COMMUNICATING WITH CLIENTS: CREATING INTELLIGIBILITY*

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Chapter 2

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INTRODUCTION

This chapter focuses on issues of intelligibility – how anthropologists and business manage to communicate, or not, and what needs to happen if mutual comprehension is to occur. I discuss both the language of business and the language of anthropology. My premise is that how we talk reflects assumptions about the way the consumer world works. I address the assumptions often made by business about both consumers and the research task, and offer strategies for mediating opposing sets of talk.

My Perspective

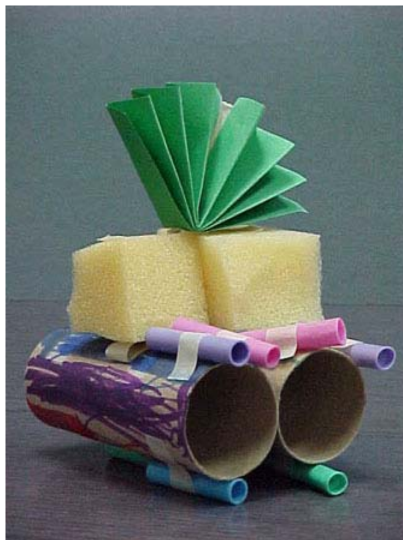
I am an anthropologist by training and market researcher by profession. I have studied communication systems of monkeys, fiddler crabs and nursery school children (University of Pennsylvania) and linguistic and nonverbal systems structuring face-to-face encounters (University of Chicago). The perspective I bring is grounded in inductive analysis – what are the rules, constructions, signs that are implicit in consumer and producer (designer, marketer, brand manager, advertiser) behavior – linguistic or otherwise – and act as a framework for that behavior.

For the last 15 years I have conducted market research for consumer products, advertising, financial, auto and electric utility industries. The B/R/S Group is a small market research and consulting group, a rather unique firm of 22 Partners in which each Partner develops a particular business practice – e.g., hi tech, new products, consumer branding, advertising development – according to professional

experience and proclivity. My work is in decoding the meanings of brands, bringing the consumers of products and services to life as cultural beings, understanding the role of products, brands or services in the context of everyday life, where meaning is produced and consumed. It is at heart a cultural analysis. If the task is successful then marketers or designers gain a renewed understanding of themselves – as professionals, consumers and cultural beings. In the end, I am an observer.

A BETTER MOUSETRAP

Anthropology, in the marketing world, is all too often embraced in the hope that it represents a better mousetrap. Brand managers, research directors, account planners, marketing directors, in search of answers or insight, grasp new approaches or new techniques in an effort to gain market share, win an advertising account, create breakthrough advertising or capitalize on shifting market dynamics. In the last decade, a shift to 'understanding consumers' or desire to 'get closer to consumers' has put a spotlight on anthropology and/or observational methods throughout the marketing world. For anthropologists interested in consumer culture, these can be good times (see Sherry 1995).



Business' view of anthropology: A bit bizarre, distinctive, a means for looking at customers.

Postmodern Consumption

There is an increasing awareness on our clients' part that traditional ways of comprehending customers are inadequate. This is especially true of advertising agency clients whose task it is to create breakthrough communications. This sense of things is partially a result of changes observed in the marketplace. Markets are increasingly global and growth for mature brands depends on new markets. Categories are being invented and redefined by technological change, e.g., what is a phone today vs. yesterday? Is a PC a word processor or Internet access? Products in a category may be at parity functionally speaking, rendering traditional advertising messages (unique selling propositions) impossible. Consequently, there is rising reliance on "the brand" as the sole source of distinction among a competitive array.

Consumer behavior, as well, is seen to have changed. Gone is the loyalty of yesteryear. Products and brands are accessible by such a wide range of consumers that "target audiences" are so large as to be undistinguishing or so fragmented as to be unreachable by a single message. Whichever are the motivating reasons, interest in anthropology and ethnography stems from a desire to grasp new models of consumer behavior or at least alternative ways for understanding.

Cova (1996), in an article addressed to business managers, suggests that the marketing field must view the consumer as postmodern. This means accepting that contradictory behavior in consumption is normal, "heterogeneity with uniformity, passive consumption with active customization, individualism with tribalism, fragmentation with globalization (1996:16)." Fundamentally, the consumer must be seen as producer of experience:

> In postmodernity we are witnessing the emergence of the customizing consumer – the consumer who takes elements of market offerings and crafts a customized consumption experience out of them. . . . In modernity, consumers were increasingly divorced from their ability to control the objects or their lives;

they ended up as stooges. In postmodernity, the consumer may be finding the potential to become a protagonist in the customization of his world (1996:17).

