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## SPECIAL ISSUE OBSERVATION – EDITORIAL

# Rethinking Observation: Challenges and Practices

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Observation is the motor of empiricism. From ancient medicine (Pomata, 2011) to modern sociology (Platt, 1983), observing phenomena is considered critical to making sense of them. In social sciences, observation is more than a 'technique' or a 'tool'. It is a broader epistemological position, which supposes that to study a phenomenon, one must watch it attentively and at length. In the Management and Organization Studies field, observation is also a data collection method that is frequently acknowledged as uniquely enriching. This is particularly the case when it comes to investigating phenomena that are difficult to examine otherwise or reexamining those already extensively studied to unsettle their accepted truths (Bernstein, 2012; Locke, 2011). Despite this, it remains under-engaged by management scholars (Cunliffe, Linstead, Locke, Sergi, & Hallin, 2011; Von Krogh, 2020), certainly compared with interviewing or quantitative analysis. Even when used, it is frequently over-stated: as Bate (1997) stressed, much of its use in our field is best described as 'quasi-anthropological' that is characterized more by "quick description" (Wolcott, 1995, p. 90) than 'thick description' (Geertz, 1973). The 'ethnographic consciousness' (Linstead, 1997) central to its capacity for rich contribution thus remains lacking. This is for both analytical and practical reasons: some research questions are thornier than others in demanding more in-depth engagement; the contemporary realities of business schools rarely make space for extended forays into organizational fields.

In many methodological discussions, in turn, observation too often remains perceived as self-evident, engaged as secondary, and overshadowed by other research design elements, such as interviews or data analysis. Even when observation is central to a research design, its detail is often subsumed under discussion of related concepts, like ethnography (e.g., Kaplan, 2011) or case study (Yin, 1994), which often come to 'speak' on its behalf. This state of affairs likely reflects its deceptively obvious nature: how can going somewhere and seeing what happens be in and of itself complicated?

Beyond this, its frequent use in parallel with other methods (like interviews, archival, secondary data, etc.) contributes to an increasingly 'taken-for-granted' view of observation as well. Here, observation is used to theorize from data (e.g., Garreau, Mouricou, & Grimand, 2015; Journé, 2005); it is often used with equal importance to other data source (e.g., Dobusch, Dobusch, & Müller-Seitz, 2018), or used in order to contextualize (e.g., Bardon, Brown, & Pezé, 2017) or triangulate with other data (e.g., Bouty, Gomez, & Chia, 2019). The discursive (Putnam & Fairhurst, 2001), narrative (Fenton & Langley, 2011; Rhodes & Brown, 2005), and the practice (Vaara & Whittington, 2012; Whittington, 1996) turns in organization theory and strategy research have given observation a further notable importance in the field of organization studies in particular (it has long been elemental in others, like sociology and anthropology), as they build on what people do and say in their everyday activities. The spread of case studies, in turn, whether single or multiple, has expanded the use of observation to grasp lived realities of organizations and its members (Gibbert & Ruigrok, 2010; Gibbert, Ruigrok, & Wicki, 2008).

Observation's capacity to unearth richly meaningful data is evident in recent exemplars across organization studies. For instance, several of the most recent award winners of the best PhD dissertation by the Association Internationale de Management Stratégique (AIMS, French Association of Strategic Management, of which M@n@gement is the official journal) have primarily used observation as a data collection method. To cite a few, Grandazzi (2018) used observation as part of an ethnographic investigation in order to grasp in nuanced ways the various practices of Société Nationale des Chemins de Fer Français (French Railroad Company) (SNCF) staff in train stations. Sambugaro (2016), in turn, used longitudinal observation as part of a lengthy ethnographic immersion to better understand the transformation of a strategic initiative in an insurance company and to more generally address the

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complex issue of strategy making within pluralistic contexts from a pragmatist perspective. The extensive use of observation in these studies was praised as a key quality feature.

We believe observation, which has been fundamental to social science research development (Angrosino & Rosenberg, 2011; Bratich, 2017), is critical for high-quality qualitative research. Yet, for all its promise, it remains a difficult business in practice. To address just the tip of the iceberg: it is personally challenging, and spatially and temporally unruly; it involves access to often delicate realities, for which formal pre-consent may be impossible; its open-endedness brings not only freedom to explore but also the nuanced task of inserting boundaries, of 'cutting the network' somewhere, sometime (Strathern, 1996). This special issue thus aims at exploring in detail the critical challenges of observation as a *research experience* – of doing observational research in the field at this moment in time. It does not purport to give a set of best practices but rather aims at enriching our collective reflexivity about observation as a method for management research.

