

## **Studying Actions in Context:**

### **A Qualitative Shadowing Method for Organisational Research**

**Seonaidh McDonald**

Aberdeen Business School  
The Robert Gordon University

Kaim House  
Garthdee Road

Aberdeen  
AB10 7QE

Tel: +44 (0)1224 263896

Fax: +44(0)1224 263870

[s.mcdonald@rgu.ac.uk](mailto:s.mcdonald@rgu.ac.uk)

#### **Biographical Note:**

Seonaidh McDonald is a Senior Research Fellow at Aberdeen Business School. Her research work covers two main fields, organisational learning, innovation and change and environmental management. Both of these areas consider the problems of how to achieve different kinds of change at an individual level, and both are studied through the use of qualitative methods.

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### **Abstract**

Shadowing is a qualitative research technique that has seldom been used and rarely been discussed critically in the social science literature. This paper has pulled together all of the studies using shadowing as a research method and through reviewing these studies has developed a threefold classification of different modes of shadowing. This work provides a basis for a qualitative shadowing method to be defined, and its potential for a distinctive contribution to organisational research to be discussed, for the first time.

**Key words:** shadowing, organisational research, literature review

## **Introduction**

This paper is concerned with a qualitative shadowing technique developed and used to great effect in the study of team leaders in a high technology organisation. The technique was developed to uncover not just the shape of a team leader's day in terms of the actions performed, but also reveal the subtleties of perspective and purpose shaping those actions in the real time context of an organisation. Rather than report the results of that study, this paper will consider the method itself.

Although shadowing has been used in some of the classic management studies (Mintzberg, 1970; Walker et al, 1956), it is not often used in modern management research (notable exceptions are Perlow (1998, 1999) and Bonazzi (1998)). When it is used, it is neither discussed as a distinct research method nor examined methodologically. As a result, the term shadowing has been used to describe a whole range of techniques and approaches.

Despite the fact that various shadowing techniques have been used across the social sciences, as shown in the extensive review presented below, it has never been described or debated in the research methods literature. This paper represents the beginning of a formal and critical discussion about qualitative shadowing which will serve to highlight its kinship with, and methodological differences from, techniques reported in earlier work.

This paper therefore has a dual purpose: Firstly it will set out formally for the first time a shadowing method for use in the qualitative study of individuals in the context of their organisations. This is done with the aim of increasing the awareness and use of this method in organisational research. Secondly, this paper will review the social

science literature, bringing together a whole range of different approaches to shadowing so that their practical and methodological differences can be made clear. This will help to illustrate the significant implications inherent in the research design choices made by researchers selecting different shadowing modes and introduce an explicit debate about the purposes and outcomes of different forms of shadowing into the literature. This kind of critical discussion will allow shadowing to be considered as a well-defined and effective research technique with its own unique and significant contribution to make to organisational research.

### **What is shadowing?**

Shadowing is a research technique which involves a researcher closely following a member of an organisation over an extended period of time. When the person being shadowed goes to another department, the researcher follows them. When they have a project meeting or meet with a customer, the researcher sits in. If they have coffee with friends who are colleagues from another site, the researcher goes too. The researcher 'shadows' the target individual from the moment they begin their working day until they leave for home. This can include hours of stationary observation whilst the person being shadowed writes at his or her desk, running between buildings for a series of meetings or attending dinners held for clients. Shadowing activity will be as various and complex as the job of the individual the shadower is investigating. Shadowing can be done over consecutive or non consecutive days for anything from a single day or shift, up to a whole month. Studies can be focused on a single role (such as new recruit or purchasing manager) in several companies or on a number of roles within the same company.

Throughout the shadowing period the researcher asks questions which will prompt a running commentary from the person being shadowed. Some of the questions will be for clarification, such as what was being said on the other end of a phone call, or what a departmental joke means. Other questions will be intended to reveal purpose, such as why a particular line of argument was pursued in a meeting, or what the current operational priorities are.

During the shadowing the researcher will write an almost continuous set of field notes. They will record participants in, and times and contents of, conversations. They will write down the answers to the questions they ask and as much of the running commentary as is possible. They will note the body language and moods of the person they are shadowing. At the end of the shadowing period the researcher will have a rich, dense and comprehensive data set which gives a detailed, first hand and multidimensional picture of the role, approach, philosophy and tasks of the person being studied. These data can then be analysed in the same way as any other qualitative data.

