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Paper Session 2: An Angel at My Table

Curated by Doerte Toellner

In need of an agent provocateur or unifier, a cultural translator, tour guide or decoder of corporate culture? There is a multitude of surprisingly diverse ways in which organizations can benefit from ethnographers – at their boardroom table and beyond. In our session, we aim to present and to scrutinize best practice examples of ethnography-based added value from a wide range of areas and industries. We hope to spark a vivid debate surrounding the potential for growth of successful ethnographic research in navigating the vagaries of evolution and revolution.

ETHNOGRAPHY AS A CATALYST FOR ORGANIZATIONAL CHANGE: CREATING A MULTICHANNEL CUSTOMER EXPERIENCE

ROBIN BEERS, Ph.D.
Wells Fargo Bank

TOMMY STINSON
JAN YEAGER
Cheskin Added Value

This paper describes how ethnography became a catalyst for organizational change in a leading financial institution by providing a collaborative context for functional groups to come together in co-creating a multichannel customer banking experience.

While consumers increasingly expect a good cross-channel experience as a de facto element of their engagement, few companies successfully deliver this experience in a compelling way. Because functional groups are siloed, focusing on their own business goals and managing their own discrete parts of the customer experience, there is limited understanding of the experience as a whole and limited interest in bridging units to improve customer experience. Building a 360° view of the customer is an "excuse" for people to step outside their silos. The ethnographic process can become a collective learning platform where people gain a common understanding of the customer and how they're accountable for delivering the customer experience. However the process endeavor may trigger organizational change issues which must be thoughtfully and actively managed in tandem with the ethnographic endeavor.

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INTRODUCTION & CONTEXT

In the course of this paper, the authors will present a case study of applying ethnographic methods to create a shared organizational understanding of customer needs and experiences as a means to bring about significant shift in organizational perspective and mindset. The authors will also present an overview of the organizational context for this effort and highlight key elements of the process, of the outcome, and of lessons learned. The ideas and analysis presented here represent an integrated perspective of an internal team player and outside consultants working in partnership to bring about this organizational change.

Ethnography has grown in prominence and popularity in the years since its initial introduction into business settings.[1] As it has become a more accepted research approach, there has been a growing awareness that the understanding it fosters (through depth of information and in situ exposure to customer needs) may have power to create shifts in how organizations interact with customers.[2] This shift is not only a function of better meeting customer needs through an emic understanding of their experiences, but also of potential re-alignment and re-configuring of organizations' internal cultures, languages, and organizational structures. It is to this latter point that the authors turned their attention in mid 2010.

As with most research studies, this one began with a clearly-articulated set of objectives. We set out to identify the following about the multichannel customer experience:

- How customers navigate touchpoints in ways that do and don't meet their needs
- Positive and negative elements of the multichannel experience that should be reinforced or corrected / guarded against
- New opportunities to combine or leverage each channel's strengths and appropriateness for different steps along the customer's journey

A secondary set of objectives had organizationally-focused outcomes--to shift the bank's culture toward a more customer-centric perspective. The ethnography was a platform on which to foster cross-group interactions and build new relationships between group members through the process of co-creative meaning making and collaborative negotiation. Ultimately, the research represented a first

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[1] Burkhalter, S. Brian (2000). "If Only They Would Listen: The Anthropology of Business and the Business of Anthropology." In Classics of Practicing Anthropology 1978 – 1988. Patricia J. Higgins and Anthony Parades, eds. Pp. 77- 86. Oklahoma City: Society for Applied Anthropology.

[2] Perry, B. (November-December 1998). "Seeing Your Customers in a Whole New Light." Journal of Quality and Participation. Reprinted with permission: http://www.barbaraperryassociates.com/pub_BParticle_seeing.htm

step to collaboration across silos as well as a mechanism through which to introduce user-centered thinking and build appreciation for a service design approach.[3]

