

# Researching Situated Learning: Participation, Identity and Practices in Management Consultancy

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## **Abstract**

Situated learning theory has emerged as a radical alternative to conventional cognitivist theories of knowledge and learning, emphasising the relational and structural aspects of learning as well as the dynamics of identity construction. However, although many researchers have embraced the theoretical strengths of this perspective, methodological and operational issues remain undeveloped in the literature. This paper seeks to address these deficiencies by developing a conceptual framework informed by situated learning theory and by investigating the methodological implications. The framework is applied in the context of an empirical study of how management consultants learn the practices and identities appropriate to client-consultant projects. By presenting two vignettes and interpreting them using the conceptual framework, we show how learning is regulated by the consulting firm as well as individuals themselves, and that, paradoxically, 'failure to learn' may be an outcome of consultants' efforts to construct a coherent sense of self.

**Keywords:** Situated learning; consultancy; methodology; communities of practice; identity.

## Introduction

Situated learning theory offers a radical alternative to conventional cognitivist theories of knowledge and learning (Lave and Wenger, 1991). At its core is a critique of assumptions implicit in many conventional theories: firstly, that 'learning' represents the acquisition of objective knowledge; and secondly, that learning is best achieved during educational / training sessions which are separate from the settings in which that learning will be applied. In contrast to the cognitivist perspective, situated learning theory sees learning and knowing as processes which are integral to everyday practice in workplace, family and other social settings. The focus shifts from decontextualised 'objective' knowledge to the accomplishment of *knowing in action* and *in practice*. Thus, learning and knowing cannot be separated from everyday practice; furthermore, learning cannot be isolated and then studied as though it were a discrete activity. This conceptual shift poses methodological challenges for research on learning. However, although many researchers have embraced the theoretical strengths of the situated learning perspective, methodological issues remain undeveloped and neglected in the literature.

This paper seeks to address these deficiencies by developing a conceptual framework informed by situated learning theory, and by considering the methodological implications of the framework. The framework's core constructs of participation, identity and practice are introduced in the section on situated learning. An appropriate setting was required in order to apply the framework - one in which individual and group interactions might reasonably be expected to reflect 'learning'. A review of the literature indicated that an appropriate setting would be a client-consultant project, where consultants are presumed to facilitate their client's (and their own) learning by developing and translating management knowledge.

The paper is organised as follows. Firstly, the conceptual framework is developed around the key constructs of participation, identity and practice. Secondly, the methodological implications of the framework are discussed. Thirdly, the conceptual framework is applied to the empirical setting of a client-consultancy project from which we present two vignettes illustrating processes of situated learning.

The first vignette explores the heterogeneous nature of participatory opportunities engineered by the consulting firm for its junior consultants. The second vignette explores processes of identity-regulation by consultants seeking to maintain a coherent sense of self in the face of client demands which appear to challenge their sense of what 'good consulting' means. The vignettes illustrate ways in which consultants seek to develop their practices and identities as they move between different forms of participation. Our analysis also highlights instances of resistance to learning as a result of identity-regulation (Alvesson and Willmott, 2002). Thus, by introducing vignettes we aim to demonstrate the heuristic value of the conceptual framework in helping to generate insights about processes of learning.

### **Developing a conceptual framework**

An important deficiency of the situated learning literature is the absence of a conceptual framework and methodology which links the concepts of participation, identity and practice in ways which inform research activity. Conceptual frameworks create 'boundary objects' (Star and Griesemer, 1989), which enable researchers to share an understanding of theoretical perspectives and their methodological implications. Using Star and Griesemer's (1989) typology, a framework can be depicted as an orienting map which reduces the complexity of the landscape in order to highlight its important features, where 'importance' is defined by the researcher's theoretical perspective. However, we acknowledge that any framework - whilst bringing benefits of conceptual simplification - is also necessarily reductivist. Frameworks, like any tools,

are helpful only to the extent that they are used with a sensitivity which allows for the incorporation of tacit understandings and refining of interpretations.

In developing the conceptual framework we draw on an established literature oriented around a situated perspective on learning. Central to this literature is a focus on participation, identity and practice (in communities or networks of practice [Brown and Duguid, 2001]), and the dynamics between them. As Lave and Wenger (1991) propose:

Conceiving of learning in terms of *participation* focuses attention on ways in which it is an evolving, continuously renewed set of relations ... [Learning is] an integral and inseparable aspect of social *practice* ... [furthermore] learning and a sense of *identity* are inseparable: they are aspects of the same phenomenon (Lave and Wenger, 1991: 49, 53, 115) [emphasis added]

An important mediating process is that of 'participation' which may, for example, be peripheral or core (Lave and Wenger, 1991) or marginal (Wenger, 1998). In recent years, the ability of individuals to participate, and the forms which that might take, have been seen to be constrained or enabled by the power dynamics relevant to the local setting (e.g. Contu and Willmott, 2003; Huzzard, 2004). Furthermore, the meaning of 'community' has been theorised and extended to produce distinctions such as 'communities', 'networks' and 'collectivities' of practice (Brown and Duguid, 2001; Lindkvist, 2005).

