Enabling Ethnography in Small Budget Economies

DANIELA CUARON
EMMA SAUNDERS
MATTHEW ELLINGSEN
Empathy

This paper discusses a collaborative research model, referred to as 'The Art of Empathy'. This is a model developed to integrate ethnographic practices in small budget economies. The paper aims to contribute to the variety of working approaches to ethnography in business, exploring the work to be done in straddling the delicate balance between growing and enabling ethnographic thinking without contributing to it's de-enrichment and commoditization. Key words: client collaboration, capability building, and design research.

INTRODUCTION

It is a reality of working in a business environment that we have to shape the way we do ethnography to fit the business context. Our aim is to do this in a way we are comfortable with. We want to leave our clients, their people of interest and the field in a better place than if we didn't do the work. In our particular context we are confronted by big desires but small budgets. This paper presents a model by which we can operate successfully, ensuring we are comfortable with the short-term quality outcome and the long-term value and contribution to the field.

CONTEXT

In our role as consultants and researchers, we have noted the tendency in New Zealand to look at international business trends with keen interest.

It is common for New Zealand organizations to observe continuing trends abroad, see them work in that particular context and want to take them on board for themselves. Over the last eight years, two trends of particular relevance to us as a business design firm have captured New Zealanders' interest: design thinking and design research[1]. Organizations have started to grasp the value in understanding and being close to those they are providing solutions for. This has been reflected across both the private and public sector.

We get asked to help them bring these trends on board. However, most organizations do not have the budget to support these types of projects. There are two reasons for this.

First, New Zealand is a small budget economy. This is largely due to the size of businesses located here. Small businesses – those with fewer than 20 employees – represent 97% of its industry (Ministry of Business, Innovation and Employment, 2014). Even those classified as large enterprises in New Zealand are likely to feel small relative to international standards. Characteristic to this context are small budgets and limited resources.

Second, these methodologies are new and unproven to New Zealand companies. Our clients are interested in taking them on board, but without being assured of their positive

2015 Ethnographic Praxis in Industry Conference Proceedings, pp. 174–189, ISSN 1559–8918.

impact they shy away from any significant financial commitments to them. So they are only willing to make a small budget available.

As such, our working context is such that people are asking for the services we provide as business designers and design researchers, but cannot afford it. They have heard of design thinking and ethnographic or design research and believe in those approaches at a conceptual level. They believe that it could be valuable but they have little understanding of what working like this actually entails and the impact or value it provides. They are taken aback by the cost.

Clients often either ask we do the work at about a quarter of the budget, suggest we train them so they can do it themselves, or determine without evidence that following an ethnographic approach is not a good return on investment. We are not comfortable with any of these options. This places us in an interesting position as researchers, as advocates for this type of work, and as a company seeking to add value to our clients. As Hanover (2014) suggests, it is our job to prioritise what is impactful and important for business.

We needed to find a way to enable organizations with small budgets to engage with design research and the ethnographic mindset. It is important to us that we do this in a way that leaves our clients, their people of interest, and our discipline in a better place than if we did not do the work.

OUR IDEA

We strongly believe in the value of conducting design research. It is a main component of our design projects and frequently a project in its own right. We see ethnographic mindsets as key to this approach.

To enable our clients to commission design research in projects, we thought about how we might work within constrained budgets. The challenge was to find a way to reduce project costs without impacting on project quality or the fields of ethnography and design.

As a result we came up with a model underpinned by the following elements:

- The client and we both contribute project team resources and share the workload. We work with our clients to do the project, rather than acting as independent, external consultants. We 'co-do' rather than 'go do'.
- The client and we do different roles on the project. We lead, guide and do critical parts of the process while they contribute people resources and business context knowledge to each phase.
- We train the client's resources in fieldwork, with a focus on ethnographic principles.
- We emphasize mindsets – the design mindset and the ethnographic mindset - throughout the phases of the project.

We recognize that we're not the only people advocating client collaboration within design research or ethnographic projects. For example, ReD Associates (Schwarz, Holme and Engelund 2009), Jump Associates (Howard and Mortensen 2009) and AnswerLab (Ulaby 2010) state they use similar approaches. We are also aware of a range of voices that discuss involving clients and bringing them into the field (de Waal Malefyt and Morais 2012, Gordon 2011, Ladner 2014, Santee 2013,). However, we hope that our model can add to both the practice of assigning roles and the discussion about the associated impacts.

