

MAPPING 'PARTICIPATORY APPROPRIATION' AFTER THE FACT: FIELD OBSERVATIONS AS A FORMAL INTRODUCTION TO RETAILING FOR MARKETING STUDENTS

Meredith Parrish and Jim Callan
Central Queensland University

ABSTRACT

Field observations provide pathways for marketing students engaged in situated learning. Mapping that which students appropriate as they participate in field observations provides early evidence of transitions in critical reasoning and personal reflection. These dimensions to ongoing personal development in marketing students are pivotal. Actual observed experience in "live" retail settings is seen as a way to broach the gap between rhetoric and reality in marketing.

INTRODUCTION

At the outset of the 21st century, marketing educators have begun to draw on fundamental principles of learning and development, such as the scaffolding (Vygotsky, 1978) of student learning. This is due to a number of challenges (Smart, Kelly, & Conant, 2003; Smith and Van Doren, 2004; Thomas, 1994) to the discipline's penchant for prescriptivism and objectivism. Field observations, normally used to develop research skills, are presented as a classroom technique to negotiate "pathways" and to establish learning partnerships.

As marketing educators, we acknowledge the effort required to develop student competencies in such areas as critical reasoning and personal reflection. This is not a straightforward matter in today's lecture or seminar environment, however, as the learning context does little to challenge student assumptions about a discipline's content or theoretical edifice. Furthermore, given that global education entertains the prospect of reconciling multiple perspectives, the task of sensitising students to retailing phenomena has to proceed based on authentic experience. Until students individually or collectively acknowledge that they are able to see the world differently, it is difficult for marketing educators to address the shift in learning requirements towards relevance or authenticity.

We seek to elucidate a method based on constructivist approaches to the teaching of retailing in response to requirements to circumvent objectivist learning approaches (Biggs, 2003; Ramsden, 2003). The use of the field observation technique fosters ongoing commitment to student enquiry in "live" retail settings befitting the realities of 21st century education.

Field observations in retailing

Retailing practices are highly diverse and warrant elaborate understanding and informed critical appreciation. A pluralistic (polycentric) approach to retailing theory and practice is an important inclusion in the curriculum for developing students of marketing. McCall's (1984) field observation technique is used as a device to activate higher order thinking instead of up-skilling students for research. Each observation comprises an exercise where students "consciously maintain a state of curiosity" when observing at least three different retailers.

Instead of "stepping inside the shoes of retailers", students are asked to act as customers *en rôle*, as a way of internalising concrete retail events or situations. It is important for students to experience and begin to comprehend the gaps between the rhetoric and the reality of retailing. In class de-briefing sessions involving personal logs, insights derived from observed experience of customer handling procedures are formulated, with particular emphasis on the students' perceived perspective of the retailer. In other words, subsequent to each observation, students recall, reconstruct, interpret, and deliberate over the approaches, techniques, and actions retailers took when dealing with retail events. This approach is in accord with the theory of legitimate peripheral participation (Brown and Duguid, 1991; Lave and Wenger, 1991).

Also of significance to student achievement is the ability to articulate or define problems, constraints, and difficulties that are typical of live retail settings (Gremler, Hoffman, Keaveney, and Wright, 2000; Herrington and Oliver, 2000; Rogoff, 1995; Roth, 2004; Smart,

Kelley, and Conant, 1999; Smith and Van Doren, 2004).

THE CRITICAL INCIDENT TECHNIQUE AS A METHOD

The “Critical Incident Technique”, established as a research method over 50 years ago (Flanagan, 1954), is also recognised in the area of services marketing research (Edvardsson and Roos, 2001; Edvardsson and Strandvik, 2000; Johnston, 1995; Lockshin and McDougall, 1998). The technique is reported here as a useful way to identify what students gain from the field observation exercise. The Critical Incident Technique provides a feedback loop that identifies what students gain as a consequence of field observations. We take such feedback as content that reveals, through sematic maps, the nature and extent of critical reasoning and personal reflection amongst students. Of some consequence to the teaching effort is the ability to recognise whether the students register a capacity for critical reasoning and reflection in “readiness” for further scaffolding of the learning content.

