



## PROFILES IN PRACTICE

On the recommendation of the Practicing Advisory Work Group, AN has launched a series of Practitioner Profiles to illustrate the work currently done by practicing anthropologists. It is very difficult to make sweeping generalizations about the practice of anthropology. While there are still fuzzy boundaries defining the identity of a practitioner or professional anthropologist, it is clear that there is a significant trend of more anthropologists working outside of academia. PAWG concludes that over half of all PhD anthropologists and virtually all anthropologists holding a master's degree work outside of full time academic positions, in a range of jobs, from methodological and statistical development, to analysis,

to management for the federal government, work as contractors, as independent consultants, for non-profits and for corporations large and small. Each month, this column will feature jobs held by practicing anthropologists. The first profile is based on Profiles in Practice Contributing Editor Shirley Fiske's January 10th phone interview with Patricia Ensworth in New York about her work in the global financial services sector.

## Providing Cultural Translation for Global Financial Services

SHIRLEY FISKE  
PROFILES IN PRACTICE CONTRIBUTING EDITOR

After receiving her masters in anthropology from Columbia University in 1982, Patricia has spent her entire career in financial services, which, as she puts it, covers "anything an individual or organization can do with money, including banking, trading, investing, and issuing securities and debt instruments." Within this world, she has focused her career on software engineering—quality assurance and testing for software used internally by employees of international firms.

### What was the career path for an anthropologist managing software quality insurance?

While working on her masters at Columbia, Patricia supported herself by doing word processing. When the first personal computers appeared in offices, she found opportunities to try programming, business analysis, testing, training and technical writing.

At that time, computers designed for non-engineers were a new phenomenon, the trend of the future, and there was much creative work being done to realize a major cultural-technical transition. It was exciting to be part of multidisciplinary informal groups, full of idealism and plans to change the world with this breakthrough technology.

Patricia's education in anthropology allowed her to understand the implications of computers for organizations, work groups, communities and peoples' lives. Her concentration in graduate school was business anthropology, and the connection between the models of behavior encoded in software and the patterns of real-world human interaction was evident.

The *hard decision* was whether to continue in graduate school or jump on the computer revolution bandwagon. She chose the latter. However, her training and perspective in anthropology have been critical to her success in financial services and software engineering.

### First career job and the anthropology connection:

After she received her MA in cultural anthropology, Patricia answered a newspaper ad and was hired by Merrill Lynch as a software tester. Like

many recent graduates, she discovered that her employment options were strongly influenced by her part-time jobs, volunteer work and extracurricular activities while in school.

One of Patricia's initial assignments was to lead the user acceptance testing for the first world-wide desktop retail branch management software. Although the software was being designed and developed by a team of Americans in New York, early in the project there was an assumption that it could easily be deployed in other areas of the world and users everywhere would find it appropriate for their needs. This hypothesis soon proved false.

As an anthropologist, Patricia helped clarify how peoples' work values and cultural variation affected their attitudes toward the tool, and how the behaviors imposed upon the users by the system would become embedded in their lives. She was able to show the importance of requirements-gathering—identifying user ideals, expectations and taboos—through ground-level understanding of the personal and social structural relationships in different cultures. This was the *launch of a career in software quality assurance as an expert in cross-cultural analysis.*

### Subsequent career path and achievements:

Patricia continued to work at Merrill Lynch for five years, when she took maternity leave and stayed at home until her son entered kindergarten. Her next job was with Moody's Investors Service.

Moody's is a global financial research firm, best known for its influential Moody's Rating, a score assigned by analysts to corporate and government debt instruments so that investors can evaluate credit risk. At Moody's she created and led the first software quality assurance group, coordinating the testing of software used by internal staff and external customers around the world.

During her nine-year tenure with Moody's, Patricia became involved in *outsourcing* after senior management decided that maintenance programming should be contracted to a supplier so that staff developers could focus on innovation. When changes in US immigration laws resulted in a large contingent of IT guest workers collaborating side-by-side with American staff

members, she applied cross-cultural communication skills on a daily basis, dealing with engineering teams "that looked like a model of the UN."

While at Moody's, Patricia wrote and published *The Accidental Project Manager: Surviving the Transition from Techie to Manager* (2001), which she characterizes as "based on all the quality assurance briefings I gave over and over to new software project managers."

### Patricia Ensworth

**Title:** Manager of Software Quality Assurance, UBS Investment Bank, New York City.

**Salary Range:** \$100,000–\$200,000, including yearly bonuses.

**Organizational Memberships:** AAA, Institute of Electrical and Electronics Engineers (IEEE), American Society for Quality (ASQ), Project Management Institute (PMI). Level of involvement: She doesn't have time to be involved in most of these. She graciously agreed to be interviewed for this column.



Patricia Ensworth and the Wall Street Bull.

The success of the book enabled her to leave corporate life and establish her own consulting firm, Harborlight Management Services, in 2003. As a consultant, she worked with private clients, taught workshops at conferences, and led seminars for the American Management Association.

In 2005, a managing director at UBS (Union Bank of Switzerland) invited her to join the firm to help solve technical and organizational issues around quality assurance. UBS, a Swiss company, has offices in 50 countries, but the main ones are in Switzerland, New York City, London and Hong Kong. Americans are a minority in management.