We see both risks and benefits to this approach for our clients, the project, and the fields of design thinking and ethnographic research.

THE RISKS OF JOINT PROJECT TEAMS

The approach detailed above enables us to work within small budgets. But there are risks in collaborating with clients in this way. The risks fall under five overlapping categories, as described below.

Reduced quality of research for the project

Often, our clients have no or very little ethnographic training or experience. By involving untrained, inexperienced people in ethnographic and design research, we risk the quality of the insights being reduced and our process being compromised.

If this occurred it would be bad for our clients as it can result in them acquiring misleading insights. Equally, it would be bad for us if the project does not provide good insights or point our client in the right direction. This risks our reputation when it impacts our ability to add value. Ultimately, it could also result in larger expenditure to resources and costs and to our efficiency as we go back to get us where we need to be. This would be bad for our client and difficult for us to manage.

Over-confidence

By training and up-skilling people to feel confident going out into the field to conduct research, we risk them thinking they have a greater level of expertise than they actually possess.

People often grasp at specific tools or methodologies and lose sight of the ethnographic principles that lead to quality. They do not know what they do not know. They cannot see their gaps in their process or findings and the shortfall in their skills. They do not recognize when something is not good or true, when they have taken a comment at face value rather than digging deeper for true meaning. Their design research findings lack depth and reflection. Additionally, their lack of experience means they are not able to adjust their approach to suit their appropriate context.

In that way, a little knowledge is a dangerous thing. There's a serious risk for the company and the project if they go down the wrong path. It can also lull them into a false sense of security, where they believe they understand their people of interest's needs and are not able to see what they don't know. Ultimately, it can lead to unsuccessful design research projects. These come at a great cost to the company, and reflect poorly on ethnographic practice in industry.

De-valuing expert ethnographers' contributions

By enabling people to take part in and contribute to design research we run the risk of lessening the importance and role of ethnographers and design researchers.

There is potential for our approach to be interpreted as suggesting one does not need to be an experienced researcher to run and conduct research phases or projects. That diminishes the perceived value of our role, and the demand for what we do. These effects are also noted by Lombardi (2009).

Commoditizing the ethnographic research field and market

As more people become skilled at ethnography through our training and other methods, and as more people believe they are sufficiently skilled, more people will be providing ethnographic services. When the role becomes commonplace and perceived as easy to do, its perceived market value will diminish. Our role within the production of ethnographic research will likely be de-skilled (Lombardi 2009). In that way, ethnography will become commoditized, and ethnographers will not be able to command the fees of a rare specialist.

Over-simplifying the principles

As a field is popularized, messages and principles often get simplified. This can lead to a simplistic understanding of the field, which can be misconstrued or misleading. We have seen this begin to occur to other fields, such as design thinking. As things become popularized, the rigor and robustness, quality and effectiveness are often lost. As these things are lost people lose faith in the value of the approach and turn to dismissing it as a viable strategy.

We have been aware of these risks as we work with clients. Our model for collaborative working has provided mitigation.

THE MODEL

Over several projects, we created a model for collaboration in ethnographic research as part of design thinking or customer insight projects. As noted above, our model involves:

- Project teams comprised of client resources and our own
- Taking different roles on different tasks or in different phases of the project
- Training client team members in ethnographic fieldwork principles and techniques
- The emphasis of mindsets – the design mindset and the ethnographic mindset - throughout the phases of the project.

Through our model, we become facilitators of our client's involvement in the project as well as project team members. As we have progressed with our model, we've come to realize which aspects are 'not negotiable' if we are to achieve a good project outcome. We also know which are flexible, and can be changed depending on our client's capability, resources or, the project and its context[2].

Below we discuss how the model works through different phases of a design research project.

Phase 1: Research plan

We lead collaborative working sessions with the client to formulate a research plan. Both sides of the project team bring something valuable to the table. Our clients bring expertise in their business problem and some knowledge of their customers. We bring expertise in how to find the information we need from their people of interest to inform and inspire designs.

Once the client's existing knowledge is on the table, we drive the creation of the research plan, including main purpose, research question and objectives, methods, participant types, participant spread, participant numbers, timings, and costs. Through this phase our clients are not heavy contributors. They are in the room learning from our discussion and gaining an understanding of both our process and our reasoning. We discuss openly, 'thinking aloud' to explain our rationale and the considerations. We seek their input along the way, but rely on our experience to shape and structure the research project, in a way that provides them with a demonstration of research planning.

