



## Building on Consensus

### *Business Anthropology Matters*

Patricia Ensworth

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Cultural analysis for managing risk and quality on transformative organizational projects.

Studying cultural change is at the core of many ethnographers' everyday work. We apply the concepts, methods, and tools of social science to the research, yet our perspective all too often remains that of a spectator analyzing from the sidelines. For anyone who wants a different kind of participant-observer experience of cultural change, there is another career option: Become a project manager.

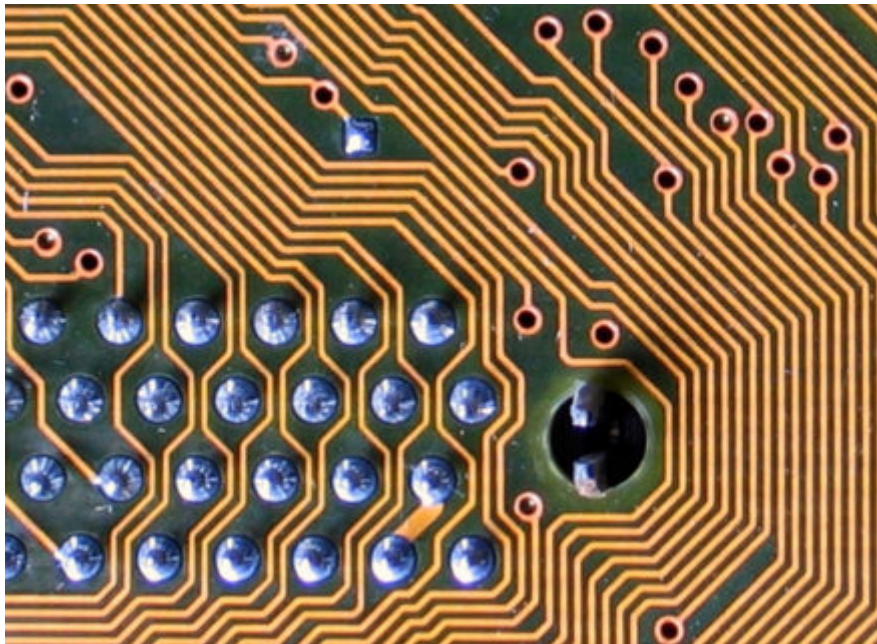
The term **project** has many meanings in everyday discourse. You might be planning a so-called project to reorganize your sock drawer or book your next vacation. In business, a project is "a temporary endeavor undertaken to create a unique product, service, or result" ([PMI 2015](#)). Its goal is to implement some sort of change. Organizations undertake projects when they want to restructure their internal operations, or when an event in the external environment triggers a need to respond. A project manager leads the change initiative, assuming a role that varies from orchestra conductor to ship captain to adventure-travel logistics manager.

*Even if our employers and clients don't know exactly how we do it, when we apply this expertise to lead an organization through a cultural change, they can appreciate and reward our special aptitude for project management.*

Nowadays, in large global companies and on major transformative projects, it is often mandatory for the project manager to hold a Project Management Professional (PMP) certification. This credential is similar to the Certified Public Accountant qualification. PMP candidates memorize a list of methods for "gathering requirements" to determine the characteristics of whatever

product/service/result the project will eventually provide. Such methods might include interviews, brainstorming, observation, and focus groups, among others. The requirements are stored in a database, and the success of the project is usually measured by the degree to which they are achieved.

When a project is either breathtakingly urgent or boringly routine, and the items on the stakeholders' wish lists are clear and congruent, conventional "requirements gathering" methods can work just fine. But the limitations of those requirements become evident as soon as people realize that the outcome of a project will change their organizational culture—their status, responsibilities, routines, workplace social network—in uncertain ways which they may not like. On a transformative project, adversarial factions can coalesce around issues of territory, procedure, and methodology (Cefkin 2009; Szymanski 2011). Disputes about permissible levels of risk (Kendrick 2013) and acceptable standards of quality (Rose 2014) are common. In the absence of a consensus, progress toward the goal grinds to a halt.