The following research questions (RQs) operationalize the teaching focus:

- RQ1: What insight does the field observation technique provide about student approaches to retail encounters?
- RQ2: What do the findings suggest about assumptions students hold concerning observed experiences of retailers in action?

Since retailing concepts extend to theoretical matter which, for the most part, merely represents one level of reality in today’s retailing contexts, it is important for students to confirm for themselves through observed experience the extent of the gap between the rhetoric espoused in the literature and the reality of the live context.

Three questions form the basis of the critical incident technique (Flanagan, 1954). The first two recall key or specific positive and negative encounters with the field observation technique. The third elicits critical changes students would make if they had to repeat the exercise. In this way, the Critical Incident Technique obtains “top-of-mind” detail of each retail encounter from a stream of experiences (Edvardsson and Roos, 2001; Edvardsson and Strandvik, 2000).

One limitation associated with the Critical Incident Technique is that respondents generally

do not elaborate or, necessarily, deliberate over issues that occur (Edvardsson and Strandvik, 2000). Such a limitation is irrelevant in this instance since students provide lots of insight during tutorials, seminars, and informal discussions.

The juxtaposition of the Critical Incident Technique as a mechanism to for identifying pathways to negotiating learning stems from a need to offer marketing students opportunities to engage the realities of commercial business settings. This prelude to skills acquisition in the form of critical reasoning and reflective practice (Cunningham, 1999) is necessary given the dynamic of retailing as one dimension of applied marketing.

INTERPRETATION OF INITIAL FINDINGS

The findings of this pilot study comprise qualitative data from a sample of undergraduate (first-year or second-year) students (n=32) taking an introductory course in retailing; (the total sample was 261 students).

Mapping the meaning of student participation and observation

Studies which utilise the Critical Incident Technique conventionally rely on content analysis to enumerate the “instances that fall into each category” of response (Silverman, 2001, p. 123). The approach adopted here involves interpretive analysis of text (Schwandt, 2000) as a basis for mapping meaning (semantic network maps) in order to understand what students see as critical. Analysis of this type requires methodological rigour and an approach to coding data that achieves *Verstehen*, which simply means “the notion of interpretive understanding” (Schwandt, 2000, p. 191). Categories of meaning within the data were obtained by means of systematic analysis of responses to requests made by email.

Our purpose is to make sense of categories of meaning as a consequence of applying interpretive method. The understanding gained over time is expected to substantiate the field observation technique as a worthwhile (valid) learning approach. The impetus is to substantiate field observations amongst other approaches to teaching marketing. Figure 1 illustrates a semantic map (Barry, 1998; Brown, 2002) of response to the question, “What was the best thing about the field observation technique?”