We are not flexible about our role in this phase. If we are to ensure a good research plan, we need to be leading and driving its creation.

This phase does not necessarily save our client any cost because of our heavy involvement. However, it is important for the rigor of the research, and brings other benefits as discussed later in this paper.

Phase 2: Training in ethnographic field techniques and principles

We train our clients to enable them to follow our design research approach and techniques as we work together. This is necessary to allow for trusted collaboration through the fieldwork phase.

Through this training phase we rely on three core elements: theory, demonstration, and practice. We use these to introduce ethnographic research methods such as participation, observation, contextual enquiry, and in-depth conversations. As business designers we also heavily rely on a design mindset, and so take a 'learn by doing' attitude. For instance, we set up field environments during the training, so our clients can practice and develop their research skills; they engage with real participants in a safe environment without concern to impacting on project outcomes.

This training fulfills the purpose of preparing our clients to gather information from the field and gain valuable insights alongside us. We communicate key ethnographic principles and enable people to try ways of bringing those principles to life. Our training is not intended as a substitute for research training or experience. We are not training people to become ethnographers. Instead, we are helping them come to an understanding of what is involved in this practice and identify elements they might use to enhance their work. (We like Hasbrouck's (2015) idea that ethnographic thinking has more value to contribute than just the practice of ethnographic research.) The training process becomes about embracing the opportunity to think as ethnographers and design researchers.

As an outcome of these initial training sessions we co-create field guides, and prepare to go into the field. Through this period we take on the role of coaches as we work with them to shape their technique and encourage self-reflection.

We are not flexible about this phase, or our role within it. We lead the training and preparation, as experts.

Phase 3: Fieldwork

Both the client's people and we do fieldwork. Team members from our company and team members from the client's side all have engagements with participants with the purpose of gaining insight into their lives.

We are careful to conduct enough fieldwork ourselves to feel comfortable in producing our analysis. It is key that we have enough insight that we reach a point we can use as a springboard for our recommendations for direction to the business.

This has become a fixed element to our approach and one of our learnings as we have developed this model for collaboration with clients. In two projects last year, we relented in our assertion that we share the fieldwork with our client. The results of both of those projects were not satisfactory for us, the client, or the fields of ethnography and design[3]. As a result, we are no longer flexible on the issue of conducting some of the fieldwork ourselves.

However, we have also gained empathy with how it feels to be brought information without having been involved in the process. It has reinforced our belief that our clients should be involved in the fieldwork, as they are the ones that need to understand the topic at hand the most.

To further ensure the quality of the research conducted by our clients, their training continues during the fieldwork. We follow two main methods. How we apply these is a flexible element depending on our client's level of experience and ease in the field.

Shadowing and handover – Their first experience in the field engaging with participants is usually an in-depth conversation in the participant's own context. For this engagement our client team member primarily observes, 'shadowing' as we lead the conversation with the participant.

For their second experience, we allow them to lead the conversation but accompany them and act in a support role. Finally, they conduct the remainder of the conversations independently.

We use the same shadowing-handover approach for other research methods i.e., contextual enquiry, observations and prototype testing.

Debriefing and coaching – As our client team members conduct their fieldwork we have debrief sessions with them. This allows us to transfer knowledge from them to us, and to enable them to reflect on their learnings. Most importantly, it gives us the opportunity to review how it went. We coach them to improve their technique and become more aware of themselves and their approach.

We believe reflection through this process is key. We see it as core to an ethnographic mindset and have also found it's a characteristic that distinguishes those that most improve their skills and technique. To reinforce the value of reflection, we discuss areas where they are doing well and the elements they need to continue to develop.

This becomes a part of us facilitating them through the research experience in such a way that allows them to cement their understanding of the ethnographic mindset, design research, and the value those things bring. In working with clients we are mindful of both the value to their business, and that they have a positive experience of the process.

Phase 4: Analysis and definition

After conducting fieldwork we all continue to work together to understand and derive meaning from what we found. We use design thinking techniques to uncover learnings and facilitate a team through analysis; a stage of the research process that can often feel messy and disconcerting to even experienced practitioners.

We do our analysis and definition of the research in several back-to-back, intensive, and immersive sessions.

