

Shadowing

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Shadowing is a method that generally involves following a person during their daily activities, using video and/or audio recordings and/or by taking fieldnotes (Vásquez et al., 2012). Shadowing shares a focus on first-hand experience with classical ethnographic observations (see **ethnography**). However, it differs in that it takes the shadow metaphor literally: the researcher follows a person like a shadow, walking in their footsteps over a relatively long period of time, through their various activities, to gather detailed data and generate knowledge (Vásquez, 2019).

In a foundational review of shadowing techniques in organization studies, McDonald (2005) distinguished three variants: 1) shadowing as a learning experience, which refers to a pedagogical strategy that gives the observer, such as a trainee, direct experience of the various practices that await them in their new roles; 2) shadowing as a means of recording behavior, which derives from a positivist epistemology and seeks to inventory behaviors based on pre-established categories and, mostly, in a quantitative manner; 3) shadowing as a way of understanding organizational actors' roles and worldviews. Anchored in qualitative epistemologies, this third form of shadowing is mainly research-oriented and rooted in the activities of organizational actors (McDonald, 2005). Management and organization studies scholars have favoured this latter variant as a research method, as it provides researchers rich empirical insights and knowledge into everyday organizing practices and **lived experiences**.

Despite the emphasis on concrete practices carried out by organizational actors and their sensemaking, shadowing has surprisingly not been much picked up in **Strategy-as-Practice (SAP)** scholarship (for exceptions see Berisha et al., 2018; Gylfe et al., 2016; Jarzabkowski et al., 2013; Samra-Fredericks, 2004). This entry discusses the contributions of shadowing as a research method for studying strategizing and strategy making from the viewpoint of any organizational actor, be they a strategist or not, engaging in formal instances of strategy-making or in “fleeting moments of strategy” (Cooren et al., 2024, p. 381; see **moments of strategy**). First, we present four key features of shadowing that distinguish it from other qualitative methods: mobility, the peculiar shadower-shadowee relationship, longitudinally, and a dual point of view on organizing and organization. Second, we engage with three methodological conversations in the strategy-as-practice literature to which shadowing can contribute: the strengths and weaknesses of ethnographic methods, the key role of practitioners and the need for

developing innovative methods. We conclude by inviting strategy-as-practice scholars into the exciting journey of shadowing.

Key features of shadowing

Mobility: One of the defining characteristics and strengths that sets shadowing apart from other observation methods is mobility. By following actors in their footsteps, shadowing allows capturing the daily and mundane activities as they happen, giving access to both formal and informal spaces of organizing, as well as explicit and implicit work practices. By its mobility, shadowing thus offers a privileged entry point to the front and back stage of organizing, one that can keep up with the accelerated pace of work practices and the fragmented and multiple contexts where they occur (Czaniarwska, 2007). This being said, the mobility that characterizes shadowing goes beyond moving from one place to another, as the world and its events become accessible to both the shadowee and the shadower. The movement is thus twofold: The shadower and the shadowee observe each other and they both observe what is happening around them (Czaniarwska, 2007). The relationship between the shadower and the shadowee is thus central to how they *move together*: it defines practically how to go about shadowing, but also outlines the *rapport* to reality and knowledge production.

Intimate and up-close relationship between the shadower and the shadowee: Shadowing creates an intriguing dynamic between researcher and participant – what Czaniarwska (2007) calls a peculiar twosome. The way this relationship is experienced and acknowledged may vary, as the relationships between shadower and shadowee tend to become more or less intimate, intricate, and often productive. While most researchers adopting a subjectivist approach aim to understand organizing practices through the shadowee's perspective, they diverge in how much they recognize the impact of their interactions and relationships on their understanding of these practices (Vásquez et al., 2012). For instance, some researchers may assume that their interactions with the participants they are shadowing only minimally influence the latter's "natural" behavior. These researchers thus view themselves as mere observers without significant impact on the research subject and the object of their study. Others, embracing an intersubjective, standpoint recognize the dynamic and interactive nature of shadowing (Vásquez et al., 2012). The presumption is that the shadower-shadowee interaction forms distinct relationships that enable both parties to comprehend the situation at hand, recognizing the shadowee's contribution to the development of the researcher (e.g., access to the organization, duration of the fieldwork, orientation of the object of study) and the construction of meaning. This intersubjective stance also highlights the reflexive and affective nature of shadowing.

Longitudinal character: There is no consensus in the literature regarding the duration of shadowing. Experiences vary from following a person or a team for a week to following a project for one year (Vásquez, 2019). However, researchers agree on the importance of maintaining the continuity of the observation, in order to gain familiarity with the field, capture the longitudinal nature of work, and also, as mentioned, access those more informal and implicit moments that more formalized observations (of meetings, for example) do not allow an outsider to seize. Vásquez et al. (2012) highlight the ongoing negotiation between shadower and shadowee regarding how to establish the boundaries of the field in terms of time and space. For these authors, boundary setting involves addressing questions such as: when, where, and for how

long should the researcher observe the person they shadow? As a shadower, when are they considered to be “on” or “off?” When is the researcher “in” or “out” of the field? Where and when should the researcher be shadowing, and conversely, where and when should they refrain from doing it? More specifically, which events and locations does the researcher prioritize, and which do they consider less suitable for study?