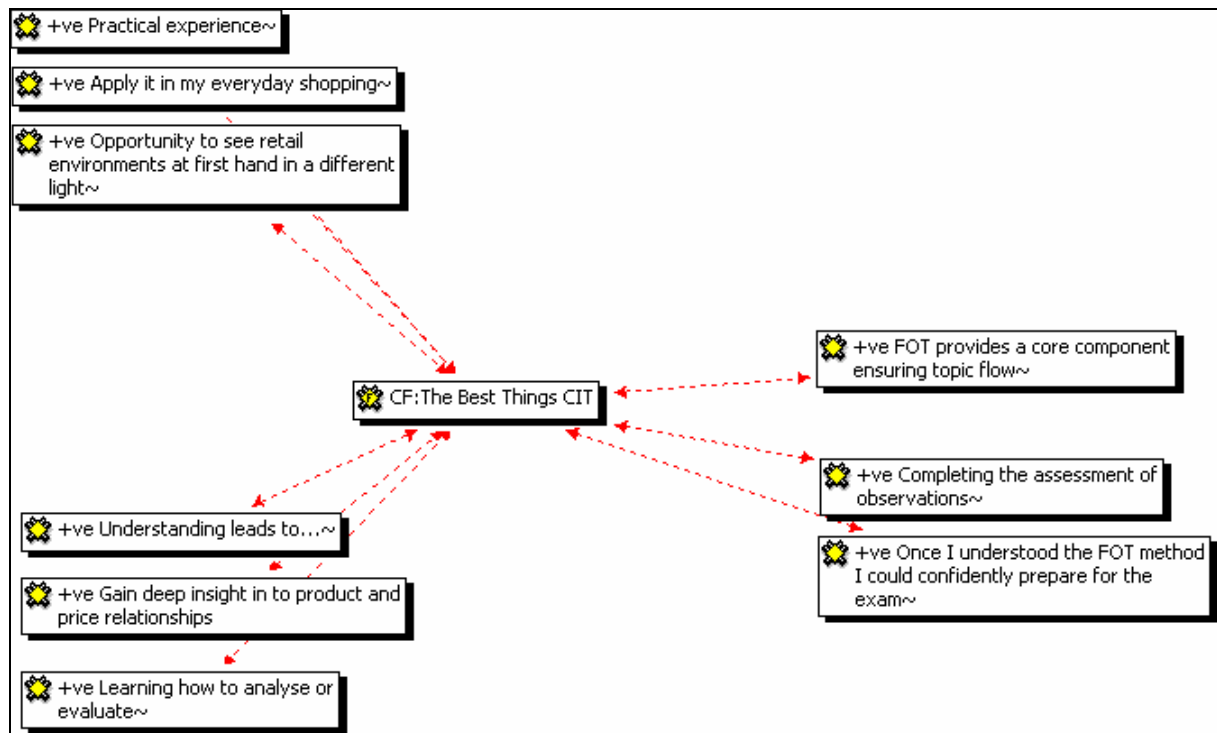


Figure 1. Code family of the best things about the observation technique.

Figure 1 illustrates the basis of the semantic network map, and while groups of categories are not linked, it is possible to attribute differences between the categories. In Table 1, for instance, categories differ because students confirm in their responses whether or not the field observation technique led to instances where critical reasoning was salient, or whether

a critical dimension to their reasoning emerged during field activities (items in bold). This, of course, contrasts with other (perhaps errant) responses to the Critical Incident Technique which in this instance proved to be functional or course-related in nature.

Critical reasoning skills	Critical dimension to reasoning	Functional outcomes
[Gain deep insight into product and price relationships]*	[Apply it in my everyday shopping]*	[Completing the assessment of observations]
[Learning how to analyse or evaluate]*	[Opportunity to see retail environments at first hand in a different light]*	[critical incident technique provides a core component ensuring topic flow]
[Understanding leads to...]*	[Practical experience]*	[Once I understood the critical incident technique method I could confidently prepare for the exam]
Code Family: The Best Things critical incident technique		
Created: 09/01/06 03:30:57 PM (Super) Quotation(s): 38 Codes (9):		

Table 1. A delineation of semantic differences between codes stemming from the question: “What was the best thing about the field observation technique?”

In the case of the opposite question, “What was the worst thing about the field observation technique?”, the categories revealed a quite unexpected level of functional concerns associated with the field observation technique. It is almost as if the students misread the

requirement of the question, or responded as if the question provided an opportunity to criticise the technique itself.

Critical dimension to reasoning	Functional outcomes
[Less motivated to visit the same stores or number of stores]	[Assessments too similar in nature]
[Not sure how the FOT skills relate to career skills]	[Competition with other students for the same category]
	[Could not see the link to assessments]
	[Demography (part 1) too confusing]
	[Final part "Managing People" irrelevant]
	[FOT is a poor substitute for "interviewing"]
	[FOT produces bulk paperwork - too much output]
	[FOT work load too onerous]
	[Some aspects of FOT appear not related]
	[Suggest 2 retail categories instead of 3]
Code Family: The Worst Things critical incident technique Created: 09/01/06 03:31:23 PM (Super) Quotation(s): 44 Codes (15):	

Table 2. A delineation of semantic differences between codes stemming from the question: "What was the worst thing about the field observation technique?"

Consequently, in the case of the third and final question shown in Table 3, it appears the respondents formed a mindset which simply

produced more instances of criticism levelled at the course and not the field observation experience.

