

Agency, Power, and Identity in Business Meetings:  
A Comparison Case Study Between Kuwaiti and American Organization

by

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## ABSTRACT

This dissertation examines the organizational discourse of business meetings in a Kuwaiti financial organization (*Innovative Kuwait Co.*, pseudonym) and an American non-profit trade organization (*Global Phoenix*, pseudonym). Specifically, I explore the discourse and social identities, agency, and power used in staff members' task-oriented business meetings (Bargiela-Chiappini & Harris, 1997). The study is based on ethnographic business meetings data collected during eight months of fieldwork in 2010, 2011 and 2012. I used three major qualitative methodologies: observation, audio recording, and feedback focus group. In this study, I propose three research questions: 1) How does agency of staff members reflect membership in the corporate culture of an organization as a whole? 2) How is power used in relation to agency in business meetings? And 3) How are discourse and social identities of staff members enacted in business meetings? The analyses of ethnographic and fieldwork data demonstrate similar and different business linguistic behaviors in the two companies. In *Innovative Kuwait Co.*, male managers are responsible for opening and closing the meetings. They also perform power by using language directives and suggestions directed to staff members. In contrast, female staff members in the Kuwaiti company participated insignificantly in meetings and produce more nonverbal cues. However, in one meeting, a female manager organized the discussion by controlling topics and giving directions. In *Global Phoenix*, female managers outnumber their male counterparts; therefore, agency, power, discourse, and social identities are performed differently. Female managers are responsible for opening and closing the meetings and for organizing

the overall discussions. Additionally, female and male staff members participate equally and they interrupted their colleagues less frequently compared to staff members in Kuwait. Interestingly, American staff members laugh and joke more together than staff members in Kuwait. The findings of this dissertation will contribute to existing linguistic literature on business discourse and the examination of social meanings and structures in organizations, explaining how language shapes the actions and relationships of business staff members. This dissertation will also encourage business people to become mindful of the role of language and language training in developing and maintaining the corporate culture of their organizations.

## DEDICATION

To my beloved parents, adorable siblings and cousins, aunts and uncles, and my two beautiful nephews, my lifelong brother and friend Ahmad AlGumar for his continuous support to complete this research, and to Innovative Kuwait Co. (pseudonym) and Global Phoenix (pseudonym), and to everyone who supported me and believed in the potentials of this dissertation project. Nothing in a simple paragraph can express the appreciation and love I have for all of you.

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## CHAPTER1.

### INTRODUCTION

Early June has just started. It's nine in the morning and the weather is still pretty hot. Once in a while, it may rain and cool down a bit during the night, but the dry heat stays the entire summer. Downtown Kuwait City. The hub of major industrial, engineering, and financial companies, is crowded with hundreds and hundreds of people. The crowd includes males and females from different backgrounds, largely Indians, Pakistanis, Egyptians, Syrians, and Lebanese. Everyone is busy either driving or taking the bus to work. The traffic jam never ends. The typical employment schedule for them lasts from seven AM to four PM Sunday through Thursday for full-time employees working in top companies. There are also employees with lower income who are expected to work for the morning and night shifts, usually in small industrial and retail companies. Although there is no official employment law on lunch breaks, I notice numerous co-workers leaving at noon to grab a fast meal. I also notice them bringing their own food when there is no free time to have lunch.

I was in the city for two summers and during one fall. I saw this busy scene every day. I met and spoke to many businesses while looking for a field site, but I was not sure what to expect prior to going there and experiencing an actual business site. Once I entered the huge building that had more than 15 floors in the heart of downtown, the doorman asked me for an identification card and the reason for my visit to *Innovative Kuwait Co.* (pseudonym). For a moment, I thought I was the only woman in the company after a quick welcome trip in every

department. At last, I was at the human resources department signing the confidentiality paperwork to observe the business meetings in the risk management and compliance department. Like any other employee, I had to arrive by eight AM before the meetings started. I sat with four staff members, including the department vice president, and sometimes with more, especially if the meeting involved other department members and outside auditors. The room was big, with an abundance of natural light. I placed the Philips Conferencing System digital recorder on the large, round table next to the staff members to produce a good-quality recording. I also brought a back-up digital recorder. The meeting started at nine AM with the vice president talking about different compliance issues. I listened carefully with an objective mind and took notes as the vice president and his staff continued the task-oriented business talk. It was little overwhelming for someone with limited business background, but I kept my professional demeanor.

A few months later, I was far away in another busy locale. Similar to downtown Kuwait City, the weather was hot and dry. The sun was shining, and flocks of birds were chirping. Riding in the taxicab, I observed the beautiful architecture and giant buildings. I saw a lot of people heading to work but not as many as in Kuwait City. They were all dressed professionally, text-messaging with one hand while holding their morning coffee in the opposite one. I enjoyed watching in silence, jotting down my thoughts and feelings about approaching this new experience that would truly invigorate and fuel my passion for further linguistic observation. I finally reached my destination, downtown Phoenix. The city looked busy and active, just like any other metropolis city in the area, and

employees were in a hurry to catch the metro light rail to their workplaces. I also noticed that they came from different backgrounds and ethnic groups.

It was Monday eight AM in the summer of 2011. I entered the building quickly in my professional best, wearing a formal peach jacket and black skirt. I was content to meet the executive vice president of a nonprofit trade organization *Global Phoenix* (pseudonym). The vice president was very friendly; she felt like an old friend. She invited me to lunch and I enjoyed talking to her about my dissertation topic and goals. My next surprise was to meet her staff members prior to audio recording the business meetings. Everyone welcomed me with open arms and made me feel comfortable. I felt at home even when I attended my first business meeting. Unlike the round table in the Innovative Kuwait Co. meetings, Global Phoenix staff members preferred a hollow square conference-style table with more than ten chairs. They also used digital conference technology to communicate with their out-of-state merger branches. I prepared the audio recording system and opened my fieldwork blue book, writing down my thoughts and questions. It was a bit difficult in the beginning with more than ten people talking. I kept observing the meetings during the summer and fall 2011, struggling to focus on the many voices around me; as I practiced attentive, unbiased listening, I was able to identify each member and business task.

These types of business task-oriented business meetings, which I attended and observed extensively in downtown Kuwait City and the metropolitan Phoenix area, are certainly indispensable social events for managing the business foundation and members' relationship in both organizations. Additionally, I noticed that these

organizational business meetings played a key role in the success of building the corporate culture of the Kuwaiti and American business organizations. Overall, the meeting events in Kuwait City and Phoenix exhibited how staff members produce language, social meanings, activities, and tasks to achieve organizational business objectives. The social anthropologist Helen Schwartzman (1986) called field researchers to examine the importance of meeting events in organizations, particularly day-to-day authentic meetings that business people establish and act upon in organizational settings. She also suggested examining the relationships between meetings and people as well as comparing meetings across organizations and cultures.

Meetings have been the subject of intriguing studies spanning many disciplines. From a business angle, meetings are essential business exchanges for negotiation and showing effective communication and presentation skills (Snair, 2003). Business researchers also perceive meetings as a systematic process consisting of technical language and steps to follow (Debelak, 2008; Henkel, 2007) in addition to focusing on decision-making and teamwork (Arnold, 1980; Tropman, 2003). As for the social science researchers, a meeting is a less technical event that incorporates social meanings. For example, Van Vree (1999) perceived meetings as a western behavior that is strongly influenced by politics and professional networks. Van Vree investigated several sociological histories of western meeting behaviors.

In the discipline of linguistics, sociolinguists and discourse analysts have investigated the social facets of meetings. One of the few linguistic accounts of



organizational meetings is Bargiela-Chiappini and Harris (1997) observational examination of telecommunication meetings in Britain and Italy. Additionally, from the perspective of critical discourse analysis, Wodak and Weiss (2005) investigated the decision-making of employment policies in European Union administrative meetings, which included members of the trade union, employees, and several politicians. Other researchers in organizational studies, management communication, and organizational communication have also addressed similar topics related to organizational meetings, such as leadership conversations (Svennevig, 2008), decision making (Castor, 2005; Kwon et al., 2009), storytelling (Myrsiades, 1987), gender differences (Georgakpoulou, 2005; Jorgenson, 2002; Mulac et al., 2000), managerial communicative styles (Dunkerley & Robinson, 2002; Zaidman, 2001), humor (Holmes & Marra, 2005; Holmes, 2005), positioning workplace identities (Ainsworth et al., 2009; Fox & Fox, 2004; Koester, 2006; Menz, 1999).

Taking a social anthropology approach, Schwartzman (1986, 1989, 1993) examined the ethnography of organizational meetings in a mental health center. Schwartzman (1986) argued that the majority of Americans hold a personal theory about meetings, and yet there is no theory of meetings in the literature. Hence, she suggested establishing an ethnographic theory of organizational meetings, claiming that “meetings are responsible for both the construction of order and disorder in social systems, and so they must be conceptualized as occasions with both conservative and transformative capacities” (p. 36). She also explained that meetings are commonplace in organizations and researchers usually examine what

goes on behind the meetings, not during the actual meetings.

While Schwartzman's (1986) call to initiate fieldwork and develop theoretical grounds on the structure and impact of organizational meetings has been a topic for the past two decades, little fieldwork research has been conducted to examine organizational meetings, especially in exploring the social interrelationships that materialize within the large corporate culture or the organization, its meetings, and participants involved in the meetings. Moreover, despite the increasing number of corporations, and the growing workforce, and the plethora of technical business and management books being published every day, little is said about the social meanings and identities developed in the meetings. Among some of the recent work in exploring the social structure of organizational meetings include Wodak and Weiss (2005), Holmes & Mara (2005) and Koester (2006).

In cross-cultural communication and international business as well, language is seen as a business skill or ability to master; business people must be attentive to the social, linguistic, cultural, political, and religious dimensions of "others" (Carte & Voc, 2008; Chaney & Martin, 2000). However, in reality, linguistic behaviors in international business conversations are empirically understudied, especially from a communicative sociolinguistic perspective.

Therefore, the outcomes of this dissertation will not only offer linguists and business researchers a communicative social perspective of business meetings in organizations, but it will also attempt to investigate the corporate culture of Kuwaiti businesses and compare them to U.S. based businesses. This dissertation

investment could be pursued by business personnel to plan future workshops and approaches to language and to communication problems in business meetings, especially cross-culturally.

### **Goals and Research Questions**

The long-term goal of this dissertation is to establish a sociolinguistic perspective toward exploring the interplay between corporate culture, business meetings, and staff members who are involved in organizational meetings. I specifically aim to provide a communicative sociolinguistic account of how staff members determine their language choices and behaviors of agency, power, and discourse and social identities when communicating in organizational business meetings. I also attempt to elucidate on how social variables, such as gender, age, educational level, cultural identity, work position, and experience may affect the agency, power, and the discourse and social identities of staff members. Finally, I argue that agency, power, and discourse and social identities may materialize differently in the organizational business meetings of Kuwaiti and American organizations. Analyzing business meetings in both Kuwait City and the Phoenix area will contribute to the academic literature on business discourse by presenting a potential perspective for understanding the social meaning of the event of business meetings.

In order to accomplish the above goals, I ask three major research questions:

1. How does the agency of staff members reflect membership in the corporate culture of an organization as a whole?

2. How is power used in relation to agency in organizational business meetings?
3. How are discourse and social identities of staff members enacted during organizational business meetings?

### **Research Significance**

Researching discourse and social identities, agency, and power in organizational business meetings could help different organizations recognize the value of language and communication styles: in turn, corporations could find language techniques that might facilitate the success of business tasks and activities. The research study proposed here will ultimately fill the literature gap in building a sociolinguistic perspective on organizational meetings and the idea of meetings as a social performance, as Schwartzman (1986) recommended. The foreseeable contributions of this dissertation are as follows:

1. Academic contributions
  - a. Initiating an attempt to develop a sociolinguistic theoretical perspective on the business event of meeting, as well as the importance of meetings in maintaining organizational business tasks and activities.
  - b. Filling in the business linguistics research gap.
  - c. Building an original study on an understudied business context (Kuwaiti businesses).
  - d. Extending the work of Bargiela-Chiappini and Harris (1997) on cross-cultural business discourse research.

- e. Identifying the importance of examining agency, power, and discourse and social identities in facilitating the flow of communication in business meetings.
2. Business contributions
    - a. Demonstrating the significant role of language and communication in business meetings.
    - b. Acknowledging how the study of business language can uncover different identities, communication styles, and communication difficulties.
    - c. Profiling a business mindset on common business language behaviors and expressions (e.g., specialized business jargon, jokes, questions, orders, etc.).
  3. Practical contributions
    - a. Providing a framework for meeting structure and episodic discussion.
    - b. Building a cross-cultural grid of American and Kuwaiti business language.
    - c. Recommending that companies develop language toolkits and workshops for new staff members.
    - d. Advising companies on hiring language and communication professionals to evaluate the way staff members communicate together in the meetings.

### **Conceptual Framework**

Multidisciplinarity is the proposed conceptual framework for this dissertation. I adopted definitions and linguistic units of meaning from different social science disciplines to build a comprehensive social-ethnographic scaffold of what constitutes the event of meeting as a social organizational action

(Schwartzman, 1986). In addition, these definitions and linguistic units of meaning are adequate in explaining why business meetings exist to create businesses, people, and organizations, as Schwartzman (1989) elucidates in *The Meeting: Gatherings in Organizations and Communities*. This conceptual framework contributes to business discourse researchers – especially linguists and discourse analysts who generally pursue multidisciplinary approaches in investigating business language and activities (Bargiela-Chiappini, Nickerson & Planken, 2007; Rogers, 2001; Schwartzman, 1989; Yeung, 2004a). The following paragraphs briefly explain the potential definitions and linguistic units of meaning for this dissertation. First, I introduce the linguistic units of meaning of agency, power, and discourse and social identities, followed by the concepts of discourse, communities of practice, the event of meeting, business discourse, communication style, and non-verbal behaviors.

**Agency.** The first linguistic unit of meaning to investigate was members' expression of agency in meetings. Based on her linguistic and sociocultural anthropological work, Ahearn (2001, 2010) argues for researchers from different disciplines to look closely at language when examining the concept of agency. Particularly, Ahearn (2001, 2010) calls attention to the numerous ways researchers have defined *agency* and *theories of agency*, opening the discussion by emphasizing that language is, in fact, a social action (i.e., Schieffelin, 1990). Although she describes the many divergent accounts on agency, she only proposed a provisional look at agency, perceiving it as “the socioculturally mediated capacity to act” (p. 112). For this research, I complemented this definition with

Van Leeuwen's (2009) framework on social action network (see Methodology discussion).

**Power.** In a similar fashion, power is another concept that has been discussed in the literature in many social theories and disciplines (Bourdieu, 1991; Giddens, 1984). For this research, I adopted a critical discourse perspective on power. Van Dijk (1998) describes this perspective as the ability to control or, as he called it, the social power of groups and institutions to control. For critical discourse analysts, the group or institution controls social power, more or less distinguishing who has the privilege to control the actions and minds of group members. Van Dijk (1998) explains that this kind of power is a power base that people and institutions possess to access resources and status, such as force, money, fame, social status, information, and knowledge.

**Discourse and Social Identities.** The third linguistic unit of meaning I wanted to investigate in this research was identity. I particularly implemented Zimmerman's (1998) sociological account on talk-in-interaction and context identities. Zimmerman's focus was to bond the proximal and distal contexts of social action among people through aligning three types of identities: discourse, situational, and transportable. The *proximal context* of interaction, as he defined it is, "the turn-by-turn orientation to developing sequences of action at the interactional level" (Zimmerman, 1998, p. 88), whereas the *distal context* represents the extra-situational agendas and concerns obtained within interactional development. Zimmerman (1998) highlights that every identity has a distinct home territory of its own. For example, *discourse identity* identifies the moment-

by-moment organizational background of the interaction where members are involved in a variety of sequential tasks and roles that is – speaker, listener, storyteller, negotiator, question seeker, answerer, repair initiator, and so on.

In specifying different situations in the interaction, Zimmerman argues that *situational identities* come into play in interaction to build situations and goals, such as setting a particular identity to overcome an emergency situation at work. In contrast, *transportable identities* are latent by nature, traveling with people through many situations. He adds that these identities are often visible and assigned to individuals due to their physical and cultural symbols, such as gender transportable identities.

**Discourse.** I adopted a multidisciplinary critical definition of discourse from the pioneering work of Fairclough (1991, 1993, 1995a, 2005a), Van Dijk (1997, 2007a, 2008a, 2009), Wodak (1989, 2007, 2009), Kress (1979, 1996), Van Leeuwen (2008, 2009), and others on critical discourse analysis (CDA). As a new perspective in critical social science, CDA researchers argue that actual discourse analysis aims to address social problems in a multidisciplinary fashion. As Van Dijk (1998) explained discourse also structures, enacts, challenges, and reproduces different relations of power and dominance. For this research, I took Van Dijk's very broad definition of *discourse*:

A multidimensional social phenomenon. It is at the same time a linguistic (verbal, grammatical) object (meaningful sequences or words or sentences), an action (such as an assertion or a threat), a form of social interaction (like a conversation), a social practice (such as a lecture), a mental representation (a meaning, a mental model, an opinion, knowledge), an



interactional or communicative event or activity (like a parliamentary debate), a cultural product (like a telenovela) or even an economic commodity that is being sold and bought (like a novel). (in Wodak & Meyer, 2009, p. 67)

***Communities of Practice.*** Another concept that complements discourse is the idea of shared communities of practice developed by Lave and Wenger (1991). In his personal website introduction, Wenger (2006) defined *communities of practice* as “groups of people who share a concern or a passion for something they do and learn how to do it better as they interact regularly” (para. 2). Wenger (2006) argues that not every community is a community of practice because some do not involve a passion to learn and interact together. Furthermore, he suggests three key qualities for defining true communities of practice: (a) a shared domain of interest among participating members; (b) collective community for engaging in different group activities and building relationships; and, finally, (c) the practice itself, where participating members are practitioners in their own community. Wenger explains how members create a practice: “They develop a shared repertoire of resources: experiences, stories, tools, ways of addressing recurring problems—in short, a shared practice. This takes time and sustained interaction” (para. 5). Wenger also adds that in communities of practice, members engage in many shared activities: problem solving, information seeking, experience sharing, group synergy, future developments and projects discussion, and identifying the work agenda and what knowledge to use.

***The Event of Meeting.*** From the work of Hymes (1962, 1974) and Gumperz and Hymes (1964, 1972) on communicative events, and Schwartzman on

organizational meetings (1986, 1989, 1993), I conceptualized the event of meeting from an anthropological perspective emphasizing two linguistic features: the ethnography of speaking and communication. For this research, I used Schwartzman's (1989) definition of *the event of meeting*: "a communicative event involving three or more people who agree to assemble for a purpose ostensibly related to the functioning of an organization or group" (p. 7).

