Strategic ethnography 2.0: Four methods for advancing strategy process and practice research

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Abstract
Although slow to enter mainstream strategy research, ethnographic methods play an important role in studies of strategy processes and practices. In this article, however, we argue that the potential of “strategic ethnography” has not yet been fully realized. In particular, we maintain that there is a need to complement conventional non-participant, observation-based ethnography with other ethnographic methods. This leads us to suggest four methods that will help advance contemporary research in strategy processes and practices: auto-ethnography which can provide a better understanding of the lived experiences of different types of strategists in different settings; video-ethnography, which allows detailed analysis of strategic practices in their sociomaterial context; comparative ethnography, which enables comparison of processes and practices in different settings, and virtual ethnography, which will further our understanding of the virtual aspects of organizational strategy work.

Keywords
Fieldwork, qualitative methods, research design, strategic ethnography, strategy as practice

Introduction
While ethnography is generally regarded as an important part of management and organization studies (Van Maanen, 2011; Ybema et al., 2009), it is generally not seen as part of the mainstream of strategic management research. However, it has gained increasing ground in strategy process and practice research, where it has emerged as a fruitful approach to elucidate the micro-level aspects of strategy work. For example, in her study of strategists-at-work, Samra-Fredericks (2003) explored

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through close-up observation how strategists’ linguistic skills influence strategy processes, Rouleau (2005) has elucidated micro-level practices in middle managers’ sensemaking and sensegiving in interpreting and selling strategic change, and Kaplan (2011) has explored the affordances of PowerPoint as a technology to influence the discursive practices of strategic knowledge creation. Thus, strategic ethnography has so far produced interesting and important insights, and we believe that it can offer further benefits to contemporary strategic management research.

Nevertheless, the full potential of ethnography remains to be realized. In this article, we argue that this is at least partly because strategy scholars have mainly conducted conventional non-participant and, to a lesser extent, participant observation and not pursued other forms of ethnography that take advantage of new technologies and/or more creative and more complex forms of engagement with research sites. Although we have learned a great deal about strategy work by following managers (Rouleau and Balogun, 2011; Samra-Fredericks, 2003) and observing meetings (Jarzabkowski, 2008; Vesa and Franck, 2013), we maintain that strategy research in general and strategy process and practice research in particular would benefit greatly from other more specific forms of ethnography. Thus, we argue for a shift from strategic ethnography 1.0 to strategic ethnography 2.0.

While we see value in promoting strategic ethnography per se, we wish to underscore that specific forms of ethnography can advance specific issues in strategy process and practice research. These include a need to broaden the scope of strategy process and practice research in terms of types of organizations and actors studied, a need to go deeper into strategic practices involving sociomateriality, a need to compare strategic processes and practices in different organizational, institutional and cultural contexts, and the need to take the virtualization of organizations and strategic processes and practices seriously. This leads us to suggest four specific ethnographic methods that can advance strategy process and practice research: auto-ethnography, an underutilized method for understanding the lived experiences of different types of strategists in different settings; video-ethnography, a means to advance detailed analysis of strategic practices, in particular sociomateriality; comparative ethnography, which enables comparative analysis of strategic processes and practices; and virtual ethnography, which will further our understanding of the virtual aspects of organizational strategy work.

**Toward strategic ethnography 2.0**

More or less all organizational ethnography is a search for socially shared and acquired local knowledge (Van Maanen, 1979). As Geertz (1983) observes, ethnography is characterized by an in-depth and detailed analysis of social phenomena in their historical and cultural context: “to-know-a-city-is-to-know-its-streets” (p. 167). Thus, ethnography is of value in management and organization research because it allows immersion into the researched organization and access to the lived experiences of managers and other organizational members (for excellent examples, see Michel, 2012; Pratt, 2000). This is also true of the kind of strategy research that aims at a better understanding of the actual processes and practices of strategy work (Mantere, 2008; Stensaker and Langley, 2010; Jarzabkowski et al., 2012). Strategy process research is by definition interested in longitudinal social and organizational processes and the role of managers in them (Langley et al., 2013; Mintzberg and Waters, 1985). A closely related area, research on strategic practices—often under the umbrella of strategy as practice—focuses on the social and organizational processes, activities, and practices of strategy work (Balogun et al., 2014; Johnson et al., 2003; Vaara and Whittington, 2012).

