Article title: Benefits of boredom: An 'interlopers' experience of conducting participant observation on the production line

Short title: Boredom on the production line

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Abstract

Embracing a lyrical style of writing, the paper discusses the advantages of conducting participant observation and calls for its increased use in business and management research, especially the field of HRM. In a sector dominated by quantitative research methods, we are left with many unanswered questions about organisational life. Whilst surveys have provided us with an abundance of 'hard' data, it has resulted in a lack of depth and understanding around the employee experience. Reflecting on a research project that explored the concept of High-Performance Work Systems, the paper discusses a chance opportunity to undertake participant observation and how the experience not only changed the focus of the research project but provided a depth and understanding currently missing from the HRM/HPWS paradigm. Structured around 'lessons learnt', the paper calls for methodological eclecticism and hopes to encourage others to become 'interlopers' and embrace the benefits of conducting participant observation.

Introduction

Before I begin, I need to make a confession. I am an 'interloper' in the world of participant observation (P-O) and ethnography (see Yanow, 2009: 187). With a background in statistics, I was out of my depth when given the opportunity to undertake P-O and would have

welcomed the opportunity to learn from the experiences of others. As such, the aim of this paper is to provide insight into the practicalities and difficulties of undertaking P-O in a manufacturing organisation and the associated emotional effects it had on me as a researcher. The paper embraces a lyrical style of writing (see Abbott, 2007) on my experiences as an 'interloper' in the world of P-O. Lyrical sociology aims to recreate and engage the reader in the emotional and intense participation in the object they studied (Abbott, 2007: 74). To do my experiences justice, this approach seems fitting. I hope it will challenge other researchers to consider P-O and experience the world they are researching. In doing so, it will hopefully provide the depth and understanding around organisational life that is currently missing in research (especially in HRM literature).

I did not set out on my PhD journey to undertake P-O. Although I had read with interest 'the classic' examples of ethnography (e.g. Roy, 1959, Whyte,1981, Burawoy, 1979), I had no intention of going down that path. However, a chance opportunity presented a new direction that not only reshaped my PhD research, but has influenced my career since. Exploring the concept of High-Performance Work Systems (HPWS), I was struck by the (over)reliance on quantitative research and the lack of employee perspectives. Consequently, the empirical focus of the research was on employees and their experiences of work. Theoretically, the aim was to look inside the 'black box'. To do so, required methodological eclecticism. The intention was to undertake an employee attitude survey and conduct interviews and/or focus groups. However, when offered the chance to undertake P-O, I was intrigued by the opportunity to discover not simply what people said they were doing, but instead to witness what they were *actually* doing in practice (see Mintzberg, 1973). By doing so, I felt it would allow me to not only look inside the 'black box', but to essentially step inside it.

Whilst negotiating access to my case study organisation, my gate-keeper thought it would be a great idea for me to spend some time working in the organisation to help me understand the production process. An opportunity they offer all their graduates. Not wanting to offend, I accepted. Although I had undertaken several research method training courses, when qualitative methods were taught, the focus was on conducting face-to-face interviews (usually with management). Observational research was often seen as a 'poor relative to questionnaire surveys and qualitative interviewing' (see Sandiford, 2015: 411). In part, this was attributed to the perceived perils of publishing qualitative research (especially those involving P-O) and the associated risks on an academic career (see Van Maanen, 2011). I was repeatedly told P-O was used to produce books, not the journal articles needed to advance your career.

Whilst quantitative approaches provide us with facts and measurable figures, it is qualitative research methods that enable us to understand the meaning behind those numbers. Although there are a few notable exceptions (see, Alcadipani *et al.,* 2015; McCann *et al.,* 2013; Root and Wooten, 2008; Samnani and Singh, 2013; Smets *et al.,* 2014; Stokes *et al.,* 2015; Thomson and Hassenkamp, 2008), the use of P-O in organisational research is rare in the field of HRM. As a result, when it came to conduct and analysing P-O research, I felt ill equipped and unprepared for the challenges of doing so in the context of the organisation. By reflecting on the practical challenges and the lessons learnt, the paper intends to help navigate other 'interlopers' through the twists and turns. Although it is not necessarily the easiest (or quickest) path, it is one that provides a richness and depth to research, allowing us to answer research questions involving *how* and *why,* especially when triangulated with other methods.