***Business Discourse.*** To identify the event of meeting within the community practicing business tasks and activities, I adopted Bargiela-Chiappini, Nickerson, and Planken's (2007) definition of *business discourse*. The authors perceive business discourse as a social action that shows "how people communicate using talk or writing in commercial organizations in order to get their work done" (p. 3).

***Communication Style.*** To better recognize discourse, situational, and transportable identities in meetings, I incorporated the concept of communication style in this research by three intercultural scholars. Saphiere, Mikk, and DeVries (2005) offered an inclusive account on communication style and communication style behaviors, underlining the literature gap in defining communication style. The authors define *communication style* as "the way in which we communicate, a pattern of verbal and nonverbal behaviors that compromises our preferred ways of giving and receiving information in a specific situation" (p. 5). Additionally, Saphiere, Mikk, and DeVries describe communication style as the "how" message that individuals exemplify when interacting with each other (p. 5).

From the work of Hall (1981), Eckman (2003), Saphiere, Mikk and

DeVries (2005), I defined non-verbal behaviors as the learned cultural-specific non-verbal characteristics that are commonly used in everyday situations including: eye contact, facial expressions, kinesics, proxemics, haptics, physical appearance, chronemics, vocalics, and artifacts.

### **Field Site: Background and Research Design**

Following Schwartzman (1986, 1989) and Bargiela-Chiappini and Harris (1997), this dissertation aims to extend the literature on business meeting discourse and cross-cultural business research, particularly drawing attention to an unexamined field site that is, the Arab State of Kuwait. It is my contention that exploring how Kuwaiti – and non-Kuwaiti business personnel working in Kuwait – conduct business tasks and activities will bring new linguistic insights, contributing to the emerging field of business and workplace linguistics. I also intend to compare Kuwaitis with another population, American business personnel working in the Phoenix metropolitan area. Hence, the first field site for this study is a medium-sized Kuwaiti financial company located in the heart of Kuwait City's financial and trade district. I will compare the Kuwaiti company with a medium-sized non-profit American trade organization located in Phoenix, Arizona.

The research design I used to arrange and collect organizational business meeting data is qualitative in nature. I specifically wanted to conduct an in-depth case investigation of two different populations. Hence, a qualitative focused design will facilitate in providing a rich, complex understanding of business meetings in both field sites in addition to describing the relationship between the research linguistic units of meaning. The case study design will also help answer

the research questions, showing how business personnel communicate and conduct business tasks and activities together. More importantly, I sought to bring a communicative sociolinguistic account while examining the meetings data in order to establish a starting point for a sociolinguistic theoretical perspective on organizational business meetings.

### **Organization of Chapters**

The next chapter provides a review of the scholarly work on business discourse and organizational business meetings in linguistics, discourse analysis, and other related social sciences. Chapter Three discusses fieldwork and methodologies I used to collect qualitative data on the business meetings and the challenges encountered in data collection, in addition to validity and reliability issues. Next is Chapter Four which is data and analysis and interpretation where I present the details of data entry and storage, coding and developing category systems, relationships, and enumeration. In the findings and discussion chapter, I report the findings from both field sites and answer research questions, situating my findings within a communicative sociolinguistic framework and previous work on business meetings. Finally, in Chapter Six, I conclude with offering a communicative sociolinguistic account of the way meetings are established and maintained in Kuwait City and Phoenix.

## CHAPTER 2.

### LITERATURE REVIEW

Over the past 20 years, the field of business discourse has become something of an umbrella term integrating various research traditions and approaches. Vigorous interests from linguistics, sociolinguistics, discourse analysis, conversation analysis, critical discourse analysis, pragmatics, ethnography, genre theory, organizational communication, intercultural communication, management studies, and sociology have sought to situate business discourse as a novel language field with a business emphasis. Perhaps one of the key figures in launching the beginning of business discourse is the Italian sociolinguist Bargiela-Chiappini. In compiling the wide multidisciplinary work of business discourse research, Bargiela-Chiappini (2009) described defining business discourse as almost impossible, “defining business discourse in a short and exhaustive answer is, I think, next to impossible” (p. 1).

Since business discourse is studied from different theoretical perspectives, the term “business discourse” has also incorporates miscellaneous linguistic and discourse topics. Topics discussed include power and politeness in government and industrial workplaces (Holmes & Stubbe, 2003), intercultural communication in business meetings (Spencer-Oatey & Xing, 2003), rapport management (Planken, 2005), multimodal business discourse (Askehave & Nielsen, 2005), identity and workplace role construction (Mullany, 2007), teaching business education (Bhatia & Candlin, 2001) and many more. These topics are certainly important and influential in developing the field of business discourse; however,

the field is still in its immature status in other business topics, mainly organizational business meetings (Bargiela-Chiappini & Harris, 1997).

Whereas some of the linguistic features have been explored in business meetings, for example discursive strategies in multilingual meetings (Poncini, 2004) and gendered discourse in meetings, there is yet a limited research of examining how meetings are structured, organized, and maintained socially, as Schwartzman (1986, 1989) and Bargiela-Chiappini and Harris (1997) explicated. It is within this gap in literature that I focus on examining the social meaning and role of language in constructing the organizational context of business meetings. In the following scholarly review, it is my ultimate aim, then, to eventually pursue a solid descriptive and empirical understanding of how business meetings are indeed the homeostats of an organization, as Schwartzman (1986) declared.

Accordingly, the scholarly work described here addresses three major core areas of research in regard to understanding organizational business meetings as ritualized symbolic communicative events in organizations. The first core topic maps out a broad review on the different definitions of business discourse, in addition to the many studies and approaches used in conducting business tasks and activities. In the second core topic, I address the focus of this dissertation; namely, organizational business meetings, arguing that little has been written about the communicative event of meeting as a social organizational performance. In doing this, I will draw on several studies that have established a concrete framework for exploring business meetings in organizations.

## **Business Discourse: The Definition**

The term business discourse (or, as it is sometimes referred to, workplace discourse, institutional discourse, or professional discourse) is used in linguistics and other related fields to locate the discourse of business conversations between individuals working together. One of the imposing definitions of business discourse originates from the early work of Bargiela-Chiappini with Harris (1997) and Nickerson (1999). Bargiela-Chiappini (1999) defined business discourse as an organized process that involves spoken and written communication between individuals from the same organization and “whose main work activities and interest are in the domain of business and who come together for the purpose of doing business” (p. 2). In this definition, Bargiela-Chiappini considered spoken and written business communication as a social action activity that social actors build in an organizational context to achieve mutual understanding, business meaning, and knowledge. In a recent account, Bargiela-Chiappini in collaboration with Nickerson and Planken (2007), interpreted business discourse as “how people communicate using talk or writing in commercial organizations in order to get their work done” (p. 3). Unsurprisingly, the authors conceived business discourse as a social action occurring in a business environment.

Besides the mainstream term of business discourse in the literature, it is essential to stress that many linguists and discourse analysts sometimes call business discourse “workplace discourse.” In this respect, the discourse in context is focused on the occupational setting of a workplace, not necessarily with a business emphasis. Koester (2010), for example, defined workplace discourse as

the “spoken and written interaction occurring in a workplace setting” (p. 3). She added that workplace discourse covers workplace talk in various occupational localities, such as factories, hospitals, government offices, private companies and businesses, and nonprofit organizations. Other linguists, including the collaborative team of New Zealand’s Victoria University language workplace project has also termed business discourse as workplace discourse, focusing on the occupational language of government workplaces, industrial factories, telecommunication companies, and small businesses (Holmes & Stubbe, 2003; Brown, 2000; Stubbe, 2000; Vine, 2004).

Another different labeling for business discourse is institutional discourse. The term institutional discourse, which is also known as institutional talk, has emerged from the field of conversation analysis within Drew and Heritage (1992)’s edited book. Entangled in conversation analysis, institutional discourse is a general type of discourse that is used interchangeably with workplace discourse (Koester, 2010), and often compared with everyday ordinary conversation, given the different institutional tasks and functions, talk restrictions, and distinctive inferences, meanings, and actions associated with specific institutions (Drew & Heritage, 1992). Another important base for creating an institutional discourse is the participants’ institutional identities that are relevant to “the work activities in which they are engaged” (Drew & Heritage, 1992, p. 3). Institutional discourse also relies on task-oriented activities performed in a formal setting with an institutional system (Sarangi & Roberts, 1999), such as courtrooms, hospitals, job interviews, and consultation (Koester, 2010).



And finally, business discourse is sometimes called or considered a type of a “professional discourse.” Gunnarsson (2009) defined professional discourse as the “text and talk – and the intertwining of these modalities – in professional contexts and for professional purposes” (p. 5). Among the most common professional discourses she discussed are the scientific discourse in medicine, technology, and economy, legislative discourse in law texts, and workplace and business discourses in hospitals, banks, and engineering companies. In distinguishing professional discourse from other types of discourse, Gunnarsson identified six areas for framing professional discourse.

The first area is that professional discourse is expert discourse occurring in many professions, primarily reflecting expert knowledge and professional skills. Second, professional discourse is goal-oriented and situated within the professional domain. Gunnarsson clarified that goals are explicitly documented in professional settings and that these goals are “often related to actions leading to concrete results” (2009, p. 6). Next, is the conventionalized nature of professional behavior in establishing definite distinguishable patterns, such as in doctor-patient and salesperson-customers interaction. Additionally, professional individuals communicate in a socially ordered group discourse, which is determined upon different societal systems. Gunnarsson (2009) also explained that professional discourse is evolving through the years and in constant change in the areas of language and terminology, politics, labor market and the economy, state and cultural borders, and globalization.

So, is business discourse a workplace discourse, institutional discourse, or

professional discourse? Although there is somewhat an overlap between all business talk labels, it is perhaps easiest to use the mainstream term of business discourse in this dissertation to particularly cover the commercial perspective of business discourse, as manifested in Bargiela-Chiappini, Nickerson, and Planken (2007)'s understanding of business discourse. With this in mind, I thus use the term "business discourse" to discuss the spoken and written business activities and tasks conducted in organizational workplaces, in addition to centering my attention on the commercial angle of businesses in my dissertation field sites. In what follows, I proceed by bringing a broad image that illustrates the scholarly work and approaches utilized in investigating business discourse.

### **Business Discourse Scholarly Work and Approaches**

Business discourse, as a distinct research field, did not truly start until the early 1990s; succeeding business discourse researchers have endeavored to define the underpinnings of business discourse. This research endeavor who launched from several influential business negotiation studies. One influential example and the first in linguistics to investigate business negotiation data is Lampi's (1986) effort to observe the speech and discourse markers of British businesspersons. Another seminal account is Firth's (1995)'s call for business negotiation studies in linguistics. In his book, Firth presented 14 original studies discussing different negotiation contexts in workplaces like: the trade commission, international trading in Europe, union meetings, consultation negotiation, travel agency helpline negotiation, and welfare agencies. A major goal of his book was to inspire linguists and discourse analysts to examine negotiation both formally and informally from a

discourse-based perspective. A quite similar attempt is Ehlich and Wagner (1995) collection of discourse-based negotiation studies, showing a variety of negotiation activities and encounters in sales talk, intercultural business negotiation, facework in negotiation, and politeness. Wagner explained that discourse is negotiation “if the participants relate themselves to each other’s goals and interests and to the problems of implementing their goals” (1995, p. 30).

This negotiation work not only provides a route for examining discourse-based studies in negotiation but also has encouraged researchers to pursue original linguistic topics and categories, especially language role in organizational settings. One central account is Boden (1994)’s discussion of the business of organizational talk and the social structure of organizations. Boden’s investigation of talk was concerned with identifying the structural and interactional significance of mundane talk in organizations. Here too, Boden organized everyday talk into a broad theoretical organizational and social perspective where she aimed to shape an original account on organizational thought of talk into social theory.

In her discussion, Boden (1994) espoused a language-in-action approach to analyzing organizational talk, which involves social human actors or agents in the organization. For example, she referred to Giddens (1984) who explained that language is in fact the filter for such organizational categorizations and it is also the device that social actors use to perform membership and social activities, in addition to helping them make sense of the past and prepare for the future. Four years later, Bargiela-Chiappini and Harris (1997) conducted a groundbreaking linguistic study on intercultural organizational business meetings that compared

British and Italian businesspersons. The authors positioned their work on intracultural, cross-cultural, coherence, and sense making, analyzing business performance and action-related meetings in two tele-communication companies, one located in Britain, and the other in northern Italy. Bargiela-Chiappini and Harris explored different linguistic properties, including textual coherence, theme, personal pronouns, metaphoric language, and discourse markers and later compared the two research locales (more discussion in the second core topic).

Having emphasized these influential preliminary negotiation studies, then, it is no accident to attest that the field of business discourse has been subjected to various academic disciplines and researched by local and international scholars. To explore in detail how business discourse has developed and diversified in the past twenty years since its inception, the remainder of this section will discuss the major business discourse inquiries piloted across different locales, involving the European continent, New Zealand and Australia, East and Southeast Asia, North and South America, and Africa and the Middle East. Also, the subsequent review will accentuate the many concepts, approaches, and methods used in studying the relationship between business discourse linguistic and non-linguistic properties. Additionally, this review will discuss several related features that may be involved in establishing the context of business discourse, such as culture, age, gender, ethnicity, occupation and educational background, and expert knowledge.

## **Europe**

One could say that perhaps the European tradition of examining business discourse is, by far, the most fruitful research inquiry (Bargiela-Chiappini and

Harris, 1997; Bargiela-Chiappini, Nickerson & Planken, 2007; Bargiela-Chiappini, 2009; Gotti & Bargiela-Chiappini, 2005; Nickerson & Planken, 2009; Louhiala-Salminen, 2002; Mullany, 2006; Poncini, 2004; Spencer-Oatey, 2000a, 2000b; Vandermeeren, 1999). The history of European business discourse research is often dated from the prominent work of Bargiela-Chiappini and her colleagues (Gotti, 2005, Harris, 1997; Nickerson & Planken, 2007), as well as the work of other European linguists, including Poncini from Italy, Mullany and Spencer-Oatey from Britain, Louhiala-Salminen from Finland, and Vandermeeren from Belgium.

In fact, much of the European business discourse research was rooted in the field of applied linguistics and sociolinguistics with an emphasis on text analysis and European languages. European business discourse also manifests a contextual approach in examining the bond between the macro and the micro business properties (Bargiela-Chiappini, Nickerson, & Planken, 2007). Additionally, European business discourse includes many key names and business approaches, as Nickerson and Planken (2009) indicated in their review of the foundational key names and business approaches, which originated during the early 1990s.

Nickerson and Planken referred to names like Bargiela-Chiappini, Louhiala-Salminen, Poncini, and Vandermeeren. Despite the many linguistic efforts in investigating different business genres, Nickerson and Planken explicated that the majority of linguists and discourse analysts “have an interest in how language is used to get things in general within business organizations” (p. 19). Also, worthy

of note is that European business discourse research is data-driven based upon empirical investigation (Nickerson & Planken, 2009).

As business discourse turned into a firm research inquiry across the European continent, European linguists have proven successful in observing numerous business properties. From a conversation analysis perspective, Halmari (1993), for instance, investigates the organization of business phone discourse among Finnish and American businesspersons. Halmari collected a total of twelve phone conversations of a Finnish businessperson speaking with Finnish and American business counterparts. She specifically looked at the episodic nature of phone business negotiations, identifying several differences in Finnish-Finnish and Finnish-American English conversations, especially in the opening and closing sequences. American businesspersons, for example, preferred to open the talk with a business episode. On the contrary, the Finnish speaker focused more on the positive environment of the call, in addition to non-topical business episodes such as the use of humor while talking about business. Also, American businesspersons showed more interruption throughout the collected phone data while the Finnish speaker interrupted less at the end of some conversations.

Within the European business research, social relationship and rapport in business negotiation talk have been studied as well. One investigation involving audio and video observations and personal interviews was Spencer-Oatey (2003)'s account on relational communication among British and Chinese business negotiators. Collaborating with a Chinese linguist, Spencer-Oatey sought to examine how British and Chinese negotiators establish two business welcome

delegations. Spencer-Oatey found that both groups showed different business expectations because of contextual and cultural factors within the business discourse. For example, although the British and Chinese negotiators experienced similar meeting structure and discourse, both groups evaluated each other differently. One difference is the seating arrangement between the two groups, which by itself fostered a face-threatening atmosphere for the Chinese negotiators. Another business attitude that the Chinese negotiators evaluated negatively was the British welcome speech. The Chinese negotiators considered the speech to be offensive because it did not address them as the host party. On the other hand, the British negotiators had a different expectation about the welcome speech, believing that their Chinese counterparts are not very concerned about the speech structure.

Investigating business properties from a hypermodal and multimodal perspectives is also a hallmark of European business discourse (Garzone, 2002; Kress & Van Leeuwen, 2001). These studies tend to be greatly influenced by the field of semiotics, or signs, as well as the constant development of the Internet and high-tech devices. Analyzing online websites is a popular type of hypermodal and multimodal business discourse in which linguists attempt to understand the relationship between words, images, signs, and colors. For instance, Bargiela-Chiappini (2005b) examined the website structure of a British bank and the way customers deal with the virtual options offered by the website. Bargiela-Chiappini mentioned that the bank website uses accessible and user-friendly options for customers just like any other corporate websites. She added that British bank

websites are perceived positively across Britain and are the only choice for many customers, particularly in rural areas with closed banking branches.

According to Bargiela-Chiappini (2005b), not only did the bank website demonstrated an alternative for face-to-face interaction, but also the website provided financial medium of communication. Some of these financial tasks included managing withdrawal and deposits, emailing customers about their banking services, and sending secure messages to customers' personal accounts. Another appealing task of the website was to build a distinctive visual image of the bank by developing a graphical icon that showed the bank's brand name. Bargiela-Chiappini expressed that at the beginning the website textual layout was confusing and difficult to follow; therefore, customers complained and requested a fresher layout. What the bank staff did was to implement a simpler layout with uncomplicated color scheme that contained friendly, informal language for customers. She elaborated on the overall business hyper discourse of the bank: "It promotes financial services and actions through various modalities. In its textual and graphic modes, the smile websites deals not only with customers' personal or business accounts; its homepage (smile.co.uk) also invites visitors to 'invest' and to 'shop'" (Bargiela-Chiappini, 2005b, p. 55).

### **New Zealand and Australia**

These few examples exhibit how the European business discourse research has developed over the years, inspiring other non-European scholars to consider business discourse as a solid research inquiry. The second most productive region is New Zealand and Australia. Business research in these two areas began with the



profound linguistic teamwork (also called the *Language in the Workplace Project*, *LWP*) of New Zealand's Victoria University of Wellington during 1996. Drawing on an array of business linguistic properties, such as cultural identity, managerial talk, leadership styles, men's and women's language at work, intercultural communication, humor and small talk at work, migration and language varieties, politeness, business conversations and meetings, and a few more. The team mainly used qualitative methodologies to examine business discourse along with some quantitative analysis. The team also examined many research locales, covering government offices and buildings, educational organizations, health and high-tech stores, industrial factories, and small businesses where they all framed a robust sociolinguistic and discourse-based studies in New Zealand businesses (Holmes, 1998; Holmes & Stubbe, 2003; Holmes & Marra, 2002; Holmes & Schnurr, 2005; Marra, 2003; Brown, 1998; Stubbe & Brown, 2002; Vine, 2004).