In a more academic vein, Holt (1997) suggests that we must understand the everyday process of consuming – that it is in the process, and not in the objects of consumption (e.g., antiques, home computers, luxury cars), that distinctions of class, status and culture are created and perpetuated. Whether or not business managers subscribe to the theory of postmodernism and its implications for consumption, practically speaking, business clients are forced to look more broadly at consumers when traditional models fail to provide predictability or fail to be useful in quickly changing markets. This means that consumers are given a stronger voice in describing their view of the world. From a client's perspective, the reality is 'change' and, thus, the motivation for engaging anthropologists.

The Trap

Nonetheless, expectations of anthropological analysis are often misguided. Anthropology, at its best, offers clients a way to recast their understandings of consumers and the consumption process. This, however is not the explicit client intent. Rather, the intentions are pragmatic, directed to a particular business issue, and seemingly concrete. For example, "I want to understand healthy life styles. . ." or "we need to uncover new learnings about. . ." or "we want to understand the personality of our brand" or "we need a distinctive positioning [in a category of parity products]" or "we need to go beyond superficial responses to this new product idea" or, my favorite, "what are the unmet needs?" By "getting close to consumers" and using anthropologists as the facilitators of that experience, our clients hope that an elusive fact(s) becomes visible as a result of the process.

Implicit in clients' intents, though, are beliefs about consumer behavior and an epistemology of knowing—assumptions that anthropologists would certainly view as cultural constructions.

Assumption #1: Knowledge is concrete and layered. We simply need to have better tools, dig deeper, mine new areas, uncover new learnings, discover unmet needs. This is the pervasive language of business among designers, brand managers or executives. Implicit is a modernist assumption that producers fulfill desires and needs of (passive) consumers.

Assumption #2: Functional and symbolic arenas are separable. Thus corporations might view their reputation or image as distinct from its operational identity. An electric utility, for example, might charge its public relations department with building the image of the company through community service programs and not recognize that customer payment policies, meter reading practices and employee merit programs are equally important in sending a message about the company's priorities – its 'image.' New product teams might separate technological function from the social or symbolic functions it enables (implicitly or not). Brand managers might separate tangible, functional features of their brand from the brand's less tangible equities, such as the values it stands for in consumers' lives, and concentrate only on the first – the easily measured, easily articulated functional properties. But, for example, should an SUV's functional 4WD performance ever be separated from the idea of freedom that such functionality symbolizes?

Assumption #3: Actions speak louder than words. Behavior speaks for itself. Consumers, consciously or not, present themselves in a certain way. Their words are suspect and so managers, developers or research directors try to get beyond any public posturing to 'real behavior.' In a Harvard Business Review article Leonard and Rayport (1997) discuss the need for "empathic methods" (read "observation") for discovering consumer needs. From our standpoint, however, both words and actions are conventionally, culturally grounded, and neither is more real than the other is. Focus group formats, though – the typical methods of qualitative research – more narrowly constrain behavior than does a person's home, where multiple roles are being enacted almost simultaneously. It is not empathy as such

that is required as much as recognizing the fundamental role of consumers in producing meaning of the goods (broadly speaking) that are found in the marketplace.

Within a worldview that is partially structured by such assumptions, anthropology is viewed as a potential tool by the business culture – it gives a new set of utterances or is instrumental in providing a behavioral view. Thus researchers, marketers or new products managers have a larger arena for witnessing what is there. At one extreme, anthropological ethnography is conflated with observation—just another word for 'looking' at customers. Cited by Nardi (1998) is an "ethnographic" study of 20 to 30 people all of who were interviewed in one 3-day period. Thus do 30-minute interviews consisting of refrigerator or closet checks become "ethnography" in the marketing world. Consumers remain objects of study—their distance from us is preserved – and there is no shift in the presumed client-customer relationship.

At another extreme, anthropology is called on to speak to the human dimension of product innovation. Our expertise is called on to answer such questions as 'has technology gotten ahead of our humanity?' 'How will a particular technology evolve in human communication?' 'Who will adopt this technology?' 'What will be the next minivan?' In these instances the most intensive look at a consumer's life would yield no predictive value.