## **Contribution of shadowing**

Shadowing has the potential to make a distinctive contribution to organisational research because it differs from more traditional forms of qualitative research in two key ways. The first characteristic that distinguishes shadowing is the level of analysis. Shadowing data are more detailed than data gathered through many other approaches. Coupled with the fact that shadowing research does not rely on an individual's account of their role in an organisation, but views it directly means that shadowing can produce the sort of first-hand, detailed data that gives the

organisational researcher access to both the trivial or mundane and the difficult to articulate. These aspects of organisational life are the hardest to research and shadowing can make an important contribution in this respect.

The other feature of shadowing that gives it the potential to extend the ways in which organisations are researched is the unit of analysis. Concentrating on an individual or a series of individuals, in an organisation is not in itself an approach which is different for qualitative management research. However shadowing examines those individuals in a holistic way that solicits, not just their opinions or behaviour, but both of these concurrently. Thus actions are contextualised by the running commentary and every opinion is related to the situation which produced it. Further, shadowing is an itinerant technique which allows the researcher to experience the shape and form of their target's days. These qualities mean that shadowing is inimitably placed to investigate an individual's role in, and paths through, an organisation. The organisation is seen through the eyes of the person being shadowed and that perspective is invaluable to the qualitative researcher.

Through this distinct methodological approach to studying individuals in organisations shadowing adds a new perspective to organisational research. It is easy to see that the data surfaced through shadowing is significantly less constrained and interpreted by participants than the views obtained via a series of interviews. The itinerant nature of the shadowing method lies at the heart of the more subtle difference between shadowing and participant observation. By following one person through the organisation, the shadower obtains insight into a focused and specific experience which is relevant to a particular expert role. The commentary provided is the opinion and perspective of an expert rather than a novice. In other

words, a shadower can follow where it would be impossible for a participant observer to go themselves. (For a detailed discussion of the differences between shadowing and the more established qualitative research techniques, interviewing and participant observation, see Author (2004)).

Such differences from the accounts of an organisation acquired through interviewing or participant observation do not mean that shadowing is better than these techniques, but rather that it can provide different insights. Shadowing has the ability to capture the brief, fragmented, varied, verbal and interrupted nature of organisational life (Weick, 1974). It can help organisational researchers not only to answer *what* and *how* questions, but because of its singular capacity to link actions and purpose, it can also help address many important *why* questions.

## **Problems with Shadowing**

Shadowing is not without its difficulties. The first problem that can be encountered in shadowing studies is the access negotiation process. Like gaining access for interviews, the researcher needs to obtain both entry to the organisation and agreement from a series of individuals. This can be harder to secure for shadowing studies because the researcher is asking for a much longer term and less conventional involvement with each individual, although as McCall, Morrison & Hannan (1978:35) point out, observation does not actually 'interrupt the normal work activities of managers and take up their time'. In companies where security or confidentiality is an issue, the same managers who would be happy to give up an hour of their time to be interviewed for a study may feel uncomfortable with someone

observing their work, their workplace and their relationships with colleagues in a detailed way.

Perhaps the biggest challenge facing the shadower as compared with, for example, the interviewer is that of data management. It is hard to over state the amount of data that can be generated through shadowing. Forsblad (1984:201) notes that observational studies 'quickly produce vast quantities of data that are difficult to handle'. A typical transcript of a day's shadowing might be between 8,000 and 10,000 words. This has implications for both the time and cost of the study (Noël, 1989; O'Neill & Kubany, 1959; Perlow, 1999; Stanley, Manthorpe, Bradley & Alaszewski 1998).

The recording of this amount of data on a daily basis, and the processing of it in the evenings in order to preserve its quality and contemporaneous nature is challenging for any researcher. Couple this with the physically demanding process of running about all day and the mentally and emotionally demanding task of immersion and it is easy to see why shadowing can be an exhausting and overwhelming experience both in the data gathering and data analysis stages.

The other major problem faced by shadowers is that of managing the way the relationship between the shadower and the shadowed member of the organisation changes over time. At the beginning of the shadowing period, there will be a settling down period for both parties in the shadowing partnership. The running commentary will be patchy and the person being followed will need constant prompting. The shadower will almost certainly get in the way and slow the person they are shadowing down. The researcher will take some time to establish a situation where



they are both ignored and continually informed. This period of adjustment can feel awkward and frustrating for both parties, although it does not last for very long. Snyder and Glueck (1980:72) stated that in their study, 'the chief executives became so accustomed to providing this information that that rarely had to be asked after the first day'.