As a fixed element, we always unpack our stories and learnings together. Usually, someone shares an experience in the field to the rest of the group while the rest capture different types of information from the story they are hearing (e.g., what people said, thought, did, felt, where the tensions lie, the contradictions we heard, etc.).

A more flexible element, often dependent on client availability, is whether or not we continue through our analysis of these findings as a group or carry on ourselves. In the instances where we work together we facilitate the sessions and model behavior for our clients. For example, we make sure to be clear about when we are using an emic or etic perspective, and help them to stay honest about seeing things from their participants' lens.

Phase 5: Storytelling

An output of any piece of research is how it is shared and distributed. We have learnt that it is best to do this together, or on behalf of the client.

Often, clients have expected they will be able to share the outcomes of their work independently from us, as they have been wholly involved through the research project. However, past projects have shown us that not having done this type of research before they need our support to shape and structure their storytelling. This is an area where clients underestimate the importance of our role, but consistently grow to value our contribution enormously. Without us, clients succumb to common pitfalls. We have often been given additional budget at the end of a project to help with storytelling when clients realize they need help. We're grateful when that happens, as ending a good project with bad storytelling is frustrating and dangerous – for the client's project, for our reputation, and for the fields of ethnography and design.

As a result, we have learnt to co-do storytelling as a project team. Our side of the team ensures the quality of our findings, the insight generated, and the value and relevance to the project. We then rely on our clients to help us understand the context of their organization and the people we will be sharing our output with. Together we discuss how best to communicate and engage with the relevant people. We then use our experience to help shape a compelling story that will engage and gain buy-in from people in their organization.

Later phases

As we reach the final points of our first design research phase the project may continue in different forms.

Some of our clients come to us exclusively to learn more about their customers. However, a majority approaches us with a design moment, a business challenge or opportunity. We use the approach laid out above as we work through other aspects of the design process, such as prototyping and testing our prototypes with potential customers. We continue to co-do through and follow the same principles of our design research collaboration model.

THE MODEL IN PRACTICE

The mindful mix of fixed and flexible aspects of our model means we can accommodate different client and project needs. Here are two examples to illustrate this model in practice.

New Zealand Customs – Improving the international airport departure experience

New Zealand Customs approached us to discuss passengers' experience through the departures process at Auckland airport. They were interested in this as part of a wider move towards continuous improvement across the organization. Specifically, they were looking to make changes in the departures area at Auckland airport. They wanted someone to help them better understand people's current experience of the area and to help them design the changes to this area with their audience in mind. This would be the first of several projects to implement similar changes.

The challenge – We had a specific brief and short timelines to enable change in the departures area before peak travel times. Our challenge was to design the ideal experience through the departures process. We also had a wider brief to learn as much as we could about the passenger experience so as to shape and inform future projects. Our co-do approach was a significant factor in us winning the work. The client wanted to be involved in the ground level of the project, and build the capability of staff along the way.

The team – This project saw us working alongside different Customs staff through the various phases. The project's business owners were involved in the research plan phase, along with people who work on the ground at the airport and people who analyze passenger data. People involved in continuous improvement within the organization became our colleagues for the fieldwork, and were trained accordingly. Those people were also involved in analysis and definition.

Research plan – In line with our fixed approach to this phase, we lead the creation of a research plan. In this instance, a two-hour workshop was held wherein the client contributed business knowledge and we discussed options for methods, focus people of interest, times of fieldwork and more. We then took the knowledge and perspectives away, and created a draft research plan for comment.

Training – Given our client-side team members had some experience in gaining empathy with customers, we conducted a day workshop to discuss our research methods and approach. With their previous experience in different qualitative methods, we made special effort to distinguish our approach from market research, surveys and interviewing. During this session we ran through observation exercises, highlighted the importance of putting their own experience of the space aside, demonstrated the importance of digging deep, and brought in recent travellers to participate in a conversation (informal interview) with our client team members.

Fieldwork – Field activities included joining participants through their departures experience (which we called 'tag-alongs'), conversations about departures with participants before and after the process, and observations through different parts of the process. Our client team members joined us on our first 'tag-along' while we modeled behavior for them. From then on we all conducted field activities individually or in pairs. Pairing up allowed us to keep track of the team's performance and created great coaching opportunities. At the end of each day we held a team debrief. These allowed us to keep track of our research objectives, set out the plan for the following day, provide coaching, and gather the team's findings.