Background

To put my research journey into context, the initial focus of my PhD was on the high-performance paradigm, specifically High-Performance Work Systems (HPWS) and the causal chain between HRM practices and organisational performance (Boselie *et al.,* 2005). Research argues that a 'causal link' flows from bundles of HR practices (HPWS) through employees to organisational performance, with advocates of HPWS relying on theories of motivation to explain the connection (for example, Appelbaum *et al*., 2000). However, *how* and *why* HR practices resulted in increased organisational performance was unknown. Given the emphasis on theories of motivation and discretionary effort, there was (and arguably still is) an ironic lack of employee-focused research with few studies investigating the opinions and experiences of workers. Consequently, I was struck by the lack of employee focused research and the over-reliance on single management respondent surveys. The aim of the thesis was therefore to address the lack of employee focused research and the (over)reliance on single management respondent surveys (see XXXX, 2017).

Through the triangulation of qualitative and quantitative methods, the research highlighted the importance of data collection methods in the HRM/HPWS debate. Working on the line emphasised the importance of 'good practice' as opposed to 'best practice' (see Godard, 2002). Theoretically, the model of discretionary effort that I had originally set out to explore did not fully address working life from an employee perspective. The review of P-O data illustrated that the employment of qualitative data collection methods provided greater depth of understanding and qualified the generalisation of employee attitude surveys. Simply put, quantitative (employee response) surveys lifted the lid of the 'black box', interviews and focus groups enabled me to look inside, and P-O provided the opportunity to step into the box. In doing do, it was evident from findings that the box was filled with issues of control, work intensification, and stress (XXXX, 2017). As a result, I needed to go back to the

original direction of my research (originally concentrating on motivation and discretionary effort) and re-evaluate the focus of my thesis. Subsequently, 'accidently' conducting P-O lead to changing the theoretical focus of my research. Without P-O, I would not have had a contextual understanding of what was happening in the organisation.

Lessons from the field

There is no standardised method, or 'boilerplate' (see Pratt, 2009), on how to conduct P-O. It can therefore be unnerving for a new researcher (or any researcher) to go down the path of the unknown, especially when qualitative research is often argued to lack 'rigor' (see Gioia *et al.,* 2012). Given the nature of qualitative research, a prescriptive 'cookbook' is potentially impossible (and undesirable). Nevertheless, sharing some broad principles drawn from overcoming the challenges of P-O would be beneficial (see Jarzabowski *et al.,* 2015). By doing so, P-O research has a greater chance of becoming more mainstream in business and management research.

At the time of my PhD research, P-O studies were usually conducted in a social setting (e.g. Whytte, 1981), or over a prolonged period (e.g. Delbridge, 1998). Although interesting and theoretically insightful, empirically they rarely went into detail about *how* the research had been conducted. Whilst there are now more book-length ethnographic studies that discuss the author's experience of conducting P-O (see Wacquant, 2004; Chetkovich, 1997) or 'tales from the field' (see Emerson *et al.,* 2011, Van Maanen, 2011), they are often inconspicuous in business school libraries. With the focus in the classroom on quantitative data collection, it was not surprising that the shelves were filled with books on statistics. Mainstream and anodyne research method textbooks rarely discuss the practicalities of conducting P-O or

putting the process into the context of the organisation. Even though P-O enables the researcher to explore 'how things work' (Watson, 2011), explanations about *how* to conduct P-O are less pronounced. Instead, the practicalities of *doing* P-O were lessons that I learnt the hard way. By 'exposing how the thing is done' and indulging in some 'self-absorption' (see Geertz, 1988: 1-2), I hope to offer some useful insights on undertaking P-O. As a result, the following paper focuses on the lessons I learnt as an interloper with the aim to assist other researchers navigating their P-O and (hopefully) encourage others on the path.

Lesson 1: Gaining and negotiating access

A key lesson I learnt when conducting P-O was the need to gain access at multiple levels. Negotiating access is a balancing act (see Hammersley and Atkinson, 2007) and a reiterative process that was required with each new interaction. Although I was aware from the literature that I would need to gain access, I had not considered the need to negotiate access with multiple gatekeepers (see Gouldner, 1954). Whilst the focus of my research was on shop-floor workers, to get to that level involved negotiating access through levels of bureaucratic management. Each managerial level needed to 'authorise' my access (even though I had been given approval from my gate-keeper - a member of the senior leadership team). Access into the four departments I intended to work was at the discretion of the General Manager, each departmental manager and then each shift manager. Access to each manager came from the manager above. At times, it felt like trying to gain entry to a well-guarded castle. Negotiations with middle management was needed for approval to use the drawbridge, departmental and line management negotiations to lower the drawbridge, then shop-floor workers for permission to cross the moat and access the main courtyard. With each new department I worked in, and every new manager and shop-floor worker I met, the process

needed to be undertaken again. The course of negotiating access and gaining acceptance impacted both on my experiences and acceptance into the social groups.