In hindsight, reviewing the project dynamics and the team's emphasis over the course of the initiative, it became clear to the authors that the primary, more explicit, research objectives commanded the lion's share of attention from the team. To our credit, we emerged with high quality insights that the stakeholders bought into, but upon reflection, we might have been better prepared to gain ground against the organizational objectives had there been a more intentional and regular focus on specifically addressing them. While the team conducted weekly status and progress reviews against the primary research objectives, the organizational objectives were not allotted equal attention. In a sense, we thought the inclusive ethnographic research process could speak for itself and the experience of participation would do the work of translating perspectives and fostering a service design orientation. We now realize that by orchestrating a broader, ecosystem view of the customer experience in a siloed organization, we found ourselves navigating massive organizational change issues and implications without an explicit charter or well-articulated process for doing so.[4] Our experience suggests that ethnographers may increasingly be called upon to help organizations become more customer-focused and, thus, will need to be aware of the implications of playing a broader role and develop parallel consulting skills to diagnose organizational culture, develop cohesive cross functional teams and facilitate through resistance.

"THIS IS OUR SECRET SAUCE"

The first thing that Robin Beers, one of the authors of this paper, did when she joined Wells Fargo's Internet Services Group (ISG) as the Manager of User Research in 2004, was to embark on the group's first internally conducted ethnographic research project. For three weeks, she took designers and business strategists on the road to observe and talk to people about how they managed their finances. From that point on, ethnographic studies were undertaken each year to investigate a variety of topics related to consumer financial planning and management. The findings from these studies became baked into reusable user centered design tools and influenced product strategy and design across many projects.[5] More subtly, but perhaps more importantly, the incorporation of an ethnographic approach to understanding customers contributed to developing and evolving a

[3] Multiple definitions of service design are offered in This is Service Design Thinking (Stickdorn & Scheider, 2010. Pp. 30-33). This excerpt from the Copenhagen Institute of Interaction Design captures the essence: "Service Design as a practice generally results in the design of systems and processes aimed at providing a holistic experience to the user" (p. 30).

[4] Bodine, K. (2011). *The Customer Experience Ecosystem.* Forrester Research Report. http://www.forrester.com/Research/customer_experience_ecosystem/q/id/59115/t/2#heading8

[5] Beers, R. and Whitney, P. (2006). "From Ethnographic Insight to User-centered Design Tools." EPIC 2006 Conference Proceedings, pp. 144-154. ISBN 1-931403-30-4. American Anthropological Association.

customer-centric culture within the Internet Services Group at Wells Fargo because it allowed us to bring real people's faces, stories and needs to the table. So, when ISG's Leader joined his peers in a senior leadership Multichannel Steering Committee that was tasked with developing a multichannel strategy for sales and service, he recommended starting with ethnographic research to understand the current multichannel customer experience.

Though this leader had a traditional business background, he had come to see ethnographic research and user-centered design as the Internet Group's "secret sauce" –

that is, a structured approach for bringing the customer to the table and creating positive experiences through understanding their needs, goals and tasks. ISG is essentially a technology company inside of a large bank and, as such, the group's perspective, methods and tools are oriented towards prototyping, iterating and building online services. Within ISG, research methods like ethnography, participatory design, and usability testing – and tools, like personas and task models – are used to design around customer's goals and tasks. The group's leader believed that user-centered design processes and methods could be applied and extended to designing better multichannel experiences (both online and offline), and his goal was to bring this way of thinking about customer experience and holistic problem-solving to the rest of the Enterprise. The first step to developing user-centered design competencies was to understand the current multichannel experience via ethnographic research. The other channel leaders representing branch, ATM, phone channels and the deposits and debit card product groups agreed to take part, if not entirely enthusiastically.

"WHAT DO YOU MEAN?"

The typical timeframe to conduct an ethnographic study within the Internet Services Group is about four months from planning to insights. The multichannel ethnography took place over nine months, due to the intense socialization and educational component upfront. The first three were focused on pitching and selling the project to stakeholders across all channel groups. We knew that this socialization effort was critical to the success of the research. This process turned out to be an indicator of the challenges we would face throughout the project. In presenting our case for conducting ethnographic research, we developed a pitch deck that became a kind of boundary object for people's assumptions about the initiative and how it should be positioned with the wider stakeholder group (Star & Griesemer, 1989). As it made its way around the various stakeholders, it went through many rounds of vetting and iterating, with some stakeholder feedback conflicting with other member's opinions (Carlile, 2002).