## The challenges of observation

Observation is not a mere research tool. Instead, it draws on a triptych of epistemology–methodology–theory, which generates four central-related challenges as we see in the following sections.

### Challenge 1: What to observe?

The foundational matter of the object of observation is misleadingly simple: is not the answer everything, as much as possible (Neyland, 2008)? Materiality, for example, has been extensively researched via observation (e.g., Dameron, Lê, & LeBaron, 2015), as have practices (Balogun, Best, & Lê, 2015; Kaplan, 2011; Nayak, 2008; Nicolini & Korica, forthcoming; Smets, Jarzabkowski, Burke, & Spee, 2015) and discourses (Abdallah & Langley, 2014; Hardy & Maguire, 2020; Vaara & Monin, 2010). Other phenomena seem less intuitively open to observation, such as cognition (Gylfe, Franck, LeBaron, & Mantere, 2015) or emotions (Cornelissen, Mantere, & Vaara, 2014; Liu & Maitlis, 2014). Here, observation operates via proxies.

For example, emotions are a physiological change in the body but can be manifested via facial expressions. For emotions to become observable, Plutchik (1997) proposed a complex model that made it possible for a researcher (or any other person) to observe emotions via standardized facial expressions. Emotional expression exists in context, however, which may make universality of agreed meaning far from settled. Does a presenter's wink to their audience observed in a meeting 'do' the same thing as a wink observed on a date? When we observe either, what phenomenon are we

observing? Should we really be observing (or more realistically, noting) this in the first place, especially if say our analytical focus is on governance in practice or on the work of public landlords? Not to mention: how do we know which observations will eventually matter? This brings into question the customary ethnographic injunction to observe everything. As Czarniawska (1998, p. 29) stressed, "although in the beginning researchers tend to be taken by panic and try to chase 'the action', in time they learn that important events are made into such in accounts. Nobody is aware that an important event is happening when it takes place."

Furthermore, while emotions may have customary proxies enabling some coherence in observation (even if inherently limited), other phenomena will not. Indeed, such proxies may likely emerge only in our very act of observing them: I observe laughter as a proxy for humor but not winks. It is said no person steps into the same river twice. If two researchers observed the same event, would they 'see' the same thing, or agree that what they saw meant the same? Even more tricky is the question of observing the 'unobservable'. Importantly, observation can be used to grasp absence or emptiness. For example, "space may be thought of as an absence of presence, as vast emptiness, as something that one can get lost in" (Kornberger & Clegg, 2004, p. 1095). How does one observe organizational decline or death, for instance? What proxies are suitable to speak on behalf of their absent friends? And finally, should some things simply not be observed (Roulet, Gill, Stenger, & Gill, 2017)?

### Challenge 2: How to observe?

The question of how to observe is a tricky one too. It speaks to the distinction between observation and witnessing (Fassin, 2010; Reed-Danahay, 2016). This stresses that the method depends highly on the way the researcher recognizes and claims their subjective participation in the processes of observing/witnessing the phenomenon (Emerson, 1981). In this dichotomy, observing is seen to get rid of the subjective experience of seeing/hearing, by avoiding empathy in the way the phenomena are grasped. Modern anthropology, however, relies more on witnessing, in which the researcher's identity and empathy as a witnesser become more central to the process of perceiving and sensing phenomena. Epistemological orientations are thus key to considering how to observe.

This point also echoes the traditional distinction in management research between participant versus nonparticipant observation (Journé, 2008), though as this special issue also explores, this is just one dichotomy of many when it comes to types of observation. In particular, participant observation involves a period of intense social interaction between the researcher and actors, in which data are collected in a systematic

way (Lapassade, 2002), with a normally designated formal role for the researcher in that setting. Here, observation relies on the intersubjective relations that stand between the researcher and the field. The researcher can either make a reflexive use of these relations or even use this relation to modify the field in a collaborative design (Ledunois, Canet, & Damart, 2019). In contrast, observation customarily relies on a more detached stance. This includes dedicated efforts to avoid the researcher from becoming overly immersed (i.e., 'going native'), most chiefly by retaining solely an observer role. More radical is video recording that allows observing via a technological device (LeBaron, Jarzabkowski, Pratt, & Fetzer, 2018), which can involve complete avoidance of a researcher's presence in the field – at least during the data collection period. This method is particularly useful for accessing microelements such as an actor's praxis. It also facilitates interviews with the actors' post video recording, for them to comment on specific moments or practices (Rix-Lièvre & Lièvre, 2010).