Senior Management Negotiations – gaining consent into the castle

As previously stated, the opportunity to undertake P-O occurred by chance at the suggestion of the case study organisation. During the meeting, it struck me how relaxed management were with me observing organisational life, especially given their nervousness and gate-keeping of the employee attitude survey (which required repeated management vetting before administration). Spending time on the production line was part of the organisations graduate scheme, as such, it was a common practice that was widely accepted. This resulted in it being non-threatening to the organisation. However, whilst discussing the opportunity with my supervisor, we reflected on whether this process would have been different if I was not a PhD student and therefore fitted the mould of their graduate programme.

Middle Management Level – permission to use the drawbridge

The next stage in negotiating access was with the General Manager of the manufacturing division and I was conscious that gaining his approval was fundamental to the success of my research. Consequently, I was very nervous prior to the meeting as I felt there was a lot riding on it. The General Manager had worked at the organisation for most of his career and was by chance considering following a life-long dream to undertake a PhD. Subsequently, he was keen to 'pick my brains' about his proposed research ideas and the PhD journey. During our meetings, I often found myself balancing 'contrasting impressions of expertise and ignorance' (Atkinson, 1997: 65). The balance paid off and his backing had a positive impact on my access and exposure into the main manufacturing departments. Hence, I was able to

move around the manufacturing division without question. Even though I only spent a week working on the production line, I spent a total of two years going unnoticed as a 'white coat'. Whilst wearing the required white coat, hairnet and white trainers that were demanded by health and safety, I was largely ignored, therefore giving me an invisibility cloak to explore at ease. During my time at the organisation, I was frequently approached by the General Manager to debate theoretical ideas for his PhD proposal. Although I was happy to discuss his academic ideas, I did wonder the impact on my own research (and my freedom of access) if I had not been so willing. By making myself valuable, I had secured open access. It was also apparent that the General Manager was highly regarded. Whilst his approval carried favour with the front-line staff, it did not with the departmental managers who appeared nervous of my presence and had a tendency to treat me like a spy. As a result, this created a tension and the potential for a conflict of interest that I was aware I needed to carefully manage (see Bell, 2019; Calvey 2019).

Department and Line Management Level Negotiations – lowering the drawbridge

As experienced by other researchers (see Karjalaines *et al.,* 2015), I found negotiating access to be a continuous process. Before working in each department, I needed to report to the departmental manager. Although aware I was going to be working in their department, it was clear that they had been 'told' rather than 'asked'. Most looked at me with suspicion and did not make any effort to help integrate me into their department. I was placed on the production line at a distance to other workers and rarely introduced. In hindsight, I had not considered that I would need to negotiate access at this level of management or reflected on how they might feel about my presence. I had simply turned up for my shift and had not considered how departmental managers would perceive someone 'researching' their department, talking

to their workers about their levels of motivation, and investigating their management style. This was very narrow minded of me and I believe negatively impacted on my research. If I had reflected more on this stage, I could have approached my interaction with departmental managers in a different way, potentially making my integration into the department smoother. Given the overall findings of my research, not engaging with this group was an oversight and one I later regretted as I lost the opportunity to understand 'their' experiences of working at the organisation.

Shop-floor Worker Level Negotiations – approval to cross the bridge and enter the courtyard

The need to gain approval and access into the 'research sample' population was emphasised in almost every study, so whilst I had not been aware of the layers of negotiation prior to this point, I was prepared to negotiate access with shop-floor workers (or so I thought). Having rejected the decision to undertake covert research, I favoured the role of participant observer (see Gold, 1958). As such, I had condensed the focus of my research into a well-rehearsed jargon-free blurb to introduce myself. However, I was taken aback by not only the lack of curiosity in my presence, but also the total disinterest in my research. The practice of encouraging graduates to work on the production line worked in my favour. Line Managers saw it simply an extra pair of hands and they paid me no attention. For workers, once it was established that I was not seeking one of the coveted permanent roles, I was no longer a threat. Those that did pay attention to me did so out of boredom and were far more interested in my personal life than in my research. Although it would be foolish of me to assume that there was no impact on the shop-floor workers, their nonchalant manner at my presence surprised me. As one worker put it when introducing me to a colleague, I was just doing a 'school project'. It was evident from the lack of interest to this statement, that this put me in a

non-threatening light – although I did have to control my immediate objection that a PhD was comparable to a school project! Instead, it was evident that downplaying my role and playing along with the constant 'lazy student' jibes put those around me at ease. By doing so, respondents were more relaxed around me, enabling me to 'find a place' in the organisation (see Warren, 1988).