Broadly, then, business discourse research in New Zealand and Australia has its own unique character, as Zorn and Simpson (2009) clarified in their background review, stating that "business discourse research is alive and exceptionally well in Australia and New Zealand/Aotearoa, with a substantial body of work that exhibits an exciting variety of approaches, topics and methods" (p. 30). Zorn and Simpson reviewed the dimension of discourse and business in New Zealand and Australian businesses, focusing on the different approaches and methodologies used in examining linguistic business properties. The authors also discussed the macro (broad) level of studying business practices in an organization, as illustrated in the work of the *Language in the Workplace project*

(Holmes & Stubbe, 2003), in addition to the micro (focused) level of looking at specific business properties and the meso-level of analyzing discourse practices in organizations, as in Treleaven et al. (1999) study on the discourse patterns occurring in a college consultation session. Zorn and Simpson also argued in this review that New Zealand and Australian business research is text-foregrounded, theory-driven, focused on negotiated identities and multi-tasking at workplaces, and organizational change.

Actually, numerous linguistic business properties discussed in Zone and Simpson (2009) can be found within the rich analysis of the Wellington *Language in the Project* data. One complete discussion is Holmes and Stubbe (2003)'s sociolinguistic analysis of power and politeness in New Zealand workplaces. Adopting a pure qualitative approach of ethnographic observation along with audio and video recording, Holmes and Stubbe investigated power and politeness at work, mitigation and management behaviors of co-workers with equal work status, managers' cooperation, business meetings, social small talk, humor, problematic talk, and miscommunication between co-workers. In examining power and politeness, Holmes and Stubbe observed how business personnel with higher work status like managers deliver imperatives and directives to their co-workers. They found that managers use power to make co-workers perform the required business task by uttering the directive statements of "give it to X," "check it with X," "send them to X," and others more. Managers also used "I" and "you" to state their power to direct co-workers to do business tasks. More interestingly, Holmes and Stubbe found that managers intensify their directives by using many linguistic

devices, such as speaking loudly and increasing their volume, adding stress to words and utterances, and repeating the directives many times.

Different kinds of power may be manifested in the interaction of managers with equal work status, as Holmes and Stubbe (2003) illustrated. The authors indicated that co-workers with equal work status usually use politeness when asking one another to perform a business task or activity. However, in some cases, those workers may utilize direct forms of asking, especially “when there is a recognized emergency or unexpected deadline, [in addition] at the end of a discussion where the next steps have been negotiated and agreed” (p. 40). For example, in one conversation between two senior managers, one manager uses a mitigated type of directive, as in the modal “you might do” in order not to offend the other manager. Holmes and Stubbe explained that managers and co-workers with equal work status pay great attention to their interaction and save each other’s faces to reach agreement and complete the business task.

Other polite directives and requests may appear when New Zealand co-workers communicate with their managers, on a few occasions co-workers use mitigated directive statements with their managers. Holmes and Stubbe (2003) described, “There are situations where the work responsibilities of subordinates do entail their having to give instructions to a superior” (p. 44). It is also the case that New Zealand businesspersons used power and politeness to interact during everyday business meetings. This by itself managed the flow of social small talk in New Zealand workplaces. Holmes and Stubbe considered social small talk as vital but marginalized in the literature. The data showed that New Zealand

businesspersons interacted in small talk to mark occupational and social boundaries, discuss work tasks, building interpersonal relationships at and outside work, and express power among participants in group talk. Similarly, humor among New Zealand businesspersons played an important part in spreading entertainment at work and maintaining interpersonal relationships, in addition to challenging authority, as in the example of using funny abusive jokes in friendly collegial talk at work. Holmes and Stubbe also looked at problematic talk and miscommunication in New Zealand workplaces. In problematic talk miscommunication, Holmes and Stubbe showed that managers successfully managed to save the face of their co-workers by using both an explicit authority and facilitative coaching interaction.

Along these lines, Vine (2004), who also used the *Language in the Workplace Project* data to complete her doctoral dissertation examined directives, requests, and advice among co-workers with different work status. Vine focused on 52 interactions in one of New Zealand's government organizations; 22 of these interactions consisted of women-only employees, eleven contained employees with equal work status, and 41 featured employees from different work status. The overall findings showed that managers interacting with their senior staff members often produce more directives, requests, and advice, while staff members prefer to use mitigated types of requests and advice. Expectedly, explicit directives ranked first when managers addressed administrative staff with different work status. Additionally, Vine noticed that managers demonstrated power by acknowledging

staff members' skills and expertise in some conversations through direct statements of what they had done during the week.

Co-workers attitudes toward indigenous languages in New Zealand workplaces are another central business property that has been studied by the *Language in the Workplace Project* linguists. For instance, De Bres (2009) examined the positive and negative attitudes of New Zealander non-Māori co-workers regarding the use of the indigenous language of Māori in the workplace. To understand the personal accounts of co-workers, De Bres interviewed eighty non- Māori speakers, in addition to giving them a questionnaire about their support for the Māori language and language planning in general. De Bres labeled the speakers as positive supporters (a total of 65%) for the use of Māori, uninterested (38.8%) in Māori, and those with negative views (only 5%) who seek an English-only work environment. Non-Māori speakers showed varied attitudes toward Māori pronunciation, Māori words and phrases, and mastering Māori in the workplace. In most occasions, positive, supportive co-workers attempted to use Māori words and phrases with English, whereas uninterested and English-only speakers preferred to use less Māori. An interesting result of both the interviews and the questionnaire was that most participants claimed that the work environment is a critical factor in determining what language varieties are used in business tasks and activities.

### **East and Southeast Asia**

Certainly, the field of business discourse thrived as it developed across the European continent, New Zealand, and Australia, encouraging other linguists and

discourse analysts elsewhere to join the field. In East Asia, Japan has been one of the leading nations in the global economy and international businesses; this has intrigued several Japanese linguists, who have explored the intercultural situation between Japanese businesspersons and their western counterparts. A great example of these types of studies is Yamada (1992)'s comprehensive examination of Japanese and American intercultural business meetings. Taking an interactional sociolinguistics and conversation analysis perspective, Yamada observed the conversations of Japanese and American bankers in San Francisco. She focused on linguistic strategies in which speakers employ pauses to achieve their goals, such as making points and shifting attention while presenting business topics. She collected her data from conversations in four business meetings: a Japanese-to-Japanese meeting, an American-to-American meeting, and two cross-cultural meetings between Japanese and American bankers. In the Japanese-to-Japanese meeting conducted in Japanese, the three Japanese male senior staff members organized their topics in circular fashion with a topic-opening strategy that emphasized meta-communication. In another meeting, Americans communicating with their American banker colleagues used more specific strategies to open and close their topics in a linear way. A remarkable result of Yamada's study is found in the two intercultural meetings, where Japanese and Americans demonstrated distinctly different linguistic strategies. The Americans sought to maintain autonomy, while the Japanese sought group harmony. American bankers also used fewer pauses between topics than their Japanese colleagues.

Yamada's study has been very influential in motivating other Japanese

linguists to consider subsequent work on business meetings and other business linguistic properties. Fujio (2004)'s analysis of a business meeting between a Japanese manager and an American manager is one example. In looking at both managers, Fujio described how the American manager perceived the Japanese manager's silence negatively. Fujio argued that in general, Japanese businesspersons use silence as a face-work strategy to show shame in case of making mistakes when using English. Fujio's observations also included indirect speech in the meeting, finding distinctive linguistic behaviors of indirect utterances by the American manager and direct utterances by his Japanese counterpart. Additionally, other Japanese linguists studied Western ideologies in Japan's business society (Tanaka, 2006), Japanese factory workers' interactions in South America (Sunaoshi, 2005), the use of English in Japanese government public places (Kawai, 2007), and small talk and greetings in Japanese and American contexts (Ide, 2005).

As Japan has become more westernized with its integration into the global economy, so, too, Southeast Asia (especially Malaysia, Indonesia, Singapore, Vietnam, and Thailand) has been influenced by globalization, the economy, and the use of English in many multicultural businesses. East Asian linguists in this region have discussed several business topics, such as English varieties in the workplace (Nair-Venugopal, 2009), culture, relationship building, and group harmony (Chew, 2009), globalized discourse (Nugroho, 2008), economy discourse (Wong & Bunnell, 2004), and business negotiation (Punturaumporn & Hale, 2003). Although these linguists have produced a broad body of business discourse

research in Southeast Asia, the Malaysian case has proven most successful in developing the overall Southeast Asian business theoretical work.

Much of the work on the Southeast Asian region was performed by the Malay sociolinguistics Professor Nair-Venugopal. In addition to her work on the use of English varieties in Malaysian workplaces and banks, and on language and style choice in businesses, (1997, 2000a, 2003), Professor Nair-Venugopal (2009) provided a recent account on how Malaysian bank employees perceive their localized English choice at work. She explained that in most Malaysian workplaces standardized English is recommended for the dominant business discourse, and that adapted local forms of speaking English “are new forms of functional literacy at work.” Reviewing the personal evaluation of four bank trainers on the use of English in training and communication with senior staff, Nair-Venugopal found that the four trainers followed the bank policy of using English as the corporate business language for training sessions. Also, despite not having a written policy on using English in the training sessions, the trainers were encouraged by their senior staff to use it. More important, the trainers stated to Nair-Venugopal that sometimes they spoke both English and Malay in order to accommodate a trainee with a low-proficiency in English. In fact, the trainers believed that using English and Malay together helped to facilitate a conducive language-learning space for most trainees.

### **North and South America**

While there is a growing body of business discourse research on the Asian continent, the field remains less well explored within North and South America.



However, there are a few such works; in the United States, for example, Andrews (2009) reviewed the development of business discourse as an interdisciplinary concept in many academic departments and fields, including MBA programs, organizational communication, business and technical communication, professional and business writing, and composition studies. She added that North American business research became an appealing topic of investigation because of its widespread use within the field of organizational communication, as in Mumby work (2007)'s on power, gender, and discourse. Additionally, the American research included a call for multiple methods of investigation, the creation of new organizational concepts and features, and an exploration of virtual and multi-media business communication.

By way of contrast, the French-speaking (also known as the Francophone speaking region) portion of Canada has proven successful in bringing an original business discourse perspective to the professional workplace environment. Work analysis is what Francophone researchers first used to outline the business discourse space for examining the labor situation. Filliettaz and Saint-Georges (2009) explained that business discourse, or as they called it, language and work, was established to assist manual workers to adapt to the changes in the economy during the 1960s and the 1970s. Drawing on many concepts and methodologies from psychology, organizational sociology, economy, anthropology, discourse analysis, and linguistics, Francophone analysis researchers continued to expand the field. Francophone researchers sought to understand the different kinds of workplace issues and problems, including the role of language, which ultimately

led them to launch The *Language and Work Network* for conducting language research throughout the Francophone region. The group had a vast array of academic specialties, and conducted various business research concerning topics like the changing status of language at work (Boutet & Gardin, 2001), coordination among co-workers and professionals (Mondada, 2001), negotiation and decision-making in professional contexts (Grosjean & Mondada, 2005), and written business documents (Clerc & Kavanagh, 2006).

Turning to South America, the research field of business discourse remains nascent in the Spanish-speaking regions. Brazil, by contrast, drew the attention of researchers early on. As Brazil is the only Portuguese-speaking country in South America, and has had diverse ethnicities and sociocultural changes, the field of business discourse in Brazil accommodated these rapid changes in culture and economy. In reading through the Brazilian business discourse literature, one is struck by the solidity of the initial work of various linguists at the Catholic University of São Paulo who started the *DIRECT Project (toward the language of work)* in the early nineties. This project brought a great deal of young Brazilian linguists to examine professional language, in addition to opening the door for international exchange projects with Portuguese linguists at the University of Lisbon. The Brazilians and the Portuguese collaborated to conduct research on leadership styles (Oliveira, 2009 Oliveira, 2009), cooperation among Portuguese businesspersons (Gago, 2002), translating business reports at work (Santos, 2001), and teaching business English for professionals (Vian, 2003). A third major project was connecting with French linguists to assess different research

methodologies, business activities and identities in the workplace, and the verbal interaction of engineers and technicians (Oliveira, 2009). One final notable characteristic of the Brazilian business discourse research is that the recent socioeconomic and political changes in the state have motivated further linguists to investigate topics like business interactions and meetings between international importers and Brazilian businesses, and business emails, professional letters and recommendations (Oliveira, 2009).

### **Africa and the Middle East**

As noted above, over the past twenty years the field of business discourse has been fostered by a number of more established academic disciplines, and has adopted their approaches and methodologies. However, this may not be the case in Africa and the Middle East, since so little work on the subject has been done there. In fact, to date the field is still undeveloped across the African continent. In the Middle East, limited linguistic work has brought attention to studying the role of language in institutional and business settings, especially in the Arabic Kingdom of Jordan. For instance, the linguistics professor Al-Ali (2004) compared the Arabic and English business rhetorical strategies used in job advertisements. Al-Ali observed 60 application letters: 30 written by applicants who responded to the Arabic ad, and 30 written by applicants who responded to the English ad. Taking genre analysis as his methodology, Al-Ali analyzed how the Arabic and English letters addressed future teacher applicants. The Arabic letter ad included rhetorical expressions for promoting compassion for work, and built a glorified image of applicants in their future roles as teachers. In contrast, the English letter ad

contained an explicit and direct request that those interested apply for the job. Ali concluded that the factor of culture plays a central role in determining the institutional language of advertisement.

### **Organizational Business Meetings**

Based on the above scholarly work, it is no overstatement to argue that little has been documented about the communicative angle of meeting as a social organizational performance. Actually, much of the work on business meetings discussed previously conceptualized a partial image of what constitutes the social communicative environment of the meeting event. Exceptions are the primary work of the Wellington *Language in the Workplace* research team, Yamada (1992), and the work of Bargiela-Chiappini and Harris (1997). Although there is no existing complete theory on organizational meetings, as Schwartzman (1989) claimed 20 years ago, the constant linguistics and discourse analysis research efforts have managed to build a relatively bold multi-ethnic theoretical process that can be used to examine a vast range of business properties, including meetings in different organizations. What follows is a detailed description of the construction of organizational meetings and some of the prominent studies that shaped early work on the topic of organizational meetings. This section will also serve as a foundation for understanding the social structure of organizational meetings as a ritualistic performance among staff members, and will facilitate answering the dissertation research questions while examining the collected data thoroughly.

#### **The Construction of Organizational Meetings: The event of Meeting**

This forthcoming review addresses the relationship between business meetings and organizational settings, demonstrating the role of multiple social factors affecting meetings, such as agency, power, culture, interpersonal relationships and organizational experiences, and the discourses involved in everyday organizational interaction. My intent here is to spotlight the anthropological work of Schwartzman (1986, 1989, 1993) and Boden (1994) in their analysis of talk in organizations. This will shape a schematic framework for the organizational meeting case I am using in this dissertation. Also in this review, I will outline a business account of what constitutes organizational meetings, based on the work of Hindle (1998).

### **Schwartzman's Work on Organizational Meetings**

The anthropological work of Schwartzman on organizational meetings (1986, 1989) incorporates Goffman (1961) account on focused human interaction and Hymes (1962, 1972) framework of communicative event. According to her, an organizational meeting is “A Communicative event involving [people] who agree to assemble for a purpose ostensibly related to the functioning of an organization or group” (p. 7). Schwartzman explained that in this type of meeting people meet to “exchange ideas or opinions, to solve a problem, to make a decision or negotiate an agreement, to develop policy and procedures, to formulate recommendations, and so forth” (p. 7). Moreover, Schwartzman (1989) posited two research questions to understand the functions of meetings: 1) what are organizational meetings and how are they constructed in specific social environments; and 2) why organizational meetings exist and continue to exist in

social and cultural settings, how meetings are used, and what kinds of outcomes do meetings bring to an organization.

In the first set of questions, she stated that researchers must develop an understanding of how staff members produce and use local knowledge in their meetings. She also recommended that researchers recognize the importance of meetings to actors in different organizations. Examining what organizational meetings are and how they are constructed helps researchers to identify the form, type of talk, processes, functions, stages, knowledge, and meanings produced in the meeting. As for the second set of questions, Schwartzman argued that in order to explore how meetings exist and are maintained in organizations, researchers must gather naturally occurring data on the way staff members organize and use different kinds of organizational meetings.

Additionally, Schwartzman stated that meetings exist in numerous societies to govern people, provide direction, and regulate different kinds of activities. In Western societies, such as the United States, meetings are arranged and used by groups of individuals in community, political, religious, business, educational, and personal settings. She suggested distinguishing between meetings and groups, and argues that meetings are usually communicative events involving group activities, but not all group activities include a meeting. Meetings are also arranged with or without a schedule. Scheduled meetings, as Schwartzman (1989) defined it, are the planned gatherings where a group of individuals discuss reoccurring work tasks, activities, policies, procedures, reports, etc. She also described scheduled meetings as coordinated meetings that usually involve intergroup tasks and

activities, such as the meetings of a board management committee, staff members, professional society, division committee, etc. Not only do scheduled meetings involve scheduled tasks and activities, but staff members also use formal scheduled talk to accomplish tasks and activities. On the other hand, unscheduled meetings are unplanned. Schwartzman (1989) described that staff members in these meetings use friendly, informal talk and do not have as much responsibility as staff members in scheduled meetings. On many occasions, unscheduled meetings consist of smaller groups whereas in scheduled meetings the size of groups may include two or more groups depending on the scheduled tasks and decisions. Also, because of their unstructured nature, unscheduled meetings can occur anywhere in or outside the office.

Scheduled and unscheduled meetings include several components that illustrate the communicative event framework in meetings that Hymes (1962, 1974) has proposed to explore communicative events in general. One key component is the participants. Participants communicate with one another in the meetings according to their roles as speakers, senders, hearers, and receivers. They also build relationships and have responsibilities while communicating in the meetings. Another component of meetings the channels and codes of communicating, such as speaking and writing channels, linguistic, paralinguistic, and interactive codes. Nowadays, technology has become an innovative channel for communication and is highly recommended for many business tasks and activities, especially the Internet and the use of personal emails. Several linguists have conducted studies on multimodal texts such as analyzing personal and

business web pages, business chat rooms, and online business conferences (Kress & Van Leeuwen, 2001).

The third component is meeting frame, which is also fundamental in initiating, maintaining, and ending the process of meeting. Participants frame the meeting according to their cultural metacommunicative meeting values. In describing the nature of communicative talk in meetings, Schwartzman (1989) integrated the following components of: topic and results, norms of speaking and interaction, norms, oratorical genres and styles, interest and participation, norms of interpretation, goals and outcomes, and meeting cycles and patterns. The question of which topic, task, activity, and decision to include and exclude in a meeting is manifest through topic and results selection by participants. Participants plan different kinds of topics and issues for discussion in every meeting and they produce results based on their pre-meeting selection.