Accordingly, we have seen a growing stream of ethnographic strategy process and practice research in recent years. A part of this work has used the term “ethnography” in a relatively loose
manner to refer to qualitative data gathered with close access to the target organization. However, there are also a number of excellent studies that have made effective use of ethnography to advance strategy process and practice studies methodologically and theoretically. Most of these studies have been based on classical forms of ethnography that employ non-participant or participant observation. Some scholars have employed non-participant observation as the main source of data (Denis et al., 2011; Jarzabkowski, 2008; Kaplan, 2008), while others have used it in a triangulating role (Balogun and Johnson, 2004; Salvato, 2003). In the latter case, observations have been used as a complementary data source with the purpose of strengthening or testing the validity and quality of theoretical constructs (Yin, 2014). This is done in order to mitigate the effects on the analysis of any bias in information processing due to interview data (Eisenhardt, 1989).

In contrast to the more widespread use of direct non-participant observation, participant observation has played a less central role in strategy studies. However, participation still offers a rich and meaningful method for gaining insight into the everyday life of organizations from the inside. The researcher contributes to the host organization through local interaction, often by adopting boundary-spanning roles such as those of consultant (Laine and Vaara, 2007; Sminia, 2005), trainee (Howard-Grenville, 2007), or managerial assistant (Rouleau, 2005). In these studies, participation forms the primary data source.

These studies have greatly advanced our understanding of strategic processes and practices. However, we argue that these classic forms of ethnography can be complemented with others to realize the potential of ethnographic analysis. In particular, we maintain that there are four areas of research that could benefit from specific forms of ethnography. First, although strategy as practice research has helped us to better understand the “lived experiences” of strategic decision-makers (Samra-Fredericks, 2003), more could be done to dig deeper into the experiences of strategists in different positions and different settings. Auto-ethnography is a form of ethnography that focuses on this issue, and it can specifically help to add to the relevance of strategy research. Second, studies of strategic processes and practices have often focused on specific cases. It would, however, be of great value to compare processes and practices in different settings. While classical ethnography is typically conducted by individual researchers, comparative ethnography allows teamwork. Third, in-depth analysis of strategic practices requires increasingly detailed data. In this regard, video-ethnography can be of considerable assistance; in particular, it can help us to better understand the sociomaterial aspects of strategy work. Fourth, contemporary organizations are increasingly virtual, and strategic processes and practices are changing. Virtual ethnography allows us to dig deeper into these processes to better understand new forms of online and virtual strategy work.

**Four methods to advance strategic ethnography 2.0**

*Making use of one’s own experiences: Auto-ethnography*

Auto-ethnography, which uses one’s own experiences as data, is a classic form of ethnography that has seldom been used in strategy research (Karra and Philips, 2008; Rasche and Chia, 2009). The methodological preferences of mainstream strategy research—with which auto-ethnography and its inherent “subjective bias” readily clash—are perhaps the reason for this neglect (Hambrick and Chen, 2008), which is indeed ironic in view of the calls made for relevance and closer collaboration with practitioners in management studies in general and strategy research in particular (Jarzabkowski et al., 2010; Rynes, 2007; Walsh et al., 2007). In fact, auto-ethnographic immersion within an organization ensures access to privileged knowledge not usually available to outsiders and an intimate understanding of what it is and feels like to do strategy—with all its limited information, unpredictability, emotional upheaval, lack of resources, and constraining sociomaterial conditions. In auto-ethnography,
participation in strategy-making is a form of natural behavior that contributes to the local organization on its own terms.

