

## Use of Electronic Media in a Participant Observation Study

John P. Workman, Jr.

---

*I wake up at 6:15 am, roll out of bed, and flip on my personal computer. Fieldwork is never more than a few steps away, thanks to my access to Zytek's electronic mail system. I dial into the network and spend the next 30 minutes sending out messages to set up meetings. I am planning another trip to Detroit in two weeks and send a message to the area sales manager I met last week in order to get permission to attend a two day event for a major customer. I send additional messages to set up an interview and get my name put on a distribution list, download new mail to my PC, and start printing it. After breakfast, I return to find 17 pages of mail—announcements and agendas for four meetings, a five page memo with the minutes from yesterday's pricing committee meeting, a five page memo requesting input from marketing groups for a software product, and a response from a marketing manager to my request to have lunch next Wednesday. I look through my mail for ten minutes and then head out the door. It's 7:35 am<sup>1</sup>.*

---

Participant observation has typically called on the fieldworker to get close to those being studied and seek to come to an understanding of how they see the world. As Van Maanen (1988, p. 2) notes, "Fieldwork usually means living with and living like those who are studied." However, when those being studied are geographically dispersed and rely on electronic mail, telephones, faxes, and video conferences in order to communicate with one another, new approaches to fieldwork may be called for. This

Direct correspondence to John P. Workman, Jr., Ph.D., Kenan-Flagler Business School, University of North Carolina, Chapel Hill, North Carolina 27599-3490.

note, based on nine months of participant observation in a computer systems firm, considers some of the ways in which electronic communication forums may be utilized in a field study.

## OVERVIEW OF ELECTRONIC MEDIA

During the site access negotiations, insiders had informed me that a computer account would be essential for communicating with others and thus I was assigned an account which allowed me to access "Zytek's" worldwide computer network from my PC at home. While there were a broad range of on-line services available (e.g., daily corporate news, new product information, price lists, text of internal publications for the sales force), the services I spent the most time using were the electronic bulletin board system and the electronic mail system (E-mail system). The bulletin boards facilitated discussion among groups of people with common interests while the E-mail system facilitated sending information from one person to another.

The E-mail system along with the ability to set up distribution lists allowed for the rapid and widespread dissemination of information within Zytek. For example, one marketing manager had a list of over 1000 Zytek employees that she could forward messages to with less than ten keystrokes. However, this ease of communication also led to a considerable amount of unwanted information on the other end. For example, during the first week of my fieldwork, my sponsor's secretary mentioned that she'd gotten a little behind in handling the mail sent to him and there were over 1500 mail messages in his account. She said he typically received 150 to 200 messages a day and I frequently ran into people who said they received more than one hundred E-mail messages a day.

In addition to the computer-based communication forums, Zytek also made extensive usage of audio and video conferences. The audio conferences linked individuals or groups by telephone, the video conferences used satellite communications to either downlink a broadcast, or to link two groups using both transmitting and receiving equipment. Audio conferences included phone calls using speaker phones on one or both ends, meetings using speaker phones to allow people at distant locations to take part, as well as conference calls where people at up to 30 or 40 different locations could take part. Due to the cost of satellite broadcasts, the video conferences were primarily used for large scale training programs for the sales force or for large product introductions where customers were simultaneously present at dozens of locations. Additionally, many presentations were videotaped and the corporate libraries had hundreds of video tapes. I

viewed several tapes to learn the histories of specific projects and the evolution of some of the marketing strategies. With this overview of the various types of electronic media, I now discuss how this information was used on a daily basis.

## HOW THE ELECTRONIC MEDIA WAS USED IN THE FIELDWORK

Within the first few weeks of the fieldwork, I found people asking me for my electronic mail address and saying they would forward material to me that they thought might be of interest to me. I soon was checking my account several times a day and was finding it an essential part of my fieldwork. In this section, I discuss various ways in which I used the electronic communication system.