Analysis and definition – With restricted timelines we opted for an agile approach to fieldwork and, analysis and definition. One week into the fieldwork we began to analyze our findings and make meaning. We were able to map the current passenger experience, use it to identify gaps in our knowledge and shape our objectives for further fieldwork. In this instance we collected our client team members' findings during our debrief sessions and conducted the rest of the analysis work internally. The joint project team then went back into the field and continued the same approach as above. On returning from the field our internal team continued to un-pack these new findings and began shaping the ideal customer experience.

Storytelling – Using our fieldwork findings we designed an ideal customer experience through the departures process. This was documented to enable our client to share our design and design notes. From there we continued to work with our client in a workshop to help them determine what and how to implement this new experience.

The outcome – New layouts, signage and enhancements to technology will be trialed in the departures zone. The project team who is implementing the redesigned experience has a greater understanding of customers, so is better able to make decisions that positively impact their customers and their business.

GMI/Kiwibank – Savings and wealth-building products and services

Kiwibank is one of New Zealand's four main banks. GMI is their partner for wealth-building products. They approached us to help them increase their market share in accounts related to retirement savings and wealth-building. We were engaged to help shape what the offering could be so that it truly adds value to their customers and they re-engage with their finances. We set out to gain customer understanding as part of the wider design project.

The team – In this instance there were three parties involved in the project: our design partners, our client, and us. All three parties came together to form a project team of seven people.

The research plan – The essence of the research plan was largely created as we worked with the client to scope the project for the sake of providing a cost and proposal. From there, we leveraged our clients' business expertise and built on their business inkling to detail a research plan.

Training – Both our clients and our partners needed up-skilling to conduct fieldwork. We held two full day sessions back-to-back to prepare them for going out into the field. Training continued through the fieldwork, with our part of the team available on hand to provide coaching and support to the rest of the team, often by phone before or after engaging with a participant.

Fieldwork – Fieldwork comprised of conversations with participants and spending time with them in their own homes observing and participating in their daily lives. All project team members conducted at least six participant engagements individually. Our people conducted over a third of the engagements.

Analysis and definition – To enable key business decisions and the beginning of solution design by a certain date, we conducted an analysis session halfway through the fieldwork. During this session we all got together to share stories from the field and make meaning from what we found. This also became a coaching opportunity where we shared how we analyze our learnings and use them to define our perspective. We then fed into business decisions and iterated our field guide based on some of the areas we wanted to explore further and the findings we wanted to continue to test. At the end of the fieldwork period we conducted a second session to analyze and define our findings where all the project team contributed.

Storytelling – We did the storytelling on behalf of our client. We documented the design research findings and suggested solution direction, and presented to a wider group from our client's organization. This customer insight is now being used to inform the following stages of the project as we work to create a portfolio of offerings that are truly customer focused.

The outcome – New products are being championed through the business, and we have been engaged for more work on different products and experiences.

DISCUSSION

Collaboration is becoming a more prevalent element to how we as researchers work with our clients and others[4]. Effective collaboration with clients on a design research project requires measures for quality assurance. We want to leave our clients, their people of interest and the field in a better place than if we didn't do the work.

We think our model lets us do that. It allows us to mitigate some of the risks and has lead to some imagined and unexpected benefits. Below we will discuss these in detail.

Risk reality

Earlier we presented some of the risks we anticipate in following this approach to research. Here we discuss what we have found so far with our model.

Reduced quality of research for the project – Collaborating on the research plan and storytelling actually improve the quality of the research. Doing this together, and taking different roles, means we account for business context and design research expertise. This brings a better outcome than if we were planning or storytelling alone.

The risk to reduced quality in our learnings from the field is still present. However, we currently compensate by shouldering enough of the fieldwork ourselves. Furthermore, we continue to work with them as they engage with participants in the field to help shape their approach and identify areas of improvement. This helps us to maintain a certain level of quality in the field, and gives us a chance to judge people's practice before relying on their findings.

Over-confidence – A little bit of knowledge actually goes a long way, provided people are aware of where their knowledge ends or their limitation lies. To that end, we are careful to respectfully acknowledge their limitations and humbly showcase our expertise. For example:

- We are careful to say, "you were great at this, next time you need to…" so that they are aware they have not got to the end of their learning.
- We explain the dangers of making assumptions, not gaining enough context, and not digging deep enough along the way. E.g., "You didn't ask them why they do that or how they feel. If you don't ask why, you make assumptions … and we don't get to true insights."
- We rigorously debate various intricacies of the research plan or field insights in front of them. This way they can follow our decision-making. It also means that they see how much specialist knowledge and thinking is involved.
- We are careful in our positioning of the training. We never call our training a 'masterclass', which many in the industry do. We are clear to say this is a basic introduction to the mindsets and practices. We talk about next steps on their learning curve.