Critical Reasoning based on reflection	Functional reasoning
[Chose different retailers and avoid being so self-conscious] *	[Clarify the purposes of Parts 1 and 2]
[Reconsider my approach to ensure greater contrast or better outcomes] *	[Explicate the method in concrete terms to help overcome recognisable pitfalls]
[Work harder] *	[Make the link to summative assessment more explicit]
	[No change required to FOT]
	[Obviate the language load on international students]
	[Redevelop the assignment or the questions]
	[Reduce the paper trail]
	[Reduce to 2 retailers instead of 3]
	[Rethink design approach to the exam]
	[Shift in approach to presentation as part of the assessment]
	[Shift the approach to interviews or group work]
	[Shift the extent of emphasis on the FOT]
Code Family: Changes I would make in approach in future Created: 09/01/06 03:31:52 PM (Super) Quotation(s): 35 Codes (15):	

Table 3. A delineation of semantic differences between codes stemming from the question: "What changes in approach would you make next time with the field observation technique?"

In this instance a significant proportion of the respondents miscued in their interpretation of the question. It is evident that in the majority of cases errant responses were the order of the day. The data clearly show that the students effectively baulked at the direction of the question, preferring to criticise the course rather than their own behaviour.

DISCUSSION

The findings indicate that the field observation technique, while seemingly acceptable as an approach to learning, produced a highly varied response as a practical exercise intended to emphasise critical reasoning and reflection. It is clear from the data that students had difficulty interpreting the requirements of the second and third questions in particular. The number and extent of errant responses to the third the question suggests at least three possible courses of interpretation. The first, is that the question proved too difficult and that the students, predominantly, were unable to fathom its intent, which was to have them reflect on the time spent undertaking field observations and for them to critically assess what significant personal gains they made in learning about the retailing encounters. The second possibility is that student involvement with the observation format warrants closer attention – students may have wittingly or unwittingly circumvented the learning objectives of the exercise. The third possibility is that the respondents, by baulking at the question, have shown that they are yet to master the necessary skills or competencies associated with critical reasoning – an issue seemingly not confirmed by the responses to the first question. An unfortunate outcome is that all but three respondents in the current sample had difficulty with the third question.

As a consequence of this finding, it is clear that the use of the Critical Incident Technique requires scaffolding in the sense that students need exposure to questions of this nature during the course. Notwithstanding the possibilities of countervailing issues related to the application of the field observation technique and its associated implementation during the course of instruction, there are a number of assumptions about the students' approaches to retail encounters which warrant closer scrutiny. It is clear that the findings suggest that an identifiable approach to detecting pathways to critical reasoning and reflection exists through interpretive research. It is more than likely that the nature of the partnership between the use of the field observation technique as a teaching

approach, and as a learning approach, in marketing, warrants closer attention.

CONCLUSION

Marketing educators are beginning to appreciate that there is more to learning than merely citing facts or describing retail settings. Indeed, marketing students need to be engaged in situated learning where the live dimensions of retail encounters are internalised through observed experience. In preparing marketing students for the uncertainties of global markets, it is necessary to provide, in introductory retailing courses, learning opportunities that are closely aligned to real world practices. There are two principal reasons advocating such a stance. Firstly, there is a recognisable distinction to be made between localised practices in retailing and those that are portrayed in standard marketing texts and lectures. Secondly, the retailing concept that students are expected to internalise, while generic in its application, forms the basis of a constantly evolving set of encounters. Really "knowing" something about retailing derives from acquired experience. Such experience must be formed through an internalised set of precepts tempered by competencies associated with critical reasoning and reflective practice. The case in favour of using the Critical Incident Technique as a basis for gauging the merit or otherwise of the field observation technique has yet to run its full course.