### Distribution Lists

My earliest exposure to the E-mail system came in the first week as I started attending the meetings for the projects I was assigned to. The product managers had set up distribution lists with the names and E-mail addresses of people interested in their products and used these distribution lists to announce the time and place for team meetings. These distribution lists were also used to send correspondence that might be of interest to team members, such as "product requirements" and "market requirements," proposed schedules, costs, planned introduction strategies, and text for brochures or advertisements. I asked to be placed on the distribution lists for these products and in this way automatically received notification of all team meetings as well as the same documents that team members received. As I started observing activities in other parts of the firm, I also asked to be placed on the distribution lists for these groups.

I was soon receiving an average of five to ten documents per day due to being on these various lists. Some messages were only one or two lines long, simply announcing the time and date of meetings; others were dozens of pages long, providing the full text of marketing or planning documents or asking for detailed information from others. I relied on the E-mail system to keep track of the meetings I was to attend, to learn of the agendas for these meetings, and to receive the written minutes for these meetings. Since I was soon following activities in a range of groups and was not able to attend all meetings, I found the minutes from meetings I did not attend a useful way to keep up with what was going on. I initially downloaded

my mail and printed it out at home, but soon found this too time consuming and instead routed it to a laser printer at corporate headquarters. In this way, I was able to save and file the thousands of pages of E-mail messages I received.

### **Scheduling Interviews**

In addition to automatically receiving mail by being on distribution lists, I also used the E-mail system to schedule interviews or to obtain permission to attend various activities. In the first week of the fieldwork, the vice president sponsoring me had one of his managers write a one page memo describing my project and asking people to cooperate with me. I kept this memo in my computer account and over the course of the fieldwork, sent it to over a hundred people when requesting an interview or asking for permission to attend a meeting.

Due to the geographic dispersion of the Zytek facilities (I visited over 20 facilities), in many cases I made my initial introduction via E-mail. I kept several introductory memos in my account and edited them as needed and forwarded them along with the VP's memo. All of the seven interviews I had with vice presidents at Zytek were arranged by E-mail and typically were set up two or three months in advance. For mid-level managers, it was typically necessary to schedule interviews two or three weeks ahead of time and many interviews had to be rescheduled (some as many as 4 or 5 times) via E-mail. I typically sent reminders a few days in advance of an interview and in some cases people asked for a short outline of topics I wanted to discuss with them.

### **Monitoring Internal Debates**

There were hundreds of electronic bulletin boards, facilitating discussion of topics such as products (e.g., mid-sized systems, desktop systems, printers, networks), applications (e.g., desktop publishing, networking, graphics and imaging), organizational groups (e.g., marketing, field service, sales support), specific customer accounts, and competitors. There were additionally dozens of bulletin boards on non-work related topics such as current events, religion, parenting, relationships, skiing, entertainment, and hobbies. Anyone could post an initial question or topic for conversation and initial postings were typically fairly short and either asked specific questions (e.g., "Are there any plans to introduce a color monitor in the next four months?") or asked general questions to provoke discussion (e.g., "What do you make out of the recent announcement by [Competitor R]?")

The more "interesting" bulletin boards might get five or six new topics a day, with dozens or even hundreds of responses to a given topic. Most of these bulletin boards retained old correspondence (sometimes three and four years old), and in some cases, it was possible for me to go back and look at debates about strategic decisions made several years earlier. While I never posted my own questions or comments on the bulletin boards, I did spend dozens of hours reviewing the content of many of these files and I found them useful for keeping abreast of developments in a wide range of groups that I would not have otherwise had easy access to. While virtually everyone at Zytek claimed they monitored a handful of bulletin boards related to their interests, many people warned me to not take them too seriously. The limitation seemed to be that those in power tended not to participate while those being the most active participants seemed to be the disenchanting. In this way, the bulletin boards tended to overstate marginal positions and understate mainstream positions.