**"Labyrinthine circuit board lines."** Karl-Ludwig Poggemann/Flickr CC BY 2.0

Ethnography can make the process of fulfilling the project's requirements more effective and comprehensive. Cultural analysis practices, which have been successfully employed in consumer research (Sutherland and Denny 2007) and software engineering (Ladner 2014), can help reveal tacit assumptions and unconscious behaviors, facilitating negotiation of shared values. These practices demand the allocation of time, space, and resources in the project plan so that participants can step back from their idiosyncratic visions of the end result and consider larger,

more abstract questions: What is efficiency? What is reliability? What is an on-line community? To probe for insights into risk and quality, the project team asks: How could this product/service/result create problems for you or cause you pain? How could it improve your life or bring you pleasure? Sharing the results of this research improves understanding among the various factions, clarifies people's uncertainties about the future, and marks the boundaries of consensus as a foundation upon which developers can build more detailed specifications.

For example, a few years ago I was engaged as a consultant by a well-known global financial services firm to manage a transformative organizational project in the domain of information security. The company employed more than 50 thousand people worldwide in four major divisions: wealth management, investment management, investment banking, and securities trading. The reason for the project was that the firm was acquiring another investment management company. The merger depended upon the successful transfer of more than seven million accounts into the purchaser's operations and systems. Conservative estimates indicated that the jobs of more than half of both companies' employees would be affected in some way.

This initiative occurred at a time when cybercrime and cyberwarfare were first beginning to create serious challenges for financial services firms and other critical industries in the United States. Among its other attractions, the company being acquired possessed many information security safeguards that were superior to those deployed by the purchaser. Senior management at the acquiring firm believed that the standards, practices, and tools for information security from both companies could be combined and reorganized to leverage the strengths of each and reduce costs by sharing resources.

The goal of the project stated: ***"To improve the security of our e-commerce business, we will implement a new governance structure."***

As project manager, my first task was to establish a consensus on the interpretation of the goal statement so that we could create a list of deliverables and milestones and understand the dimensions of people's hopes and fears. Predictably, initial outreach to stakeholders yielded a potpourri of ideas:

"We need more staff for the firewall."

"Can you get [a brilliant IT security architect in another division] assigned to my group?"

“Our institutional clients want secure access to our trading platforms on their tablets from their yachts.”

“Please provide us with a prioritized list of information security regulations from governments in all countries where we do business because we can’t comply with all of them.”

“Update the Windows System Administrator training.”

The traditional PMP requirements gathering process would have employed an etic approach, quickly coding the responses according to predetermined categories and handing the data over to the security engineers. Instead, the project team adopted more emic methods, scheduling many formal and informal follow-up discussions to enable us to understand the context of the requests and the dynamics of the work communities. After we built relationships with the stakeholders and gained their respect and trust, we were able to ask them the more fundamental questions, such as: What is security? What is e-commerce? What is a governance structure?

The process of facilitating the discussion, ideation, and negotiation regarding these answers served as a feasibility study. It determined the project scope, the risk plan, and the quality assurance procedures. It also revealed the existence of a dissident business unit that refused to cooperate under any circumstances, leading to modifications in senior management’s long-term business strategy.

In my experience, the term “cultural analysis” means very little to most businesspeople. “Ethnographer” often evokes a blank stare. Yet even if our employers and clients don’t know exactly how we do it, when we apply this expertise to lead an organization through a cultural change, they can appreciate and reward our special aptitude for project management.

**Patricia Ensworth** is President of Harborlight Management Services LLC. She is the author of *The Accidental Project Manager: Surviving the Transition from Techie to Manager* (Wiley 2001), and numerous essays and articles. She leads training workshops through the American Management Association and teaches as an adjunct instructor at New York University.

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