The presentation was designed intentionally to look unlike the bank's typical decks; it contained lots of pictures of people, bright colors and some visual models. We wanted to be clear from the outset that ethnographic inquiry was not the usual business-centric approach, but rather invited new ways of

thinking and seeing. One visual model (Figure 1.) depicted how we would use insights from behavioral analytics in conjunction with ethnography to identify opportunities. When the deck was passed along to the business team for review, they had trouble "reading" the visual and replaced the model with a typical, chevron-shaped process model (Figure 2.). To them the funnel looked too loose – like the process of generating opportunities would go on and on forever with no end point.

FIGURE 1. AFTER

FIGURE 2. AFTER

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It was clear that the way information was depicted, and the choice of words, would be as important as the communication itself. The inherent challenges in transferring knowledge across functional boundaries are tied to developing a syntax, the vocabulary. and semantic, the interpretation, approaches to communicating that aids in the processing of information and insures a quality exchange (Carlile, 2002).

Decentralization figures prominently in the bank's traditional structure with channels and lines of businesses operating as almost separate entities and "running their business like they own it." These functional groups also develop unique contextual knowledge and frames for reacting to situations, interpreting events, and solving problems. As such, there are boundaries (often referred to as silos) between these entities, with differences in practice, perspectives, cultures, language, terminology, experiences, and epistemic styles. The result is that groups form vastly different ideas, opinions, beliefs, values, and assumptions about how the world works and what is important. (Crossan et al, 1999, p. 529). Boundaries can prevent knowledge transfer and collaborative problem solving and reinforce competition between groups. Collaboration across silos means confronting and crossing these boundaries. The mechanism for traversing boundaries is communication which allows participants to broker their different perspectives and effectively translate terminology (Bechky, 1999; Bijker, 1987; Dougherty, 1992; Liedtka, 1999; Nahapiet, & Ghoshal,, 1998; Wenger, 1998).

So, as we moved further along in the vetting process, it was not uncommon for meetings to be taken up with lengthy discussions of what was meant by the terms "communication," "service," "interaction," or "touchpoint." We found ourselves negotiating the conveyed meaning and different interpretations of graphics and terminology at every interaction as well as authority concerning who could best determine how ethnography would be positioned. As experienced ethnographers, we wanted to lead the facilitation but we were also cognizant of the fact that this research was being conducted within the context of a larger multichannel initiative and complicated organizational politics were at play.

The bank is comprised of 85 different businesses and each is rewarded separately and according to their specific goals. Groups were not accustomed to thinking about or attending to the customer's journey across touchpoints. In addition, a sales-driven culture forms the bank's "power core,"[6] with sales-optimized channels enjoying primacy within the touchpoint ecosystem and service-oriented channels viewed as sales-support and service cost centers. The result is an environment characterized by complexity, little collaboration between groups, and focus within groups on increasing revenue generated by sales and reducing service costs.

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[6] Jeanne Bliss, author of *Chief Customer Officer* describes an organization's primary skill set or comfort zone as its "power core" and is the area where people gravitate to perform and seek rewards. Bliss contends that any customer experience change effort must first begin with identifying the organization's power core.

The context in which we set out to educate stakeholders on the value of ethnography was doubly challenging due to these factors and the fact that the ethnographic approach was strange and unfamiliar to many within the multichannel initiative. Ethnographic research emerges out of a different worldview than the numbers-centric one that most business functions come from and we were often asked:

"Why can't you learn what you want to know with a survey and therefore have statistically significant results?"

"How many participants will be included?"

Fortunately, this qualitative study was one prong of a two-pronged insights work stream that also included a behavioral data analysis study with a sample of 148,000 customers. We were able to position the combined effort as bringing left and right brain thinking together. The left brain approach would get us to aggregate patterns of behavior that were statistically significant. The right brain approach would fill in the "why's" of these patterns and give us the stories underneath the numbers.

Roger Martin, in making a case for the importance of design thinking in business concedes that the larger the company, the less likely it will be to embrace intuitive thinking. The reason is that analytical thinking – the predominant type in companies that are good at sustaining growth and scale – is at odds with design thinking that privileges intuition, creativity and both-and solutions to problems.