REFERENCES

- Barry, C. A. (1998). Choosing Qualitative Data Analysis Software: Atlas/ti and NUD.IST Compared. *Sociological Research Online*, 3(3).
- Biggs, J. (2003). *Teaching for Quality Learning at University: What the Student Does* (2nd ed.). Berkshire: SRHE & Open University Press.
- Brown, D. (2002). Going Digital and Staying Qualitative: Some alternative strategies for digitizing the qualitative research process *Forum: Qualitative Social Research*, 3(3), 1-13.
- Brown, J. S., & Duguid, P. (1991). Organizational Learning and Communities-of-Practice: Toward a Unified View of Working, Learning, and Innovation. *Organization Science*, 2(1), 40-57.
- Cunningham, A. (1999). Confessions of a Reflective Practitioner: Meeting the challenges of marketing's destruction. *European Journal of Marketing*, 33(7/8), 685-697.

- Edvardsson, B., & Roos, I. (2001). Critical incident techniques: Towards a framework for analysing the criticality of critical incidents. *International Journal of Service Industry Management*, 12(3), 251 - 268.
- Edvardsson, B., & Strandvik, T. (2000). Is a critical incident critical for a customer relationship? *Managing Service Quality*, 10(2), 82 - 91.
- Flanagan, J. C. (1954). The Critical Incident Technique. *Psychological Bulletin*, 51(4), 327-358.
- Gremler, D. D., Hoffman, K. D., Keaveney, S. M., & Wright, L. K. (2000). Experiential Learning Exercises in Services Marketing Courses. *Journal of Marketing Education*, 22(1), 35-44.
- Herrington, J., & Oliver, R. (2000). An instructional design framework for authentic learning environments. *Educational Technology Research and Development*, 48(3), 23-48.
- Johnston, R. (1995). The determinants of service quality: Satisfiers and dissatisfiers. *International Journal of Service Industry Management*, 6(5), 53-71.
- Lave, J., & Wenger, E. (1991). *Situated learning: legitimate peripheral participation*. Cambridge: University of Cambridge Press.
- Lockshin, L., & McDougall, G. (1998). Service problems and recovery strategies: an examination of the critical incident technique in a business-to-business market. *International Journal of Retail and Distributions Management*, 26(11), 429-438.
- McCall, G. J. (1984). Systematic Field Observation. *Annual Review of Sociology*, 10(1), 263-282.
- Ramsden, P. (2003). *Learning to Teach in Higher Education*. London: Routledge Falmer.
- Rogoff, B. (1995). Observing sociocultural activity on three planes: participatory appropriation, guided participation and apprenticeship. In J. V. Wertsch, P. Del Rio, & A. Alvarez, (Eds.), *Sociocultural studies of Mind* (pp. 139-164). Cambridge: Cambridge University Press.
- Roth, W.-M. (2004). Activity Theory and Education: an introduction. *Mind Culture and Activity*, 11(1), 1-8.
- Schwandt, T. A. (2000). Three Epistemological Stances for Qualitative Inquiry: Interpretivism, Hermeneutics, and Social Constructivism. In N. K. Denzin, & Y. S. Lincoln, (Eds.), *Handbook of Qualitative Research* (2nd ed., pp. 189-213). Newbury Park, CA.: Sage Publications Inc. .
- Silverman, D. (2001). *Interpreting Qualitative Data: Methods for Analysing Talk, Text, and Interaction* (2nd ed.). Thousand Oaks, CA: Sage Publications Ltd.
- Smart, D., Kelley, C., & Conant, J. (1999). Marketing Education in the Year 2000: Changes Observed and Challenges Anticipated. *Journal of Marketing Education*, 21(3), 206-216.
- Smart, D., Kelley, C., & Conant, J. (2003). Mastering the art of teaching: Pursuing excellence in a new millennium. *Journal of Marketing Education*, 25(1), 71-78.
- Smith, L. W., & Van Doren, D. C. (2004). The Reality-Based Learning Method: A Simple Method for Keeping Teaching Activities Relevant and Effective. *Journal of Marketing Education*, 26(1), 66-74.
- Thomas, M. J. (1994). Marketing - In chaos or transition? *European Journal of Marketing*, 28(3), 55-62.
- Vygotsky, L. S. (1978). *Mind in Society: the development of higher psychological processes*. Cambridge, MA: Harvard University Press.