Regarding the norms of speaking and interaction, Schwartzman (1989) clarified the significance of developing and sustaining a meeting's discussion, including central and unimportant discussions, turn-taking, speaking roles and tasks, voting among group members, and expected decisions. Participants also produce several oratorical genres and styles of proverbs, jokes, slangs, prayers, direct and indirect speech styles, formal and informal talks in the meeting in addition to deciding the means, sanctions, and rewards for meeting participation. Furthermore, she argued that participants interpret what occurs during a meeting by relating it to their personal and professional lives. Another communicative component is the goals and outcomes of the meeting. Most participants have



individual goals they want to achieve and participants collectively aspire for inclusive outcomes for their community and organization. Meetings are also connected with one another in the organization and help to build social relationships and patterns among participants (Schwartzman, 1989).

Expounding on Hymes (1962, 1974) work on framing communicative events, Schwartzman (1989) suggested a typical course of constructing organizational meetings used by most participants in Western societies. The course consists of eight stages: negotiating a meeting, a meeting setting, meeting arrivals and departures, the meeting frame, meeting talk, participation and interest, post-meetings, and meeting cycles. She began by asserting that formal meetings require participants to negotiate the place and time of the meeting, in addition to the different activities, tasks, and conventions in the meeting. The next stage is to plan the setting for the meeting by clarifying the focus of negotiation, the context of interaction, channels of communication, and the physical location of the meeting. With regard to meeting arrivals and departures, participants are assigned roles and responsibilities in the meeting. One crucial phase of arriving at a meeting is the five to ten minutes “opening phase” of introducing the meeting agenda and goals, and sometimes the participants.

Participants also follow the meeting frame by acting according to the talk and decisions made before the meeting. Schwartzman explained that the meeting frame gives participants the opportunity to build “individual and group social relationships, agreements, and disagreements to be discussed and framed as a discussion of business” (1989, p. 78). Likewise, the stage of meeting talk

encourages participants to communicate with each another and build rapport during each meeting. A crucial feature of meeting talk is the transformation of individual work into group work. Another is the debate nature of meeting talk among participants due to competition, power, and status. Participation and interest are also vital to maintaining the flow of meeting talk because they improve the topics and results of the meeting. Next is the post-meetings stage where participants negotiate an informal meeting to interpret what was been previously discussed in the formal meeting. Finally, the meeting cycle examines the interrelationships between different meetings and meeting components and stages. For example, she emphasizes looking at the relationships between a meeting and meeting groups, such as a committee or a board group meeting.

Underlying Schwartzman (1986, 1989)'s comprehensive work on meetings and organizations is another central role of meetings in shaping, organizing, and maintaining the overall organizational setting. This role contains three perspectives, or images, as Schwartzman called them: 1) meetings as a sense-making strategy 2) meetings as social and cultural validators, and 3) meetings as a space for transforming organizational conventions. The first image of meetings concerns the way in which meetings help social agents to make sense of their organizational lives. The idea of meetings as sense-makers starts from the view that meetings are significant events in an organization, and that conducting meetings in the organization is, in fact, a powerful social symbol that shows how the organization is making sense of its organizational actions. In that regard, meetings are also the organizational medium for communicating social and

cultural norms and relationships. Schwartzman has argued that “[m]eetings are a successful social validating mechanism because acceptance of the form requires, at least in part, acceptance of the current social and cultural order,” (p. 41). In order to achieve this image, Schwartzman emphasized that social agents must use negotiation to create a balanced social and cultural relationship in the meeting. Also within this image, every meeting has its own unique system for validating cultural beliefs. The last image connects with the role of a meeting in transforming the organizational setting, as well as reproducing former cultural conventions in the organization.

### **Boden’s Work on Meetings and Organizations**

In a similar way, Boden (1994) has provided a substantial description of talk and meetings as social actions in organizational settings. In her examination, Boden perceived language, agency, and structure as connected organizational factors that affect one another. She argued that in order to achieve language and agency in organizational structure researchers must analyze organizations from a language-in-action perspective. Boden continued by explaining that human agency is critical in managing language-in-action within the organization. For example, social agents in the organization use language to filter their organizational needs and relationships. Boden also claimed that language helps social agents to gain membership and make sense of their past and future: “language-in-action as everyday talk thus provides the primary medium through which the past is incorporated into present action and each are projected into an evolving, never-to-be-arrived-at future” (1994, p. 57).

With regard to organizational meetings, Boden identified the major points around which meetings are composed and organized by social actors. In fact, she began her discussion by claiming that meetings are the place “where organizations come together” (1994, p. 81). Boden also described meetings variously as “[t]he interaction order of management,” “ritual affairs,” “tribal gatherings” and “the proper arena of organizational activity” (p. 81). Additionally, she described meetings as the joining space for partnership and work agendas. Boden argued that the crucial role for meetings is “talk, talk, talk and more talk” (p. 82). In her view, social talk in meetings is situation-specific, trans-situational, and organized by the members involved to achieve organizational goals. Boden categorized meetings into two types: formal, fixed, planned gatherings and informal, task-oriented, smaller discussions. A significant linguistic behavior that Boden underlined within the accomplishment of both formal and informal meetings is turn-taking: “Whether formal or informal, meetings and their agendas are achieved incrementally on a turn-by-turn basis, in various adjustments to the basic model for mundane conversation” (99). Like Schwartzman (1989), Boden called for seeing meetings as symbolic ritualized affairs of organizational action performed by social actors who are connected through patterned, routinized interactions.

### **Meetings in the Business Literature**

Meetings in the business sector reveal a more practical reality than what is found in the social sciences. Hindle (1998) explained, “a business meeting consists of people coming together for the purpose of resolving problems or making decisions” (p. 6). In most business settings, business meetings are

considered formal and are scheduled according to a specific arranged agenda. Also, business meetings are arranged as one-on-one meetings with another participant (i.e., CEO, head of department, client). Hindle claimed that business meetings are considered successful if they save time and money “the best meetings save time and money by bringing together the right people to pool their knowledge for a defined purpose” (p. 7). Not only do business meetings require preparation and save time and money, but participants also recognize that any business meeting involves a variety of reasons and purposes. In most organizations, the common purpose of business meetings is to communicate information and advice among participants as well as to issue instructions, address certain topics of grievances and arbitrating, implement decisions, generate ideas, and produce a proposal for further discussion. Considering a purpose is the first reason for conducting business meetings. Another reason for a meeting is to sort out details, such as the place, time, agenda and goals, refreshment break, participants, and intervals. Assessing personal goals of the meeting and participants is another important reason for conducting business meetings. Lastly, business people conduct meetings in order to reinforce objectives.

Business meetings can be arranged either formally or informally. Formal business meetings include: board meetings, standing committees, ad hoc committees, public meetings, conference meetings, external meetings, annual general meetings (AGM), and extraordinary general meetings (EGM). Each formal meeting consists of a variety of reasons and objectives. In board meetings, for example, board members of an organization under the supervision of a

chairperson meet once each month to discuss the organization's business, whereas standing committees only include a subgroup of board members who often meet to complete ongoing board tasks and actions. Ad hoc committee meetings are also prepared by a subgroup of board members who usually focus on a complex task or action that requires particular attention. Board meetings, standing, and ad hoc committee meetings are open only to the organization's members, while public meetings are open to other parties, especially government officials and private action groups (Hindle, 1998).

There is also conference meetings, which are open for the public to discuss a particular business issue; sometimes, the discussion sessions are restricted to the organization's members. Confidentiality is evident in external meetings between one organization and another. External meetings require parties to cautiously consider what information to reveal and conceal in the meeting. Annual general meetings (AGM) and extraordinary general meetings (EGM) are similar in nature. In AGMs, the organization board members and stockholders hold a mandatory yearly meeting to discuss their ongoing business performance and future plans. EGMs are arranged upon request between board directors and stockholders to discuss an immediate task or action. Although board members and employees use formal language and communication styles in most formal meeting types, informal meetings, such as impromptu meeting types serve similar business functions apart from formal and informal speaking manner. Impromptu meetings can occur anywhere in the organization (i.e., a hallway, in the doorway of an office, sending an email, etc.) between colleagues and board members. The meetings are

characterized by an informal language style and relaxed, non-verbal language. Other types of impromptu meetings include small informal meetings that are usually prepared in advanced with an informal agenda and objective. One example is the brainstorming session meeting between colleagues for generating business ideas and solutions (Hindle, 1998).

### **Linguistic Research on Organizational Business Meetings**

In sum, the previous paragraphs reviewed accounts from both the social sciences and the field of business concerning the construction and significance of meetings in organizations. It is hoped that the ideas presented above will provide a broad base upon which to develop an understanding of the linguistic studies that will be explored in the next section. I begin by re-visiting the leading comparative study of Bargiela-Chiappini and Harris (1997). Here, the authors emphasize the role of meetings in organizations: “most organizations exist and will continue to exist in so far as individuals come together to talk them into being during meetings” (p. 6). From the intra-cultural, cross-cultural, and coherence and sense-making perspectives, Bargiela-Chiappini and Harris observed business performance-and action-related meetings in two telecommunication companies — one in Britain, and the other in northern Italy.

One challenge of conducting such observational studies, as Bargiela-Chiappini and Harris stated lies in privileging one methodology than the other, arguing that the choice of privileging spoken word over other types is to build “a world [which] is less unique, more typical, more repetitive, more stable, more enduring” (1997, p. 36). However, Bargiela-Chiappini and Harris also provided

some quantitative interpretations to endorse the existence of both methodologies. Another challenge was the access to the two companies and business meetings, which both authors resolved by using personal contacts and with the help of university colleagues in the companies.

In the Italian data, Bargiela-Chiappini attended and observed periodical and multifunctional quality review meetings concerning the design plan of new business products. She collected information on over thirty meetings consisting of fifteen to twenty-five members with the presence of two women present in the meetings, and labeled the meeting types as internal quality review, quality assurance, product development, interfunctional, or intrafunctional. Bargiela-Chiappini specifically, examined the language structure in the quality assurance internal meetings; a total of nineteen meetings examined the pragmatic meanings of textual coherence, such as theme, personal pronouns, metaphoric language, and discourse markers.

Thematically, Bargiela-Chiappini noticed that the quality assurance internal meetings were composed of two major thematic backgrounds, an official instrumental theme of official openings, discussions, and documentations, and an unofficial relational theme of participating members who were trying to make sense of the meetings and maintain relationships with each another. She also found that members officially instrumented a distinct business task to begin the meeting followed by various business sub-tasks (i.e., business small-talk, preface, introduction of the agenda, expansion of the agenda, discussion, breakdown, repair, final agreement, and informal closing). Bargiela-Chiappini defined sub-



tasks from a pragmatic point of view, as “what the interactants are seeking to achieve through language at a given time in the interaction” (p. 72). Additionally, she interpreted the meetings as goal-activity events that consist of a main business task that includes different thematic textual pointers describing how members collaborate in order to accomplish such sub-tasks in the meeting. This is also referred to as textual coherence, where members create local coherence textually while communicating in meetings and global coherence through producing situational and contextual knowledge in meetings. For example, she gave the example of the chair who begins a meeting with a specific local coherence pointer that explains the meeting’s main task. This flows into the conversation and becomes a collaborated action among members: “before giving somebody a responsibility – they are giving me responsibility for these things – which things can you explain to me which are the things that are expected of me. Then I’ll go and I see” (p. 74).

Another linguistic action that Bargiela-Chiappini (1997) explored through textual pointers is power and powerful roles in meetings. She observed employees using both direct and indirect references to the meeting chair or manager, hypothesizing that Italian meetings incorporate an atmosphere of social relationship on a power-solidarity continuum where Italian staff members use two major roles: the chair and the group. Bargiela-Chiappini explained that Italian chairs control the meetings by starting with the official agenda and maintaining this throughout the meetings, as in the example: “... now then last time from that discussion a proposal came out agreed on nearly everyone, myself included and

last night also by the boss” (p. 77). She also added that the boss, or *il copo*, may not necessarily be referred to as the major initiator of the meeting. Rather, Italian staff members may use an agentless construction, as in the previous example referring to a powerful agreement between staff members.

An example of powerful roles in the Italian meetings was contextual expertise power, where Italian managers or chairs use foreign expressions to convey their proficiency in English or other languages. “Knowledge of a foreign language, which is an Italian business environment very often means English, is considered an attribute of an educated and professional individual” (Bargiela-Chiappini & Harris, 1997, p. 80). Some of the English business terms that Italian managers or chairs have adopted are: checklist, two steps, and list. Bargiela-Chiappini also examined the role of “I” and “we” in building and maintaining local coherence within meeting talk, explaining that personal pronouns between Italian staff members “construct local and global relational and meaning networks through which meetings are embedded in precise socio-historic environments” (p. 82). Interestingly, the quantitative data of the Italian quality assurance internal meetings show that Italian staff members use “I” or “io” more frequently than “we” or “noi” because of competing strong self-referencing and personalities, as Bargiela-Chiappini found.

Moreover, Bargiela-Chiappini examined metaphors in Italian meetings, and describing them as cultural repertoires of sense making meetings and organizational coherence. She explored the metaphor of discourse, or *discorso*, that is shared by most Italian staff members, which she describes as highly

semantic and pragmatically complex. Bargiela-Chiappini also described the discourse metaphor, as a euphemism that Italian staff members produce consciously but do not define or name while communicating, such as *tirava lui il discorso* (playing the tune) and *il solito discorso per cui* (the same old story). Additionally, the discourse metaphor included elaborated expressions on discourse, such as *il discorso del* (another aspect), *il discorso dell'ispettore* (the case of the inspector), and *un discorso di servizio* (it's a matter for the assistance). She explained that the discourse metaphors in the meetings indicate objection, argument, concept, approach, and constructive talk among staff members (1997, p. 93).

In contrast to the Italian meetings, Harris (1997) found the British meetings to be more complex than the Italian ones, including additional business sub-task phases, such as business small talk, apologies, nomination of the secretary, review of the current situation, statement of the problem, discussions, challenges, agreements, and setting the next meeting. The British meetings also started with the chair setting the relational theme for staff members, as in the opening paragraph of one meeting: “and what we thought we needed to find out about people’s perceptions of performance-related pay” (p. 105). Harris described the British meetings in regard to three major thematic points: thematic introduction, thematic development, and a thematic ending for the meeting. Unlike the Italian meetings, she explained that the British meetings included a mixture of instrumental and relational themes that flow during every meeting.

In reviewing all the British meetings, Harris also found that the meetings

shared a common integral structure of business talk, composed of five important phases: business small talk, review, discussion, planning phase for the next meeting, and ending business small talk. She stated that British staff members develop relational themes during talk phases by asking about the interpretation of the performance-related pay questionnaire and the reaction of staff members on the questionnaire's progress. As a consequence, British staff members initiated thematic progression – performed by the chair, an executive manager, and a team facilitator – whereas in Italian meetings, only the chair controls the meeting. Pronominalization is another coherence point that Harris addressed to indicate agency and the shifts in identities among staff members. She focused on identifying the first-person pronouns “I” and “we,” finding a high degree of “we/us” references, collegiality in business talk, an absence of female referents, and “they/them” references explaining company employees as a whole – or, as she calls it, the workforce. Harris portrayed the pronominal choice as a key indicator of identity that sometimes revealed ambiguity about different kinds of identities in textual and written interaction.

Additionally, Harris (1997) examined corporate identities by looking at symbolic references, focusing specifically on symbolic clusters produced by British staff members. She identified two main semantic clusters: management and workforce. The first category of semantic clusters is the addressees' cluster, including managers identified in meetings by the terms personal director, managing director, and company manager. The workforce was illustrated via the following references: they, people, employees, individuals, colleagues,

respondents, everybody, someone, groups, anyone, population, areas, and sample. The second category was the addressors' cluster, and it is composed of two references: self (identified by I, we, and the meeting) and references to self as other (identified by the concept of team and personnel in the meeting). Harris also added a third semantic cluster – the trade unions' cluster – including shop steward, unions, and trade unions.

To further explore the relational progression among British staff members, Harris explicated the complex relation between the function of personnel in the meeting and the others, stating that personnel attending the meetings have power but “there is a clear tension between its corporate identity and its identity as a function” (p. 130). As Harris elaborated, Part of this tension results from the management hierarchy and responsibility system in the company organization. She used the Latin term *longa manus* – the long hand – to describe the important role of personnel in obtaining and storing information in organizations, which is in addition to their role in developing and implementing organizational policies. Personnel in the British company not only showed relational progression and identities of their own, but they also placed their identities' function “in a mediating position between management and workforce, without having the full confidence of either” (Bargiela-Chiappini & Harris, 1997, p. 133). Harris also highlighted some sarcasm to show the tension of this kind of identity: “You know. Leave it in our capable hands. The personnel department can be trusted, can't it? You know personnel” (p. 133). She called this identity function as conflicting and dividing, indicating a personnel's maintenance of status quo of the organization

and a need to initiate a business change.

Similarly, Poncini (2004) conducted a longitudinal study on the discursive strategies in multicultural business meetings of an Italian company. From a discourse analysis perspective, Poncini looked at three linguistic areas: intercultural communication in the company, business discourse in multilingual settings, and the business discourse across multi parties from different companies. She also investigated personal pronouns, lexis, and evaluation in the meetings, emphasizing group work (what she called “groupness”), the use of English as a lingua franca, and the business situation of doing business. Poncini’s with her economics and pragmatic background enabled her to explore business discourse from a marketing angle, looking at business relationships and the need to define culture from a corporate multinational context. The data consisted of audio recordings of the meetings in addition to Poncini’s (2004) personal observations of the meetings. She selected several linguistic and interactional extracts from the meetings, drawing on both quantitative and qualitative approaches. For example, Poncini found that multinational parties create their own groupness in the meeting by using English as the lingua franca. She considered groupness as a business culture of its own: Parties come together cooperatively and manage to overcome such distributive conversational behaviors. As in the Italian meetings in Bargiela-Chiappini and Harris (1997), the main speakers – those with more power – controlled the meetings and used more discursive strategies than other staff members to build common ground and maintain cooperation during meetings.

In investigating the role of business lexis and evaluative talk, Poncini

(2004) found that business discourse with specialized business terms helped multinational parties conduct successful business tasks and activities. Further, the terms used by many participants demonstrated the social roles enacted in the meetings as well as showing the culture of groupness among them. Poncini also observed how multinational parties evaluate business tasks and activities, stating that evaluative language was a significant linguistic strategy to accomplish the company's image building, blocking criticism among parties, bringing positive connotations into the meetings, facilitating participation, and managing business roles among participants.