Drawing on this literature we take as our starting point the need to represent the core constructs of participation, identity and practice, depicted in Figure 1. Each construct is elaborated in later sections. For the moment, however, we aim simply to represent the dynamics between them. This is shown using two-way arrows between because it is *through* participation that identity and practice develop. Participation enables or constrains opportunities to develop identities and practice, including linguistic practices. Conversely, changes in an individual's identity and practice may influence the search

for new participatory opportunities. For example, the managerialist self-identities developed by MBA graduates may encourage them to seek workplace responsibilities which entail new forms of participation at senior levels of their organisations (Sturdy et al., 2006).

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Figure 1 about here  
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However, at this stage the contextual setting is missing, which invites the question, 'participation in what?' Figure 2 therefore extends the framework by representing not only the individual, but also the work-based communities and networks of practice in which he or she participates. Community 'A' represents the dominant workplace community associated with the individual's current place of work as in the case of Orr's study of Xerox photocopier engineers (Orr, 1996). Network 'B' represents the individual's participation in a wider network of practice across organisations which employ workers with similar roles (Brown and Duguid, 2002). The bonds which tie members of such a network will be looser than in a community, but influential nevertheless. 'C' represents a community in which participation is more peripheral than in Community 'A' but which nevertheless influences the individual's development of identity and practice. Wenger (1998: 105) gives an example of this in the context of insurance claims processors, where a unit supervisor belongs to 'local management' as well as her own 'processing unit'. The supervisor's role and identity in each community allows her to span the boundaries between them. These two communities enjoy some commonality and can be represented as Communities A and C in Figure 2. Clearly, the supervisor may additionally participate in a broader network of practice as in Network B (e.g. insurance claims processors across multiple organisations) but this is not discussed in Wenger's example. Of course, individuals participate in many communities at different times and at varying levels but, for simplicity, these are not shown in the framework. Also relevant (but not shown) is Bourdieu's notion of habitus

(Mutch, 2003) - a set of dispositions which an individual develops during his or her formative years in educational or early-social settings. We refer to the influence of such dispositions later in the article. We now elaborate on the core elements in Figure 2.

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### ***Participation***

Lave and Wenger (1991) argue that participation is central to situated learning since individuals develop their identities and practices according to the participatory opportunities available to them. Participation is not simply an event. It involves the way individuals understand, take part in and subscribe to the social norms, behaviours and values of the communities in which they participate. The definition of 'community of practice' is not prescribed in *Situated Learning* (1991), but the examples given (for example, of tailors, midwives and meatcutters) tend to illustrate learning within a single, localised and relatively small community. Most represent an apprentice-to-master model where apprentices move from peripheral to full forms of participation. Indeed, a common reading of the book is that situated learning theory applies only to informal apprenticeships rather than 'formal' learning settings. However, the early examples have since been qualified and elaborated. For example, Lave (e.g. 2004) now uses the concepts of 'newcomers' and 'oldtimers' to denote an individual's lifespan within a community, but makes no presumption regarding the newcomer's status as a novice, nor of his or her inevitable movement from 'peripheral' to 'full' participation as a master/expert.

In a parallel development, Wenger (1998) has elaborated various forms of community participation: 'peripheral' and 'full' are now contrasted with 'marginal'; non-legitimate forms of participation are introduced; and the multiplicitous and overlapping nature of communities is explicitly acknowledged. Indeed, as Bourdieu's concept of *habitus*

implies, an individual not only participates in multiple communities of practice, but also brings to those communities a personal history of involvement with social, familial, ethnic and other groups and identities (such as gendered identities) whose norms and discourses may complement or conflict with one another (see also Whittington, 1992). The extent to which those conflicts are negotiated and reconciled - partly or temporarily - influences the individual's ability to construct a coherent sense of identity across these arenas of participation.

### ***Identity***

Situated learning theory brings a renewed focus on 'identity'. 'Learning' is concerned not only with developing ways of 'knowing' in practice, but also with understanding who we are and what potential we have (Lave, 2004). Perhaps surprisingly, given the emphasis on identity, there is little elaboration in the situated learning literature of how identities develop and are shaped by social and contextual influences as well as individual agency, except to reject the idea that it is purely a process of imitation (Lave and Wenger, 1991: 95). This central omission weakens the explanatory power of situated learning theory, leaving researchers ill-equipped to construct empirical narratives of how and why identities change (for a notable exception, see Keller and Keller, 1996).

A review of the literature reveals several conceptualisations of identity. These vary in their emphasis on structural or agential influences, their accounts of identity-development, and the possibility of stability around a single or multiple sense(s) of self. Social identity theory, for example, argues that our sense of identity develops through the medium of the groups we belong to (or disassociate with). An implicit assumption here is that these groups (which may, for example, be ethnic, socio-cultural or work-based) are relatively internally-coherent and therefore act as a stabilising influence: we

'belong' to a small number of such groups and carry a small number of identities (Tajfel and Turner, 1986).

Whilst social identity theory continues to offer explanatory power, recent debates have drawn attention to the precarious nature of identity construction, and to the possibility of multiple and fluctuating selves. Kondo (1990), for example, in her ethnography of a Japanese workplace, portrays the ways in which individuals adopt many changeable - and at times apparently-contradictory - identities in order to 'fit' with the varied contexts of everyday life. Others, however, while agreeing that 'identity' is rarely as stable as is predicted in social identity theory, argue that individuals do strive to achieve a sense of coherence between their multiple identities (Giddens, 1991). This perspective seems to most closely fit with the proposition in situated learning theory that identities are continually evolving through - but bounded by - participation in multiple communities of practice. This means that identity-construction is not eclectic because it is framed by the possibilities available in the community of practice as well as broader structural contexts. On the other hand, identity-construction is not a finite process because individuals continually strive to construct a coherent narrative between the multiple identities they have developed or are developing throughout their lives.