Since the Investment Bank is the trading division, the purpose of most software is to enable traders of many different entities to profit from deals they arrange between buyers and sellers all over the planet. As a quality assurance manager, Patricia coordinates the activities of software test managers in the various business streams (foreign exchange, mortgages, commodities). She also manages the bank's relationship with an offshore supplier of software testing and development services.

**Example of applied anthropology:**

"The goal of a project," says Patricia, "is to create a worldwide contact management system for a company's sales representatives. The software developers envision that after every sales call, the rep will return to the office and input his or her notes into the database so others can access them and follow up. As American technophiles in a relatively egalitarian, do-it-yourself culture with flexible roles, they believe that people like computers and are comfortable typing in data themselves.

"However, user acceptance testing shows that in some Asian offices the new system will be rejected. The social structure there is a more rigid hierarchy. Sales reps have a higher status than clerks, and by custom only clerks type on keyboards.

"To accommodate the actual behavior of the Asian users, the user interface, business logic, security rules and database structure of the system must be altered. Senior management does not want to spend the extra money for the alterations. The project manager decides that the Asian sales reps are just being fussy and stubborn, and recommends that they should be compelled to use the system as originally designed. A software quality assurance manager trained in anthropology can articulate why in the long run this strategy would be counterproductive."

**Bead on the future:**

"The world is flat"—or so we've been told, with apologies to Thomas Friedman. Building global teams, including both staff members and outsourced offshore suppliers, is an increasingly important operation in software engineering and financial services. A manager must know how to lead teleconferences in multiple time zones across many cultures to reach consensus about goals, strategies and tactics.

**What Patricia does most in a workday?**

Patricia said what she does most is *translating* the beliefs and practices of one group into another—developers' principles to testers, software project managers' needs, constraints and prejudices to suppliers.

**Key tools from anthropology:**

Participant observation is a useful skill for business analysts and software testers. "You have to

live in a community (at least during work hours) to understand how the software will change their world. The anthropology perspective documents the 'grassroots' community as a whole, not just the complaints of a 'squeaky wheel' who has a specific agenda." Patricia says she constantly has the image of an anthropologist with tape recorder and fieldnotes in hand as she enters a new user community.

"If you accept the premise that an organization is a culture, then many anthropological concepts and methods can be relevant." For example, organizational structures often reflect local kinship values, both formally and informally. Rituals reinforce group identity. This is a fertile area for research. "A lot of magical thinking goes on around deadlines and budgets, and witchcraft increases at times of crisis or stress." Patricia recommends *Peopleware* by Tom DiMarco and Tim Lister as a book worth reading for anyone interested in the human dimensions of software engineering.

**Why would a financial service business or software engineering team want to hire an anthropologist?**

Anthropologists have always known that the "world is flat" and all cultures have equal value. We aren't burdened by as many First World "elitist prejudices" when dealing with the senior managers, professionals and experts from emerging nations who are playing an increasingly influential role in global enterprises.

Additionally, the 4-field training gives anthropologists unique research skills in listening to human beings tell their stories, analyzing quantitative data, and decoding patterns of communication. Physical anthropology and archaeology provide a strong background in scientific method, especially useful in relating to engineers and forming hypotheses for testing.

**Challenges and Ethics:**



One recurring challenge Patricia faces is the perception that anthropologists are instinctively more committed to the goals of disempowered communities within an organization than to the priorities of senior management. Becoming an advocate for grassroots issues and problems is helpful only up to a point, after which it can be negatively interpreted by senior management as "going native," says Patricia. She acknowledges that she has "taken some hits for that" in her career—often in the context of outsourcing.

Patricia is mindful of the importance of protecting one's sources. In gathering sensitive information about beliefs or practices, it is vital to ensure confidentiality, particularly when informants are on the lower rungs of the organizational ladder.

Patricia says she sometimes encounters hostility simply for being employed at a financial services institution or working on outsourced offshore projects. Typically this criticism comes from people "who think of capitalism primarily as an ideology rather than an economic system," and hold her personally responsible for all the ills of "neoliberal imperialism, oppression and exploitation."

**Challenges AAA could address:**

AAA can help bridge the gap between anthropology and industry. Patricia has noticed a closer collaboration between social science and business in Europe. In contrast to managers from other parts of the world, American managers are ill-equipped to deal with the consequences of globalization, such as outsourcing. In addition, the association could enhance the study of businesses as cultures, in part by encouraging the teaching of anthropological research methods to software engineers and cross-cultural perspectives in business schools. ■

**Anthropology: Real People, Real Careers**  
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**The AAA is pleased to announce the release of**

## Anthropology: Real People, Real Careers.

This new DVD addresses the perennial question, "What exactly does an applied anthropologist do?" The DVD contains interviews with individuals working in several different fields of applied anthropology and is designed to demonstrate the wide variety of career opportunities for anthropologists. With a running time of 42 minutes, this is a perfect tool for use in introductory anthropology courses!

**For more information on the DVD and how to order, please go to [www.aaanet.org/careers.htm#DVD](http://www.aaanet.org/careers.htm#DVD)**