The linguistic behaviors of power and politeness were also taken up by several linguists and discourse analysts, who investigated the relationship of both behaviors between managers and staff members during the meetings. One great example comes from the New Zealand *Language in the Workplace Project*. From the work of Holmes and Stubbe (2003), with regard to organizational meetings in New Zealand workplaces, the authors observed that there is limited research that focuses on understanding the connection between power and politeness in meetings, as well as in decision-making settings. Holmes and Stubbe examined 80 meetings involving 18 staff members with different work positions, discovering notable instances of power and politeness in the meeting staff interactions during the meetings.

In these meetings, they found that meetings following a linear order, consisting of staff members who did not have much of a relationship with one another, featured a restrictive style of control. The chair, in particular, used a

written agenda, demonstrating power and control over the discussion. He managed the discussion by going through every point on the agenda, and later summarized the important issues. Also, in a few cases, the chair exhibited some degree of politeness by rescuing the reputation of a staff member. Furthermore, Holmes and Stubbe examined other meetings that had non-linear, interpersonal character, involving a gathering of staff members to negotiate some business tasks. They noticed that the manager who had power to control the discussion was also offering support and paying compliments to some of the staff members. Interestingly, the manager also used humor to decrease tension in the meeting.

Thus, the workplace space and business meetings are usually not neutral in terms of power and agency. The social construct of gender is also evident in many workplaces. Mullany (2007), for example, investigated how British male and female managers engage in a variety of stereotypical gendered speech styles during meetings. In her ethnographic examination of professional managers, Mullany observed two companies, using a multi-method critical sociolinguistic approach of audio and video recording business meetings and small conversations between managers, in addition to collecting written workplace documentation. Mullany also interviewed the managers afterward to confirm her findings. Mullany's long-term goal was to make social change in the area of gendered workplace and that is why her observational study of the two companies included an interdisciplinary research interest, discussing gendered discourse from many academic perspectives but most crucially integrating critical sociolinguistic analysis with social theory



and feminism. The term “community of practice” is also used in Mullany’s critical framework.

In comparing the two companies, Mullany (2007) looked at how lower- and upper-level managers hold the floor, use speech acts and directives, express agreement and disagreement, use humor, and small talk. She also observed verbal and nonverbal behaviors of managers during the meetings, perceiving every meeting as a shared community of practice. First, Mullany examined a retail company, attending the technical and product departmental meetings between managers. In the technical meeting, Mullany found that the male manager opened the meeting with a managerial speech style by welcoming everybody with friendly small talk and later sharing his personal vacation stories. Mullany explained why the manager preferred this way of talk, “to minimize the power relationship between himself and Sue, re-establishing [workplace social relationships] after a period of absence, as well as acting as a link into commencing meeting talk proper” (2007, p. 97).

Another interesting observation was that the two lower-level managers joined the meeting late and apologized; in response, the upper-level manager informed them not to apologize and overlapped their apologies. Additionally, he used mitigated expressions and collective directions of “we need to” during the meeting in order to command the other managers to perform their tasks. Mullany also found that the lower-level female manager along with her two male managerial colleagues, enjoyed laughing during the meeting. Mullany argued that joint laughter is common between co-workers with equal work position (Holmes &

Marra, 2003). Overall, the manager with higher status decreased tension within his criticism, used humor when necessary, and showed agreement at the end of the meeting. As for the product department meeting, Mullany observed two lower-level male managers and four upper- and middle-level female managers. Unlike the technical meeting, this meeting was managed by an upper-level female manager who used more mitigated directives than the upper-level male technical manager. Additionally, she produced numerous questions to command her staff managers, engaged in hedging, and used humor to decrease tension. However, Mullany also noticed that the female upper-level manager used direct imperative of “don’t” which is a stereotypical male managerial speech style in most cases.

The second site for observation was a manufacturing company. Mullany (2007) attended service department meetings, examining five male managers and six female managers from different ranking management positions. The chair of the meeting was an upper-level female who opened the meeting with a typical feminine of friendly welcome and small talk. Similar to the retail company, she used mitigation and humor to remove tension within the meeting. Furthermore, Mullany observed her using a non-assertive, cooperative, and humorous style while giving everyone a chance to hold the floor, in addition to using directive commands in few occasions to express her authority, as in the example “Okay, Phyllis, anything for you in the next few weeks?” (2007, p. 133).

To confirm what she found in both companies, Mullany (2007) interviewed several managers and collected personal narratives about their professional gendered speech styles. British male and female managers revealed to Mullany

that, in the business arena, the powerful male manager is the norm. Having a child was also perceived negatively by both managers, as well as believing that communication styles at work are usually connected to biological sex differences. Interviewing managers offered Mullany a better picture of the way British managers perform business according to dominant cultural norms and possibly negative gender stereotypes.

## CHAPTER 3.

### FIELDWORK AND METHODOLOGY

What is the ideal methodological instrument to explore the different identities and work positions that are relevant in a business meeting? Is conducting a descriptive and a one-to-one encounter observation more effective than surveying the selected sample of participants and ending up with quantitative findings? What are the advantages and disadvantages of conducting fieldwork? How about the ethics of protecting participants' personal and occupational details? These are just a few of the many varied questions I had to ponder deeply while searching for appropriate, reliable, valid, and—most importantly—credible foundation for exploring and analyzing business meetings in two different cultures.

Here, I decided to implement a qualitative ethnographic case study research design in which fieldwork, observation, and audio recording as well as focus groups are interwoven to establish a solid description of business meetings. In this chapter I will first describe the terms fieldwork, ethnography, and native anthropology. Next, I will present in detail my fieldwork ethnographic report. The report will cover a synopsis of the research design, a profile of the field sites, participants' demographic details, and data on the collected meetings, the data collection procedures and methodologies employed, the research limitations, the research credibility and rigor of findings, and the research ethics.

#### **Fieldwork, Ethnography, and Native Anthropology**

I write as someone who bears the label of native anthropologist and yet squirms uncomfortably under this essentializing tag. To highlight the

personal and intellectual dilemmas invoked by the assumption that a native anthropologist can represent an unproblematic and authentic insider's perspective, I incorporate personal narrative into a wider discussion of anthropological scholarship. Tacking between situated narrative and more sweeping analysis; I argue for the enactment of hybridity in our texts; that is, writing that depicts authors as minimally bicultural in terms of belonging simultaneously to the world of engaged scholarship and the world of everyday life. (Narayan, 1993, p. 672)

Narayan (1993) is one of the various anthropologists in the field of social/cultural anthropology, who pursues firsthand a prolonged investigation of different cultures and cultural norms and practices with a high degree involvement with people. In her opinion, based on her extensive anthropological work with people, Narayan (1993) highlighted the many challenges associated with conducting anthropological work as well as investigating one's own culture. According to Narayan (1993), examining one's own cultural system involves accepting new identities and values in order to accomplish a solid descriptive analysis, which I have personally experienced during my fieldwork in Kuwait City and Phoenix.

Linguistic anthropology is another sub-discipline of anthropology that focuses on human interaction and prolonged relationship with people under study. It explores the vital social role of language in constructing everyday cultural meanings, discourses, and events (Duranti, 2009). In many ways, cultural anthropology complements linguistic anthropology with in-depth examination of

the daily lives of people in countless language practices. What is remarkable about both sub-disciplines is that they embrace doing fieldwork and the collection of naturally occurring language and language situations.

Perhaps the best expression that would describe fieldwork to most cultural and linguistic anthropologists is that it is the air they breathe. To grasp the true anthropological meaning of fieldwork, it is essential to simply be there living and engaging with the people under investigation. It is the core approach and the very heart of anthropological research methodology, as most anthropologists describe it (Cole, 1988; Nanda & Warms, 2007; Robben & Sluka, 2007). The practice of fieldwork involves a detailed and close-up understanding of the cultural and social norms and relationships among people. In other words, it is the process of cultural immersion of anthropologists in the culture and people's daily lives. This is what cultural and linguistic anthropologists call ethnography (Madden, 2010).

Ethnography is the thick description of everyday fieldwork and fieldwork practice (Geertz, 1973), including the key methodology for data collection of participant-observation, which includes audio and video recording, transcription, field notes and diaries, questionnaires, and surveys. Ethnography started as a concrete research methodology through the father of cultural anthropology, Malinowski (1922) who, provided his ethnographical successors with a superb descriptive account of exploring and observing the lives of indigenous people. More importantly, his ethnography of the indigenous people of the Trobriand Islands in Australia initiated the central fieldwork method of collecting qualitative data through participant-observation. Similarly, Boas (1940, 1966), the father of

American modern anthropology, has contributed profound findings on the relationship between human perception of geography and natural sciences, in addition to formulating a rigorous foundation for surveying the sounds of languages and perceiving culture as a product of a unique history.

Other prominent cultural and linguistic anthropologists, such as Geertz (1973, 1976), Hymes (1964, 1974), and Gumperz (1972) have espoused ethnography as the holistic cultural immersion process of studying cultural systems for the purpose of learning about the socio-cultural contexts, meanings, and the world-view of the host population. As with interpreting ethnographic findings, ethnography fosters an inductive reasoning approach, starting with specific exploration of the data set and identifying patterns and themes to formulate tentative hypotheses, and subsequently generating general conclusions and theories (O'Reilly, 2005). Geertz (1973) described the ethnographer as the researcher who “inscribes social discourse; he (sic) writes it down. In so doing, he turns it from a passing event, which exists only in its own moment of occurrence, into an account, which exists in its inscriptions and can be reconsulted” (p. 19).

For most anthropologists/linguists, conducting ethnographic fieldwork, and studying and living in other cultures increase understanding of their own native culture. As newcomers to the culture, ethnographers interact with people and observe thoughtfully, seeking to become as much a member of the culture as possible to understand the worldview of his or her people under study (Gupta & Ferguson, 1997; Watson, 1999). What is also significant about conducting ethnography is the premise that fieldwork is indeed a social performance where

ethnographers foster the “attitude of the novice or learner, rather than critic” (Schensul, 1980, p. 309). Another challenging goal that raised a great deal of vexing questions in the scholarly work of ethnography products is seeking a high-degree of objectivity, credibility and validity, and reducing bias during the exhibition of the written product of ethnography as a whole (Hegelund, 2005; Silverman, 2006; Stewart, 1998).

Hence, pursuing an ideal objective and unbiased ethnography product may not be achievable, as prearranged by many ethnographers and fieldworkers. Additionally, it will come as no surprise that native anthropology entails a similar idiosyncratic stance when scrutinizing cultures, primarily in describing one’s native culture. Native anthropology, as the term infers, is the process of examining one’s own native culture to convey the insider’s worldview. Although there is little scholarly work on how to do native anthropology; however, there are few rich and constructive personal accounts of cultural anthropologists observing the cultural system of their birth community (Fahim, 1982; Jacobs-Huey, 2002a; Chawla, 2006; Narayan, 1989, 1993, 1997).

A widely quoted account on performing native anthropology and the dichotomy between being native and non-native, or insider/outsider is Narayan’s (1993) essay “How Native Is a ‘Native’ Anthropologist?.” In explaining the dichotomy of native and non-native anthropology, Narayan claimed that both terms do not necessarily hold a fixed interpretation, especially for native anthropologists with mixed cultural backgrounds in which they experience multiple and shifting identities (1993, p. 672). Narayan who was raised in India



and later educated in the United States, elaborated on her multiplex identity, as she called it; “A mixed background such as mine perhaps marks one as inauthentic for the label native or indigenous anthropologist; perhaps those who are not clearly native or non-native should be termed halfies instead” (p. 673). Drawing from the ethnographies she conducted in India and the Himalayas, Narayan (1993) underlined the very strong and direct relationship between the native researcher and his or her community of people.

Accordingly, research participants may ascribe to native researchers different identities and cultural roles for many reasons, as well as influence the direction of the ethnographic product. Narayan (1993) expressed how the villagers in the Himalayas mistakenly considered her American education as a foreign prestige, recalling their commentaries; “From America ... she came all the way from there for this function, yes, with her camera and her tape recorder!” (p. 674). She concluded her essay by arguing for the hybridity of shifting identities within one’s native culture; “Every anthropologist carries both a personal and an ethnographic self. In this scheme, we are all incipiently bi- (or multi-) cultural in that we belong to worlds both personal and professional, whether in the field or at home” (1993, p. 681).

Other native anthropologists faced very similar research challenges as Narayan. Chawla (2006), for example, is also an Indian of Pakistani descent who opened her discussion of her ethnographic experience with Hindu married women by acknowledging the complexity of fieldwork shifting identities: “I traveled in with trepidation, constantly worried about and uneasy with ‘who’ was going with

my 'I's' into the field" (2006, p. 3). She continued calling her identities worried selves that her people assigned during research, and, most importantly, her selves came to be reinvented, as the research progressed (p. 3). Like Narayan (1993), Chawla (2006) too was confronted with the eligibility on piloting research of married women while she was single; "In staying single, I had cast myself out, from a net of family relations and had made myself ineligible to some of my participants" (p. 5). Regardless, though, she found this unfamiliar and distant situation as a fresh anthropological stance for observing women, and identified herself as a familiar strange (p. 5).

Establishing legitimacy as an insider in the culture and gaining support from participants is not the only challenge for native anthropologists. Jacobs-Huey (2002), a linguistic anthropologist who studied the hairstyles of African American woman, argued that language and discourse knowledge, attentiveness to cultural roles, and verbal, and non-verbal interaction are fundamentally rooted in the process of gaining trust and cultural legitimacy. Here, Jacobs-Huey considered communicative competence as the key language constituent to negotiate "identities in the field" (2002, p. 794). Communicative competence, which is one's knowledge and ability to communicate appropriately and effectively and produce social meanings in different speech varieties (Hymes, 1972), promotes rapport and facilitation among the native researcher and his or her participants, as Jacobs-Huey (2002) suggested.

Therefore, Jacobs-Huey (2002) relied on various verbal and non-verbal speech varieties during her fieldwork, such as conducting face-to-face

conversations, using an African American Vernacular English (AAVE) dialect with her participants, disclosing her racial identity when writing email messages and sharing her own hairstyles. For most African American cultural and linguistic anthropologists (Gwaltney, 1993; Nelson, 1996; Williams, 1996), ease of access and legitimacy entail speaking the African American dialect of the community. The last two research matters that Jacobs-Huey (2002) suggested native anthropologists consider were the inherent role of politics in conducting native ethnographies, particularly in the dilemma of translating ethnographic products into the native language, and reporting on the confessions of failure during fieldwork as a meaningful ethnographic technique to reveal the socio-political stakes involved in the overall ethnography product.

### **Ethnography—It's Sink or Swim**

Like Narayan (1993), Chawla (2006), and Jacobs-Huey (2002), I myself, a young Kuwaiti Arab female, PhD student who is American-educated, encountered the good and the bad—and perhaps the downright ugly—challenges of doing native anthropology in my home culture, Kuwait City. Surprisingly, I faced less difficulty and resistance within the people of my host culture, Phoenix, Arizona; sometimes I even forget that I am originally from Kuwait, living in the United States for the past 13 years. I, too, was vulnerable to dealing with a patriarchal structure, hopelessly searching for enthusiastic financial companies that thrive on making the research come true. Yet I was able to portray the most confident version of myself just to hold on to some hope.

In my home culture, I searched over 50 companies either by calling or

visiting in person. Weird, dreamy, passionate, Americanized, optimistic, different, and young were some of the common labels I received while endeavoring to convince Kuwaiti companies about my research potential. I spoke a standard Kuwaiti Arabic and English when appropriate with non-Kuwaiti business staff; I acted formally and dressed like a professional but nevertheless I was perceived as having too much optimism because of American education and culture. Interestingly, sharing my academic background was also problematic for most of the companies I visited; I was constantly asked to explain what linguistics means and how it relates and fits into the business world.

On the contrary, searching for American financial companies across the Phoenix metropolitan area was as hectic. Once again, I contacted numerous financial companies and organizations in the area asking them for a quick visit. I succeeded in convincing some; however, I received no final response. If my nativity, young age, sex, and academic and professional background were the downright ugly barriers to gaining access to most Kuwaiti financial companies, for American business people it was merely academic credentials and concerns about confidentiality of business information. Thus, I was labeled a lone graduate student who was trying hard without much authoritative support. The business queries I noted were unlike the ones I received back home: Are you from the Business school? and Who's funding your research?. At the time, I was so concerned with portraying myself in a professional manner that I spoke and acted formally; I also wore proper business attire on every visit. Unfortunately, I had no luck, and all companies refused to participate because of privacy issues. So, I chose to continue

searching—but for financial/or trade non-profit organizations who might be more open to observation.

This was how I felt: lost and perplexed, disappointed and desperate, yet highly determined to continue the fight for access, legitimacy, and credibility in both field sites. Honestly, I thought I knew what kinds of challenges cultural and linguistic anthropologists might encounter in fieldwork and that I would have many struggles, but I should probably know better by now. What I experienced during the eight months of my ethnography work both in Kuwait and Phoenix reminded me of Tedlock's (1991) insightful cultural anthropology commentary of gatekeepers in the community: "No matter how much care an ethnographer devotes to his or her project, its success depends on more than individual effort. It is tied to outside social forces" (p. 78). Tedlock (1991) defined the anthropological community as one social factor as well as the relationships endorsed within the community and across the community to move fieldwork into practice. As I reflected on Tedlock's 1991 study, I deliberately forced myself to "act confident and savvy" just to attain the anticipated ethnographic product.

For a fresh sociolinguist scholar in the field and a novice learner of ethnography, perhaps this is not the ideal ethnographic fieldwork and ethnography product. This is just the beginning, and no matter how hard it may seem, fieldwork and ethnography have indeed become a potential lifestyle of mine. It is where I learned how to sink or swim in two different cultural systems, and eventually I succeeded in managing my multiplex identities. In what follows, I outline six central topics: (1) a synopsis of my research design, (2) a profile of the

field sites, participants demographic details, and collected meetings data, (3) the data collection procedures and methodologies employed, (4) research limitations, (5) credibility and rigor of findings, and (5) research ethics.

### **Research Design**

This dissertation project is qualitative in nature. I employed a case study ethnographic research design, focusing on four central methodologies: ethnography of speaking/communication (Hymes, 1972) and fieldwork techniques, including participant-observation, audio recording of everyday meetings, and feedback focus groups. Coming from a sociolinguistic background, I chose a qualitative design approach to best describe the social event of business meetings in organizations. A qualitative research design is the process of naturalistic inquiry where researchers pursue in-depth description and analysis of social phenomena. Qualitative research is often subjective and more flexible as the researcher is the key instrument, building a relationship with his or her participants and learning from their personal lives (Cresswell, 1998; Rossman & Rallis, 1999; Silverman, 2006). I, like any other social researcher, seek to explore cultural practices and systems in naturalistic settings to answer the question of what's happening and to recognize the meaning-making process of everyday human interaction.

So why not choose the reverse design—that is, the qualitative approach of objective findings? Unlike qualitative design, quantitative researchers have a detached stance from participants and data, exploring social phenomena through testing predetermined hypotheses and variables, then quantifying findings into statistical analysis and models (Silverman, 2006). To offer a complete answer, I

used Punch (1998)'s research design guideline questions. He recommended that social researchers consider the following prior to conducting research: (1) "What exactly am I trying to find out?;" (2) "What kind of focus on my topic do I want to achieve?" (3) "How have other researchers dealt with this topic?" (4) "What practical considerations should sway my choice?;" (5) "Will we learn more about this topic using quantitative or qualitative methods?;" and 6) "What seems to work best for me?" (1998, p. 244-5).