So far, where we have worked with our clients in this way, they have not then assumed they are fully prepared to practice design research independently. In fact, our model has served to set us apart as experts.

De-valuing the expert ethnographers' contribution – As suggested above, the model often results in us standing out as experts, and our contribution is more valued. Working alongside our clients is an opportunity to showcase the value we add, our expertise in tackling complex challenges, and the impact our work can make to their business. In fact, additions to project scopes – to do additional fieldwork, to do additional storytelling, to do additional rounds of research – suggest that our value is newly appreciated.

Our focus on the ethnographic mindset helps in this area. We're not de-skilling or dumbing down ethnography, just making it more accessible. We retain the specialness and value of our expertise while adding scale, engagement, and a way of implementing research with our clients.

That said, we do have some trouble advocating the value of different types of ethnographic methods, such as participant observation. Clients still struggle with the idea that their small budget will be spent on less people, since those methods are more time-intensive and harder for their team to grasp and do. In that way, our expert contribution is valued but not commissioned.

Commoditizing the ethnographic research field and market – We believe we walk a delicate balance in this regard. While we are still regarded as experts, clients are now much more aware of the components of ethnography and design research. Further, the more that we work with a particular client, the more mainstream the field seems. That's a good thing, in that clients do not feel they're going out on a limb in commissioning our work. But it also means that the field is naturally being commoditized over time.

Over-simplifying the principles – We strongly believe in increasing the understanding of our field with others, particularly our clients. We are against protecting knowledge for 'the experts' and ultimately see this strategy as counterproductive to the health of our field. If we cannot create lucidity for others, then where is the value in our understanding of complexity? (Hylland Eriksen 2006).

On the other hand, we worry that our message could become diluted. If not with our clients, with the next person they share our approach with, or the person after that. We think it is when this message becomes diluted, and tools and methods are used out of context, that our approach becomes less effective. When people believe they are using design research methods but not wielding the desired outcomes, that is when we believe we risk the field's reputation.

So far, we have learnt that those involved understand and value design research more, and are more likely to champion it with seniors and to commission it.

Strengths to our model

Rather than risking the field, client projects, and our businesses, we believe our model to be beneficial to those things.

Customer knowledge is held in the client's organization - We believe our clients should be the ones to know and understand their customers, their staff, their people. This model brings them close to these people and allows them to gain empathy with them. The client's people are in the field, sharing and hearing stories during analysis and definition, and sharing within their business the insights gained. As a consequence, nuanced knowledge about the customer is held within the organization, not by an external party, and can be more quickly and correctly used to their benefit (Howard and Mortensen 2009, Ladner 2014).

Engagement – Our model builds engagement in several ways. We have found that our clients are:

- More engaged in the research process, since we involve them and value their business content knowledge as we create research plans, follow hunches about customer-based opportunities and more
- More engaged in the resulting customer knowledge and more likely to see it as important, since they have engaged with 'real people' and have a visceral appreciation of the learnings, and since we have demonstrated our expertise and proven our credibility (similar to the assertions of Howard and Mortensen 2009, Schwarz et al. 2009)
- More engaged in other aspects of their role, as they have reconnected with the people they're here to serve.

Recognition of specialist knowledge and skills – There's nothing quite like being involved through a complete research process for a client to gain perspective on the specialist knowledge and skills required.

As opposed to claiming our work is black magic that happens behind closed doors working alongside clients offers a transparency and frankness that illuminates the skills we bring to the table in a genuine way (Schwarz et al. 2009). We show them what we do, not tell them what we do. This means our clients are more realistic about the effort and skills required. They are more willing to get external help, which means we are often offered bigger roles the next time around.

Recognition of value – Beyond recognizing our skill set, having to work alongside our clients means they can see the value created by the research and the project. This is good for both parties. We want to deliver in a way that truly adds value to our clients. When they understand more about how we work, they also understand more about the value generated. It is good for them because they can see the value we are creating and know they are not being duped. They also know a bit more about how to recognize good practice for the future, whether they're working with us or someone else (Santee 2013).