Key point: Whilst I was not considered a threat and had been locally accepted, it did not automatically give me access into shop-floor workers social groups, interactions or general conversations. Although aware that this would take considerably more time, I was conscious of the relatively short period I would be experiencing life on the line. I quickly realised it was naïve of me to assume I could produce the depth of insights I had read about in Roy's 'Banana Time' (1959) in the time-frame available. Instead, I was simply participating in their world for only a short period of time (Chetkovich, 1997: 197). With a need to be proactive, I immersed myself into the organisation, utilising the norms of organisational practice that were already in operation and use these to support my acceptance into groups. Essentially, I decided to embrace the role of novice student/worker who needed to be shown the way by my co-workers. It can take time to find your role in the organisation and it might not be one that you are always comfortable to have (see, Alcadipani *et al*., 2015). It is important to reflect on the role and the impact it had on how you were perceived and the subsequent impact on the research.

Lesson 2: Immersion and acceptance

Dressing the same way as the people I was hoping to study made it easier for me to be included, an observation highlighted by other researchers (see Van Mannen, 1991). As

emphasised by Liebow (1967: 255-6) 'the change in dress, speech, and general carriage was as important for its effect on me as it was for its effect on others'. The literature frequently talks about the importance of appearance, but it rarely considers the emotional impact this can have on the researcher. Although I was mentally ready to dress and act in a certain way, I was not prepared for the impact this would have on me, or consequently, on my research. Wearing the 'white coat of invisibility' meant I was ignored whilst walking past 'suits' who had previously acknowledged me. No one stopped and noticed me or assisted me. Walking into the office area wearing a white coat made me feel instantly guilty, largely due to the looks of suspicion from the office staff who clearly wondered why a white coat was in their domain and what I was doing. The asserted 'open door policy' was not as open as management had suggested. By a simple change in attire, I had gone from being a 'someone' (albeit only a minor someone), to feeling like a minion. I had to admit, this feeling deflated me considerably, but it was at this point that my 'loss of self' took me a step closer to immersing into the environment I was studying. I decided to use this to my advantage - if no one was going to question my presence, or even acknowledge my presence, then I could observe my environment and those in it at ease.

The reaction of the suits to my change in attire had another effect, it created a sense of comradeship with my other 'white coats'. However, wearing a white coat did not automatically result in inclusion with other white coats. Instead, everyone ignored me, until I had proven my worth and shown I was useful. This was evident during my time in the talc packaging department. The task was to manually place talc bottles into tight-fitting polyphone trays. Although this sounds straightforward, the line moved extremely fast and hold ups were strongly frowned upon. After a morning being ignored, the line manager (almost) gleefully informed me I would be responsible for placing the bottles into the

polyphone bases – thereby facing the full brunt of the speed of the line. Not surprisingly within minutes I was struggling to put the bottles in the bases in time and the line quickly jammed. This resulted in lots of taunts and shouts from everyone for being a 'lazy student'. With the whole team laughing at me, I became very flustered. This happened several times, resulting in increased jibes and laughter at my expense, but I held my own and began to laugh along at myself. Eventually the line manager whispered in my ear a 'secret' technique (tilting the bottles as you placed them into the polythene bases) and I was able to keep up with the line, much to the amazement of my teammates. With newfound credibility, employee attitudes towards me changed. Having the approval and 'sponsorship' from the line manager worked as an introduction to the group and enabled me to move into the social circle I was trying to observe. From that point, I was included in the banter whilst working on the line.

Key point: To gain acceptance, the lesson I learnt was the need to allow my emotions to play a part in my research. To an extent, you cannot 'participate' in P-O without bringing some of yourself into the research. Consequently, the role you play will impact on your research and your experiences. There is a balance between immersing in the world you are studying and maintaining enough of yourself to develop relationships and connections to gain acceptance. Whilst there is a need to ensure methodological rigor to your research, allowing your emotions to play a part (or at least acknowledging your own unconscious bias and assumptions) in your research enables a closer understanding of the world you are observing. Be prepared for the emotional impact P-O can have on you and your research.

Lesson 3: Positioning and performance

Deciding to play the role of 'lazy student' and joke at myself paid off. My status gave me a non-threatening image for other workers and they relaxed around me. However, given the

hours I was working (not to mention commuting and writing up my fieldnotes on top of my shift), I had to struggle to keep any defence of the contrary to myself, which was not always easy. A situation also experienced by Alcadipani *et al*., (2015) who felt conflict between gaining access into the group and the 'banter' about his home country:

> 'I became increasingly conflicted over my participation in hegemonic masculinity that was increasingly sexist in tone and my desire to perform to secure inclusivity.'
>
> (Alcadipani *et al.,* 2015: 88)

However, the role of 'lazy student' did not work in all departments and I had to learn to adapt according to the atmosphere of each division. The culture of each department often represented the managerial style of the departmental manager. It was also dependent on the product and the degree of automation. The greater the automation, the fewer the workers needed on the line, resulting in less interaction.

