, my findings should be of interest to applied researchers who also study these fast-growing types of work arrangements. This study also combines standardized methodological approaches from the management sciences with intensive participant observation to show how reductive but useful typologies can be complemented by a more holistic approach intent on uncovering the lived experience of virtual work.

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Appendix One

Permission to Use Previously Published Material

Appendix Two

Institutional Review Board Approval

USF
UNIVERSITY OF
SOUTH FLORIDA

DIVISION OF RESEARCH INTEGRITY AND COMPLIANC
Institutional Review Boards, FWA No. 0000166
12901 Bruce B. Downs Blvd., MDC035 ● Tampa, FL 33612-479
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February 22, 2012

Jennifer Avery
Anthropology
5042 Sunridge Palms Drive
Tampa, FL 33617

RE: **Expedited Approval** for Continuing Review
     IRB#: Pro00002569
     Title: Assessing the Corporate Culture of a Virtual Organization: A Case Study of a
Virtually Organized Market Research Firm

Study Approval Period: 3/11/2012 to 3/11/2013

Dear Ms. Avery,

On 2/22/2012 the Institutional Review Board (IRB) reviewed and **APPROVED** the above
protocol **for the period indicated above**. It was the determination of the IRB that your study
qualified for expedited review based on the federal expedited category number:

(8) Continuing review of research previously approved by the convened IRB as follows:(a)
where (i) the research is permanently closed to the enrollment of new subjects; (ii) all subjects
have completed all research-related interventions; and (iii) the research remains active only for
long-term follow-up of subjects; or (b) where no subjects have been enrolled and no additional
risks have been identified; or (c) where the remaining research activities are limited to data
analysis.

Protocol Document(s):
Avery, Jennifer Revised Proposal 2 28 11.docx

We are aware that you had used an unwatermarked version of the valid consent form to consent
subjects. This was determined to be not serious, non-continuing non-compliance, with no further
action needed. Please refer to USF HRPP policy #601 which addresses the need to only use
valid, USF IRB watermarked consent forms.

Please reference the above IRB protocol number in all correspondence regarding this
protocol with the IRB or the Division of Research Integrity and Compliance. It is your
responsibility to conduct this study in accordance with IRB policies and procedures and as
approved by the IRB.