> Organizations dominated by analytical thinking are built to operate as they always have; they are structurally resistant to the idea of designing and redesigning themselves and their business dynamically over time. They are built to maintain the status quo. (Martin, 2009, p. 6)

Analytical thinking and risk aversion is fundamental to financial business, making it particularly difficult to engage in a different mode of thinking.

"I'M NOT GOING TO CRY"

Part of the vetting process included soliciting volunteer team members from the different channel groups to both participate in the research and act as ambassadors during the process. The concept of collaboration tends to be viewed in a very positive light in the sense of, "We will combine and build on

our ideas and emerge with something better than the sum of our individual efforts" but this cheery definition often obfuscates the challenges of negotiating, advocating, and making tradeoffs.[7]

Effective collaboration also requires that stakeholders want to work together towards a common goal. They trust each other, share accountability and assume that all participants' viewpoints are valued. As we proceeded to put together the team, we found this spirit of engagement and the leadership level missing. One of our research team members later told me that when her boss asked her to participate she remarked, "Probably nothing will come of this study, but we should represent our channel." Others demonstrated this attitude through their half-hearted participation in the process throughout.

One leader, notorious for his straightforward communication style pulled no punches during the pitch phase, saying: "Look, I don't really believe in this type of research. You put up all those pictures and quotes and show some video of heart wrenching stories. I'm an engineer by training. I know what you want, you want me to cry. I'm not going to cry. But if you want to do this, I won't be an obstacle; I don't think it will destroy shareholder value."

Needless to say, the executive opinion of ethnography ranged from enthusiastic to apathetic to skeptical and support for the approach felt tenuous. An entire paper could be written about the importance of leadership support for customer experience initiatives, but we will simply note that once the research commenced, leadership presence was largely absent as the researchers brought the team together and began the work of traversing organizational boundaries.

"I NEED TO SET YOU STRAIGHT"

After three months we got the nod to proceed and access to the volunteers representing online and mobile banking, ATM, Branch, Phone – as well as the Deposits group that formed the Multichannel Core Ethnography (MCE) team.

Going into the project, the lead researchers hypothesized that functional boundaries could be crossed by having a common focus on the customer experience and inviting participation and openness. The project was seen as an opportunity to span knowledge boundaries and each phase was carefully designed to optimize collaboration and co-creation while emphasizing the value of each member's subject matter expertise. From the outset, we were explicit with the team that a key activity was taking part in the ethnographic process itself and that the value of doing so would push us toward becoming a more customer-centric culture by collectively surfacing, comparing, challenging and aligning channel specific business assumptions with customer's expectations. We expected that over time the team would develop cohesion of its own and that the frequent communication we'd designed

[7] Jassawall, A. R., & Sashittal, H. C. (1999). Building collaborative cross-functional new product teams. *Academy of Management Executive, 13(3),* 50-63.

into the process would result in the social lubrication that would make working together easier in this endeavor and in future multichannel initiatives. To create shared understanding, group interpreting and translating processes must occur (Weick & Van Orden, 1990) and what von Krogh et al. call "indwelling," a word that means "to live together with a concept" (von Krogh et al., 2000, p. 58). Dwelling in a concept can be understood as a dramatic perspective shift from judging new ideas to actually trying them on: to indwell is to get inside of an experience, idea, or concept. And, it is a relational concept−as the focus is broader than one's own self or group interests.

In hindsight, we underestimated the impact of the organizational dynamics that each Core Team member brought to the table had on their willingness to alter not only their own knowledge of the customer but to influence the knowledge of the team as a whole. First, it became clear that *participation* is not exactly the same thing as *collaboration* (Darrouzet, Wild & Wilkinson, 1999). In spite of the intense socialization of the study, many of the volunteered ("volun-told" may though be a more accurate, if made-up term) Core Team members brought with them a sense of skepticism and low investment in this study.

Second, while the authors intentionally designed the research to accommodate buy-in and collaboration, we were struck that, rather than approach their role as co-creators of the research, Core Team members tended to act as consumers of research. That is, critiquing the milestone artifacts, as opposed to feeling joint ownership and accountability for the quality of the study. A partial explanation lies in the fact that some members were used to commissioning, but not conducting research, but we also believe that this was indicative of the transactional and competitive interactions that individuals were used to having with people outside their group.