The process of identity-construction has been explored in the work of Alvesson and Willmott (2002) which is of interest here because of its recognition of the effects of power relationships, particularly in a workplace setting. They argue that workplace self-identity is a continually evolving outcome of two main processes: identity regulation and identity work (see Figure 3). The first process refers to regulation originating from the organisation (e.g. induction and promotion policies) as well as employees' individual responses such as enactment and/or resistance. The second process refers to employees' continuous efforts to form, repair, maintain or revise their perceptions of self in relation to others in the community of practice. There is no predetermined

*direction* for the development of identity; nor is there a final resting point which equates to a stable sense of self.

To some extent, this continual reworking of identity arises because, as argued above, individuals participate in not one, but multiple communities and networks of practice. Each will have different norms of belonging and a different repertoire of 'typical' identities. Furthermore, individuals bring to these communities their early-socialised 'dispositions' to act in similar ways across different contexts and communities (Mutch, 2003). The potential for identity conflict is therefore significant as individuals move between different communities. Nevertheless, in spite of (or perhaps because of) this internal conflict, individuals may still seek to present particular identities to outsiders. For example, as we demonstrate later, consultants may seek to project a coherent identity which they believe their clients want to see (e.g. being the expert, and being in control), and which is regulated by the managerialist discourses at their workplace and more generally.

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### ***Practice***

In the context of situated learning, practice is always *social* practice (Wenger, 1998: 47) because it is the 'historical and social context' that provides structure and meaning to what we do (ibid). Through participation, newcomers 'gradually assemble a general idea of what constitutes the practices of the community' (Lave and Wenger, 1991: 95). Those practices may relate to the use of language, role-definitions, behavioural scripts, and other explicit artefacts as well as various implicit values, assumptions and understandings that underpin them. Individuals do not necessarily imitate these practices, but instead - depending on other situated influences - may come to adapt, transform or even reject them.

An important explanatory framework which sheds light on practice-development is social learning theory (Bandura, 1986). Ibarra has translated this into a workplace context, and suggests that individuals develop their practice by observing and (initially) imitating others within their community of practice, and by experimenting with and adapting their own practice repertoire. She calls this process 'experimenting with provisional selves', emphasising the close relationship between the development of identities and practices. Situated learning theory elaborates on this argument by suggesting that the opportunities to observe, adapt and experiment are dependent on the participatory opportunities available to the individual. These influences on the development of practice are illustrated in Figure 4.

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We have so far discussed participation and the development of identity and practice as distinct concepts and processes. It is important to emphasise the interactional effects of these processes. For example, individuals may 'try out' new roles and identities by experimenting with practices typically associated with the identities they aspire to (Ibarra, 1999; see also Ashforth and Humphrey, 1993). By bringing together these constructs, learning can be considered as the development of *identities* and *practice* achieved through *participation* in communities of practice. This process is illustrated in the full conceptual framework in Figure 5.

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### **'Participation' versus 'practice'**

The concepts of identity, participation and practice are central to situated learning theory yet there remains some ambiguity around the distinction between 'participation' and 'practice'. These terms are sometimes used interchangeably creating conceptual

confusion. For example, if 'practice' is not just about 'doing' but is also about relationships, why use the term 'participation'? Yet if 'participation' is not just about being involved in a meaningful way but is also about ways-of-behaving, why use the term 'practice'? What seems to be required is a way of differentiating between participation and what Wenger calls 'mere engagement in practice' (Wenger, 1998: 75). A key assumption here seems to be that participation involves 'hearts and minds': a sense of belonging (or a desire to belong), mutual responsibilities and an understanding of the *meaning* of behaviours and relationships. This suggests that, for the purpose of developing the conceptual framework, one way to distinguish between the two terms is to limit 'practice' to 'activity' so that 'participation' can be understood as '*meaningful activity*' where meaning is developed through relationships and shared identities. Practice therefore becomes simpler to operationalise because it is limited to observable activity rather than the relationships and meanings which such activity may or may not imply. Clearly, this distinction is conceptual rather than empirical, and is proposed only for the purpose of reducing some ambiguity inherent in situated learning theory. Nevertheless, the proposed distinction may facilitate empirical research which requires at least some attempt at operationalising these terms.

### **Methodological implications of situated learning theory**

To complement the framework, research methods are required which support an investigation of the core constructs, but which allow for the heterogeneity of context-specific learning practices. Clearly, methodological choices reflect a range of factors and there are no inherently 'natural' approaches to studying, say, identity. A review of research in this area suggests a traditional focus on ethnographic approaches (e.g. Lave and Wenger, 1991; Engestrom, 1999; Keller and Keller, 1996). However ethnographical research carries its own dilemmas and ambiguities. The seductive promise that the researcher will be able to 'tell it how it is' from a purely inductive non-

theoretical stance is illusory. An investigation of observable interactions *per se* will not reveal fully the meaning of what is occurring without recourse to structural explanations which themselves imply theoretical frameworks and deductive logic. Interactions are nevertheless an important source of data, which raises a question about *which* interactions should be the focus of inquiry. This question is problematic because it apparently flouts a central assumption of situated learning theory: that learning *is* practice, and is therefore present in *all* interactions. According to this logic, it is impossible to discriminate between different types of interactions because they are all relevant to learning.