First of all, what truly promoted me to choose a qualitative design research is the context of meetings as ritualistic events in society and the limited literature on our knowledge base of the social structure of meetings. Therefore, I decided to focus on exploring the meeting event from a social communicative perspective, following the influential work of sociolinguists and discourse analysts (Bargiela-Chiappini & Harris, 1997; Holmes & Stubbe, 2003). Practically, this kind of focus is valuable for both research inquiry in sociolinguistics, cultural and social anthropology, and—crucially—business. Using a qualitative design will best represent my sink or swim journey through the business field and eventually will direct me to conduct a blended design research for my next attempt at studying business discourse. Because this dissertation will address different audiences, I plan to outline some numerical data for explanatory purposes. I favor in-depth description over numbers to show a human centered account of business interaction (Lindlof & Taylor, 2011) of what constitutes and maintains business meetings in organizations.

I also chose to implement a case-study design to highlight focus and

interpret the population selected in this project. Similar to ethnographies, case studies are descriptive, explanatory, and exploratory (Yin, 1993), reporting relationships and realities in a single setting. Benbasat et al. (1987) defined it as the investigation of: “A phenomenon in its natural setting, employing multiple methods of data collection to gather information from one or a few entities (people, groups or organizations)” (p. 370). Categorizing the research as a case study requires researchers to utilize direct and indirect observation of the social phenomenon, conduct structured and unstructured interviews with participants, collect written documentations of the investigated case and any important surveys or questionnaires necessary to explore the social phenomenon (Yin, 1984). One of the main reasons I became interested in the case study approach with in an ethnographic methodology is its unit of analysis, which consists of a system of action covering different agents, voices, and perspectives throughout the investigated case. Furthermore, case studies promote using mixed methodologies in research triangulation (Feagin, Orum, & Sjoberg, 1991), which I will discuss in the procedure and methodologies section.

### **Field Sites, Participants’ Demographic Details, and Collected Meetings**

#### **Data**

Here is where and how the sink-or-swim journey started. I started fieldwork in the summer of 2010, first in Kuwait City, Kuwait. Between June and August 2010, I made monthly daylong observations of business meetings at a Kuwaiti financial company, collecting data from two meetings. In December 2010, I audio recorded one meeting in the company. I also visited the company



between May and July 2011 where I audio recorded two meetings. By the end of December 2011, I collected a total of six hours and a half of meeting discussions. As for the fieldwork I conducted in Phoenix, Arizona, I visited a trade organization every Monday between June and September 2011, and between December and January 2012. Similar to the Kuwaiti company, I attended the staff meetings, made thorough observations, and collected data from five meetings for a total of six hours and a half. In both field sites, I used the same data collection procedures and methodologies with small modifications, spending four months of observing and making audio recordings (a total of eight months of fieldwork). Next, I specify the social structure of both field sites and how I carried out the data collection procedures and methodologies for the fieldwork. I will begin by reporting fieldwork information on field from site one, followed by fieldwork information from site two.

### **Field Site One: Kuwait City, Kuwait**

The first field site is my hometown, Kuwait City, the capital city of the state of Kuwait. Kuwait is an Arab Muslim country in the Arabian Gulf Peninsula, bordered by Saudi Arabia and Iraq. Like other Arabian Gulf countries, Kuwait is a constitutional monarchy ruled by the royal family of Al-Sabah and governed by the British Empire before 1961. Kuwait is also one of the largest producers of crude oil. Kuwait's first language is Arabic, although most Kuwaitis are fluent in English. Additionally, the monarchy offers free education and health services for every citizen. The population of Kuwait is small, with 1.06 million Kuwaitis and 2 million non-Kuwaitis (Arabs 35% from Egypt, Syria, Lebanon, and Jordan; South

and East Asian 9% from India, Pakistan, and Sri Lanka; Iranian 4%; and other 7%). Kuwait is a modern state with a variety of architectural styles, entertainment facilities, and businesses. On August 2, 1990, Kuwait occupied by Iraq for seven months. The country suffered enormous infrastructure losses, property damage, economic declines in oil revenues, and the mass murder and torture of civilians. Following its liberation on February 26, 1991, Kuwait was recovered from the severe catastrophe. Today, Kuwait is considered a prosperous state in the Middle East region (CIA, 2011; U.S. Department of State, 2011).

**The Kuwaiti Company: Innovative Kuwait Co. (Pseudonym)**

Innovative Kuwait Co. is the name I chose for field site one. By doing so, I warranted protecting the identity of the company and participating managers and staff members. Innovative Kuwait Co. is medium-sized Kuwaiti financial company located in downtown Kuwait City's financial and commercial district area. The company was founded in the early 70s, and later designated as one of the finest financial companies in the Arab Gulf region and on the Kuwait Stock Exchange (KSE). Its board of directors consists entirely of men including a chairman, a vice chairman, and five directors. The company's executive management team is chaired by a chief manager officer and a senior management team consisting of different managerial positions. Innovative Kuwait Co.'s emphasis is financial services, including corporate finance, asset management, local and international investments, investment banking and advisory, treasury, and private equity. Innovative Kuwait Co. also manages services in real estate, oil and gas, and has other administrative tasks in media, communication, IT, human

resources, compliance, and risk management. One distinguished accomplishment of the company was its determination to maintain strong financial operations and its loyalty to clients after the Iraqi invasion and during any financial or economic crisis.

### **Participants in Innovative Kuwaiti Co.**

I conducted fieldwork in the business ethics and laws department (pseudonym). The department consisted of four main participants, the vice president from India and his staff members, including two females from India and a female from Kuwait. Typically, the vice president and his staff members meet with other departments and outside clients to discuss ethical and regulation issues related to the company's business projects and budget. In fact, this department operates as the arbitrator for most business tasks and activities across departments. When I first joined the department, I remember the vice president reassuring me not to worry too much about access to other departments "If you stay with us, you will be able to attend other meetings and meet different people across the company." The four members often met in the same conference room and invited other departmental staff members and outside clients. During my fieldwork, I chatted freely, expressed myself as much as I wanted to and laughed as I became intimate with my participants; I even enjoyed eating breakfast and lunch with them. The following table summarizes the participants' demographic details. I then discuss the table by outlining brief introductions of each member, followed by introducing the ten additional internal and external participants who also participated in the meetings.

Table 1

*Innovative Kuwait Co. Participants Demographic Details*

Participants	Age	Gender	Nationality	Spoken languages
Zeeshan (pseudonym) Vice- President	late 40s	M	Indian from Chennai	Tamil, Hindi and English
Kamya (pseudonym) Analyst	early 30s	F	Indian from Chennai	Tamil, Hindi and English
Deshna (pseudonym) Senior Analyst	mid 30s	F	Indian from Kerala	Malayalam, Hindi Marathi and English
Muneerah (pseudonym) Analyst	late 20s	F	Kuwaiti from Kuwait City	Arabic and English

As shown in Table 1, Zeeshan, as a vice president, is the foremost business member holding power in the business ethics and laws department. Zeeshan is in his late forties, a senior manager, and is originally from Chennai, located in southeast of India. Chennai is also known as Madras the capital city of the Tamil Nadu region and the fourth most populated city in India. Zeeshan's native language is Tamil, which is typically spoken among southeast Indians. He also speaks Hindi, the official language of India in addition to English. As for his educational background, Zeeshan attended public schooling in which the medium of teaching is Hindi and English. He later pursued a bachelor's degree in mechanical engineering, an MBA, and other management and financial qualifications, such as the chartered financial analyst program certificate (CFA).

Similarly, Kamya, who's in her early 30s, comes from Chennai, India and

is fluent in Tamil, Hindi, and English. At the time that I started fieldwork in the summer of 2010, Kamyra had just been hired. She was quiet most of the time and she spoke softly even during argumentative discussions in meetings. I enjoyed her presence though, as she reminded me of my own tranquil temper. We also shared the same desk office for days. She attended public schooling in Chennai under the state board syllabus, which focused on learning Hindi more than English, and she later obtained a bachelor's degree in accounting.

The other Indian female staff is Deshna, a mid-30s senior analyst from Mumbai, the capital city of India. Deshna told me that her family is originally from Kerala, a popular tourist area for international travelers. In addition to English and Hindi, she speaks Malayalam and Marathi. Marathi is language spoken in the central region of India, whereas Malayalam is mostly spoken by southeastern Indians. Desha has a strong business background and gives attention to tiny business details, especially when she is safeguarding the company's ethics with outside clients. She has a bachelor's degree in accounting and a master's degree in commerce.

Lastly, Muneerah who, is the only Arab speaking staff member in the compliance and risk management department. Muneerah is in her late 20s and she is a graduate of Kuwaiti University with a bachelor's degree in business administration. She attended public schooling in Kuwait where the medium of teaching is Arabic, and English is offered as a core course in the syllabus. Muneerah and I bonded very quickly, not because we share the same cultural background but because she enjoyed inquiring about information and details about

the meaning of linguistics and what I was trying to prove by doing this research study. “I will wait and see” is what she said to me each day.

Furthermore, ten internal and external staff members also have participated in the meetings. The following table outlines participants’ demographic details and the number of meetings they attended. Next, I provide a synopsis of each participant.

Table 2 lists the internal and external participants who attended one or more than two meetings at Innovative Kuwait Co. Kumar (pseudonym), for example, who is in his early 40s, attended meetings 1, 3, and 5 due to his important business role in Innovative Kuwait Co. In fact, Kumar is the vice president of the business management department (pseudonym). He is originally from Mumbai and he speaks Hindi and English. Similar to his Indian coworkers, Kumar pursued a bachelor’s degree in business management and a master’s degree in management in addition to attending several business management training workshops.

The second participant is Reham (pseudonym), a senior manager from the business operation department (pseudonym). Reham is in her mid-40s and grew up in Beirut, Lebanon. Besides Arabic, Reham speaks fluent English and French. She obtained a bachelor’s degree in law and a master’s degree in accounting.

Table 2

*Demographic Details of the Additional Internal and External Participants in Innovative Kuwait Co. Meetings*

Participant Work Position	Age	Gender	Nationality	# of Meetings
Kumar (pseudonym) Vice-President	early 40s	M	Indian from Mumbai, India	three meetings (meetings 1, 3,

Reham (pseudonym) Senior manager	early 40s	F	Lebanese from Beirut, Lebanon	and 5) one meeting (meeting 5)
Wael (pseudonym) Senior manager and External auditor	mid 30s	M	Syrian from Damascus, Syria	two meetings (meetings 3 and 5)
Aishwarya (pseudonym) Wael's secretary	mid 30s	F	Indian from Mumbai, India	one meeting (meeting 3)
Kamal (pseudonym) External senior auditor	late 40s	M	Egyptian from Cairo, Egypt	one meeting (meeting 5)
Ayman (pseudonym) Senior manager	mid 30s	M	Syrian from Damascus, Syria	two meetings (meetings 2 and 4)
George (pseudonym) Senior data programmer	mid 30s	M	Lebanese living in Dubai, United Arab Emirates	one meeting (meeting 4)
Deena (pseudonym) Business law analyst	mid 30s	F	Syrian from Damascus, Syria	one meeting (meeting 5)
Raj (pseudonym) Senior analyst and manager	early 40s	M	Indian from Mumbai, India	one meeting (meeting 3)
Babu (pseudonym) Senior Analyst and Manager	mid 40s	M	Indian from Mumbai, India	one meeting (meeting 3)

Reham only attended meeting 5. Next is the external auditor Wael (pseudonym).

Wael is in his mid-30s, and he is originally from Damascus, Syria. He speaks

Arabic and English, and he is quite familiar with most Kuwaiti financial businesses. Wael has a bachelor's degree in business. He attended meetings 3 and 5. Following Wael is Aishwarya (pseudonym), who is in her mid-30s and is from Mumbai, India. Aishwarya is Wael's assistant secretary. She performed some audit work with Innovative Kuwait Co. staff members over the past two years. Another external auditor is Kamal (pseudonym), who is an Arab from Cairo, Egypt. Unlike Wael, Kamal is a senior auditor in his late 40s with a substantial audit background. He is one of the key members in developing the many ethical and legal reports generated by Kuwait Innovative Co. Kamal has a bachelor's degree in management. He participated in meeting 5, where he discussed Innovative Kuwait Co.'s budget report.

Ayman (pseudonym) and George (pseudonym) have also participated in the meetings. Ayman participated in meeting 2 and 4, whereas George participated in meeting 4. Ayman is in his mid-30s and he is one of Innovative Kuwait Co.'s senior managers. He is originally from Damascus, Syria and has been living in Kuwait for the past ten years. Ayman holds a bachelor's degree in finance with many other business certificates. Likewise, George is in his mid-30s but is Beirut, Lebanon. George is a senior data programmer who lives in Dubai, United Arab Emirates. One of George's main business tasks is to travel across the Middle East to distribute data security programs to financial companies. George has a bachelor's degree in computer engineering and a master's degree in data and communication. Both Ayman and George speak fluent English, especially George, who speaks with an American accent.



One of the other participants is Deena, who attended meeting 5. Deena, who is from Damascus, Syria, is one of Innovative Kuwait Co. business law analysts. Deena is in her mid-30s and she holds a bachelor's degree in law. Deena has worked at Innovative Kuwait Co. for six years. The last two members are Raj and Babu. Both Raj and Babu participated in meeting 3. Raj and Babu are in their 40s and are from Mumbai, India. Both are senior managers and analysts at Innovative Kuwait Co. Raj holds a bachelor's degree in accounting and a master's degree in management, while Babu has a bachelor's degree in finance. Both of them attended several business workshops and conferences.

**Collected Meetings Data in Innovative Kuwait Co.**

As mentioned earlier, I was able to collect five business meetings in the business ethics and laws management department. Unsurprisingly, Zeeshan was present in all of the meetings along with Kumar, the business management department manager. The meetings consisted of a mixture of business personalities and business topics, as well as an array of various ethical issues concerning the company's documentation, activities, and projects. Also, the meetings included Reham, a female senior manager from the business operation department, and two external auditors. In the following table, I lay out the Kuwaiti meetings fact sheet (more explanation is provided in the findings and discussion chapter).

Table 3

*Innovative Kuwait Co. Meetings Fact Sheet*

Meeting	Topics discussed (duration)	Participants in the meeting
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Meeting 1 Summer 2010	equity and evaluation of projects (1 hour)	All ethic/law department staff members meeting with Kumar (total of five people: two male managers and three females).
Meeting 2 Summer 2010	equity and evaluation of projects (1 hour)	All ethic/law department staff members meeting with an external auditor (Wael) and his assistant; also Kumar was present (total of seven people: two male managers, a male auditor, his female assistant and three female staffers).
Meeting 3 Summer 2010	equity and evaluation of projects (1 hour)	All ethic/law department staff members meeting with an external auditor (Wael) and his assistant; also Raj and Babu were present (total of eight people: three male managers, a male auditor, his female assistant, and three female staffers).
Meeting 4 Fall 2010	presentation of a data and finance program (1 1/2 hours)	The ethic/law department vice president and the management vice president in addition to a staff member from the finance department met a visiting data analyst from Dubai, UAE.
Meeting 5 Summer 2011	funds, treasury, and legal assessment (2 hours)	All ethic/law department staff members in addition to Kumar, Wael and his female assistant, and Reham (senior manager), met a visiting external auditor (Kamal) (a total of nine people: three managers, one of whom was a female, one senior auditor and his assistant, a second auditor, and three female staffers).

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## **Field Site Two: The Phoenix Metropolitan Area**

My second field site is the Phoenix metropolitan area. Phoenix is the capital city of the state of Arizona. It is the one of the most populated cities in the United States, and has a diverse population of an approximate of 1,445,632, including (77.51% white, 17.95% Hispanic, 3.66% African American, and 8.49% other (U.S Census, 2010). Phoenix's climate is dry most of the year compared to

its neighboring states. Its contemporary style, cultural events, and outdoor activities attract numerous local and international tourists. (Tempe Tourism Office, 2011).

### **The American Organization: Global Phoenix (Pseudonym)**

Although I was unable to find an American financial company to draw the ideal comparison, I succeeded in locating a few trade organizations in the compliance and risk management industry across the Phoenix area. I chose the most enthusiastic to become part of my research, giving it the name “Global Phoenix.” Global Phoenix is a Phoenix-based trade organization located in downtown Phoenix. It is a medium-sized organization, consisting of 25 managers and staff members. Global Phoenix includes more than 1 million registered members across its three major divisions: Arizona, Colorado, and Wyoming. The central goal of Global Phoenix and its sister divisions is to function as a channel to connect workers organizations and members with businesses. Teleconferencing is the medium of meeting communication between divisions, along with face-to-face visits for special occasions. Staff members at Global Phoenix perform several trade activities and projects, such as banking and financial services, legislative and regulatory affairs, establishing advocacy and community outreach programs, education, leadership, and training, political funding and public affairs, compliance and risk management, and trade operational assistance.

### **Participants in Global Phoenix**

Unlike the small number of participants I observed at Innovative Kuwait Co. Global Phoenix’s business meetings included 7 to 12 participating members,

in addition to other participating staff members from the Colorado’s division via teleconferencing. In spite of that, everyone had an opportunity to share and speak freely. At first, I was lost, struggling to distinguish between all the energetic voices, which hindered my ability to write precise field notes. By the third meeting, however, I managed to cope, assigning accurate information to each participating member. I, too, began to immerse myself in a new business culture, slightly “different” than what I encountered back home, feeling very close and comfortable with the participants. Sometimes this closeness made me think, I am an insider, and I fit into my host culture very smoothly. Knowing the people of Global Phoenix actually reshaped my own understanding of the business world and corporate culture, which perhaps gets at the true meaning of the question “What constitutes native and non-native culture and identity?” Table 3 contains the demographic summary of all fourteen Global Phoenix staff members, followed by the details of the members who participated the most.