Dual point of view: Because of the intimate relationship between the shadower and shadowee, shadowing records at least two points of view that are simultaneously moving through the organization: the researcher observes the organizational action from an external viewpoint while, at the same time, the person they shadow perceives it from an internal standpoint. McDonald and Simpson (2014) use the metaphor of the front-facing light on the miner’s helmet to illustrate the shadowing’s particular perspective on organizing. As conversations unfold, the light illuminates the shadowee-practitioner. During movement, the light projects forward, guiding the way and unveiling the organizational path. Simultaneously, another light sweeps across the organization as the shadower-researcher, driven by curiosity, turns their head left and right, and even turns backward on occasion. The light is selectively cast on specific locations and other actors that are relevant to the person being shadowed and their daily experiences or sensemaking.

Methodological conversations in strategy-as-practice

In a chapter entitled “Designing Strategy as Practice Research,” Abdallah et al. (2018) discuss key methodological debates in the **strategy-as-practice** literature. Three of these debates are particularly relevant for shadowing: the strengths and weaknesses of ethnographic methods, the key role of practitioners, and the need for developing flexible methods that can capture the contextual, distributed, and shifting nature of strategy.

Ethnographic methods (see ethnography and autoethnography): While ethnographic methods have become more prevalent in management and organization studies and have gained many adepts among **strategy-as-practice** scholars, their potential in this scholarship has yet to be recognized. Ethnographic approaches have been criticized for being time-consuming, limited in scope, and too slow for embracing the organizational rhythm and complexity. Abdallah et al. (2018) also point out the strong concern in this scholarship for model-building, based on categories, and a dominant objective perspective that does not allow for studying strategy making as a **lived experience**. Hence, there is a need for alternative methods that are better suited to embrace subjectivist and reflexive analysis. Along with other ethnographic methods, shadowing can offer such an in-depth understanding of strategy practices and sensemaking. Yet, because of its mobile nature, shadowing complements other ethnographic methods by allowing researchers to study strategizing across organizational boundaries and to keep the rhythm and pace of organizational actors. In addition, shadowing permits shorter time spent in the field, as the researcher does not need to learn organizational norms and expectations, since their role is to follow a member who is already competent and fully socialized. Its duration – typically from one week to several months – diminishes the time of data collection in comparison to ethnography. This said, a shorter time-frame in the field does not ensure decreasing the time for the analysis, as the amount of empirical material collected remains important.

Focusing on practitioners: Recognizing that **strategy-as-practice** scholarship is interested in practices, praxis, and practitioners is now a well-established premise in the field. It is reasonable to suggest that strategy-as-practice researchers should reconsider and redefine their relationships with the practitioners taking part in their research. Abdallah et al. (2018) note, however, that despite several calls for engaging in more collaborative research with practitioners, to date very few strategy-as-practice scholars have done so. They suggest that a research design based on a collaborative mode would require researchers to build a more reflexive and dialogic relation with practitioners. Adopting shadowing in strategy-as-practice research design can open a path towards more collaboration with practitioners. The intimate relationship that characterizes shadowing, as well as the dual perspective on organizing and organization that it favors sets the stage for establishing a true partnership between researchers and practitioners. Particularly from an intersubjective standpoint, researcher and practitioners are seen as reflexively and dynamically co-constructing the unit of analysis, the duration of the observation, the interpretations and understandings of organizational activities and contexts, as well as their relationship (Vásquez et al, 2012). This increased collaboration comes with important challenges, such as negotiating the access to the fieldwork, obtaining organizational and individual consent for shadowing, as well as defining the roles of researcher and practitioners.

Methodological innovation: Calls for methodological innovation in strategy-as-practice scholarship have criticized the overuse of case studies and **interviews**, and the narrowness of methods for fully understanding the **lived experiences** and **moments of strategy** in organizations. These criticisms have been answered with a wider variety of data collection methods, going from archival research to focus groups, and their articulation in multi-modal research designs, incorporating visual material, artifacts, and digital platforms, for example. There has also been an expansion of sites, with more and longer engagement in the field and broader scope in sample selection. Abdallah et al. (2018) also note that while interviews maintain their centrality in strategy-as-practice researcher design, they are almost always complemented with other empirical material such as fieldnotes, video excerpts or self-reported data. Shadowing can also participate in expanding and diversifying the methods used in strategy-as-practice. McDonald and Simpson (2014) note that shadowing can be considered as a multimethod approach because it integrates observation, informal and formal interviews, as well as the collection of documents, thus favoring triangulation in the analysis. When conducted through video- or audio-recording (see also **video ethnography**), shadowing can offer an innovative and deep understanding of the role of technologies and **artefacts** (Jarzabkowski et al., 2013), talk-in-interaction (Samra-Fredericks, 2004), and embodied communication practices (see **embodiment**) (Gylfe et al., 2016). As noted by Samra-Fredericks (2004), these recordings provide a method for in-depth and detailed examination of actors' talks, physical actions, spaces, and use of diverse tools and technologies. Recordings also facilitate repeat access to and analysis of the data.

Conclusion

Shadowing as a qualitative method characterized by its mobility, the intimate and up-close relationship between researcher and practitioner, the duration and longitudinally of the fieldwork, and its dual perspective on organization and organizing can respond to some of the calls in the **strategy-as-practice** literature regarding the need for subjectivist and reflexive methods, for a deeper engagement with practitioners, and for greater diversity and innovation in

research design. Few **strategy-as-practice** researchers have ventured into using this methodological approach. We hope this entry will encourage more of them to adopt it.

See also

Autoethnography
Embodiment
Ethnography
Interviews
Lived experience
Moments of strategy
Strategy-as-Practice
Video Ethnography

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