Nevertheless, there are two approaches that may at least partially address this dilemma: the first is to draw on complementary theories of learning to identify fruitful areas of focus at the interactional level; the second - which follows the tradition of Perry (1970) and others - is to direct attention to likely points of *transition* and *transformation* as individuals navigate new forms of participation, identity and practice.

The first approach draws on theories of learning which - although neglecting the relational aspects - may indicate areas of focus at the interactional level. One source is social learning theory (Bandura, 1986) which proposes that individuals learn by observing the actions of others and the consequences of those actions, and by imitating behaviours which appear to generate positive outcomes. Whilst situated learning theory rejects the simplistic assumption that individuals learn *only* through imitation or indeed that they necessarily imitate, it does not deny that observation is influential even if only because the observed model may become something to be resisted (Lave and Wenger, 1991: 95). Thus, a focus on the way individuals apparently 'try out' different behaviours (Ibarra, 1999) may reveal evidence of learning which can be followed up in interviews or using other methods.

The second approach to studying interactions is to focus on the tensions which become apparent at times of transition, as individuals move from one existing network of social relations to another. One example would be the study of management consultants as they move from their own to the client's workplace (Czarniawska and Mazza, 2003) or from being data analysts (with limited opportunities to engage with clients) to project managers (with some client responsibility) and from there to client relationship managers. In each case, the roles represent a different nexus of relations, different forms of participation and practice, and a different sense of identity. Thus, rather than view identities and roles as static entities, a more useful approach for situated learning research may be to look for and investigate the process of *transition* and the effects of that process.

Combining these two approaches suggests a predisposition to search for apparent cases of observational learning and experimentation, coupled with an investigation of processes of individual transition between networks of social relations. We do not, however, suggest that these approaches are the only or indeed the most effective ones; merely that they provide a useful way into the investigation of learning as practice. For example, observation and interview research methods can be used to investigate how individuals observe other members of their community, and then imitate, experiment with or adapt forms of participation, identity and/or practice.

Having developed the conceptual framework and explored some of the methodological implications for situated learning theory, the remainder of this article moves from the general to the specific and illustrates the use of the framework in the context of client-consultant relationships. In addition, we discuss our practical experience of using the framework with a range of research methods and reflect on their effectiveness in illuminating aspects of participation, identity and practice. We begin by introducing the empirical setting.

### ***Empirical setting***

Our research focus was the relationship between management consultants and their clients, and the extent to which that relationship facilitated learning and knowledge transfer. The client-consultant relationship was selected because it represents an important 'bridge' for the potential transfer of business knowledge. Indeed, the growth in the consultancy industry (Engwall and Kipping, 2004) is often attributed to the ability of consultants - through their client projects and relationships - to develop and transform management knowledge and enable its 'transfer' to (and from) clients (e.g. Antal and Krebsbach-Gnath, 2001). This ability is seen to depend on several factors. These include consultants' role as process consultants, and their outsider or 'liminal' status (Czarniawska and Mazza, 2003) which is presumed to account for their ability to introduce new knowledge or to surface previously-ignored knowledge. Clegg et al. (2004: 1350), for example, propose a 'role for the management consultant as a source of 'noise' that disrupts established ways of doing and being [at the client]'. While disruption may not always be the outcome, client-consultant relationships provide a potentially important empirical setting for investigating the processes by which knowledge transfer may occur, and the ways individuals develop their skills and capabilities.

Taking a situated learning perspective, we sought to investigate the extent to which different forms of participation enabled or constrained individual learning or organisational knowledge transfer. For example, what forms of participation in client projects enable junior consultants to develop consulting practices and identities? How does the development of an individual's identity and practices influence his or her choice of participatory opportunities?

To investigate these questions, we investigated several client-consultant projects *over time* (2003-5) and *in action*. In this article, we focus on one of the projects in which consultant learning (or lack of it) was an important feature. We do not therefore mean

to imply that client learning did not occur; merely that for the sake of brevity we have selected just two representative vignettes from the project as a whole.

### ***Applying the conceptual framework to the client-consultant setting***

The conceptual framework developed earlier (Figure 5) is generic in that it does not prescribe specific communities of practice. Applying the conceptual framework to the client-consultant context, one can reasonably assume, for the sake of simplicity, that the communities relevant to the consultants' learning would be those involving the clients and consultants. In addition to being framed within broader institutional and structural (e.g. managerial) contexts, interactions between these communities are likely to be influenced by the dynamics of the specific project, the dynamics of the existing and continuing relationships between clients and consultants, and other social relations and identities.