Anthropological ethnography is not merely an observational method and it falls somewhat short of an explanation of humanity. It is not a better mousetrap (as constructed by the business culture). It represents a different way of knowing and requires of clients to invoke a different set of assumptions about who consumers are and the relationship between consumers and producers. Participant observation recasts the relationship between researcher and subject—forcing both proximity and subjectivity. In contrast to client assumptions about the way that the world works, it assumes that functional and symbolic arenas are inseparable. We also assume that language and behavior are grounded in social context and this contextualization is crucial to understand when the goal is positioning brands or creating new

products and services (Denny, 1995). Ethnography is about "why." It offers explanation, new understanding and often, new observational facts. These facts don't stand-alone; they are embedded in a cultural matrix. It is not enough, for example, to observe the therapeutic use of herbs without a corresponding analysis of the shifting cultural definition of health. It is not enough to witness college students downloading music from the Internet without a corresponding focus on the roles technology plays in their everyday lives. And so anthropology offers a different worldview, often based on different assumptions about the way that the world works.

The potential for misunderstanding between anthropologist and business client is great. Jargon, conceptual structures, and the routine shorthand of organizational speech makes talking past each other a very real possibility. I have given presentations that were disasters. If I look back, I failed to get my clients beyond their assumptions about consumers and their behavior. In a study of refrigerator use for a hard goods manufacturer, I tried to emphasize the symbolic importance of a full refrigerator (in the U.S.) and, by implication, the importance of customizing space. The ranking research manager kept asking, but how do you know this is true—did consumers *say* that? The lesson here is that if anthropologists are to form constructive partnerships with business, they must provide a way to mediate worldviews. Otherwise like Alice in Wonderland, or me talking to City Hall, conversations occur, but with no attendant understanding.

MEDIATING WORLDVIEWS

Organizational Worldviews

It is all too easy for the business culture to forget that consumers do not typically share the language of business (and its attendant implications for how the world works). Service representatives for credit card companies whose job is to get "delinquent cardholders" (are they customers or not?) to send in a "payment," might classify cardholders as "habitually late" or "one time offenders" or "abusers" or

"casually delinquent." If metaphors of drug addiction permeate conversation among service reps, management or customers – and they do – this constrains the nature of the conversation with customers. It sets a tone, invoking an implicit oppositional, didactic or patriarchal relationship. Language constrains what we experientially know. As an ethnographic observation in a research process, such metaphors speak to the implicit relationship between card issuer and cardholder and beg the strategic question of whether this sort of relationship is optimal, even viable, in today's marketplace of consumer finance.

The term "recovery," used by a multinational financial institution to reference a consumer's reversal of a poor financial situation suggests the notion of progress itself – that a consumer moved from one discrete state to another in goal-like fashion. It makes a cultural assumption about financial goals. But what if "recovery" is simply a reflection of taking a financial picture at a discrete moment? What if there is no intentional progress on the consumer's part or what if there has always been such intention but no progress? Electric utilities, to use another example, have traditionally referred to their customers as "ratepayers" while consumers have thought of themselves as "customers." Customer descriptors like these make tacit assumptions about values that may well obscure a consumer reality, as experienced. In turn, this provides a foundation for systematic misinterpretation of customer attitudes or behavior.

Consumer products companies are typically organized by brand and product offerings – each a fiefdom. Such organization is sometimes projected onto consumers, explicitly or implicitly. A manufacturer's brands may not be distinguishable in their use by consumers; functional difference may not be a relevant difference in the consumer's world. And so the separate domains of the corporate structure are not reflected in the consumer's world. Yet the corporate organization is often not questioned, indeed it is perpetuated in the research design and process, perpetuating notions of difference, when none exist.

In part, anthropological studies precisely bring such assumptions of business organizations to the forefront. This is a crucial step, a first lesson in the notion that we are all participants in the culture –

conventionalized, social and arbitrary. Mediating client and anthropological worldviews requires that clients question their own conventions but the onus is on the anthropologist to make that task part of the research process. If we, as anthropological researcher and client, comprehend the task then we are one step closer to the consumer's world.