Auto-ethnography is a particularly useful approach for studying problems requiring close collaboration with the host organization when co-production of findings of high relevance to practitioners is the aim (Johnson et al., 2010). Hence auto-ethnography usually builds on first-hand knowledge of how everyday strategy work is conducted in the research setting (Tallberg et al., 2014; Yanow, 2012) and expands the concept of “going native” in strategy studies (Brannick and Coghlan, 2007). Ideally, an auto-ethnographer is both a fully versed inside participant in strategy-making and a full-fledged member of the academic community. Hence, auto-ethnography is a tall order in today’s academic world and requires a clear awareness of its pragmatic and ethical ramifications on the part of the researcher. It is indeed difficult to be both a successful academic and an active strategist in an organization.

We maintain that strategic auto-ethnography 2.0 can be conducted in ways that help to go beyond top management decision-making in business organizations—and thus advance strategy process and practice research. First, we too often think of business firms as the only organizations to study. This may constrain our ability to see what is happening for example in the academic organizations in which we work or in other organizations of which we are part, be they more formal associations or social movements (see, for example, Alvesson, 2003; Gioia and Chittipeddi, 1991; Jarzabkowski and Wilson, 2002). Experiences from our own working life both prior to and alongside our academic duties can also be leveraged for substantial insights (see, for example, Michel, 2012; Tripsas, 2009).

Second, auto-ethnography allows one to immersively understand how strategy work is experienced by different organizational members, not only top managers, and offers means for such analysis. To advance strategy process and practice research, it is important to examine how strategies are made sense of, enacted, and resisted at various levels and parts of organizations (Balogun and Johnson, 2004). This is especially important in endeavors to understand phenomena such as the emergence of new strategies (Burgelman, 1994) or resistance in strategy work (Ezzamel and Willmott, 2008; Laine and Vaara, 2007; McCabe, 2010).

Third, auto-ethnography can build on deep collaboration with the organization being studied. This allows for substantial latitude in both how we interact with practitioners and how we report on our findings. For example, Vaara et al. (2005) analyzed bank restructuring in a research team that included the top managers responsible for the changes, while leaving the reporting to an academic team of authors. Herepath’s (2014) study of strategizing in the Welsh government builds on the naturalized immersion of the author, but reports on the findings from an almost objectifying birds-eye perspective. Contrasting to these, the primary informant in a study of organizational identity formation by Gioia et al. (2010) was an inside researcher who enacted the dual role of actor and observer, with the primary informant’s comments interspersed throughout the article. Jay’s (2013) study pursues an engaged account of both the role of the researcher and voice of the author, exposing how working ethnographically as an organizational historian accounts as an intervention in its own right. The bottom line is that auto-ethnography can facilitate our access to and understanding of the experiences lived by practitioners—and that this can be done by a variety of ways depending on the context at hand.

**Beyond notes and transcripts: Video-ethnography**

Recently, scholars have started to focus more attention on sociomateriality (Orlikowski and Scott, 2008; Spee and Jarzabkowski, 2011), by examining, for example, the spatio-temporal settings, tools, and technologies used in strategy work as well as bodily movements and expressions.
Increasing interest in emotions in strategy is a closely related development (Huy, 2011; Liu and Maitlis, 2014). Although these aspects of strategic practices are crucial, their analysis is not easy with conventional methods, including participant observation ethnography. Often crucial details are missed in the writing of field notes, which would be discernable if we had more reliable means of re-accessing the events observed.

One of the methods that offers novel opportunities here is video-ethnography (LeBaron, 2005). This provides a new angle on qualitative analysis in general and enriches conventional ethnographic analysis in particular. The possibility for continuous replay provided by video-ethnography facilitates the detailed analysis needed to gain a better understanding of the use of tools and technologies or the display of emotions. It also enables multimodal analysis, in which verbal communication can be linked with visual and aural elements, for instance in strategy meetings. Video-ethnography is particularly useful if the research problem requires exceptional detail on “nano” episodes of strategy work, for example, in ethnomethodological (Samra-Fredericks, 2010) or conversation analysis (Whittle et al., 2014). It can highlight complex and/or nuanced aspects of strategy work related to gestures or emotions (Liu and Maitlis, 2014). The method may also be appropriate for situations that forbid direct participation on the part of the researcher because the practices and processes under study are highly sensitive and/or vulnerable to interference. In such cases, video recording may still allow researchers to capture rich observational data about these situations. Recent examples include the study of Sorsa et al. (2014) where they video recorded strategy and performance appraisal discussions, and Smets et al. (2014a) who studied reinsurance underwriters. Nevertheless, video recording may also bring its challenges, including information overload in the sense that the researcher may focus too much attention on details instead of analyzing more important patterns, practices or processes.