### ***Methods***

The selection of methods was informed by our review of the methodological implications of situated learning theory, and by our aim of exploring learning *in action* and *over time*. Observational methods were chosen for their ability to provide data on interactions which might facilitate or constrain individual learning. However, we also recognised the limitations of longitudinal observation such as its emphasis on explicit interactions to the exclusion of motives, reflections and broader structural contexts which are hidden from the observer. We therefore complemented observational data with semi-structured and unstructured interviews to obtain community members' perspectives on what they learned and how this was shaped by the client-consultant relationship and project.

The following vignettes are drawn from a client-consultancy project lasting ten months involving approximately 55 hours of interviews and observation, including interviews conducted 6 and 12 months after project completion. The project context is described

in the next section. The vignettes do not, of course, reflect the full complexity of the relationship nor all of the learning which occurred, but are used here to illustrate the heuristic value of the conceptual framework.

### ***Illustrative vignettes***

The vignettes relate to a project involving a major multinational corporation (henceforth referred to as 'MNC'<sup>(1)</sup>) and a leading firm of strategy consultants ('Insight'). The client initiated the project to identify strategic options including investment and divestment of business units. For this project, MNC appointed Insight despite having a long-standing relationship with one of Insight's competitors. The rationale was to bring 'fresh ideas' into the organisation. Insight aimed to showcase their capabilities and thereby develop relationships and extend their involvement with senior executives at MNC.

The size of the consultancy team varied in line with project needs, but typically contained several junior and senior associates as well as a senior principal acting as day-to-day project manager. The project team was supported by the relationship Partner who had managed the client relationship for many years. Insight's mandate was to develop strategic options for MNC using their knowledge of the industry sector and similar clients. The options were based on a combination of mutually agreed assumptions about markets and global trends as well as other statistical and qualitative data. The data was collated by the client-consultant team and input into a bespoke data model by two junior consultants at Insight, who provided a first-level analysis of the outputs.

#### *Vignette 1: Learning through multiple forms of participation*

In the first vignette, we illustrate aspects of the junior consultants' learning trajectories. We show that their potential for developing identities and practice was shaped by their access (regulated by management) to different participatory settings involving different clients, responsibilities and activities.

The framework predicts that by participating in communities of practice, the junior consultants would develop their identity (e.g. through processes of identity regulation and identity work) and practice (e.g. through processes of observation, experimentation and adaptation). The two junior consultants (JC1 and JC2) were both relative newcomers to Insight. They joined the organisation three years previously, and completed their sponsored international MBA during that period which contributed to their enculturation into a cosmopolitan managerialist discourse. During these formative years, their participatory opportunities were regulated by senior managers who controlled their client contact-time and allocated the consultants to the least 'visible' project activities - those of data input, model-manipulation and preliminary analysis. In those background activities, they were supervised and coached by their senior colleagues who suggested alternative analytical techniques or who offered interpretive insights by explaining the client's industry context. For the junior consultants, these activities - though recognised as essential - were perceived as rather mundane. They called themselves 'data monkeys' providing 'horsepower' to their senior colleagues. From their perspective, career progression required opportunities to learn how to (and demonstrate that they could) interpret the data analysis and then present and discuss these interpretations with clients. This would require an understanding of the client context as well as interpersonal skills.

Developmental possibilities were regulated by the project partner and manager, and participation was made available in two main ways. Firstly, the junior consultants attended internal Insight review meetings. Here they could listen to the interpretations of more active team members as they spoke of project progress, client responses and ways of 'handling' the client. Their participation in client-consultant interactions was therefore vicarious, and their understanding of the proper role of a consultant was shaped by the ways their senior colleagues 'filtered' information. They were learning how they were supposed to think about client behaviours. Secondly, the junior

consultants attended some minor client-consultant meetings, though they usually did so in relative silence. These meetings provided opportunities to learn through observing senior consultants interact with clients. The apparent acceptance of this silence by all participants gave the junior consultants the space in which to observe and reflect on what was happening without worrying about how they were projecting themselves to clients or colleagues. Indeed, the MNC clients openly acknowledged that they were 'investing in the development of the consultants', but that this would have long-term benefits if the working relationship became more effective as a result.

This development of identity and practice was made especially visible when the consultants were released for a short time in the middle of the MNC project in order to work for a less prestigious client, 'Jupiter'.

[At Jupiter] I was being asked to do something which to me was like climbing Everest in two days. I didn't even know where to start and I was actually thrown in that big room and it took me a couple of days to realise I could do it and then my confidence level went sky high (laughter) ...

We knew it was pretty risk-free. We had a very good relationship with the client and although I was going to be thrown in that alone, if required I was going to be able to pick up the phone and have the firm back-up in minutes. It was like 'you need to do this, we know you can do it, if something goes wrong we'll be there but nothing will go wrong'. [Interview with JC1]

During interviews, the two consultants indicated that it was through their peripheral (observational or vicarious) participation at MNC and their engagement at Jupiter that they were able to develop their identity and practice. For example, at Jupiter, they managed small client meetings and took responsibility for client deliverables. They were certainly not silent observers. As indicated in the above quotation, the consultants initially felt 'thrown in' yet knew there was organisational back-up if required; furthermore, after the Jupiter experience, their existential confidence in *being* a good consultant seemed to rise dramatically. Emotions of fear as well as self-confidence were experienced during this time of transition. Thus, the consultants were developing

their work-based identities as expressed to clients and colleagues, as well as their existential sense of self as 'good consultants'.