Importantly, however, a researcher's physical absence from the field itself does not necessarily imply an absence of impact. The observed by virtue of being observed changes (Neuman, 2004). For example, critical management scholars tell us that being observed, including by a detached system of surveillance like electronic systems, can lead to conforming to corporate expectations via acts of self-discipline (Sewell, 1998), hiding deviant behaviors (Burawoy, 1979), managing impressions (Iedema & Rhodes, 2010), or even engendering a particular ethics of the self (Bardon, 2011). Even if a researcher's body or camera become part of the background noise to those observed, that forgetfulness itself may have effects. In a tense moment, the observed may all of a sudden remember they are observed, and the achieved sense of normalcy may switch to one of intrusion, leading to less openness down the line. Even after a lot of time together, it does not mean we are no longer noticed – as Barley (1990) found when the radiologists and technicians he observed positioned him for parting photographs painfully accurately in line with his usual stance when observing. This leads to a broader question of: to what extent can we become wholly invisible, and thus impact-less, to those we observe, regardless of which approach to observation we take? It also poses the related epistemological question: should we be wholly invisible and impact-less?

A more transversal way to consider how to observe is via the lightning metaphor, to which four criteria can be applied (Journé, 2008): unity of place, unity of time, unity of actor, and unity of inquiry. This results in four main observational strategies: street lamp observation (unity of place and time), spot lightning observation (unity of place but different periods of time), torch observation (unity of actor), and headlight observation (unity of inquiry). Each have their opportunities and disadvantages but may be complemented by each other in a

dynamic way to provide a robust data collection method, especially when the research aims at studying organizations coping with unexpected events (Journé, 2005).

### **Challenge 3: How to preserve what is observed?**

After observation comes the handling: what to do with all that has been collected? Video recording makes the question of data recording and transcribing relatively easier, though safe storage of easily identifiable data is more than a trivial affair. For in-person observation, data transcribing and storage are of a different magnitude of complexity. Here again, choices have to be made in line with theory and the overall research design. Lots have been written on ethnography and taking notes of the field (e.g., Emerson, Fretz, & Shaw, 2011; Peretz, 2004; Van Maanen, 1979; Werner, 1999). When it comes to other research designs, however (e.g., observation is used in nomothetic multiple case designs [Eisenhardt, 1989] and collaborative designs [Ledunois et al., 2019]), prospective researchers find much less available. For instance, the research diary as a foundational component is too often relegated to the rank of an "accessory document" (Mucchielli, 2009, p. 130), despite a more promising start (Balogun & Johnson, 2004). In an attempt to draw on how researchers make sense of phenomena, Laszczuk and Garreau (2018) thus propose a structured research diary that articulates theoretical anticipation, descriptive field notes, analytical notes, and reflexive notes.

More broadly speaking, this acknowledges the individual nature of recording the observed. As Denzin and Lincoln (2005, p. 3) stressed, this is central to their definition of qualitative research more broadly, as "a situated activity that locates an observer in the world. It consists of a set of interpretive, material practices that make the world visible. These practices transform the world. They turn the world into a series of representations." This also means individual choices in what is not observed, or not formally recorded, recognizing the key role of trust in facilitating continued access (Barley, 1990).

### **Challenge 4: How to tell what was observed?**

Telling what was observed – in a book, an article, a dissertation, and a presentation – inherently generates a paradox: to represent with words what has happened some time ago somewhere else (Enaudeau, 1998). Providing a vivid sense of 'being there' is one of the biggest challenges of observation. How to make the reader sense what happened in the field without the possibility of physically transporting them (back) there? How to convince the reader of the account's nuances, not to mention 'validity'? Description *per se* can be insufficient for publishing (Suddaby, 2006), as a case study is not a case history (Pettigrew, 1990), even if ethnography has long relied on 'pure

description' that escapes formalism (Van Maanen, 2006). Researchers need to consider both making their theoretical analysis understood by the reader and demonstrating adherence to the data (Corbin & Strauss, 1990; Langley & Abdallah, 2011; Golden-Biddle & Locke, 1993). This double injunction generates tensions that the researcher may try to solve via using a first (highly descriptive) and then a second (analytical) order analysis (e.g., Gioia & Chittipeddi, 1991), articulating observational data via exhibits (e.g., Garreau et al., 2015) or engaging structured description mixed with verbatim excerpts (e.g., Kaplan, 2011). Three characteristics are thus accepted as central to the power of convicting the reader: authenticity, plausibility, and criticality (Golden-Biddle & Locke, 1993).