The effect that a researcher has on the situation they are researching, called the Hawthorne (Shipman, 1997:99) or observer effect, is an obvious issue in shadowing. How can a researcher be sure that by following someone around for days at a time they are not altering the very nature of the work they are trying to describe? Indeed, this can be neither ruled out nor measured (Snow & Thomas, 1994). Burgoyne and Hodgson (1984) suggest that it is possible to discuss observer effects directly with those being observed. In their study, managers believed that in the presence of the researcher, 'they had been conscious of being less severe with subordinates than they would normally be' (1984:177). Guest reports that the managers he followed, 'showed some self-consciousness at the beginning of the observations, but appeared to lose this feeling once they "got into the swing" under the normal demands of the job' (1955:21). Mintzberg (1970) discusses possible observer effects in his classic study of CEOs, but does not believe that they are significant. McKechnie (2000) writing in the education literature, where observer effect is more often discussed, suggests a number of data collection strategies which she feels can help lessen and assess the observer effect. These include asking participants (or other actors involved) to discuss how 'normal' their day has been and going through the data to count incidents of observer effect ('what are you writing?') and checking whether they are persistent or recurrent. Although these commentators do not consider observer effect to be an insurmountable problem for this type of research, it

is important to note that although the person being shadowed may soon grow accustomed to the researcher, this will not be the case for those with whom that person interacts infrequently during the shadowing period.

At the other end of the project, extended contact with a particular participant can make the researcher sympathetic to their views and problems. Whilst this is a good sign in some respects, the researcher must retain sight of the research question and avoid uncritical acceptance of a single view of the organisation. In the participant observer literature, this is sometimes called 'going native' (see e.g. Ackroyd and Hughes, 1992: 136).

For a first time shadower, Figure 1 summarises some of the research designs and practical strategies which can help to alleviate many of these problems.

### **Figure 1. Practical recommendations for shadowers**

#### **Different forms of shadowing: a literature review**

A review of the literature has revealed that shadowing is in use in the social sciences. Although it has a limited presence in the management literature, (Bonazzi, 1998; Perlow, 1998; Perlow, 1999), shadowing is being adopted by other vocational disciplines such as education (Polite, McClure & Rollie, 1997), social work (Stanley et al, 1998), information studies (Orton, Marcella & Baxter 2000; Hirsh, 1999) and nursing (Vukic and Keddy, 2002). A number of the studies reviewed here have made use shadowing as one of a number of research methods. It has most commonly been combined with in-depth interviews (Walker, Guest & Turner, 1956; Stewart, Smith, Blake and Wingate, 1982; Polite et al, 1997) but has also been used in

conjunction with other observation methods (Bonazzi, 1998; Perlow, 1998;1999), diaries (Perlow, 1998;1999) and telephone and postal surveys (Stanley et al, 1998). The purpose of employing several methods is not however triangulation, but often a richer (Bonazzi, 1998) or pluralistic (Stanley et al, 1998) view of the research setting.

Within the social science literature three different forms of shadowing can be distinguished, depending on the purpose of the shadower: to learn for themselves; to record behaviour with a view to discovering patterns in it and; to investigate roles and perspectives in a detailed, qualitative way. The literature review that follows illustrates these three positions in detail in order to make clear the differences between the approaches and to examine their underlying methodological assumptions.

### **Shadowing as experiential learning**

Research which is explicitly labelled 'shadowing' is perhaps most common in vocational education where it is seen as a valuable technique to help students learn aspects of their own, or other professionals' roles. Shadowing has been introduced to nurses' training both in order to make impacts on specific skills, such as negotiation (Eddy and Schermer, 1999) or critical thinking (McKenzie, 1992), as well as to allow them more generally to apply, contextualise and extend their academic training (Paskiewicz, 2002). It has also been used to introduce an experiential element into the clinical training of medical students (Rancour, 1996; Cydulka, Emerman and Jouriles, 1996) and to help them to understand the role of other professions which they will rely on in their future professional practice (Saine and Hicks, 1987). In a similar way, shadowing has been suggested as a way of

enhancing the management training provided by business schools (Bartz and Calabrese, 1991).