However, in a further example of managerial regulation, the junior consultants' ability to apply these new practices and identities on returning to MNC were still constrained - though less so than previously. For example, during one feedback meeting with the MNC client and consultant project manager which we observed, JC1 spoke infrequently, but when invited to do so he talked at length as though practicing the language and actions he had begun to develop at Jupiter. Thus, there was still some diffidence, but also more active involvement when invited to contribute. During later interviews he spoke of his increasing confidence which translated into a willingness to act more spontaneously during client-consultant meetings, offering ideas and analysis not only when invited to do so, but also when he felt it was the 'right' thing to do.

Our analysis illustrates ways in which relative newcomers developed their identity and practice within the context of a client-consultant project. Rather than experiencing a smooth trajectory from peripheral to fuller participation in one particular setting, the junior consultants were moving between multiple forms of participation: peripheral at MNC but more central at Jupiter. This movement was regulated by the consultancy organisation, but nevertheless enabled the junior members to develop their practices and identities as more accomplished consultants.

#### *Vignette 2: Failing to learn*

In the second vignette, we consider the assumption prevalent in much of the consulting literature (e.g. Heron, 1990; Schein, 1987), that consultants promote change initially by *challenging* the preconceptions and practices of clients.

The client, MNC, expected the Insight consultants to be knowledgeable and confident enough to provide rigorous challenge to their unfolding strategy. To a certain extent this did occur, but only when the consultants felt they could support their opinions with

empirical data or strong argument. They seemed reluctant to go further and challenge the client's preconceived ideas by playing the role of 'devil's advocate' or by providing tentative opinions unless they could provide water-tight arguments. In a reversal of much of the literature on client-consultant relations, it was the client and not the consultant who challenged preconceptions about how things 'should be done' (c.f. Fincham, 1999). As one client said:

Sometimes, like with [*competitor consultancy firm*], we just say 'this is a working session, this is off the record. We want to hear what you think, even if it's wrong. It's your opinion. It doesn't matter.' But I don't think we've achieved it with this team yet. We've not been working shoulder to shoulder. [MNC manager]

The consultants' self-identity as rational analysts seemingly precluded them from offering more tentative challenges based on experience if these were not supported by incontrovertible evidence. Throughout the interviews and observational research, the consultants demonstrated their considerable pride in their intellectual skills and the rigour of their analysis. For example, consultants spoke about the 'very [intellectually] demanding' nature of the work. One commented: 'what keeps us going are the intellectual molecules; otherwise you couldn't take it' [Insight project manager]. In this example of identity work, the consultant sought to justify his long working hours by reference to the cerebral benefits; he also expressed his identity as someone who *had* this intellectual ability.

Through our discussions with the consultants about recruitment, it also became apparent that an enduring story (and form of identity regulation) was that recruiters selected candidates who demonstrated creativity, intellectual rigour and effective articulation skills: the ability to identify innovative solutions to hypothetical client problems, and the critical thinking skills to argue for that solution. For the Insight consultants, their belief that clients wanted these rational-analytic skills and subscribed to such managerial norms was continually reinforced by senior management at Insight.

Paradoxically, the consultants' desire to present this identity to their clients (and avoid what might appear to be 'woolly' challenges) seemed to lead them to *decline* opportunities to participate in ways desired and requested by their client. Perversely then, this process of 'identity-regulation' (Alvesson and Willmott, 2002) had the effect of limiting the consultants' (and clients') possibilities for learning and knowledge transfer.

Although processes of identity-regulation thus appeared to constrain the consultants' willingness to try out new behaviours, the relationship Partner at Insight did not appear to feel these constraints. When he demonstrated what he thought were the desired practices, his challenging ideas - though pertinent in terms of their content - were delivered in a manner which the clients perceived as inappropriate to the context of a formal senior executive meeting. The Partner was labelled by the client as a 'loose cannon' whose challenges had to be stopped. The 'cognitive' (cultural) distance (Nooteboom, 2004) for the clients was too great, and they responded by rejecting the validity of the challenge. What became apparent is that each community of practice develops its own norms, values, practice and appropriate identities, and that those at the margin (such as the senior Partner and consultants at the margin of the client community) need to understand those norms in order to be recognised as legitimate participants. The relationship Partner had worked with senior MNC management over many years, creating project opportunities by highlighting innovative industry trends, identifying client weaknesses and so on. His role was acknowledged and accepted by MNC and Insight as being, to some extent, a source of challenging ideas which might or might not have relevance for the client. Problems arose, however, when this role was enacted during senior executive workshops (as opposed to the usual one-to-one conversations). This was partly because any discordant ideas and suggestions at an open workshop required a defensive response, yet could be politely ignored during small, informal conversations. The inability to adapt role to context was perceived by the client as a deficiency which the Partner - without more participatory opportunities at

this senior executive level - might have difficulty overcoming. The vignettes thus demonstrate failure to learn as well as the problems of transitioning between different contexts.

## **Conclusion**

In this article, we have attempted to develop a conceptual framework informed by situated learning theory and to investigate the methodological implications. In doing so our aim was to draw attention to the possibilities and difficulties of operationalising the theory, which we argued was an undeveloped area of the literature.