Of course, the act of convincing is also an act of rhetorical construction, which ought to be openly acknowledged too. As Yanow (2006, p. 1748) noted, "we construct representations of the situations we study, piecing together an understanding of what we see, read, and/or are told." This brings to light the role of the observer in that which was observed: his/he specific eyes seeing specific things through specific lenses and from specific starting points (Van Maanen, 1979). Ethnographic writing on method has thus long identified observation as inherently personal (Shaffir, 1999; Watson, 2000). In this way, it is also political: "it involves choices to include some things and exclude others and to view the world in a particular way when other visions are possible" (Stone, 1988, p. 306). Our field, however, engaged in an extended process of scientific emulation, has generally not made room for the personal – or seen it as consistent with credibility. As such, realist writing (Van Maanen, 1995b, p. 139) remains the standard means of reporting observational writing, to match "our customary aggressive certitude toward reality." What gets lost in such reporting, however, both practically and analytically? How can the 'shadows' (Van Maanen, 1995a) of organizational life, which observation has the notable capability to access, be preserved in our writing? Can we account for our observations' inherent limitations in a way that openly runs counter to 'the allergic reaction to admitting doubt' (Klemola & Norros, 2001), which remains dominant in our scholarship?

Various reflections on the criticality of how to write ethnography and on the complexities of formally putting observation to paper in a field characterized by diverse positionalities have been offered in the recent years (Abdallah, 2017; Dorion, 2020; Ericsson & Kostera, 2020; Isoke, 2018; Schindler & Schaffer, 2020; Yousfi & Abdallah, 2020). Describing observations 'flatly' is no longer an option. The challenge of conveying what was observed is considerable: after years of internalized methodological training that puts a presumed neutrality of the author at the center of academic research, it is hard for observational researchers to find their voice and own it. Confidence in one's ability to describe the inflection of a tone of voice, the particular 'texture' of a social practice (Cozza et al., 2020) or

the transformation of a group dynamic is hard to achieve. Today, such matters are given increased attention within broader discussions of qualitative research approaches. Yet, while many authors have variously engaged with these challenges over the years, with new sites, assemblages and methods of observation come possibilities for further theoretical and methodological refinement. The papers in this special issue propose such contributions.

### Papers of the special issue

The first article of this special issue is a theoretical piece that discusses how to cope with the challenges of observing materiality in organizations. After reminding the reader of the key definitional and ontological debates, Isabelle Royer proposes that the three components of materiality (following Lefebvre, 1991), namely, 'activities', 'conceptions', and 'lived experiences', should be investigated via distinct observation methods: respectively, via 'observing materiality in actions', 'observing beyond seeing', and 'making participants observe'. For each observational method, Royer details the main challenges associated with data collection, storage, and analysis. While observing materiality in action could appear quite straightforward in that it involves paying particular attention to how materiality is produced and used, Royer emphasizes that specific techniques are nevertheless helpful. Royer then states that a privileged way to grasp 'conceptions', understood as how artifacts and spaces have been conceived by planners, is to pay particular attention to the unseen, including feelings, odors, sounds, or even absent elements. She discusses several ways for observing beyond seeing, including for researchers to experiment with materiality themselves. Finally, Royer reminds us that observing individuals' lived experience of materiality is particularly challenging since cognitive and emotional mechanisms are not directly visible. 'Making participants observe' thus implies engaging the informants' perspective by observing photographs, videos, or drawings they generated themselves, that is, engaging proxies that offer a representation of how they see the world and experience materiality.

The second article authored by Christelle Théron resonates with Royer's contribution, in that it deals with the challenge of capturing the cognitive mechanisms that underpin organizational actors' various actions. Théron proposes to investigate the inner experience of individuals through an original research approach: the Shadowing–Conversations–Interview (SCI) design. This method builds on situated action scholarship and consists of combining shadowing with conversation analysis and 'interview to the double' (i.e., the shadowed person), a distinct interview method that aims to access an actor's customary practices by asking him/her how the interviewee might act as they do. Théron starts by reminding us about key

epistemological foundations of situated action scholarship in relation to cognition. Notably, she examines how the cognition-action link and the distinction between the *in situ* and structuring facets of cognition are understood in this intellectual tradition. She argues that existing methods fail to fully grasp organizational actors' cognition, either because they capture cognition separately from actions or because they are unable to capture both its *in situ* and structuring facets. This allows Théron to outline how the SCl research design addresses such shortcomings by illustrating her points with empirical vignettes, which make the main benefits and the practical challenges of this approach visible.

Beyond offering a method for grasping the cognitive mechanisms underpinning organizational actors' actions, Théron's article invites us to reflect on how observational methods can be combined with other data collection techniques. Going beyond the tendency of approaching observation as a minor or peripheral method, Théron demonstrates how it can be combined with others following a synergy-driven logic, rather than a stacking logic, to better understand organizational phenomena.