Table 4

*Global Phoenix Co. Participants Demographic Details*

Participants Work Position	Age	Gender	Hometown state	Spoken languages
Molly (pseudonym) Executive vice president	early 60s	F	Ohio	English
John (pseudonym) Senior vice president	early 50s	M	Montana	English
Brandon (pseudonym) Legislation	late 20s	M	North Dakota	English

Table 4 (continued)

*Global Phoenix Co. Participants Demographic Details*

Participants Work Position	Age	Gender	Hometown state	Spoken languages
Chris (pseudonym) IT/Communications	mid 30s	M	Arizona	English
Allison (pseudonym) Business lending	early 40s	F	Colorado	English
Alexandra (pseudonym) Communication	mid 30s	F	Arizona	English
Sarah (pseudonym) Administration	early 50s	F	Arizona	English
Daniel (pseudonym) Politics	mid 30s	M	New Mexico	English and Spanish
Angela (pseudonym) Administration	early 60s	F	Arizona	English
Zoey (pseudonym) Business services	late 30s	F	Arizona	English
Jennifer (pseudonym) Administration	late 30s	F	Arizona	English
Tina (pseudonym) Administration	mid 40s	F	Arizona	English
Laura (pseudonym) Accountancy	late 20s	F	Arizona	English
Melissa (pseudonym) Counseling	late 30s	F	Ohio	English

A total of twelve participants at Global Phoenix have attended and engaged in the five meeting discussions; however, only six participants showed significant participation in terms of organizing and holding conversations in addition to speaking for longer periods of time. The other six participants produced fewer speech utterances and turns. The participants who spoke and participated the most were Molly (pseudonym), John (pseudonym), Brandon (pseudonym), Chris (pseudonym), Sarah (pseudonym), and Tina (pseudonym). Molly is one of Global Phoenix's executive vice presidents. She is in her early 60s and has been working at Global Phoenix for almost 30 years. Molly is originally from Ohio, USA. She has taken several college courses in addition to attending numerous professional meetings and conferences.

John, like Molly, a senior vice president at Global Phoenix. John is from Montana, USA, and he is in his early 50s. John has taken several college courses and ten years of experience of administrative and legislative work. Similar to John is Brandon, who also manages the legislative and political affairs of Global Phoenix. Brandon is in his late 20s and grew up in North Dakota, USA. Brandon has two bachelor's degrees, one in political science and the other in communication. The person responsible for organizing administrative work at Global Phoenix is Sarah, who has been employed by Global Phoenix for the past 20 years. Sarah is in her early 50s and is from Arizona, USA. Sarah did not disclose any educational information; however, she has attended a variety of business administrative workshops and training sessions.

Chris and Tina have different business tasks than Molly, John, and

Brandon. Chris is a native of Arizona, USA, and he is the main IT and communication controller at Global Phoenix. He is in his mid-30s and he has worked at Global Phoenix for ten years. Chris has a bachelor's degree in communication. His main task is to control communication and technology issues across Global Phoenix, and specifically, its branch in Colorado. Tina is another controller, but her responsibility is for the vice presidents' business tasks and documents. Tina is in her mid-40s and she is originally from Arizona, USA. She has some college degree and six years of experience in business control.

Although it was not part of this study to focus on Global Phoenix's Colorado office, staff members assigned to this location produced a substantial amount of speech utterances and turns. Therefore, I decided to include the demographic details of the six participants who spoke and participated the most. Table 5 indicates their personal information; afterward, I provide a brief introduction of each staff member. All members attended all five meetings, except for Monica, who only attended the second meeting.

Table 5

*Colorado Participants Demographic Details*

Participants Work position	Age	Gender	Hometown state	Spoken languages
Raymond (pseudonym) President	early 50s	M	Utah	English
Gary (pseudonym) Senior vice president	early 50s	M	Colorado	English

Table 5 (continued)

*Colorado Participants Demographic Details*

Participants Work Position	Age	Gender	Hometown state	Spoken languages
Judy (pseudonym) Education	late 30s	F	Colorado	English
Oliver (pseudonym) Government affairs	late 30s	M	Colorado	English
Sean (pseudonym) Regulatory affairs	late 30s	M	Colorado	English
Monica (pseudonym) Accountancy	early 40s	F	Colorado	English

Similar to Global Phoenix’s office, the Colorado office is comprised of two senior staff members, a president, and a senior vice president. Raymond (pseudonym) is the Colorado branch’s president and he is in the early 50s. Raymond is a native of Utah, USA. He has a bachelor’s degree in management and six years’ experience in administrative work. Gary (pseudonym) shares many responsibilities with Raymond, especially in managing the work between the Arizona and Colorado offices. Gary is the senior vice president of the Colorado office. He is the same age as Raymond but a native of Colorado, USA. He holds a PhD degree in administration and has 14 years of experience.

The third member is Judy. Judy is also from Colorado, USA, and is in her late 30s. She manages the education section of the Colorado office. Judy has a



bachelor’s degree in management. Oliver and Sean have similar business tasks; both of them organize government and regulatory affairs in Colorado and, sometimes, for Global Phoenix’s office. Oliver and Sean are the same age and they both hold a law degree. Also, Oliver and Sean are natives of Colorado, USA. Last is Monica, who controls the accountancy department in the Colorado office. Monica is in her early 40s and she has 12 years of accounting experience.

**Collected Meetings Data in Global Phoenix**

At Global Phoenix, I attended the same number of meetings (five meetings total and 6 1/2 hours in total). The meetings were held every Monday at 8.30 AM in the morning. Diana, the vice president, was responsible for organizing the meeting and distributing the agenda. Likewise, William had similar power in giving meeting instructions. The meetings usually consisted of 8 to 10 staff members, in addition to Colorado’s division staff, which attended through teleconferencing. Table 6 lists the meeting information (more explanation is provided in the findings and discussion chapter).

Table 6

*Global Phoenix Meetings Fact Sheet*

Meeting number	Topics discussed (duration)	Participants in the meeting
Meeting 1 Summer 2011	Business updates and upcoming events  (1 hour)	Almost all Phoenix staff (total of 9 members; the female vice president, male vice president, six female staff members, and one male staff member). There were also 7 staff members from CO division (two male staff members, and four female staffers).

Meeting 2 Summer 2011	Discussion of a new accountancy form (1 hour)	Almost all Phoenix staff (total of 9 members; female vice president, male vice president, six female staff members, and one male staff member). There were also seven staff members from CO division (three male staff members, and four female staffers).
Meeting 3 Winter 2012	Business updates and upcoming events  (1 hour)	All Phoenix staff (total of 12 members; female vice president, male vice president, six female staff members, and four male staff). The three additional members hold secretarial positions and they were on vacation. Also, the CO staff members have participated (six staff members: four female and two male staffers).
Meeting 4 Spring 2012	Business updates and upcoming events (1 ½ hours)	All Phoenix staff (total of 12 members; female vice president, male vice president, six female staff members, and four male staff). The three additional members hold secretarial positions and they were on vacation. Also, the CO staff members have participated (six staff members: four female and two male staffers).
Meeting 5 Spring, 2012	This was the first	All Phoenix staff (total of 12 members; female vice president, male vice president, six female staff members, and four male staff)

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### **Data Collection Procedures and Methodologies Employed**

This section discusses the process of data collection used in both field sites, beginning with an outline of the sampling and participants' recruitment procedures. Next, the research methodologies of ethnography of speaking/communication (Hymes, 1972), participant-observation, audio recording, feedback focus group, and open-ended individual interviews are described with justification.

## **Sampling and Participants Recruitment Procedures**

Sampling participants is a key issue in research, especially in determining numerical data and inferences to test different hypotheses in quantitative research design. However, it is of greater importance to establish a similar qualitative sampling procedure to obtain robust and in-depth analyses of the representative population. Unfortunately, the process of establishing such robust sampling was not an easy task for this dissertation project. My initial fieldwork plan was to investigate Kuwaiti financial staff members working in Kuwaiti-based financial companies and international financial companies in Kuwait City. I received written permission from the Arizona State Institutional Review Board (IRB), and planned to try out this desired population (See Appendix A). Therefore, I traveled to Kuwait City in early summer 2010 looking for interested companies. I was hopeless again, but I was persistent and kept looking. I contacted more than 50 companies and ended up visiting half of that list, as several companies were suffering from severe financial losses. I also modified my population: I chose to only focus on Kuwaitis and non-Kuwaitis working in Kuwaiti financial companies, and compare them with American financial staff members in the Phoenix metropolitan area. By then, I received a new IRB approval to conduct a comparison study between the two field sites (See Appendix B). Expectedly, I experienced the same sampling dilemma in Phoenix. Most American companies were not interested to in revealing personal information or to being audio recorded, perhaps especially by a female or someone from an Arab country without some kind of formal academic and professional affiliation.

Consequently, recruiting participants was challenging. Because of the hierarchal system in Arab cultures—including that of Kuwait—recruiting participants for research purposes is difficult and time consuming. There was a need to contact many social networks to find the names of accessible Kuwaiti companies. As an insider, I found social networking to be more effective than using flyers and sending e-mails when recruiting and convincing CEOs of the research mission. I looked for the following criteria: (a) a medium-sized company consisting of 80 to 150 employees; (b) a company that conducts financial activities and projects; and, (c) a company that usually trains future employees and welcomes research opportunities. I used the same sampling guidelines to find the second research field in the Phoenix area.

In Kuwait City, I succeeded in finding only one well-known Kuwaiti financial company that showed interest in becoming part of my research, Innovative Kuwait Co. (pseudonym). After receiving access to the company, I was allowed to observe and attend only the business ethics and laws department (pseudonym) meetings with a possibility of attending other departmental meetings upon the ethics/laws' manager approval. Not all the department members were originally from Kuwait.

Similar to what I encountered in sampling Kuwaiti participants, I had to modify my Phoenix population as well in order to succeed in finding a financial company. I decided to search for financial and trade organizations with nonprofit focuses. This sampling modification required me to prepare a recruitment letter explaining the research goals, procedures, and confidentiality matters (see

Appendix C). The letter was inappropriate to distribute at Innovative Kuwait Co. due to the hierarchal system, in which individuals favored social networking. Following this modification, I searched for companies for almost two months and succeeded in finding a Phoenix-based union bank through an acquaintance but because of privacy issues I was not allowed to attend its business meetings. Afterward, the bank board of directors referred me to the vice president of a nonprofit trade organization in the Phoenix area, which I called Global Phoenix (pseudonym). I was kindly welcomed and accommodated by staff members, especially the vice president, who made her best efforts to relate the research goals and their significance to every staff member.

### **Research Methodologies**

Because this dissertation project fosters a descriptive and in-depth inquiry of the event of business meetings in organizations, I aimed to collect data from different resources using the strategy of “triangulation.” In the next section, I put forward an explanation of my justification for selecting and using triangulation as a key strategy in the data-collection process. Further, I discuss the four qualitative methodologies I used to obtain meetings data: (1) ethnography of speaking/communication (Hymes, 1972); (2) participant-observation, (3) audio recording the meetings, and (4) a feedback focus group.

### **Triangulation**

Triangulation is simply the use of more than one method or approach in collecting research data. The term has received debate in the qualitative and quantitative inquiry literature; nevertheless, many researchers agree that

triangulation is a strategy required for evaluating and increasing the validity of research findings (Campbell & Fiske, 1959; Denzin, 1978). Also, sometimes researchers use more than one theory, investigator, and analysis to validate their research findings (Denzin, 1978). Olsen (2004) has also explained that using a mixture of data resources offers researchers an in-depth understanding of the social phenomenon under investigation. With this in mind, I believe it is essential to try out more than one method to understand meetings from varied perspectives, or as Mathison (1988) described it, “Good research practice obligates the researcher to triangulate” (p. 13).

**1) Ethnography of Speaking/Communication.** Besides adopting ethnography from cultural and linguistic anthropology, I also used Hymes (1972)’s communication framework of ethnography, “ethnography of speaking or communication.” Hymes’s framework emphasized two goals: 1) a thick description of human communication in cultural contexts, and 2) establishing concepts and theories that improve the understanding of human communication. Saville-Troike (1989) explained, “The ethnography of communication takes language first and foremost as a socially situated cultural form, while recognizing the necessity to analyze the code itself and the cognitive process of its speakers and hearers” (p. 3). Therefore, the focus of research in Hymes’s framework included the language areas of patterns and functions of communication, the nature of the speech community, means of communication, communicative competence, language and social organization, and linguistic universals and inequalities. Most importantly, Hymes (1972, 1947, 1977) focused on communicative events in

culture, offering sociolinguistics and ethnographers a well-put model of analyzing speech; he called it the “SPEAKING” model (more explanation in the data analysis chapter).

**2) Participant-Observation.** In ideal ethnography, researchers collect data by observing participants as well as participating in the overall cultural system (Stewart, 1998). Because I chose a private business field site of business meetings consisting of confidential details, I had to only observe my participants without disturbing the meeting’s discussion. “Observation without participation is seldom adequate, but there are times when it is appropriate data collection procedure” (Saville-Troike, 1989, p. 121). Saville-Troike elaborated on the context of business meetings: “In observing group dynamics in a meeting or other gathering, it is generally better for a marginally accepted observer to refrain from taking active part in the proceedings” (1989, p. 121). In my observation process, I, too, used field notes as a strategy to report the meeting’s verbal and nonverbal dynamics, in addition to offering participants the required consent letter that stated their research rights and their choice of participating in the observation/audio recording process (see Appendix D).

**3) Audio Recording.** The methodology of audio recording is also critical in the data collection process, particularly in transferring fieldwork events and practices into words. Meyer and Schareika (2009) described audio recording communicative practices as the process of “listening carefully to what the locals speak among themselves and to how they perform speech acts, how they attribute meaning, how they shape, comment on, and explain events and phenomena in the

world” (p. 3). In recording the meetings in Kuwait and Phoenix, I used the Philips Digital Conference Recording System to audio record the business meetings at both field sites, in addition to keeping another back-up digital recorder.

**4) Feedback Focus Group.** To increase the validity of the findings, I decided to use the qualitative methodology of the focus group, aiming to obtain participants’ feedback on the overall research results and interpretations for verification and future insights. Forming focus groups is common in many social studies. A focus group is a social dialogue of gathering knowledge, perceptions, beliefs, opinions, and attitudes of people concerning such ideas, products, concepts, and services. Focus groups are usually comprised of six to twelve members who are guided by a trained moderator, or the researcher him/herself. The discussion includes a defined topic, several questions asked by the moderator, and a conclusion. Social scientists pursue forming focus groups for their significant part in stimulating group self-disclosure and conversational environment for all participants (Edmunds, 1999; Morgan, 1996). Therefore, I, too, used a focus group to encourage in-depth dialogue and opinion sharing among my participants. Figure 1 shows how I established the focus group structure and implemented it at both field sites.

Figure 1.

*Focus Group Structure*

<p><b>Focus group structure:</b> (1 hour) use of PowerPoint for highlighting charts and the dialogue’s question</p>
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**Goals:** 1) How I performed the data analysis, and 2) What do you think about it

**Procedures:**

**Step 1**→ the moderator will open the dialogue by presenting two topics:

a) coding and utterances charts of language and business focus, b) interpretation of it

**Step 2**→ the moderator will ask one major question – “What do you think of the findings?,” or “How do you see these interpretations”

**Step 3**→ to facilitate understanding, the moderator will ask the sub-questions – “Surprising? Interesting? Or maybe aligned findings with your business and interpretation?”

**Step 4**→ the moderator will open the floor for shared discussion

**Step 5**→ the moderator will end the discussion with a summary of what she found in the American business meetings for additional discussion.

**Research Limitations**

During fieldwork, I was mindful of the many challenges and limitations confronted, and for that reason I undertook the necessary procedures to reduce their effect. This dissertation project has limitations in the following areas:

1. Sampling:

Although I was able to find two field sites for this study, I experienced difficulty in deciding whether research site one is comparable with research site two. The sampling process in both field sites may not represent an

ideal perspective of the desired populations, but overall it offers a blueprint for comparing two different populations.

2. Accessibility:

Likewise, due to the many challenges encountered while searching for accessible financial companies, the selected field sites may not offer a complete picture of the business discourse in both organizations. This limitation became problematic in terms of collecting an adequate number of business meetings. For that reason, I decided to categorize this research as a “case study,” focusing on five business meetings in both field sites.

3. Naming terms:

Because of the above issues, I also had to modify my focus for this study by replacing the term “companies” with “organizations” in order to succeed in comparing the two field sites. However, I still referred to the Kuwaiti field site as “company.”

4. Transcription accuracy and difficulty:

In this research study I also struggled to transcribe some of the Kuwaiti meeting data. In fact, it was very difficult for me to hear the Indian English accent on an audio tape, and for that reason I searched for private Indian transcribers who were more familiar with the different south Asian English accents to ensure transcription accuracy. Additionally, the use of high-quality conference recording system might not necessarily guarantee capturing the entire spoken discussion because of background noise and overlap speech, as I noticed in both audio recording the American and

Kuwaiti meetings. I also carried a backup audio recorder to capture some of the absent utterances and interview participants.

### **Credibility and Rigor of Findings**

Without thorough evaluation of research instruments, methods, and rigor of findings, research by itself is considered meaningless and unsatisfactory in most academic disciplines. Therefore, both qualitative and quantitative researchers have attempted to ensure the attainment of rigor in research. Reliability and validity are the two fundamental evaluation processes of research rigor, particularly used by quantitative researchers (Creswell, 2003; Golafshani, 2003). For quantitative researchers, reliability is the process of knowing if a particular test or procedure will in fact produce the same findings in different circumstances without changing the original test or procedure. By ensuring reliability, quantitative researchers aspire to replicate the same methodologies and instruments to produce consistency of findings over time, and a complete representation of the same population but in different settings (Joppe, 2000). Additionally, quantitative researchers have accentuated the importance of achieving validity in research. Validity is the process of determining if the research is truly measuring what it is intended to measure and how truthful the research findings are (Roberts & Priest, 2006).

Although reliability and validity are common evaluative processes utilized within quantitative studies, the processes are labeled and applied differently in qualitative studies. In fact, qualitative researchers have established an array of evaluative procedures for ensuring validity and reliability from a naturalistic and descriptive perspective. In qualitative research, validity and reliability are often

called “credibility” and “trustworthiness” of research; researchers aspire to achieve credible, plausible, and trustworthy findings. In evaluating the rigor of findings in this dissertation, I adopted Guba’s 1981 model that consisted of four criteria for ensuring the trustworthiness of qualitative and quantitative research: (a) truth value, (b) applicability, (c) consistency, and (d) neutrality. Under each criterion, Guba addressed several qualitative approaches for assessing the research design and rigor of findings. In truth value, the researcher has to establish confidence and truth within his or her research design, methods, and findings. Lincoln and Guba (1985) explained that the attainment of truth in qualitative research derives from human experiences and it is usually participant-oriented. They also described truth value as credibility of research, which is termed internal validity in quantitative research.

To warrant truth in research, Guba (1981) suggested the following strategies: prolonged fieldwork experience, time sampling, field journal (reflexivity), triangulation, member checking, peer examination, interviews, establishment of researcher authority, structural coherence, and referential adequacy (Johnson, 1997; Krefting, 1991). For qualitative researchers, including myself, the process of credibility involves establishing trustworthiness in demonstrating a linkage between my study and real world contexts. In other words, by ensuring credibility or internal validity, I want to persuade my readers that I performed the required evaluative procedures to reach as close to reality as possible. Hence, I conducted eight months of ethnography in both field sites, establishing the unbiased stance of a researcher, in addition to using triangulation,

which included interviewing participants and member checking where I conducted focus groups at the end of fieldwork to check my interpretation and to allow participants the opportunity to evaluate the findings and to add insights to final interpretations. I also kept a field journal and I provided coherence where I explained consistencies between the meetings I observed and the coding interpretations.