To some extent, the difficulties originate from a central assumption of situated learning theory (which we adopt) that learning *is* a normal part of everyday practice, and is therefore impossible to isolate and then research as though it were a discrete process. This premise brings with it a methodological dilemma: what should researchers look for? One response is that researchers should investigate *all* practices. This is an ideal which is impractical in most research contexts. As an alternative, we firstly developed a heuristic conceptual framework informed by situated learning theory (focusing on constructs of participation, identity and practice), and then investigated the methodological implications and empirical possibilities of using the framework.

The framework illustrated that development of identity and practice are mediated by the participatory opportunities available to individuals in their communities of practice. For example, in vignette 1 we showed how a combination of observational and 'filtered' participation at MNC, and fuller participation at Jupiter, enabled junior consultants to become aware of, and then demonstrate, 'appropriate' consultancy behaviours, and to develop a sense of confidence around their capabilities as 'good consultants'. In vignette 2, we showed how consultants' desire to project an identity as rational analysts (which they had come to associate with their work-identity) led them to decline client requests for more tentative opinions and challenges: for the consultants, if they could

not fully argue their case, they seemed reluctant to suggest it at all. Analysis of the vignettes suggests two areas for further research: firstly, investigation of how actors seek to construct a coherent sense of self-identity as they move between different forms of participation engineered by their employers; and secondly, how learning opportunities may be resisted as a consequence of processes of identity-regulation.

Our analysis of the vignettes illustrates ways in which the conceptual framework explicates the theoretical emphases implicit in situated learning theory. We recognise, however, that any framework is inevitably reductivist: by recommending a focus, it also conceals some of the nuances of understanding which are required for insightful interpretation. For this reason, tools such as conceptual frameworks are best used with sufficient subtlety to re-introduce the tacit understandings derived from experience.

We also proposed that the utility of the framework would improve as approaches were identified which 'sharpened' its conceptual lens. We suggested two possibilities, each of which seeks to answer the pragmatic question 'what are we looking *for*?' The first possibility is to watch for apparent points of transition as individuals navigate new forms of participation, identity and practice within their communities. The skill of the researcher, of course, is to try to predict what might be a time-of-transition, recognising that apparent triggers will not have the same effects for everyone. The second possibility is to observe individuals over time (as we did in our research) to watch for ostensible examples of 'observation, experimentation and adaptation' (Ibarra, 1999; Bandura, 1986) of practices and expressions of identity. Where feasible, this would require longitudinal access to empirical settings. An important area for further research would be to identify other possibilities for improving the utility of the conceptual framework.

A supplementary aim of the article was to explore the broader methodological implications of the framework: which methods might be appropriate to investigate each

conceptual element? However, it became apparent that attempts to isolate particular methods for particular elements were ineffective and possibly inappropriate. Indeed our experience in analysing the client-consultant projects suggests that different methods were complementary; indeed they were potentially misleading if used in isolation. For example, observation data, though interesting in its own right, told us little about individuals' reflections, perceived motivations, intentions and so on. On the other hand, interview accounts were less useful unless they could be validated in some way, for example through observation. In practice, we adopted a strategy of iterating between observation, interviews and documentary material. Initial observations provided a baseline reference point of behaviours, practices and expressed identities; they also shed light on who participated in marginal, peripheral or 'core' ways. Later interviews allowed us to explore what was 'going on', and therefore enriched our understanding of the norms of the community as well as the motivations and existential concerns of individuals. When there was limited observational data, we used documentary records (e.g. meeting minutes or project Gantt Charts) to ask about practices, roles and identities, and their changes over time. By iterating through these methods, we were able to enrich our appreciation of the dynamics of participation, identity and practice.

Throughout this article we have tried to demonstrate the heuristic value of the conceptual framework as a way of explicating the key constructs of situated learning theory. We have also discussed some of the methodological possibilities for operationalising the framework. Conceptual frameworks, as boundary objects and a means to provide theoretical focus, can be extremely valuable. However, as argued earlier, it is important to recognise that such frameworks require sensitive and careful interpretation if they are to be effective as research tools.

## Notes

(1) Names of the individuals and organisations involved in this research have been changed to ensure anonymity