Key point: Whilst engaging with the General Manager, I took on the role of fellow PhD student and academic. Wearing a suit meant I took on the role of office worker. Whilst wearing a white-coat I took on the role of invisibility. Consequently, I learnt I had to fulfil different roles reflecting those around me. It can be difficult to balance the variety of roles required, especially when you are also trying to balance the role of researcher. If you are not careful, it can become emotionally draining. For me, the time commuting alone in the car at the end of a long shift was my moment to 'transition' from the world I was researcher and reconnect with my own world. My time on the commute reminded me of deep-sea divers needing to ascend slowly before resurfacing. Calculating this time into your research timelines is important.

Lesson 4: Interpretation and representation

Once I was granted permission to work on the production line, I quickly realised that I had rushed in without really giving time and reflection to *how* I would conduct P-O. I had spent little time thinking through *what* to make notes on, *how* to make notes and *when,* not to mention consideration on ways to analyse the data I collected. Whilst developing both the employee attitude survey and the interview/focus group schedules, I had reflected on the questions I intended to ask and how they related to my research questions. I contemplated phraseology, I piloted both, and considered the processes I would take to analyse the data. If I had taken the time to consider the practicalities of P-O with as much detail, I feel the 'quality' (i.e. the focus and rigor) of the data I had collected might have been richer.

Interpreting the world around me

To undertake P-O I knew I needed to observe what was happening around me and take notes of these observations. It was not until I settled into my first role on the production line that I started to consider *what* to observe. My first shift was in the Powders department. With the sickly-sweet smell of baby talc getting stuck at the back of my throat, I waited for direction on what I should be doing on the line in the hope that I would be working near others and able to listen (and hopefully join in) with interactions. Instead, I had to stand at the beginning of the line, largely by myself. The closest worker was in shouting distance and was slumped in a chair half-asleep. To make conversation I asked for direction on what I should be doing. Without moving or acknowledging my presence, the response of *'just watch the bottles'* was barked back. Initially believing his comment to be some sort of initiation, the kind apparent in other ethnographic studies (see Roy, 1952), my initial excitement was soon replaced with the reality that he was speaking the truth. My role was to watch empty plastic bottles being

automatically placed on the line, which might occasionally fall over (if I was lucky!).

Standing isolated, I began to panic at the lack of activity and interaction, uncertain how I

could observe the behaviour of the workers when nothing was happening.

Within a short space of time boredom set it and I began to question *why* I was there. A desire

to stick to surveys and remain in my ivory tower took over me. Sitting in the endless traffic

jam that I experienced on the way to the factory was more exciting in comparison (at least the

cars came in different shapes and colours, with different passengers to gaze at, and most

importantly a radio). It was at the pits of boredom that I had a light bulb movement. In the

traffic jam, I had passed the time by observing the obvious and was not trying to over think,

theorize, or expect revolutionary findings to just happen in front of me. I acknowledged to

myself that I was not going to generate insightful analysis from a few hours working on the

production line. Instead I needed to give it time, start observing the basics and work from

there. What did the place *look* like, what did it *feel* like, what did it *sound* like, and what did it

smell like? I needed to become 'sensorially engaged' in my P-O (Pink, 2015: 95). I then

started to observe the workers, keeping my observations descriptive as though I was trying to

use words to paint a picture of the world around me.

Painting a picture

The importance of notes was clear, yet the practicalities of making notes was not. Whilst

production was running, workers could not leave the line (even when the line was paused).

As a result, it was difficult to write notes until official breaks. Given breaks were limited, the

challenge was trying to remember everything so that I could write it down when opportunity

arose. Consequently, I found myself recalling books I had read about memory games. Given

the situation, I decided to test them out. Of the different techniques described in the books, the one that advocated one-word associations allowed me to remember what had happened and helped momentarily elevate the boredom on the production line. When I then had the opportunity for note-taking, I started with the one-word associations which sparked my memory and I was able to write about the observation in more detail when I got home. The technique also helped with the need to carry reems of paper which were not permitted on the shop-floor, especially given I was self-conscious making notes around others. As noted by Brewer (2012), although obtrusive, a notepad is an essential piece of equipment. Being able to scribble down what looked like a shopping list, was a useful technique and easily excused. Trying to define the observation into one word, also unconsciously began the process of analysis and theming my observations.

Capturing the full events of the day happened when I returned home at the end of my shift. It was a long day as my shift did not finish until 10pm and I had an hour-long drive. I would often write up my notes into the early hours of the morning slumped in bed. Not only was the time limited in the morning, but the risk of a sleep-induced fog affecting my memory was too high. In hindsight, I should have organised my time on the production line over a greater period (or at the very least on alternative days). This would have allowed me the opportunity to focus on writing up my field notes, and more importantly, time to process what I was observing. Allowing time for 'headwork' had not been part of my planning, as is often the case (see Van Maanen, 2011).