Another group of studies that reports the use of shadowing techniques is concerned with various aspects of career exploration. Career exploration is the practice of giving people insights into the day-to-day reality of a role or profession with the hope of promoting a good fit between the individuals who seek a particular job and the demands of that job (Herr and Watts, 1988; Arrington, 2000; Fagella and Horowitz, 1997; Norton and Field, 1998; Leftridge, Mays, MacAvery and O'Connor, 1992; Chapin and Kewman, 2001).

Both the studies aimed at better training and those designed to allow career exploration are essentially concerned with delivering 'lived' practical first hand experience. In Boland and Tenkasi's (1995:356) terms, the shadower is 'perspective making': they are strengthening their understanding of their own community and its skills, priorities and activities.

### **Shadowing as a means of recording behaviour**

The largest group of studies which use the term shadowing in organisational research takes a largely quantitative methodological stance. They make use of a following method as a quantitative tool to record behaviour against a set of predetermined categories. The classic example is Walker, Guest and Turner's (1956) study of foremen in a car assembly plant. Their research design included following all 56 of the foremen for a whole working day. The observers recorded each 'observable incident...according to six dimensions' (Walker, Guest and Turner, 1956: 82). These included what the incident concerned, who the foremen had

contact with, where and for how long. In this way, they were able to analyse statistically the foreman's day in terms of his (and they were all men) reliance on verbal versus written communication and patterns of communication with those above, below and at the same level as himself, for example. At the same time, the foremen were interviewed using 'semi-directive' (Walker, Guest and Turner, 1956: 2) interviews which add a considerable amount of qualitative data to the study, although they are largely treated as background information and used illustratively.

Orton, Marcella and Baxter (2000:207) report that they used a 'shadowing methodology' to observe and log the information seeking behaviour of two Members of the UK Parliament over a period of 4 weeks. A similar tracking technique was used to uncover the 'movements and activities' of journalists over the course of three different social science conferences (Fenton, Bryman, Deacon and Birmingham, 1997: 4). Hirsh (1999) shadowed US school children as they tried to find information using various electronic resources for a school project. She observed their behaviour in the library, asked them questions and encouraged them to 'think aloud' about what they were doing (Hirsh, 1999:1269). This qualitative study was aimed at understanding how children use these resources, but also how they evaluate what they find.

In management research, Perlow has employed shadowing as one of a number of approaches to examining how engineers spend their time at work (1999) and how this is controlled by the organisation (1998). The shadowing (which informs both these studies) entailed spending a total of 14.5 days shadowing 17 members of a product development team. Each individual was shadowed for between half a day and three days over the course of the 9 month study. This contributed to a wider

programme of data collection, which also included participant observation, interviewing, and tracking logs (time diaries filled in by the engineers). Whilst shadowing, she states, 'I observed everything the individual did, and I wrote down each activity as it occurred' (Perlow, 1998:335). The activities were later broken down into time blocks and coded according to whether, for example, they were individual or interactive.

In these cases the shadowing is being used as a proxy for a diary study in a situation where the target individuals would not, or could not, take on the recording task themselves. The researcher adds an element of accuracy and impartiality to this recording process, as Orton et al (2000:208) note 'observation is a good technique for looking at behaviour because it is objective and only records what actually happened' (Eager and Oppenheim, 1996). Although the research is being framed in qualitative terms, these researchers are making assumptions about the shadowing process which have much in common with a positivist methodology. The tool (shadowing) is seen as a neutral means of recording what is 'actually' happening. The fact that this involves observation and small samples gives the research the outward appearance of a qualitative study. In the case of Perlow's work (1998; 1999) the employment of mixed methods embeds the quantitative data in a wider social context, which is certainly qualitative both in terms of methodology and method, although this is not dealt with explicitly in either paper.

Another study that combines shadowing for the purpose of recording behaviour with more qualitative techniques is Bonazzi's study of supervisors in a Fiat factory. He uses what he describes as a 'work shadowing method' (1998:223) developed from Walker, Guest and Turner's (1956) and Mintzberg's (1973) classic studies of

behaviour in organisations. Over the course of 3 months he shadowed 2 members of each of 4 different work teams involved in different process within the same car-manufacturing factory. Each of these 8 individuals had a supervisory role in their work teams and they were each shadowed for 2 shifts. He 'logged, minute by minute, the sequence of activities and events in which they were involved' (Bonazzi, 1998:223). These data were contextualised as part of a 'larger ethnographic observation' informed by conversations with the supervisors he was shadowing, company meetings and an extensive study of company documentation. Bonazzi (1998:223) makes these methodological issues explicit, stating that, 'the constant shuttling between hard data gathering and interaction with the subjects was essential in order to go beyond the level of observing mere behaviour and grasp the meaning the observed actions had'.