Comparison of strategic processes and practices in different settings: Comparative ethnography

One key challenge facing much strategy practice and process research is its apparent inability to move beyond what are essentially single-case studies; this is particularly true of research that employs ethnographic fieldwork. This may pose considerable challenges for the generalization of findings. Furthermore, there is a general lack of comparison in strategy process and practices research that calls for new kinds of research designs and methods. Comparative ethnography is unusual because it often builds on the work of a team of several fieldworkers rather than on that of a single researcher (Clerke and Hopwood, 2014). By collectively observing similar activity at different organizations or at different sites inside an organization, it allows a research team to compare their observations and cover much more of the phenomenon in question. Thus, comparative observation requires an unusually high degree of co-ordination for ethnographic fieldwork. While individual researchers may even pursue immersive fieldwork, on the team level, comparative observation is about focusing the research on specific pre-identified points-of-interest that may evolve through iteration as long as the research focus of the team remains synchronized. Overall, the ability to compare observations is useful for dealing with the “subjective bias” that is sometimes associated with ethnography. Contrasting with classical participant observation, comparative ethnography is often an unobtrusive form of fieldwork, as researchers typically gather observational data that are supplemented with interviews.

Though uncommon, there are useful examples of such studies. Using comparative ethnography, Barley (1996) employed a team of eight fieldworkers over 5 years to study occupational structures in post-industrial society. Using a team enabled the combination of the unique fieldwork experiences of each researcher for the purpose of gathering comparative data on contemporary work
roles. At the team level, the researchers were able to move away from understandings of work roles structured around local notions. This allowed the team to theorize about new ideal types of work. At the same time, each individual researcher was able to retain a personal localized point-of-view. Sometimes, comparative ethnography can emerge through serendipity. In their study, Bechky and Okhuysen (2011) combine ethnographic data from two previous studies, on police SWAT teams and film crews, respectively, to conduct a comparative ethnographic analysis regarding how organizations react and handle surprises.

More recently, in their study of Lloyds, Smets et al. (2014b) used sustained comparative observation by three fieldworkers to examine the actual working practices of insurance underwriters. Their observations allowed them to capture the full pattern of the working practices and interactions of the research subjects; the comparative element allowed the researchers to establish that what they observed was in fact typical of underwriters at large, rather than the idiosyncratic working pattern of individuals. This is important for establishing the presence of dense networks that transmit and stabilize collective practices (Smets et al., 2012).

Finally, in addition to studying parts of the same organization or related ones, comparative ethnography provides huge opportunities for comparison of strategic processes and practices across different institutional and cultural contexts. Such comparisons have been very few in strategy process and practice research. Comparative ethnography offers one way of dealing with this gap, but such research designs and related issues of access and workload are challenging. Thus, we want to underscore that such comparisons may combine empirical material already conducted.

Taking online strategizing seriously: Virtual ethnography

Today’s strategy work is mediatized and often takes place at least in part online. Although online communities have received increasing attention (Dahlander and Magnusson, 2005; Jeppesen and Frederiksen, 2006; O’Mahony and Bechky, 2008), we need a better understanding of the virtual aspects of strategy work. Virtual ethnography provides the means to do this (Boellstorff et al., 2012; Hine, 2005). It means studying how people participate in virtual organizations located in virtual space as well as how these organizational forms interact with conventional organizations. We argue that virtual ethnography is particularly appropriate for understanding strategizing in emerging digitalized sociomaterial conditions, such as internal corporate-sponsored virtual worlds (Dodgson et al., 2013). In practice, this opens the way for the study of strategy work as it occurs through social media such as Facebook or Twitter, in online collaborative co-creation such as Wikimedia or open source software development, or in entirely virtual worlds. Virtual ethnography can also facilitate the study of open strategy, which is often an attribute of online organizations (Chesbrough and Appleyard, 2007; Doz and Kosonen, 2008). Furthermore, virtual ethnography is a fruitful method for studying new organizational phenomena such as gamification, that is, the introduction of game-like elements into organizing, impacts on the practices and discourses of strategizing (Werbach and Hunter, 2012) and the multi-disciplinary intersectionalities between management and game studies, such as playful organizations (Warmelink, 2014).