Gathering my thoughts

Thoughts, ideas, (some) verbatim quotes, and descriptions produced an abundance of data that needed to be processed. As Gioia *et al.,* (2012: 20) describes, the 'sheer number of categories initially becomes overwhelming'. Feelings of being an 'interloper' returned and I again questioned my lack of preparation and clear strategy for undertaking P-O. Developing categories into workable themes, or stories, was a whole journey itself, and it did not come with a route map to follow. The process was in stark contrast to analysing the survey data with clear and defined statistical tests. Given the time pressures, I soon started to appreciate the enforced 'think time' during the commute. These moments of reflection were the first stages of data analysis and it was during these moments that I would start to connect my thoughts and find links between what had happened during the day(s) with the literature. As my observational data started to develop over the course of working on the line, themes started to emerge in my head, specifically around the boredom, monotony, and isolation I felt during shifts and how I'd fall into an automatic, almost robotic stance whilst working on the line. I had gone into my time of P-O expecting to witness interactions of employee motivation, as though I was watching a film. I had not fully appreciated that these 'acts' would not be so transparent and that it was my own feelings of that experience which were the key findings.

Finding a way through the data

The vast amounts of data and the feeling of being lost made me want to cry out for a clear cut 'step-by-step' approach to analysis and I longed for a 'toolbox' (see Yanow, 2012). Having spent years bemoaning the use of SPSS, I suddenly yearned for the ease of clicking a few buttons and having the answers 'magically' appear in front of me. I decided to take a slight step back and focus on the separate themes, or stories, that had emerged. Post-it notes and flip

chart paper became my best friends, and my previously blank wall became full of 'artwork'. On reflection, my initial problem when analysing the data was trying to jump to the end of the journey and expecting the main concepts to leap out at me. I also felt pressure to experience something 'ground breaking'. As a PhD student, there is a constant feeling that you should always be 'doing' something. However, it is not only ok to step away from the desk, it is advisable. You do not need to sit at a desk to mentally process your data. Some of my best thoughts were on the treadmill or rowing machine when the monotony of the machine aided my focus. The problem I then faced was capturing the thoughts (not easy whilst running at the same time!), and I instinctively began to use the same one-word association memory game which had the subsequent advantage of helping me to start theming my concepts. What followed was a period of 'self-reflexivity' (see Brewer, 2000; Holland, 1999; Thompson and Hansenkamp, 2008; and Yanow, 2009). At times the process can be almost (emotionally) painful, and it can be hard to see the wood for the trees, but with time, the woods do clear and you can see the way forward.

Key point: Interpreting the world around me would have been an easier process if I had been more prepared at the beginning. P-O is not a simple case of just being there. It requires preparation and consideration. Learning from others is one of the most valuable processes you can do to prepare yourself for the journey. Reading ethnographic book-length studies from other disciplines can aid our understanding. Whilst there may be limited ethnographic and P-O texts in the business school library, there are plenty in other divisions. Although the context might be different, the methodological processes are very similar. Good examples include Wacquant's (2004) 'Body and Soul', Chetkovich's (1997) 'Real Heat', and Goffman's (2014) 'On the Run'. For me, undertaking participant observation, focused more on participant *experience*. To do so, required me to be 'sensorially engaged' (Pink, 2015: 95)

and allow my emotions to become part of the research. Reflection was therefore a valuable technique.

Lesson 5: Mixed methods

A key element of my research was to address the lack of employee opinions in the HRM/HPWS paradigm by using a multi-method approach. The impression from the employee attitude survey I conducted was predominantly one of contentment amongst employees. In contrast, data from focus groups showed growing discontent. P-O reinforced this picture. In fact, whilst working alongside shop-floor workers, they appeared to be not simply disappointed at work, but rather disgruntled. At first, I questioned whether being an interloper had affected the quality of my observational data, and I started to doubt myself again. However, it was during a deflated meeting with my supervisor that a 'Shazzam! moment' occurred (see Gioia *et al*., 2012). Reflecting on the survey data, I was trying to explain the discrepancy in the employee attitude survey over the issue of flexible working hours. When asked in the survey about the importance of flexible working hours, a significant number of employees stated that flexible working hours were not important to them, which was unexpected. However, during the period of P-O the topic came up in conversation. It was an opportune time to ask them about the issue of flexible working and the discrepancy in my data. The group laughed at my naivety and stated that flexible working hours would be greatly appreciated, but it was not classed as 'important' to them as it was not a possibility. Owing to the nature of shop-floor shift work, the line could not run until everyone was on the shop-floor., Flexible working was considered *'impractical'* and therefore judged 'not important'. Although my question had caused the group great amusement at my expense, it changed the course of my research. In relaying this conversation to my supervisor, clarity

'spontaneously' (see Hammersley and Atkinson, 2007) came to me. There was a not a discrepancy in my data, and it was not flawed, it was simply an example of how 'methods matter' (see Morris and Wood, 1991; Strauss and Whitfield, 1998). As a result, the whole structure of my thesis changed, instead focusing around the methodological limitations of HRM/HPWS research and the importance of combining a mixed-method approach (see XXXX, 2005).