In their study of US headteachers, Polite, McClure and Rollie (1997) make use of a shadowing study to both record behaviour and to promote experiential learning, thus falling across two of the categories presented here. They shadowed 16 school principals for a 'typical' day. They recorded their observations with a 'semi-structured Shadowing Encounter Instrument' (Polite et al, 1997:467). Shadowing work was followed up by interviews, both soon after the event, and two years later. This study produced quantitative data about the percentages of time that the principals spent on different kinds of tasks, echoing Perlow's study of engineers (1999) and Bonazzi's study of supervisors (1998). However both the role and the purpose of the shadower differ significantly from the other studies that have been discussed. Here the shadower is a senior educationalist who offers support, advice, and a chance for the principal to reflect on their daily practice, both during and after the shadowing. This shadowing has been set up as a form of experiential learning, not as in for example

Paskiewicz (2002) for the shadower, but perhaps uniquely, for the principals that are being shadowed. The role of the shadower is one of interventionist and mentor, not as a neutral researcher.

The emphasis of the studies in this section is on recording behaviour. This is often done in conjunction with a detailed time line and analysed as a distribution across different activities. In cases where researchers are making use of pre-determined categories to structure what they are seeing and recording, Mintzberg (1973: 227) criticises this kind of approach as offering, 'at a higher cost, little more than the diary method'. In other words, it can only help us to quantify and describe the patterns of occurrence of those activities that are already known to the researcher beforehand.

### **Shadowing as a means of understanding roles or perspectives**

This leads us on to another category of shadowing research: studies that use shadowing in order to try to see the world from someone else's point of view. This is closely linked to the idea of shadowing as experiential learning, but differs in the important aspect of the shadower's purpose. The shadower who is trying to gain insight into a role so that they may improve their own practice seeks experiential learning, whilst the shadower who tries to see through the eyes of another for research purposes is categorised in this third section. There are not many studies in this last category and they are drawn from across the social sciences. This form of shadowing is underpinned by a qualitative epistemology and has the greatest potential for extending the reach of current organisational research.

Stanley, Manthorpe, Bradley and Alaszewski (1998) have made use of shadowing as part of a three pronged research approach to understanding how, and to what extent



new legislation has changed the roles of community care assessors. Their study made use of a postal survey of community care assessors, a series of semi-structured telephone interviews with their managers as well as a programme of shadowing 10 care assessments from start to finish in order to build up a complex and 'pluralistic' picture of how care assessments are being carried out. They state that shadowing offered them the chance to see care assessments in action rather than elicit the assessors' opinions or rhetoric about their roles. It also permitted them to add an overlooked perspective to their research: that of the users of community care.

Mintzberg (1970; 1973) uses shadowing in his seminal study of managerial behaviour which has shaped the way that we see the role today. He followed five different Chief Executive Officers of large US organisations for a week each, noting down their activities in great detail and supplementing his observations with daily briefings where they reviewed the day together. Through this work, Mintzberg (1970:104) revealed that, 'managerial work is extremely hectic and complex and it frequently comes in short, dense bursts'.

Mintzberg used the technique he calls structured observation (a term which has now been adopted by a group of organisational researchers with a significantly more quantitative view, see Martinko and Gardner (1985) for a review and critique of this literature) in order to move his research beyond what he saw as the limitations of the diary studies of the time (Carlson, 1951; Stewart, 1967). Mintzberg points out that diary studies which rely on managers completing time sheets with codes provided by the researcher are flawed in two basic ways. First of all the data will only provide insight into the duration and incidence of tasks which have already been identified by

the researcher. Secondly, it is likely that the manager will only record tasks which they regard as significant and the minutiae and trivia of the managerial day (fleeting conversations in the corridor, greetings between the manager and other staff) will be lost to the study, thus providing only a partial picture of managerial work. This work is then the first shadowing study which has deliberately incorporated qualitative elements into its research design.

Noël (1989) challenges Mintzberg's findings of fragmentation pervading managerial work and suggests that his results are limited by the methods used in his study. Noël believes that more continuity can be discovered in managerial work by extending the sample, not over more managers, but over longer periods of time. In his study of Chief Executives, Noël reduces the sample to three but observes each of them for a whole month.