More commissions – We are proud that the majority of our projects lead to more commissions from that client. While people may become advocates of our findings and our approach, and a bit more skilled, they do not then have the resources or time to continue this work independently. Our clients are incredibly busy, and as we have already discussed our environment is resource poor. They are looking to be able to engage in these types of projects for their organization, but need external help to make that happen.

Better commissions – Former client team members become champions of design research, which leads to more and better market opportunities.

As our clients gain experience with our research style and the range of purposes it can serve we see these opportunities expand. Their better understanding of the mindsets and value means they are more likely to commission. Specifically, it means they are more able to articulate what they need. This leads to improved commissions and better briefs, which sets us all up with better projects.

CONCLUSION

Collaboration sits highly amongst our company values. We are excited that this model allows us to work with our clients not only bringing them alongside us but also engaging them as active researchers and teammates. It is important to us that the model we use be one that enables us to manage the risks we have identified in following this shared fieldwork approach. We believe we are now working with a model that not only mitigates some of those risks but also truly contributes additional value.

Our model emerges as a combination of eight years experience in this business context, the increasing demand for our type of work, and the constrictions in budget that the local business ecosystem sustains.

The majority of clients have been excited by our approach. By contributing project resources, they incur a smaller cost that they can afford. The training and coaching builds capability. By getting their people into the field and involved in analysis and definition, they build engagement in role and purpose. With us leading research planning, conducting fieldwork, leading analysis and definition, and being involved in storytelling, they gain confidence that we're assuring quality.

The four core elements are important in mitigating risks associated with client collaboration on design research. Ensuring we're involved in each phase helps retain our position as experts, the important mindsets and principles of the field, and the quality of findings. By taking different roles in different phases, we can keep a tight hold when required and a loose hold when there is more room to grow others or when our expertise is not the most critical. Training and coaching for the field gives us more assurance of the quality of findings, and the way we do it helps to gently reinforce that the client's learning curve is not complete. The emphasis on mindsets – the design mindset and the ethnographic mindset - throughout the phases of the project enables us to underscore the most important aspects of our craft. The combination of fixed and flexible elements allow us to adapt to different client and project needs as well as, mitigate the various risks working with clients and inexperienced researchers offers a project.

We remain mindful of what this approach means for the discipline. We note that whilst our immediate risks are being well managed, the greater impact to the discipline has to be explored further. We continue to adopt a mindful 'learning by doing' approach to the model itself.

As part of that, we are curious about how others are collaborating with their clients through design research projects or phases. In particular, whether they're taking specific roles or approaches in different aspects of collaboration, and what the outcomes of those roles and approaches are. It's important that those of us working in design research are aware of the impact that these models might bring for clients, people of interest, and the discipline.

Daniela Cuaron is a Business Designer at Empathy. She is a graduate of the University of Cambridge where she studied Social Anthropology. Daniela conducted ethnographic research in Mexico before joining Empathy. Her work sees her striving to understand people's unmet needs and creating ways to address these. *dani@empathydesign.com*

Emma Saunders is co-founder of Empathy. She has a PhD (Psychology) from the University of Warwick. Her background weaves together people-based research with business experience in design and innovation. Emma focuses on facilitating the processes needed to create human value within an economic system, using a design thinking approach. *emma@empathydesign.com*

Matthew Ellingsen is co-founder of Empathy. He has an MA in industrial design from Central Saint Martin's. Matthew's passion lies in solving complex problems and designing actionable solutions. He has been designing the way people engage and interact with products, services and experiences over the last 15 years. *matt@empathydesign.com*

NOTES

1. We distinguish between ethnographic research and design research. Ethnographic research is undertaken primarily for the purpose of understanding a people, whereas design research is undertaken primarily for the purpose of designing something for those people. For us, ethnography and the ethnographic mindset is key to good design research.

2. started using the terminology and framework of 'fixed' and 'flexible' elements after we had developed a model that essentially already worked this way. We heard the framework and terms in David Butler's speech at the Better by Design CEO Summit 2015 and adopted it when we realized it was a useful way to refer to our adaptable approach.

3. For example, concepts that had emerged as a result of their fieldwork had not been explored in enough depth, and the team had difficulty separating their fears about management's reaction with what they were learning from staff. We needed to do further work to create the necessary insights and confidence. The projects went over budget and time, and still did not achieve solid design direction.
4. This reflects our perspective of ethnographic research in industry. We acknowledge ethnographic research has a long tradition of collaboration.