Including the MCE team members in all research design decisions, such as recruiting criteria, discussion guide creation, data collection and analysis alone did not adequately set the stage for indwelling. At the formal kick-off meeting we asked stakeholders to articulate their assumptions about the multichannel experience going into the field, what they hoped we would learn more about, and what constituted a successful outcome of this effort in their minds. In retrospect, we should have taken the opportunity at this meeting to define a team process and set guidelines for how to work together, rather than just focusing on the research inquiry itself.

Since this project ended, a new stream of work has kicked off to codify the research findings into Multichannel Design Principles. The facilitators of the kickoff meeting explicitly included the following team-centered process principles in their introduction to the session:

- Everyone participates
- People give each other room to think and express their thoughts
- People draw each other out with supportive questions, "Is this what you mean?"

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- A problem is not considered solved until everyone who will be affected by the solution understands the reasoning
- Opposing viewpoints are allowed to co-exist in the room

The quality of interaction during this meeting was marked by open conversation and participants easily built off one another's ideas. For indwelling to occur, people have to feel that they can trust in and commit to the process. A short amount of time explicitly introducing the ground rules for collaboration and communication can facilitate the right environment. Because we did not explicitly set up ground rules within the MCE team, the dynamics between team members was formal at best, and sometimes, downright adversarial.

We emphasized that each member held critical subject matter expertise that was necessary for our cross-group learning but conversations often did not take on the characteristics of brokering or translating knowledge. More typically the conversations focused on critiquing the research materials, correcting other's understanding of how things actually worked, or what was a novel discovery vs. what everyone who knew anything already knew. When sharing our insights during various meetings we were often confronted with mixed reactions. While one person felt that an insight was so obvious as to be totally uninteresting—to another it was completely revelatory. The communication style often felt like, "I need to set you straight" rather than a process of learning together or building off each other's ideas.

A lot of conversation also focused on what we could not say. A common metaphor used within the organization for a politically sensitive topic was "the third rail" e.g., the third track of the subway system that houses the electricity. Anyone who touches it is electrocuted. The political sensitivity of making statements about other channels and their practices was never absent from the conversation.

The project design included two collaborative analysis sessions. Stakeholders were invited to participate in making sense of the data as a way to gain appreciation for the rigor of qualitative analysis. ISG had commonly held these types of sessions for all previously conducted ethnographic studies and the atmosphere has always been convivial and engaged. However, in these sessions, there was a fairly high degree of tension and contention over what insights were "right" and which were "wrong." Again our use of language was challenged. For instance, when we said "branch", which is how customers talk about the channel, the attendees insisted that we refer to it as a "store," which is the organization's internal terminology.

In previous projects, the researchers would walk away from these analysis sessions feeling more confident about the direction in which the work is heading and that the findings will be well-received as they continue to be socialized. In this instance we still had a high degree of concern that we could get to a successful conclusion. Because of the volatile environment, we felt it was important that each

participating group and channel come out in a positive light and yet we needed to honestly point out areas of opportunity to improve within and across touchpoints.

In the end, we altered our standard approach for delivering recommendations –e.g., more directive—and opted instead to package them as "Key Questions for Consideration" to encourage further cross-group dialogue and sense making.

"BRING US ACTIONABLE RECOMMENDATIONS"

This insight work – both the ethnographic and the behavioral analytics component – represented the most complete view of the multichannel customer experience at the bank to date. At the conclusion of the final presentation, one of the work stream leaders for the Multichannel Initiative praised the work but charged the research team with iterating the "Questions for Consideration" in such a way to be more actionable. We viewed this as a positive sign that the business embraced the ethnographic research findings and were looking to research to determine the multichannel strategy more explicitly. Ethnographers earned our seat at the boardroom table!

We held several stakeholder sense-making sessions to further unpack the findings and state the opportunities more directly. But when we presented this advanced thinking to leadership, they still reacted as though the recommendations were not actionable enough and some of the opportunities we highlighted were met with defensiveness. It was at this point that the Multichannel Program Manager ran interference and said, "It is important to note that the Research team has performed what it set out to do – get customer feedback on the question 'How can we best leverage touchpoints to deepen customer relationships and maximize customer value?' – and now it is time for the Business Leads to incorporate these findings and ideas into their strategies and tactics." We realized that, perhaps the subtext of the "more actionable" request was that the business wanted discrete to-do's and fixes where our "recommendations" were to think and talk differently about the centrality of customer experience, to map it from the customer's perspective, and to design sales and service interactions integrally across touchpoints. We were recommending a shift in approach, perspective and culture – in short, our actionable recommendations necessitate organizational change.