Key point: The above example was one of many in my research that highlighted the importance of not only gathering employee opinions on HRM/HPWS (something that is commonly overlooked), but also about the importance of the methods we use. An over-reliance on the same methods is unlikely to further our understanding. As it 'takes a theory to kill a theory' (Samuelson, 1951: 323), further empirical research of the same (over)utilised methods will no doubt do little more than 'dent the theorist's hide' (ibid). Instead, by adopting different methods, or combining approaches, we are more likely to start to see a deeper and more meaningful picture.

Lesson 6: Be an 'interloper'

Although it was hard work, P-O provided an un-parralleled depth and awareness of the organisation that I was researching. This was potentially the biggest lesson I learnt from my PhD. The importance of embracing 'new' methods, and that it was ok to be an 'interloper'. Whether it was exploring the factory in a white-coat or walking the corridors in a suit; being physically present at the organisation provided insights that would have been lost with survey data alone. For example, whilst waiting in the front reception area for a meeting with management, a small group of workers came out of the door behind the reception desk and walked down the stairs and out through the front entrance. The group were young and slightly

energised, but otherwise well behaved. On seeing the group, the receptionist was mortified and reprimanded them for leaving via the front entrance. She turned to me and expressed her deepest apologies that I '*had to witness that'*. Apparently, the front entrance was only for management and visitors and I should not have had to 'see' the rowdy workers. From my perspective, what I had witnessed was a group of 16-18-year olds happily chatting at the end of their shift. Instead, what I felt I had truly 'witnessed' was the segregation of workers and it was the receptionist's reaction that I found the most uncomfortable. The encounter opened my eyes to the separation and divisions between workers and I started to notice signs around the building that restricted access to certain privileged areas depending on your status (i.e. seasonal workers were not permitted in the staff shop). The encounter with the receptionist was the first spark that resulted in my research questions moving from issues of motivational theory to questions around labour process theory (see Ramsay *et al.,* 2000). If I had not taken up the opportunity to spend time working on the production line, my research would have taken a very different direction. The survey had been completed by permanent workers (at the suggestion of management) and I did not undertake P-O until after it was completed. In hindsight, I should have started with P-O and used my findings to help shape the surveys and focus groups. Since, I have continued to incorporate elements of P-O in every research project I have undertaken. At times, there has been a stronger slant towards observation then participation, but every occurrence has been beneficial to the research findings.

Key point: We encourage our children to discover the world through observation and exploration, to be 'interlopers' and try new things. Perhaps we should do the same when it comes to conducting research. Being an interloper can bring a fresh perspective to a topic. No one method is superior to another and we need to be more inclusive and openminded in the methods that we use.

Lesson 7: Publish your findings

I am ashamed to say that I have largely shied away from publishing the findings from my participant observation and have fallen down the path of 'list fetishism' (Willmott, 2011). At first, I was a strong advocate of using the data from my participant observation for conference and journal article papers. From a conference perspective, it was the stories and the narrative that created interest, but from the perspective of journal articles, the advice was to focus on the survey and focus group data with 'light reference' to the findings from my observations. The advice was consistent and from multiple sources of my peers (including a 'top ranked' HRM journal editor). Instead, I focused on the findings from the survey, interviews and focus groups. Although at times referencing the data from my P-O, I do not feel that I have done it justice. However, I am happy to note that in recent years this stance has started to change and there has been a recent increase in high quality HRM/OB journals showing interest in P-O research that is rigorous and meets the 'high standards of the journal' (Shah and Corley, 2006). Personally, I have found it a struggle to provide the rigor required by journals within the confinement of the wordcounts. It is difficult to deliver the depth and description needed to provide adequate evidence with a wordcount designed with statistics and tables in mind. There are never limitations on the amount of numbers that can be reported.