Snyder & Glueck (1980) have also replicated Mintzberg's work, shadowing two Chief Executives for 4 days each and completing detailed, coded time logs of their activities. Crucially though they have introduced the idea of asking the people they shadow to explain what they were doing and why they were doing it for each activity throughout the day. The running commentary provides the researchers with a sense making framework that can be used to interpret the detailed log of activities they are recording. Burgoyne and Hodgson also asked the managers that they worked with to, 'articulate...their thoughts, feelings and emotions while they actually go about the activity being studied' (1984:163), although their focus was on 'episodes' of managerial activity rather than the continuous study of a whole day. The commentaries sought by both of these studies go beyond the notion of simply getting participants to think out loud as characterised as by the 'concurrent verbalisations'

that Ericsson and Simon (1993:xiii) sought through their laboratory studies which formed the basis for protocol analysis. Ericsson and Simon encourage their subjects to articulate what they are thinking while they complete puzzles and games in an experimental setting and warn researchers to 'resist the urge toward coherence and completeness' (1993: xv). In contrast Snyder & Glueck (1980) and Burgoyne & Hodgson (1984) (and to a more limited extent, Hirsh (1999)) aim to surface 'social verbalisations' (Ericsson & Simon, 1993: xiv) which include descriptions of what is being done as well as explanations for those actions.

In their study of nurses in a remote northern First Nations community, Vukic and Keddy (2002) used shadowing to understand the 'lived experience' of practising community nurses. This study makes use of a methodology known as institutional ethnography (Smith, 1987). This methodology, pioneered in feminist sociology, attempts to make the viewpoint of the researched women central to the research. In this way, the research informed by this school of thought is concerned with an investigation and representation of a 'sense of lived actualities' (Smith, 1987:184). This has been gained through in-depth, open ended and unstructured interviews in which women are typically asked to 'run through a day' with the researchers (Smith, 1987:187). Vukic and Keddy (2002) have made use of shadowing techniques to operationalise this methodology by literally running through nurses' days in real time. They spent 2 weeks shadowing nurses and compared what they saw with the documentation that outlines the role of a community nurse. What they found was that some of the most crucial skills of a nurse in an indigenous community were 'invisible work' such as trust building that was never discussed in formal documentation. By designing a study which was deliberately 'taking into account the social, historical, political contextual realities' they were able to uncover and consider an important

aspect of the nurses' role (Vukic & Keddy, 2002:543). In this truly qualitative shadowing method, the emphasis of recording is on the unfolding narrative of events and how these are perceived by the person being shadowed, rather than their exact time and duration.

In the studies reviewed in this section, shadowing has made a leap from being used as a neutral measuring and recording (quantitative) tool to the means of generating a narrative to first develop and then share insight into a role (qualitative). The shadower is no longer perspective making as they are not, nor do they hope to become, members of the community that they are studying. As experts from a different (research) community, they are 'perspective taking' through their shadowing in that they hope to appreciate and articulate the distinct roles, views and contributions of those they study (Boland and Tenkasi, 1995:358).

## **Discussion**

The review shows that although there has been no formal or methodological discussion to date about shadowing in the social science literature, there are nevertheless three clear traditions of shadowing that are being reported. The first strand of literature pertains to shadowing which is used to give the shadower first hand experience of a role, for its own sake. The second type of shadowing uses the technique in order to record a detailed log of actions. The third group of studies makes use of shadowing to get an individual's eye view of organisational roles.

All three of these shadowing approaches share certain features. They have a common focus on the individual, rather than department, company or function. They are also concerned with the direct, first-hand nature of the experience that they

provide for learning, recording and understanding roles, respectively. They are all interested in the actual actions performed by the target individual, rather than second hand accounts of actions, such as might be provided through interview techniques, or the formal representations of actions that might be discovered through documentary analysis. Further, the second and third shadowing methods identified by the literature review also share a passion for detail.

The studies outlined in the third section however also have some features which set them apart in both identity and utility from the other shadowing approaches. These qualities stem from the qualitative nature of the research approach. The first difference is that the qualitative shadowing method is essentially a grounded study of activities where the patterns of actions and purpose are surfaced from the data. This is in marked contrast to the quantitative approaches which are counts of incidences of behaviours against predetermined categories. This is linked to the second distinct characteristic of qualitative shadowing, the fact that the researcher is gathering data about purpose and meaning as well as, rather than just, behaviour or actions. Further, all of the behaviours of the person being shadowed are richly contextualised by mood, body language, pace, organisational setting and other powerful observational insights.