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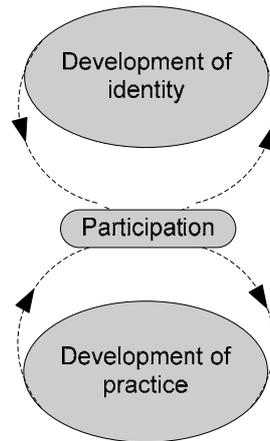
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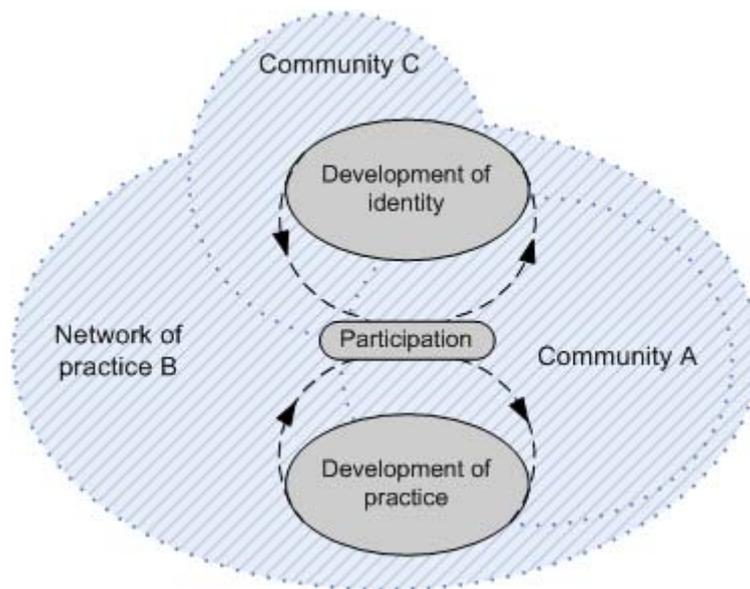
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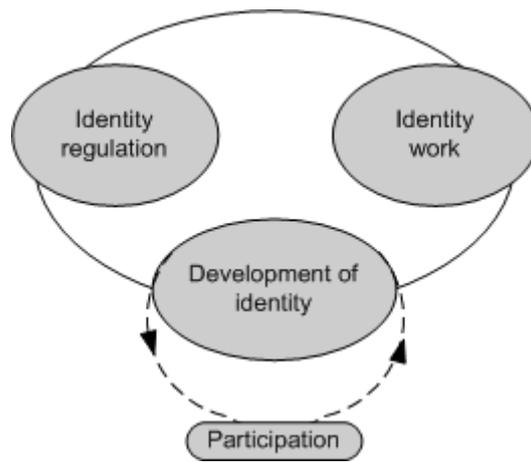
**Figures**



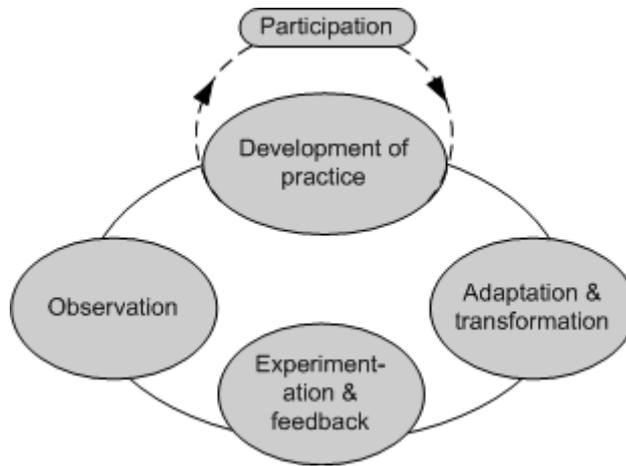
*Figure 1: Core components of situated learning theory: participation, identity and practice*



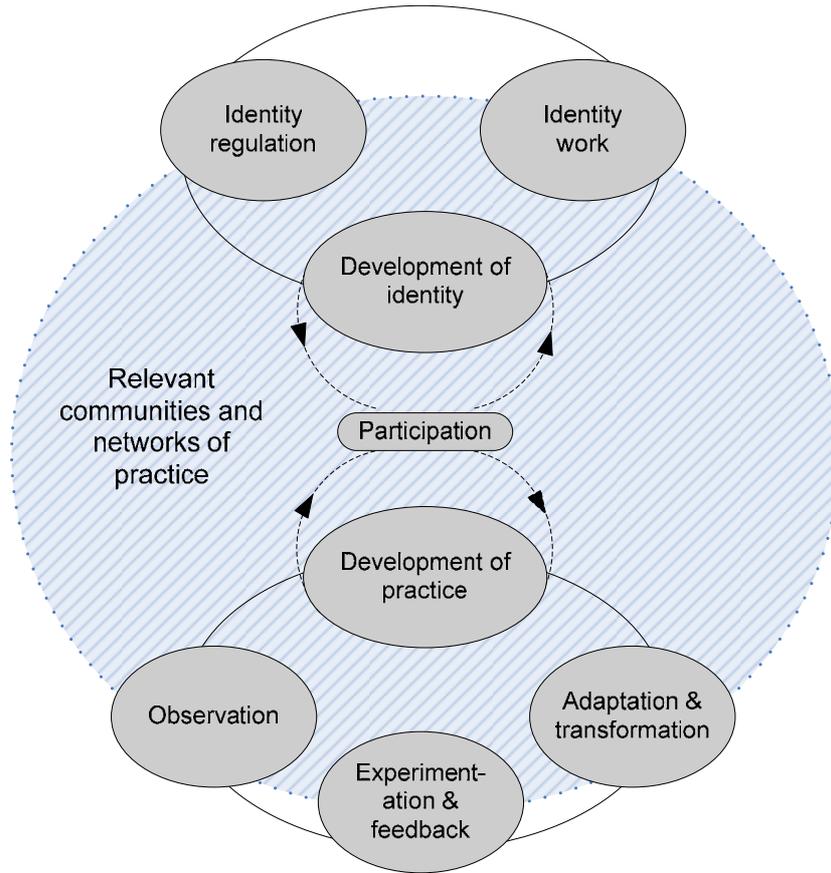
*Figure 2: Individual learning in the context of multiple communities and networks of practice*



*Figure 3: Development of identity through participation, adapted from Alvesson and Willmott (2002)*



*Figure 4: Development of practice through participation*



*Figure 5: Situated learning in the context of communities and networks of practice*