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SHADOWING

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What is Shadowing?

Shadowing is a qualitative research technique that is fairly new used and discussed in social sciences. It is used to gain understanding of an individual's behaviour, opinions and motives as well as to understand a person's role and paths through an organization or interactions with other objects or people in a given setting. The person under the study is accompanied by the researcher like a shadow enabling close observation of the person. Shadowing was mainly used in the field of consumer research and has been gaining slight popularity over the years in other fields like organizational change assessment, product marketing or positioning, and experience and service design as well.



In order to generate understanding of human needs and to develop meaningful insights for innovation, good understanding of human actions and behavior is required. Compared to traditional observation methods, shadowing provides in-depth contextual information and details. Shadowing provides rich and comprehensive data regarding patterns of actions, inter-relationship and drives of the people being studied. In shadowing, **observation is enhanced with information about mood, gestures, pace and timing that gives a full picture of the world from the subject's point of view.**

Pros and Cons of Shadowing

The foremost advantage of shadowing is that all observations are made in the natural context of the observed person. Therefore, context, informal communication, artifacts and the resulting acquisition of information are usually reliable and valid. Moreover, good preparation is necessary for shadowing.

However, shadowing cannot guarantee that the situation is not distorted by the observer. Here the researcher is usually dealing with qualitative data that would be difficult to quantify. Depending on the selected person and the objective, the representativeness of the observed situation can be insufficient and such studies usually cannot be generalized. Likewise gaining access for research can be difficult in shadowing, the researcher needs to obtain both entry to the organization and agreement from a series of individuals. Furthermore, this method makes high demands on the observer and, due to the

large amount of data, its evaluation requires a lot of effort.

When do we use shadowing?

This methodology is adopted mainly when exploring phenomenon to get rich insights on certain research topics. It can be used in cases where deep understanding of users, customers or employee are required. It can help understand motives, attitudes, behaviours and opinions of the subject under the study. Shadowing can be used in studies conducted over a long period of time or can be applied more rapidly to gain a quick understanding of a problem.

Examples of Studies Using Shadowing Techniques

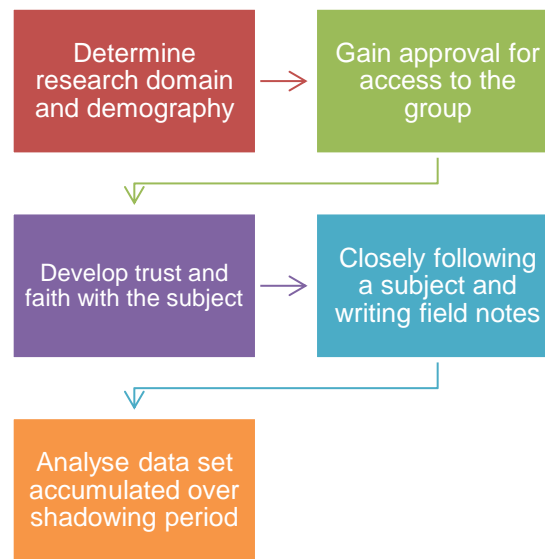
- **Stanley, Manthorpe, Bradley and Alaszewski (1998):** They have made use of shadowing as part of a three-pronged research approach to understanding how, and to what extent new legislation has changed the roles of community care assessors. Their study made use of a postal survey of community care assessors, a series of semi structured telephone interviews with their managers as well as a programme of shadowing 10 care assessments from start to finish in order to build up a complex and 'pluralistic' picture of how care assessments are being carried out. They state that shadowing offered them the chance to see care assessments in action rather than elicit the assessors' opinions or rhetoric about their roles. It also permitted them to add an overlooked perspective to their research: that of the users of community care.
- **Mintzberg (1970; 1973):** He had used shadowing in his seminal study of managerial behavior. He followed five different Chief Executive Officers of large US organizations for a week each, noting down their activities in great detail and supplementing his observations with daily briefings where they reviewed the day together. Through this work, Mintzberg revealed that, 'managerial work is extremely hectic and complex and it frequently comes in short, dense bursts'.
- **Vukic and Keddy (2002):** They had used shadowing to understand the 'lived experience' of practicing community nurses. This study makes use of a methodology known as

institutional ethnography. This methodology, pioneered in feminist sociology, attempts to make the viewpoint of the researched women central to the research. In this way, the research informed by this school of thought is concerned with an investigation and representation of a 'sense of lived actualities'.

Key Features of Shadowing

- Holistic and insightful research method
- Generates first hand, unique and multi-dimensional information
- Primarily focuses on individuals.
- Can be conducted over long runs as well as in short duration of time
- Method used to observe and understand human behaviour
- Itinerant technique which allows the researcher to experience the shape and form of their target's day
- Requires high level of analysis as shadowing data are more detailed than data generated through any other sources
- Can provide reliable and valid picture of the social settings and the individuals belonging to it
- Applicable to a wide variety of issues

Major steps involved in Shadowing



Skills required for Shadowing

Shadowing requires wide range of skills. These can be briefly listed as follows:

- High level of **interpretative and analytical skills** is required to accurately understand the issues under the study
- The researcher needs to have **good background information** about the research subjects and its environment.
- The researcher needs to have **good rapport building** ability to maintain good relationship with the subjects.
- The researcher needs to be **free of biasness or prejudices**. The researcher should have an open mind and should come without any pre convictions.
- The researcher needs to possess **good interpersonal skills**. They need to be **simple, trustworthy and friendly**.
- The researcher needs to be well **familiarized with the ethics** and norms of the individuals and groups being studied.
- **High degree of intellectual ability** is required for conducting shadowing studies.

Do's and Don'ts

Do's

- Always maintain confidentiality and get consent before conducting the study
- Always keep notes and record the activities observed
- Make yourself familiar with the research subjects and appear friendly
- Always recognize and consider the norms and values of the research subject
- Make the subject feel comfortable with the study
- Always be aware of ethics, legal issues and social limits
- Always do prior research on the research subjects before conducting the study
- Keep your personal opinions and perspectives away from the research
- Prior to the Shadowing, conduct qualitative interviews or group discussions first to get to know the topic. This way, the focus of the Shadowing can be narrowed down.
- Collect all questions during the Shadowing for a qualitative interview conducted afterwards. This way the observed person is able to explain her/his behavior and can add general statements.

Don'ts

- Try not to distract the person in order to not influence the behavior of the person being studied

- Do not cross the ethical and moral boundaries while conducting the research
- Never put any sort of pressure on the study subjects
- Record the facts as they appear and never distort or modify the facts to meet the research aim
- Never go unprepared and without background information
- Never conduct the study without the consent and approval of the study subjects
- Never let your personality and presence affect the respondent's behaviour
- Never express your personal point of view to the study subject

References

1. [Focus on Methods: Shadowing](#)
2. [Studying actions in context: a qualitative shadowing method for organizational research](#)
3. [Methods: Observation and Shadowing](#)
4. [Business Research Methods](#)

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