Quantitative shadowing techniques can give us a rich, comprehensive and systematic picture of exactly what people do at work. This is well illustrated by Polite, McClure and Rollie's (1997) study of school principals. Each of the participants gained invaluable insight into their own time spending on different tasks and roles which enabled them to reflect on how these patterns compared with their aims and aspirations. Qualitative shadowing studies give us another picture of organisational

roles. They can colour accounts of tasks by, for example, adding data about purpose or feelings. Vukic and Keddy's (2002) study of nurses working in remote communities in Northern Canada uncovered the many ways in which a nurse's day differs from the formal accounts found in day books and practice manuals. For example, they note the number of short or mundane tasks left out of the nurse's record of her work. However, they also discuss the operational and emotional implications of nurses being treated as outsiders in the communities that they serve.

What is missing from the majority of the papers in all three categories is a discussion of the methodological implications of adopting shadowing techniques. Very few of the studies make any attempt to use references to locate their choice of methods in a wider literature, often simply referring to 'shadowing' in inverted commas. Nor do they discuss their choice of methods critically. Further, many studies do not explicitly consider the epistemological standpoint that underpins their research design. This is in marked contrast to the treatment of either the more quantitative structured observation techniques discussed in the leadership literature (Martinko & Gardner, 1985; Hunt, Hosking, Schriesheim & Stewart, 1984) or the more traditional participant observation techniques documented in the social psychology literature (Filstead, 1970; Dunnette, 1976). Without this kind of debate, it is not possible to refine the method further, nor to promote its adoption in good quality research designs.

### **Figure 2. Examining research approach and data collection techniques**

Figure 2 shows that many of the studies considered in this review have an implicitly interpretive approach. However many of them have the outward appearance of quantitative studies due to their data collection techniques. The time logs favoured

by so many studies have their roots in the earliest studies of Walker, Guest and Turner (1956) and Mintzberg (1970;1973) and seek to answer questions about the distributions of different activities across the days or weeks of the study. The reason that they are recorded in Figure 2 as using mixed methods is that they often contextualise their time spending models with qualitative data. Sometimes the qualitative data is a backdrop to the quantitative results (e.g. Mintzberg, 1970;1973) and sometimes it is the other way around (e.g. Fenton et al, 1997). As a result, a great deal of what is termed shadowing is neither truly qualitative (why questions coded into time logs (Snyder & Glueck,1980)) nor truly quantitative (inductive approaches to surfacing activity categories (Mintzberg, 1970;1973)). This wide and unexamined use of mixed methods in shadowing studies makes explicit and critical debate about the methodological and epistemological implications of research design even more vital.

The qualitative shadowing method described in the first part of this paper aims to consolidate the work of the purely qualitative shadowing studies highlighted in Figure 2 and adapt it for use in organisations. Shadowing is profoundly suited to investigation the nature of managerial work. As Weick (1974) notes, “the manager works at an unrelenting pace with chronic interruptions; he prefers action over reflection and verbal media over written media”. With its ability to record and juxtapose action and narrative, shadowing is uniquely able to capture the paradoxes that lie within the speed, brevity, variety and inter-related fragmentation of this kind of work.

A research method which can articulate the mundane and taken-for-granted can offer researchers important insights into research questions concerned with cultural issues and social norms. Guest (1955) found that the foremen he shadowed were often surprised to find what the process revealed about their own jobs. In this way, shadowing can be seen as the opposite of critical incident research which seeks out the monumental or pivotal episode. Researchers who are interested in investigating and articulating some aspect of a company's 'espoused theory' in comparison with its 'theory in practice' (Argyris and Schon, 1996) might make good use of a combination of document analysis or interviewing and shadowing in their research designs. Equally, researchers who wish to work at a level of detail which might reveal different approaches to the same tasks or issues could use shadowing to supply the necessary data.