Clients as Mediators

Mediating disparate ways of understanding consumers is not possible if clients are not part of the process. Clients who buy 'anthropological expertise' are themselves mediators. Within advertising, our client is typically the Research Director or Senior Account Planner. On the industry side, our client is typically a Brand or Research Manager or Director. In either case, our clients mediate several points of view – from R&D, to marketing, to creatives (on the agency side). Our clients have broader horizons – they might be looking at a broad array of brands, considering a global market, or actively planning the future.

Our clients recognize a more complex relationship between consumer and brand/product. They go beyond functional difference to question the relevance of the difference to consumption or to consumer's lives. They are comfortable talking about the "intangible" equities of a brand, product, service or category–what we would term the symbolic meanings. Their terms might be:

- Skills vs. personality of a brand (following Aaker, 1996) in which the tangible, functional properties ('skills') are separated from intangible, symbolic properties ('personality');
- Tangible vs. intangible properties of a category, e.g., in hi-tech, to include both a discussion of technical superiority of a cell phone design, for example, but also the meaning of mobility in today's society;
- Functional equities vs. imagery or added-value equities (following Blackston, 1992)

They are comfortable posing the question, "what does this brand/product/category represent in consumers' lives?" as a means toward product and brand innovation.

While our primary client on a project will be comfortable (if not in agreement) with an anthropological worldview, their internal clients will probably not. And so, our 'best clients' are translators. They know their internal audiences -- the language, the constraints, the opportunities – better than we, as consultants, do. They also know their market better than we do. Research abounds – attitude and usage studies, market segmentations, market dynamics, consumer trends, brand equity studies and so on. Often, these are research paradigms much more familiar to client organizations. Our clients, in the end, have to translate our findings, insights, and explanations into the language of the corporation. It might be a statement of "brand essence" or "soul." It might be the "key consumer insight." It might be a discussion about "platform strategy vs. the base business." If new positioning ideas were the objective, then product concepts – ready for consumer testing – are the deliverable.

THE PROCESS OF PRODUCT DEVELOPMENT WORK

Our work occurs largely to aid discovery of new ideas for product or service development, brand positionings, or creative development (vs. evaluate existing ideas). Research objectives include developing new product or service ideas (e.g., cleansers, banking services, electric utility communications programs, a new cat litter, a personal communicating device), policies (e.g., bank credit card programs), brand positionings, or brand extensions. Such goals are often articulated as discovering "unmet needs." Packed into this phrase is an unspoken assumption about the consumer-producer relationship: producers are conduits of objects and consumers are receivers. "Need" implies a concrete, objective even deterministic reality – consumers constitute a puzzle with a unique solution. Not so.

Product design innovation walks a tightrope between what is possible, technically speaking and what is relevant, symbolically speaking. This tightrope, implicit in all our projects, is most visible here.

Perhaps this is because technological difference is so concrete. Perhaps because in a rational world, we cling to the notion that innovation is about functionality – a new feature, a new design element. Whatever the case, strong R&D firms (hi-tech or consumer products) cling to functional difference as the hallmark of innovation. In going to consumers, getting close to them, they are searching for implicit functional needs to which they can respond with a technical solution. From our standpoint, functionality is inseparable from symbolic meaning – the role of products/services/brands in everyday life and the meanings that *consumers* are generating through experience. In the U.S., for example, biomedical advances in treating asthma have not resulted in better management of the illness by teenagers, the group hit hardest by the disease. In this case, technical breakthroughs in treatment do not sufficiently consider what a teenager's world is about and that technological function is mediated through subjective experience (Rich and Chalfen, in press). These are young people who happen to have asthma, not the reverse – a crucial distinction to make. While clients' questions are often grounded in the future, anthropology tends to predict the future by decoding the present (ideally obviating the need for prediction altogether). The process for balancing on that tightrope is outlined below.

Step 1: Re-frame the Question

As noted earlier, the research questions posed by our clients are practical, focused and in industry language (whatever the industry is). Our first and completely essential step is to re-frame the question – first in conversation then in a proposal. The re-framing always makes questions of the cultural assumptions implicit in client research questions. For example:

"Will digital photography replace silver halide?" becomes 'what is a photograph?' and 'what is a camera?' as subjectively experienced by consumers.

“What are the brands’ equities?” would also include ‘what meanings does the category have for consumers?’ How have consumers integrated a set of products/a particular brand into everyday life? What meanings have consumers’ created? How can we observe this in everyday living?