While Théron's article demonstrates the benefits of combining observation with other methods, Nathalie Raulet-Croset, Rachel Beaujolin, and Thierry Boudes' contribution highlights the benefits of multi-actor observations. They demonstrate that multi-shadowing – in which several researchers shadow organizational actors simultaneously – constitutes a uniquely valuable way of observing 'organizing', that is, organizational phenomena in the making. Specifically, they argue that multi-shadowing can help address three particular challenges encountered by researchers investigating 'organizing': being able to observe several events simultaneously; knowing what to observe within the myriad of events that happen in organizational settings; and being able to grasp the coordination between geographically dispersed events and actors. To elaborate their contribution, they first compare the main mono-actor and multi-actor observational methods and show that they present important limits for getting access to organizational phenomena in the making. They then present a multi-shadowing approach to investigate how hunting with hounds unfolds. Although such hunting can seem as an unusual setting, the authors emphasize that it shares many commonalities with many modern organizations, since it involves a myriad of geographically dispersed actors unfolding in a very uncertain context. The authors report on their own experience to specify how multi-shadowing could be conducted to investigate organizational phenomena in the making, both in their temporal and spatial dimensions.

The fourth article of this series focuses on how to organize, analyze, and construct meaning from observational data. Specifically, Hélène Peton and Justine Arnoud address the challenge of giving meaning to complex and indeterminate organizational situations by using data collected through dynamic

observation. The authors argue that existing contributions recognize the relevance of using dynamic observation for investigating indeterminate situations, providing sophisticated hints about possible dynamic observation strategies. Despite this, present studies say very little about how to put to work the data collected with dynamic observational methods, beyond suggesting these be turned into 'plot-rich' narratives in order to make them speak. Quite what 'plot-rich' narratives are and how to produce them is less clear. To overcome such shortcomings, Peton and Arnoud propose a method that builds on Ricoeur's perspective, notably on the notions of story, narrative, emplotment, and mimesis. They report on fieldwork conducted in a nuclear plant as an illustration of their method. This consists of elaborating plot-rich narratives through collective inquiry, with both researchers and research participants. By doing so, they show that it is possible to make sense of dynamic observational data collectively to better understand complex situations.

The last article of this special issue is an invited contribution by Hervé Laroche, who offers a rather unconventional way to reflect on observation: using photography as a metaphor. In conversation with photography, Laroche reflects on key debates and main challenges associated with observation. To begin, he reminds us that photographs were initially understood as faithful representations of 'reality', but that their socially constructed – if not fictional – character has been increasingly recognized, debated, and played with. Laroche thus questions the ontological status of observational data as a 'raw material of truth'.

Following on, he reflects on observational data collection by building on diverse examples from forensic photographs to the work of the German artist Thomas Ruff. He argues that choosing a particular method for observation raises a number of questions. Issues such as the amount of data collected, the choice of observation targets, the granularity of observation, the attention to invisible elements, or the observers' point of view are notably discussed. Laroche then continues by drawing a parallel between reading photography and interpreting observational data. He notably reflects on the objective of analyzing observational data and what should attract researchers' attention during analysis. In particular, he advises us not to be lured in by salient elements that could make researchers miss relevant points. He also recommends paying attention to non-salient ones that are generally ignored. Relatedly, he suggests that the objective of observational data analysis might be to make visible what is invisible to others. To do so, he advises that researchers should educate their eyes and propose the organization of forums where observational data could be collectively analyzed. Finally, Laroche insists that researchers should reflect on how to present observational data in the most convincing way, as a photographer would do to persuade a curator or a publisher. He proposes several strategies to



present observational data, so that they look 'good', while also discussing how to make one's method more transparent and how to prepare readers for one's argument when using observational data.

Collectively, this series of rich and diverse contributions offers meaningful opportunities to reflect on how to collect, store, analyze, and present observational data in the context of researchers' own studies. All insist on the need to adapt observation to one's ontological understanding and research objectives, and to embrace a broader, less instrumental view of observation. In particular, they illustrate the benefits of methodological creativity by developing innovative observational methods that fit with one's research project's specific challenges. They also hint at our world today – one in which 'multi' is becoming a dominant trend in research methods (Jarzabkowski, Bednarek, & Cabantous, 2015): observing multiple targets and multiple aspects of one's target; conducting multi-actor observations; combining observation with multiple others methods; making sense of observation collectively by involving multiple stakeholders; etc. Following our increasingly dystopian realities, our research questions are likely to become more complex and require adaptive data collection approaches to provide nuanced and balanced answers. As our world becomes more fragmented, dispersed, divergent, and multifaceted, so our methods must keep up too. Our hope is that this special issue gives inspiration along the way.

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