Shadowing data can also inform research approaches that take a holistic approach, as it allows individuals to be researched as an embedded part of social and organisational environment. Activity Theory, a theoretical framework where context and the emergent and evolving nature of goals are emphasised (Engestrom, 1987), can be effectively operationalised through shadowing methods. Shadowing would also be an appropriate method for what Noordegraaf and Stewart (2000) have defined as "a managerial behaviour approach". Here, managerial work is treated as a 'whole' and "the unit of analysis is neither a specific organisational issue, nor a decision process, but the individual. It is not about issues or decision processes that attract multiple actors, but about one actor involved in multiple issues and processes". These and other approaches can help management research to address Mintzberg's (1994:11) concerns that "the integrated job of managing has been lost in the conventional ways of describing it...we have become so intent on breaking the



job into pieces that we never came to grips with the whole thing. It is time, therefore, to consider the integrated job of managing. Shadowing can document a whole variety of managerial processes going on at the same time, show their interdependence and how their competing demands are resolved in real time. Any enquiry where the unit of analysis is not just the individual, but also the network of activity and relationships, or organisational context that surrounds them would also benefit from the use of this data generation method.

Researchers that seek a great deal of detail, as might be appropriate in microprocesses research may also find shadowing data to be appropriate for their purposes. There has recently been a shift in the strategy literature towards work which places “emphasis on the detailed processes and practices which constitute day-to-day activities of organisational life” (Johnson, Melin & Whittington, 2003) and a call for a micro perspective on strategy and strategizing. Shadowing is one possible method which could produce the data needed to advance this growing field.

## **Conclusions**

Qualitative shadowing is under-utilised in the study of organisations. It is a holistic and insightful method which can lend much to the study of organisations in all their complexity and perplexity. Shadowing can provide unique insights into the day to day workings of an organisation because of its emphasis on the direct study of contextualised actions.

Although various shadowing methods are being used and reported by social scientists in a wide range of disciplines, shadowing is being not discussed in a critical way, either in terms of empirical or methodological issues. This may account

in part for the reluctance of management researchers to adopt shadowing methods. On the other hand, the opposite may be true: that shadowing is not discussed in a critical way because it is not a popular and established method of qualitative organisational research. It is also possible that qualitative shadowing is still unheard of amongst management researchers, or is dismissed because it has not yet been sufficiently distinguished from its quantitative counterparts, such as structured observation. This paper has sought to remedy these problems by a) defining qualitative shadowing, b) showing it to be methodologically and empirically distinct from other approaches which are also labelled 'shadowing' and c) outlining its possible contribution to organisational research.

What is needed now is further empirical research which both employs and critiques the research method advocated here. The threefold classification of shadowing approaches presented in this paper forms the basis for a discussion about qualitative shadowing that needs to be refined and extended through many cycles of practice and reflection.

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- **Never go in cold.** It is important to spend time getting to know both the organisational environment and, to a lesser extent, the individuals you will be shadowing. If you don't know the names of your subject's boss, work colleagues secretary and husband, not to mention the major product lines and suppliers, your notes will not be very meaningful at the start of your shadowing.
- Use a **small, hard-back notebook** to keep a research account. This will allow you to write anywhere. Tape recorders are not practical for shadowing. Take plenty notebooks and spare pens!
- **Write down as much as you can.** This is especially important at the start of a project when you can still see the organisation as an outsider. Settings, the meaning of acronyms, how meetings make you feel, relationships and your first impressions of people (and how these change) are all data.
- Try to find an academic colleague or **mentor** that is away from the organisation that you can discuss your research with if necessary. This provides vital moral support and allows you to keep your research perspective.
- Get into the habit of making a **daily tape dump** of your research notes. This makes it easier to decipher what you have been writing at speed and helps keep your accounts rich and detailed. It also helps to preserve your own thoughts and impressions, which will change very quickly as you lose your beginner perspective over time.
- Plan your **data management**. Decide how you are going to record, manage and analyse your data before going into the field.

**Figure 1. Practical recommendations for shadowers**

		Research Approach	
		Positivist	Interpretive
Data Collection methods	Quantitative	Walker, Guest & Turner, 1956 Orton, Marcella & Baxter, 2000	
	Mixed	Polite, McClure & Rollie, 1997	Mintzberg, 1970; 1973 Perlow, 1998; 1999 Noël, 1989 Snyder & Glueck, 1980 Bonazzi, 1998 Stanley, Manthorpe, Bradley & Alaszewski, 1998 Fenton, Bryman, Deacon & Birmingham, 1997
	Qualitative		Hirsh, 1999 Burgoyne & Hodgson, 1984 Vukic & Keddy, 2002

**Figure 2. Examining research approach and data collection techniques**