“How is technology integrated into home?” becomes ‘what is a telephone?’ and ‘what is TV?’ in the context of everyday living. And what is “home” today? What are the values embodied by specific forms of technology? How does behavior perpetuate such values? Are there tensions or contradictions?

“What are the unmet needs in spray ‘trigger’ cleansers?” becomes what does “clean” mean today? What are the values of home that are embodied by cleaning habits, routines, and preferences?

“Will a particular portable information-capturing device have a mass market appeal?” becomes what does technology symbolically do in everyday life? What strategies have consumers developed in their use of portable technology? How do these strategies fit with larger cultural values?

Photos 2-4. What *is* a phone? When is a computer a refrigerator?

In these cases, the explicit intents of the research include explorations into the lives of consumers and, for us as anthropologists, into the cultural life of products, services and brands. Whether we have persuaded ‘buy-in’ on the basis of “intangible equities” or “behavioral data,” we have permission to structure an ethnographic study.

Step 2: Embrace the Subjectivity of the Enterprise: Partnering with Consumers and Clients

Respondents in our studies often become analysts of themselves in the process. The methods we use (visual diaries, audio diaries) allow our subjects to observe themselves. Since our time with consumers is limited, these other forms of observation are highly valued.

Just as we engage consumers in a more participatory process, so do we try to engage clients in a more participatory process. We invite them to be participant/observers of the in-home (or in-office, in-store) experience. While we limit the number of people who can accompany us (2 maximum), client core team members will trade-off with each so that each attends some of the interviews. There is an additional cost factor here, both financially and logistically. The investment is worthwhile. Each interview provides an opportunity to experience the complexity and coherence of consumption. It also provides opportunities for great insight. Several years ago we worked with an advertising agency that was trying to win the Dominoes Pizza advertising account. In an effort to understand the dynamics of the category we were asked to conduct a cultural analysis of pizza consumption. Business pitches are notorious for their time constraints, so we conducted a series of in-home interviews with 'heavy' users of pizza and we conducted these interviews on Friday and Saturday evenings, at dinnertime. One of the crucial observations of the project was that when we had the household order pizza, we were expected (indeed culturally obligated) to share in its consumption. Our observational role was no longer permitted. This became a key ethnographic observation about the meaning of pizza.

We sometimes construct panels of consumers that meet periodically. In these cases clients get to know the consumers in a much more visceral way. In a study we did for a large retailer, we created a panel of Christmas shoppers who met weekly from mid-November through early January. The goal of the study was to determine sales and advertising opportunities for the retailer during the Christmas season. Translated, our goal was to understand the meaning of Christmas, how women (in this case)

shopped the meaning of Christmas and then to explore the roles of advertising and sales in this overall context. Quite spontaneously project participants offered to call me when they saw gifts I might want to buy, traded tips with each other and brought their Christmas finds for others to see. It is hard to distance oneself as an observer through this process. Indeed, as a result of the participatory, engaged process, we all participated in crucial dimensions of what it meant to shop Christmas.

Step 3: Interactive Reporting

Debriefing or report presentations are work sessions first among a core team. Observations, findings and arguments are all presented with time for questions. Implications for the team are often part of that discussion and facilitated by our primary client. This is hugely beneficial – we can determine what part of the project remains confusing or unclear, we can also observe what findings and implications have most impact on the business problem from their viewpoint.

Another form of process is to insert a brainstorming or ideation session into the mix. Our research findings, typically exploratory, provide the basis for a daylong ideation session that we facilitate. Clients, advertising creatives, outside industry experts might all be included in this process.

In The End

In the end, an anthropological analysis must persuade and be persuasive with an audience beyond a core team. It must be a cultural reading that is comprehensible. It has to make sense to the primary client and in many cases has to be translated by them as well – into terms and structures understood within the corporation. In projects we have undertaken – whether in the field of consumer technology, financial services, package goods or automobiles – clients have remarked that they haven't learned new things as much as gained a new understanding of what is known. We recast what is known by placing it in a broader context, creating new understanding. We bring consumers to life so that their behavior

shows coherence. We tell stories. We integrate video, pictures or consumer constructions of themselves (e.g., collages, objects representing key values) into the body of the report. Finally, "implications" of our work for the client problem is ideally in the client's language. With it, there is far greater chance of implementation. We speak of "brand essence" or "product plus" or "financial recovery." So we return to client worldviews, but the journey alters even these.

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