REFERENCES CITED

de Waal Malefyt, Timothy and Robert J. Morais
2012 Advertising and Anthropology: Ethnographic Practice and Cultural Perspectives. New York: Berg

Hanover, Evan
2014 Co-Creating Your Insight: A Case from Rural Ghana. Ethnographic Praxis in Industry Conference Proceedings 2014: 50–57

Hasbrouck, Jay
2014 Beyond the Toolbox: What Ethnographic Thinking Can Offer in a Shifting Marketplace. EPIC Perspectives. http://www.epicpeople.org/beyond-the-toolbox-what-ethnographic-thinking-can-offer/ Last accessed 17 March 2015

Howard, Catherine and Peter. Mortensen
2009 Guides not gurus. Ethnographic Praxis in Industry Conference Proceedings 2009: 22–33.

Hylland Eriksen, Thomas
2006 Engaging Anthropology: The Case for a Public Presence. New York: Berg

Ladner, Sam
2014 Practical Ethnography: A Guide to Doing Ethnography in the Private Sector. Walnut Creek CA: Left Coast Press

Lombardi, Gerald
2009 The De-Skilling of Ethnographic Labor: Signs of an Emerging Predicament. Ethnographic Praxis in Industry Conference Proceedings 2009: 46–54.

Schwarz, Heinrich, Mads Holme, and Gitte Engelund
2009 Close Encounter: Finding a New Rhythm for Client-Consultant Collaboration. Ethnographic Praxis in Industry Conference Proceedings 2009: 34–45.

WEB REFERENCES

Gordon, Jamie
2011 Client Ethnography Participation Briefing: Part 1. The Brand Sherpa's Blog. https://thebrandsherpa.wordpress.com/2011/09/27/client-ethnography-participation-briefing-part-1/ Last accessed 10 September 2015

Ministry of Business, Innovation and Employment

2014 The Small Business Sector Report. The Ministry of Business Innovation and Employment. http://www.mbie.govt.nz/what-we-do/business-growth-agenda/sectors-reports-series/pdf-document-library/the-small-business-sector-report-2014.pdf Last accessed 17 March 2015

Santee, Amy
2013 It takes two: How researchers and clients can help facilitate successful ethnographic fieldwork. Anthropologizing. http://anthropologizing.com/2013/02/23/it-takes-two-how-researchers-and-clients-can-help-facilitate-successful-ethnographic-fieldwork/ Last accessed 10 September 2015

Ulaby, Laith
2014 A Dozen Things Every Client Should Know about Ethnography. EPIC Perspectives. https://www.epicpeople.org/pblog1/ Last accessed 10 September 2015

EPIC *Advancing the Value of Ethnography*

epicpeople.org

EPIC promotes the use of ethnographic principles to create business value.

EPIC people work to ensure that innovation, strategies, processes and products address business opportunities that are anchored in what matters to people in their everyday lives. We draw on tools and resources from the social sciences and humanities as well as Design Thinking, Agile, Lean Start-up and other approaches to realize value for corporations from understanding people and their practices.

EPIC brings practitioners together as a community—at conferences and year-round on epicpeople.org—to create knowledge, share expertise, and expand opportunities. We are constantly learning and improving the ways that we achieve innovation and inform business strategy in a constantly changing world.

The annual EPIC conference brings together a dynamic community of practitioners and scholars concerned with how ethnographic thinking, methods and practices are used to transform design, business and innovation contexts. Attendees come from technology corporations, product and service companies, a range of consultancies, universities and design schools, government and NGOs, and research institutes. Submissions go through a double blind-peer review process and sessions are tightly curated. Final proceedings are published on epicpeople.org/intelligences with full-text search, as well as by Wiley Blackwell under ISSN 1559-8918.

Join us!

EPIC people learn from colleagues far and wide, at our workplace and elsewhere. We debate and push each other to improve, to experiment and to make change happen. There has never been a more important time for practicing ethnographers of all sorts to continue to have routine access to one another.

Your membership supports the first professional organization committed to the interests of anyone who seeks to advance the value of ethnography in business, research and nonprofit settings. Over the last year, memberships have supported crucial new resources to advance the professional interests of our community, including critical content, a job board and a business directory. EPIC is a 501(c)(3) incorporated in the state of Oregon.

epicpeople.org/membership