Although the use of organisational ethnography is on the rise (see Czarniawska, 2012; Erbele and Maeder, 2011; Van Maanen, 2015), acceptance of qualitative research and mixed methods is still in the minority (Cameron and Molina-Azorin, 2011) and there is a perilous path of making our qualitative research appear quantitative (see Pratt, 2009). For some, the balance is on following a realist tale (Van Maanen, 1998), writing in a largely factual manner,

that is detached from the situation and often (although not solely) written in the third person (see McCann *et al.,* 2013). For others, they have followed Pratt's (ibid) advice and have incorporated raw data and emotion. As a result, Gilmore and Kenny (2015) have highlighted the lack of emotional experiences in ethnographic research. Although there are exceptions within management and business research (see Alcadipani *et al*., 2015), emotional accounts are rare. Original drafts of this article were in a narrative style, in the belief that it would be more widely accepted. Instead, at the encouragement of the reviewers, I have embraced a lyrical style of writing, a confessional tale of sorts and it has dramatically changed from its earlier drafts. As highlighted by Abbott, there is a 'powerful evocation' when writers provide 'emotional reactions to topics as disparate as the organization man, the street corner, and the melting point' (Abbott, 2007: 72). It is these accounts that are more likely to not only resonate with us, but also remain with us.

Key point: Although journal articles based on data collected through P-O may not be the norm in business related journals (especially in the field of HRM), there is a growing interest in findings from P-O. Whilst there are obvious challenges to writing articles for journals (wordcount being an obvious one), this should not discourage researchers. There is a need for more journal articles using P-O and there are opportunities available if you find the right journal. Opportunities to 'meet the Editors' and scope out those that are receptive to articles using P-O should be encouraged. Take on board their advice, and those of reviewers in shaping your article. P-O does not need to be confined to books, especially as journal articles are (arguably) more accessible to readers (both academic and practitioner).

Conclusion

This paper has reflected on lessons learnt the 'hard way' whilst undertaking P-O in a manufacturing organisation. I have come to realise that the challenges I faced were not perhaps the result of being an interloper in the world of P-O, but instead common experiences encountered by other inexperienced (and I'd argue experienced) researchers in the field of business management. P-O is often shrouded in a veil of secrecy and magic. This can make any new researcher nervous to go down this path. With the academic emphasis to 'publish or perish', researchers need to see that P-O is not only desirable but has a publishable output. Instead, it is important for those who have gone through 'the rite of passage' reflect on our experiences, the trials that we faced, and how we overcame them. By learning from each other and passing on our 'lessons' (see Table 1) we can encourage others to take up the mantle and conduct P-O. Business and management research is (over) dominated by quantitative research data (especially in research on HRM/HPWS). Whilst having its place, the constant use of surveys is not only repetitive, but it fails to address fundamental issues and lacks the depth and explanation of qualitative research. Ideally, researchers should combine approaches and adopt a mixed-methodology. At the least, we need more qualitative research to 'balance' the facts with explanation. As participants become increasingly survey fatigued, researchers might find themselves pushed down a qualitative route to ensure data collection. From a practitioner's perspective, organisations increasingly have the knowledge (and online survey tools) to send out questionnaires, but they are experiencing a gap in the stories and accounts behind the numbers. Without them, no meaningful initiative can be successfully implemented. As such, they are looking at the academic world to fill this gap.

[INSERT TABLE 1 ABOUT HERE]

Reflecting on my own experiences, the use of P-O brought several challenges, but it also provided the ability to delve deeper into the social setting I was studying (which is unique to observational research). Drawing out the key lessons that I learnt I would encourage those undertaking (or considering) P-O to embrace being an 'interloper' (Yanow, 2009) and to take comfort that feelings of being lost, are normal. As Gioia (2004; cited in Gioia *et al*., 2012: 20) states, 'you gotta get lost before you can get found'.

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Key lessons to share		
Lesson 1	Gaining and negotiating access	• Identify any appropriate norms of organisational practice in operation and use these to support access
Lesson 2	Immersion and acceptance	• Develop inter-personal relationships • Make yourself useful to others even in small ways • Listen and show interest in the lives of those you are researching • Even small connections can aid acceptance
Lesson 3	Positionality and performance	• Be prepared to adopt and adapt different roles and positions that are available to you in the organisation • Which positions you adopt and how you perform a particular role will influence and shape the inter-personal relationships with organisational actors
Lesson 4	Interpretation and representation	• Give yourself time and space to process your thoughts. Reflection does not always happen when you want it to and will not happen over night • Collect and observe everything, even the small things. • Consider your method data collection
Lesson 5	Mixed methods	• Triangulate your data with other research methods. • It is ok (and beneficial!) to combine qualitative and quantitative research
Lesson 6	Be an interloper	• Even short periods of time conducting participant observation will enrich your research and provide greater understanding to your subject • It is ok to be an interloper
Lesson 7	Publish your findings	• Share your experiences • Explore all publishing options

Table 1. Key Lessons to share