### Communicating with Informants

Finally, I used the E-mail system to directly correspond with key informants. My network of informants regularly forwarded me messages on topics they thought I might be interested in. It only took a few keystrokes to forward a message and I received thousands of pages of messages, including several dozen messages that had worked their way down from the CEO. On many occasions, people sent me "historical memos," often several years old, on key strategic decisions. For one decision I was trying to unravel, a key informant sent several hundred pages of original memos between the key decision makers that helped me chronicle the activities. Such background information was extremely valuable in preparing me for interviews, since I often knew a lot more about historical events than the people I interviewed realized.

In addition to receiving memos forwarded to me by informants, I also corresponded with them via E-mail. In some cases I would ask specific questions to clarify technical terms, to learn the history of certain projects, or to better understand some of the organizational politics. I was very concerned about not being seen as an information broker and passing things on, but I did forward what I considered to be nonsensitive mail to others on occasion (usually when discussion came up about a message I had received and another person did not have a copy). I continued to have access to the E-mail system for 15 months after the full-time fieldwork and during this time I often sent messages to key informants to clarify certain issues.

I also sent rough drafts of chapters via E-mail to 4 or 5 of my informants and received feedback from them on what I had written.

## DISCUSSION

In this note I have outlined some of the ways electronic forums can be used when doing fieldwork. A few themes emerge as to how I utilized these media. First, I used the E-mail system just as insiders do to correspond with others and to learn of the time and place of meetings. Second, because of the ease of storing messages and forwarding them to others, there was a rich electronic paper trail which provided context to the activities I observed and which could be used to reconstruct the history of specific projects. Third, because most presentations to large groups were videotaped, I was able to watch presentations made years earlier or where I attended other activities due to scheduling conflicts. Finally, I took part in over a dozen meetings where the participants were geographically dispersed and were linked via audio and/or video conferencing. These activities included training sessions, product introduction events, and some product review meetings. While the electronic media facilitated the fieldwork, it in no way replaced traditional participant observation activities. For example, most of my time in the field was still spent either attending meetings, conducting interviews, or chatting with people I ran into.

A few aspects of the Zytek setting seemed to make electronic media especially appropriate. First, the participants worked in a technical setting and were at ease in using E-mail and on-line systems for communicating with each other. Much of the communication between people was initially in an electronic (rather than paper) format. Second, because Zytek produces computers which can be easily interconnected, almost all employees could communicate with each other over a single worldwide network. Most organizations have computers from dozens of different vendors and their systems may not be networked in the way that the computers at Zytek were. Finally, the focus of my study was on the communication between groups in the firm as new products were developed and the electronic media were the primary means by which these geographically dispersed groups were linked. If I had been focusing on activities of groups that were in the same physical place, the electronic media might have been a less central part of their lives.

Will future fieldworkers find electronic media appropriate for studying organizational groups? Computer vendors claim they are on the leading edge of a trend toward using computers and telecommunications to reorganize

work processes among groups which no longer need to be physically close to one another. The activities of the 1992 Presidential campaign whereby Bush, Clinton, and Perot use satellite conferences, "electronic town hall meetings," and electronic bulletin boards for position statements are similar to the activities I observed. I suspect that participant observers will find electronic media appropriate in their own fieldwork to the extent that those they are studying rely on it in their daily activities. In this note I have attempted to show a few of the ways in which electronic media can complement more traditional participation observation methods.

### ACKNOWLEDGMENT

Financial assistance to offset travel costs associated with the fieldwork was provided by Penn State's Institute for the Study of Business Markets.

### ENDNOTES

1. This excerpt is part of an essay on one day's activities in the field. The fieldwork on which this note is based sought to understand the process by which decisions were reached on new products. I began by attending weekly design team meetings for several projects in one engineering group and over time spent more time in the marketing and sales groups. Over the course of the fieldwork, I visited over twenty "Zytek" (a pseudonym) facilities, attended 68 meetings (averaging almost three hours in length), conducted 135 interviews (averaging slightly over 60 minutes), and had numerous informal conversations with people I ran into.

### REFERENCE

- Van Maanen, J. (1988). *Tales of the Field: On Writing Ethnography*. Chicago: The University of Chicago Press.