There are many ways to study virtual environments ethnographically, from the unobtrusive gathering of online text material known as netnography (Kozinets, 2002; Langer and Beckman, 2005) to highly immersive research designs in which organizational participation takes place through virtual embodiment such as avatars (Williams, 2007). We argue that this is important because at the moment, virtual worlds remain understudied and hence terra incognita for strategy studies. Here, it can be difficult to assess in advance what fieldwork should focus on, thus leading to what Nardi (2010) calls a “go with the flow” fieldwork strategy of following the interesting and the unexpected (p. 27).
Working through a highly immersive research design, the first author conducted a 39-month ethnographic study of the massive multiplayer online game *World of Warcraft* (Bainbridge, 2012; Vesa, 2013). The research explored the strategizing practices of virtual player guilds (Williams et al., 2006). It was conducted in-game by participating in the daily activities of five different player guilds through an in-game character. In order to explore the novel organizational context holistically, the research made use of various participatory fieldwork roles ranging from that of initiate guild member to that of leading guild officer. This allowed the research to explore and chart the virtual strategizing practices used in guilds, to identify their users, and to ascertain how information flows within the guilds were structured in relation to seniority and rank. The study also demonstrates how findings from virtual worlds can be extrapolated into general management theory by using rapidly evolving gamer groups such as guilds as online laboratory sites, in this case by theorizing around organizational evolution and the relationship between collective commitment and organizational boundaries (Vesa, 2013; Warmelink, 2014).

**Conclusion**

Ethnography has played an important part in strategy process and practice research. However, its full potential could be extended by reaching beyond conventional non-participant or participant observation fieldwork. In this article, we point to a need to connect the current challenges in the strategy process and practice research agenda with concurrent developments in ethnographic methods. We do this not only to promote strategic ethnography 2.0 per se, but to underscore the ways in which novel forms of ethnography help to advance strategy process and practice research.

More specifically, we propose four specific ethnographic methods that can achieve progress on key issues in strategy process and practice research that are difficult to tackle with other methods, including those of conventional ethnography. Auto-ethnography, which is more of an underutilized method than a novel one, offers an opportunity for strategy research to better capture the lived experiences of various kinds of strategists’ in situ work in different settings. It also offers opportunities for practitioner collaboration by enabling fieldworkers to develop an intimate understanding of the organization under study. This should facilitate crossing the bridge between academic and practitioner knowledge. Video-ethnography offers researchers new opportunities for detailed micro-level analysis that can in particular provide a better understanding of the sociomaterial aspects of strategic practices and process. Video-ethnography works especially well when analysis requires minute detail or when the research topic cannot be studied through participant observation. Comparative ethnography enables comparison of strategic processes and practices in different contexts and allows us to move beyond the experiences of a single field worker through constant comparison of empirical findings among members of a research team. This can also be extended to compare strategy processes and practices in different institutional and cultural contexts. Finally, virtual ethnography can capture the way technology impacts organizing by identifying both new research technologies and organizational realities. Virtual ethnography offers strategy researcher an opportunity to study strategizing in online settings from discussion boards to pure virtual worlds that in and of themselves can be parts of either conventional organizations or emerging online communities.

While these four forms of ethnography are not the only ones available for enterprising strategy researchers, they help us to move toward strategic ethnography 2.0, a state in which the evolving research agenda of strategy process and practice research is paired with concurrent innovation in research methods.
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References


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