Service design, as an approach and a field, fits well with theories of customer experience management−which posits that the experience that customers have with a brand is the only thing that really matters and therefore, the only sustainable source of competitive advantage (Prahalad & Ramaswamy, 2004). However, in traditional business strategy, service is often seen as one, tiny component that accompanies the product or transaction. The focus is typically on keeping the costs of such service as low as possible and not, as in the case of service design concepts, at the center of value-adding activities (Porter, 2008). In the dominant management models of corporate, business and operational strategy, service design culture is difficult to support:

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> In my view the most critical obstacle that prevents investment in service design is the assumed exclusiveness between cost leadership and differentiation on the strategic business level. It has taken the relentless communication of Roger Martin (2007), the dean of the Rodman Business School, to allow corporations to start realizing that "design thinking", also known as the iterative process of "both…and" thinking rather than "either...or" logic, offers a means to overcome such exclusivity. (Beuker, R., p.98. In: Stickdorn & Schenieder.2010.)

Our investigation of the multichannel experience shed light on a similar tension between sales/revenue generation and service/costs. Customers view their relationship with the bank as ongoing engagement across the entire ecosystem of touchpoints – and none of those interactions are considered "low value" from the customer's perspective. But the bank has tended to view interactions in terms of two camps, as either costing money or generating revenue. A customer-centric mandate requires integration of sales and service as part of the arc of "good experience" over the customer's lifecycle.

The good news is that it is not an either/or proposition. Customers do value convenience-oriented, self-service channels once they become aware and comfortable with using them. This is just one example how "service" can be placed higher up the value chain to positively impact both customer experience and profitability. Achieving this, however, does require a shift in thinking within the organization to support new processes, practices and incentive structures so that channel awareness and usage is encouraged, especially at the start of the customer's relationship with the bank. Ironically, after the final presentation, the two work streams tasked with crafting and executing multichannel strategies and tactics "siloed" into two separate tracks of "sales" and "service."

CONCLUSION

Even as we conclude the writing of this paper, events continue to unfold. Since the final presentation, the findings continue to be socialized throughout the organization and stakeholders' thoughts and ideas about the types of actions the bank should take next are being gathered. There has been very positive feedback on the quality of the findings, including from the most senior leaders in the bank. There are other signs that this work will have an impact as well: business people are reaching out to the customer experience team to read and learn more about service design; there is the work stream, mentioned earlier, to incorporate findings into Multichannel Design Principles; and, yes, there is a desire to further relationships that were formed among MCE team members during the project. Some have asked to remain intact in order to be the "arms and legs" of future multichannel initiatives and the collaboration has extended to new customer centric initiatives. Lastly, people are openly questioning whether sales and service work streams should be separate.

A large part of creating a customer-experience driven culture is about organizational change–specifically getting the organization to fundamentally shift its relationship with customers (Merholz, Wilkens, Schauer, & Verba, 2008). When ethnography is positioned as part of realizing this kind of cultural shift, it acts as a mirror through which to examine not only the customer's experience but also the organizational dynamics that can propel or obstruct this shift. Ethnographers can play a pioneering role as change agents in such organizational evolution, but it is not enough to simply be ambassadors of the customer perspective. We must be prepared to encounter, and mindfully manage, the oppositional dynamics inherent in boundary crossing and competing agendas. To do this we need to expand our skills as facilitators, in creating and implementing strategies for overcoming resistance, and in building team-centered processes where sensitive conversations can take place in a "safe" setting.

Our contribution is only a part of the work that must take place to accomplish organizational change – and there is only so much ethnographers can do without being met halfway by the business side of the equation. As we enter a new era that Forrester calls the "age of the customer,"[8] where growing customer empowerment is forcing companies to rethink what it means to engage with customers, the business side cannot ignore the fact that customers—not corporations—now hold the power to make and break brands and disrupt whole industries.

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