The second criterion is applicability. Guba (1981) also called it transferability. Applicability is the process of transferring or generalizing qualitative findings to other settings. Here, qualitative researchers are required to perform the following strategies to achieve applicable findings: (1) selecting a nominated sample, (2) comparing the sample to demographic data, (3) time sampling, and (4) providing dense description (Krefting, 1991). Guba (1981) and Lincoln and Guba (1985) have claimed that the approach of applicability aims to describe social phenomena without focusing on generalizing facts in addition to presenting adequate details on data to facilitate comparison in research. Similarly, Merriam and Simpson (1995) have argued that for qualitative researchers generalizing or transferring findings to other contexts is not the ultimate goal of qualitative research, rather qualitative researchers encourage readers to determine the applicability and generalizability of research findings to their own contexts. In this dissertation, I too, do not intend to generalize the findings for the many challenges I encountered in locating a representative sample for comparison. I only aim to show applicable comparison between two business environments, which will potentially enable me to conduct an ideal study of financial companies.

To achieve applicability, I also used thick fieldwork description providing details of the field sites, participants, methods used, and findings. With this thick description, I wanted my readers, who come from a variety of backgrounds to materialize the whole process of fieldwork and rigor of findings, and later pass their own judgment about both field sites.

Consistency is the third criterion of Guba's model (1981). Consistency is the process of guaranteeing that consistency in which the researcher would obtain the same findings when replicating his or her research with the same research design and methods. Reliability is the equivalent process in quantitative research. Guba (1981) also called it dependability. He explained that most qualitative researchers have to account for the ever-changing context within the research context. Guba called it variability, which derives from different research resources. For example, one variable is participant fatigue within research, and another is the changes occurring in participants' daily routines. Another can also be developing familiarity with the researcher and those researched. Guba (1981) suggested that the range of experiences in research is also a source of variability, and that qualitative researchers must look for unusual and nonconventional experiences as well, as part of finding variability in qualitative research. Assessing dependability comes from the strategies of dense description of research methods, stepwise replication, triangulation, peer examination, and code-recode procedure. In this dissertation, I deliberately provided thick description on methodologies and approaches taken to collect data. I also reviewed the transcribed meetings for consistency, and coded and recoded several times to establish themes and patterns

of social meanings in meetings. In addition, I used triangulation of data sources (i.e. observation, ethnography, observation, and audio recording) and triangulation of methods (i.e. combining different social science approaches).

The last criterion is neutrality, or confirmability, as Guba (1981) termed it. Perhaps this is the most perplexing criterion to fully achieve, especially in ethnographic research. Each researcher comes with his or her own different biases and perspectives, and therefore attaining freedom from bias and maintaining neutrality is not an easy process. Guba (1981) highlighted sustaining objectivity within research. He argued that there must be an appropriate distance between the researcher and his or her participants to decrease biases and achieve neutrality. By maintaining this distance, the researcher becomes objective in his or her observation and findings, portraying him/herself as a distant authoritative scholar with minimum influence on research design and participants. Lincoln and Guba (1985) have also focused on the neutrality of data, arguing for confirming the data collected by other qualitative researchers in addition to conducting a confirmability audit. Inside the audit, they recommended presenting detailed descriptions of raw data, products of data analysis, products of the synthesis of data, collected field notes and notes about intentions, and information about how methodologies were implemented. Lincoln and Guba (1985) have also suggested triangulation and reflexivity to ensure neutrality.

In fact, in the coming chapters I ensured presenting a thick description of data analysis and findings as well as using triangulation. Most crucially, I established my ethnography in a reflexive manner, maintaining a distant and

objective position among business staff members whom I hardly met in my native hometown. I had little prior knowledge of the business world and finance; that is why I always played the role of an objective observer who only wanted to learn and ask for information, not judge or interrupt the flow of business communication. Thus, I always kept my field journal next to me so that I could start reflecting on everything I observed and audio recorded; I even tried to sketch my participants' seating arrangements and the way they used hand movements during the meeting discussions. By embracing the role of neutral learner in fieldwork, I was mindful of my participants' behaviors and needs and became an effective observer of a fresh and unfamiliar social environment.

### **Research Ethics**

Participants in this research study were seen as social participants, taking action and making choices to be part of the research or to refuse to be part of the research. This is in accordance with the IRB federal regulation on the protection of human subjects (see Appendix E). In protecting my participants' personal and professional identity, I ensured compliance by:

1. Offering the informed consent for observation and personal interviews, informing participants that they had the right to be part of the research or withdraw at any time.
2. Attending to participants' needs and feedback at all times.
3. Ensuring participants that the audio recording was accessible only by the researcher and principal investigator, in addition to guaranteeing that their names and company names would remain



anonymous and that pseudonyms would be used throughout the research.

## CHAPTER 4.

### DATA ANALYSIS AND INTERPRETATION

Establishing a communicative sociolinguistic account of the way staff members determine their language choices and behaviors of agency, power, and discourse and social identities when communicating in organizational business meetings as well as attempting to initiate a sociolinguistic theoretical perspective of the social structure of organizational business meetings (Schwartzman, 1986) is the potential goal of this dissertation. In the previous chapter I thoroughly described the fieldwork, research design, and methodology I used in gathering meetings data both in Kuwait City and Phoenix. I also outlined justifications with regard to population sampling, choosing a qualitative case study ethnographic research design, and managing data collection procedures and ethical considerations.

Hence, this chapter complements the data methods I used and manifests the interrelationship between raw and processed data in research, particularly in transferring abstract raw data into meaningful concrete codes and categories, and generating a reflection of, a social entity. In this chapter I report on four major stages in analyzing the Kuwaiti and American business meetings: (1) an introduction to data analysis in qualitative research, (2) the multidisciplinary approaches I used in examining meetings, (3) the process of coding, categorization, and theming the data along with framing the potential social systems and relationships found in the meetings, and (4) supplementary language behaviors frequency counts. Last, I conclude by explaining the data analysis

findings. To begin the data analysis process, I recall the three research questions I proposed in this dissertation:

1. How does the agency of staff members reflect membership in the corporate culture of an organization as a whole?
2. How is power used in relation to agency in organizational business meetings?
3. How are discourse and social identities of staff members enacted during organizational business meetings?

### **Conducting Data Analysis in Qualitative Research**

According to Marshall and Rossman (1999), data analysis is the systematic process of producing order, structure, and meaningful units within the collected data. As a consequence, the researcher is able to interpret and synthesize the living experiences of people and cultural systems under study (Marshall & Rossman, 1999). For qualitative researchers, the aim of analysis is to search for the many constitutive meanings, patterns, and relationships from the data without relying on the predetermined codes or hypotheses used in quantitative research. This is “grounded theory,” developed by the sociologists Glaser and Strauss (1976) in which qualitative researchers perform in-depth exploration of the data to establish meaningful codes, categories, and concepts. By doing so, researchers use inductive reasoning in determining and drawing codes, inferences, and conclusions based on observations and from the collected data which facilitate them to develop a theory and patterns of meanings (Feeney & Heit, 2007; Patton, 1980).

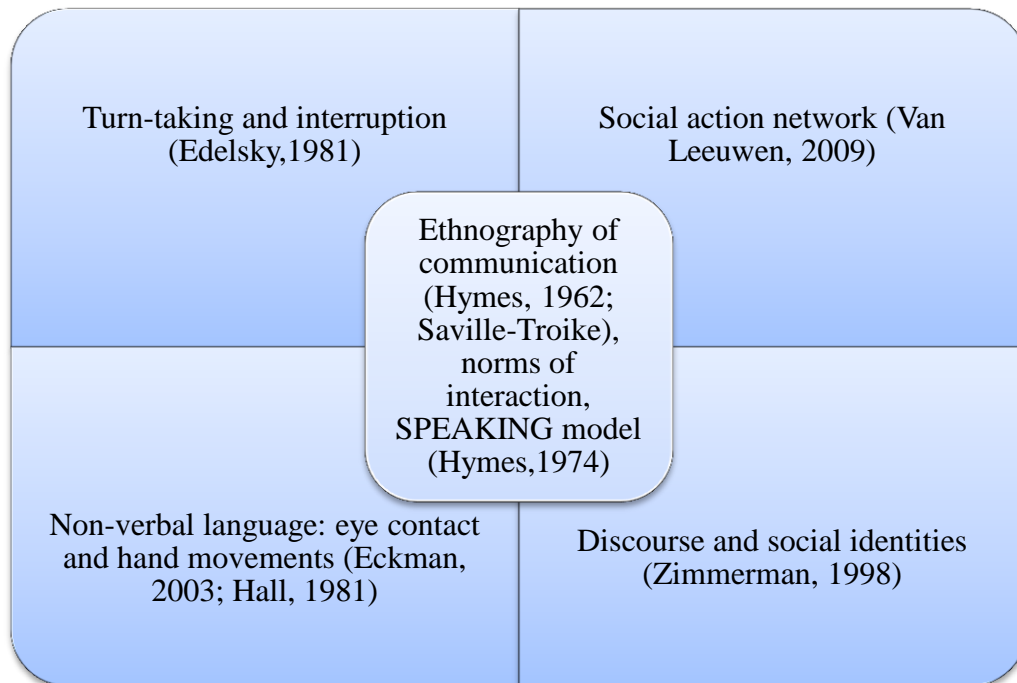
## **The Multidisciplinary Approaches Used to Analyze Meetings**

The above qualitative data analysis theoretical techniques illustrate that conducting qualitative examination is a messy and time-consuming process, requiring dense and repeated reading of the collected data. As I alluded to in the previous chapter, compiling meeting data also took a long time during which I had to espouse modified data collection procedures as well as embrace new roles and identities. At the time, I decided to obtain objective and rigorous analysis by collecting and using data from different sources, which also included the pursuit of an appropriate approach of analysis.

Because this dissertation aims to understand business meetings from a multidisciplinary social perspective, I therefore implemented the methodological approaches of ethnography of communication (Hymes, 1962), conversation analysis: turn taking and interruption (Edelsky, 1980; Sidnell, 2010), identity (Zimmerman, 1998), social action network (Van Leeuwen, 2009), and nonverbal language (Hall, 1981; Eckman, 2003) to put forward an in-depth descriptive analysis of the collected meetings. I also used the “Online Guide for the Ethnographic Study of Speech Use” (Sherzer & Darnell, 1986) to examine the meetings discourse in details (more explanation in chapter five). In this study, I paid particular attention on relating all the approaches to Hymes’s (1962) ethnography of communication approach and the SPEAKING model for its comprehensive description of people, events, behaviors, attitudes, practices, emotions, and cultural systems. Figure 2 demonstrates all the approaches used (see description of each approach in Appendix F).

Figure 2.

*Multidisciplinary Social Framework Used to Examine Meetings Data*



**The Process of Coding, Categorization, and Theming the Data**

“Any researcher who wishes to become proficient at doing qualitative analysis must learn to code well and easily. The excellence of the research rests in large part on the excellence of the coding” (Strauss, 1987, p. 27). My quest to produce the most appropriate and efficient coding system was both time-consuming and arduous. First, I searched for qualitative coding manual books, aiming to find a systematic and easy-to-use manual guide. Unfortunately, I was unaware of the different coding types and methods; I struggled to decide which one was more germane to understanding the thick meetings data. For the Kuwaiti verbatim transcriptions, I had 157 pages, which include approximately 49,124 word tokens, whereas for the American data, I had 126 pages with a total of 38,440

word tokens. Compiling this large database of meetings discourse was problematic, too. My second challenge was to exercise caution to ensure the coding system I used would be appropriate and valid for a huge corpus of data.

A third difficulty was to choose manual coding or electronic coding. As a novice in coding data, my goal was to learn the process, as Strauss (1987) suggested, and most importantly, to become proficient. Being old-fashioned and somewhat resistant to technology, I was afraid to try out the various coding programs, knowing that new challenges can easily turn into frustration and I might be overwhelmed with the consequences. I was already frustrated just thinking about it; I feared that using computers would diminish the authenticity of presenting how Kuwaiti and American business people construct their business speech community.

To acquire the solutions to the challenges I encountered while exploring the process of coding, I used professor Saldaña's (2009) coding manual for conducting qualitative coding applications for its elaborate explanation of the functions of codes and the different coding methodologies and recommended applications. In the manual, Saldaña described each coding method along an example of how the coding is conducted manually. He also discussed applications and recommended ways to further examine the qualitative data in each method. By reviewing the comprehensive materials Saldaña (2009) offered, I was able to make sense of the meaning of coding and categorizing data and how coding functions as a coherent qualitative tool and a system of critical analysis. Additionally, Saldaña's manual directed me to examine the dense verbatim transcriptions with caution and

flexibility, using a variety of coding methods when my coding process yielded adequate and thick descriptions of the collected meetings data. Figure 3 explains the definition of coding and coding process stages.

Figure 3.

### *The Coding Process*

#### **Definitions**

*Code:* A code in qualitative inquiry is most often a word or short phrase that symbolically assigns a summative, salient, essence-capturing, and/or evocative attribute for a portion of language-based or visual data. The data can consist of interview transcripts, participant observation field notes, journals, documents, literature, artifacts, photographs, video, websites, e-mail correspondence, and so on.

*Theme:* A theme is an outcome of coding, categorization, and analytic reflection (e.g., a pattern, trend, or concept).

#### **Coding process Stages:**

(a) First Cycle Coding process – can range in magnitude from a single word to a full sentence to an entire page of text to a stream of moving images.

(b) Second Cycle Coding process – the portions coded can be exact same units, longer passages of text, and even a reconfiguration of the codes themselves developed.

#### **Codifying and categorizing:**

To codify is to arrange things in a systematic order, to make something part of a

system or classification, to categorize. When codes are applied and reapplied to qualitative data, you are codifying – a process that permits data to be “segregated, grouped, regrouped and relinked in order to consolidate meaning and explanation.”

**Recoding and recategorizing in First and Second Cycle Methods:**

To strive for more refined codes and categories.

**From codes and categories to theory:**

When major categories are compared with each other and consolidated in various ways, you begin to transcend the “reality” of your data and progress toward the thematic, conceptual, and theoretical.

*Figure 3.* The coding methods used for analyzing the meetings. Adapted from The Coding Manual for Qualitative Researchers, by J. Saldaña, 2009, p. 3-10. Copyright 2009 by Sage Publications.

**Precoding Stage**

As I carefully read and reviewed the dense verbatim transcriptions, it was clear to me that not only I did I need to focus on my participants’ language behaviors and attitudes, but also on how they generate their overall business community of practice. I came to comprehend that manual coding is both difficult and exhausting, especially for a huge database like mine. I had to immerse myself in understanding the data both orally and in the printed form in which I coded the meetings data by listening to all the recorded meetings and coding words and phrases at the same time. This inevitably made me feel the lively flow of participants’ interaction, and ultimately affected my choice of (1) what to look for



in each meeting, (2) what could be coded, and (3) what were the appropriate and valid coding methods to use to (4) conduct the coding and analysis in a proficient manner. I used the following transcription conventions (Wray & Bloomer, 2006) to transcribe the collected meeting data in Kuwait and Phoenix:

Speaker's name	in the left-hand margin
=	there is no break in the first speaker's utterance
[[	if two people start at the same time
[	where one speaker begins when someone else is already speaking
[...]	when one speaker finishes while the other continues speaking
(.)	pauses of measurable length
((silence))	indicates silence in the conversation
((nods))	when a speaker nods without saying anything
((smiles))	when a speaker smiles
((laughs))	when a speaker laughs
((coughs))	when a speaker coughs
((sneezes))	when a speaker sneezes
CAPITAL LETTERS	to show loudness and a degree sign
(...)	indicate external events that provokes a reaction
-	inserted at the word ends to show that a word has been started but not finished

The following sections described the way I started my coding and categorization

process.

### **Stage 1: What I Looked For**

The process of looking for meaning in the meetings' verbatim transcriptions was designed according to the research questions, which focused on three major linguistic analytical units: agency, power, and discourse and social identities. Prior to starting the coding process, I carefully examined my research questions and looked for possible units and realities to find in the meetings data. In the first question "How does the agency of staff members reflect membership in the corporate culture of an organization as a whole?," I identified six units that might be explored in the meetings: agency of staff members, staff members as individuals, reflection of membership, corporate culture of the organization, the organization's identity, and the holism of staff members and organization. Likewise, in the second question "How is power used in relation to agency in organizational business meetings?," I paid attention to six linguistic behaviors: power of staff members, the use of power, the connection between agency and power, the organizational setting of meetings, and finally the meetings of a business nature.

Questions three and four included different linguistic units. In question three, "How are discourse and social identities of staff members enacted during organizational business meetings?," I identified two new units: the discourse and social identities of staff members. I also considered the action unit of enacting business identities in organizational business meetings. As for question four, "What linguistic similarities and differences exist between the two organizations in

the enactment of the issues experienced in questions 1-3?," here I identified the unit of comparison between two different business language discourses in two different cultures. In other words, question four is where I complete my sociolinguistic understanding of what makes business organizations similar or different.

## **Stage 2: What I Coded**

Reflecting on the research questions and identifying possible linguistic units to code was not sufficient to begin the coding process. Therefore, I had to look for a balance between my intuitive novice contemplation and scientific inquiry. I adopted two set of units of meanings: Lewins, Taylor and Gibbs (2005) units to code decisions, and the units of social organizations developed by Lofland, Snow, Anderson, and Lofland (2006). Lewins, Taylor, and Gibbs (2005) suggested coding behaviors, events, strategies and tactics, states of conditions, meanings and interpretations of actions, participation, conditions and constraints, consequences, settings of different contexts, and the researcher reflexive role in generating the data.

The latter model is rather elaborate. Lofland et al. (2006) emphasized the notion of social organization by claiming that social life develops due to four components, "the intersection of one or more *actors* [participants] engaging in one or more *activities* (behaviors) at a particular *time* in a specific *place*" (p. 121). They proposed the units of: cultural practices, episodes of activities, interaction encounters, roles and social role types, personal and social relationships, groups and cliques, organizations, settlements and habitats, and subcultures and lifestyles.

Lofland et al. (2006) have also outlined cognitive and emotional meanings in addition to hierarchal and inequalities found in social organizations.

### **Stage 3: How I Coded (Coding Methodologies Used)**

The in-depth knowledge I obtained from reading Saldaña’s coding manual and all the deliberate actions taken in stages 1 and 2 resulted in the concrete decision to select a number of coding methods that were both appropriate and valid to analyze the Kuwaiti and American verbatim meeting transcripts. Figure 4 shows the coding methods I implemented in the First and Second Cycle Coding stages. The figure also refers to the theming of data stage.

Figure 4.

#### *The Coding Methods Used for Analyzing the Meetings*

<p><b>First Cycle Coding Methods</b></p> <p><b>Elemental Coding Methods:</b></p> <ol style="list-style-type: none"><li>1) Descriptive Coding: also called “Topic Coding” Summarizes in a word or short phrase—most often as a noun—the topic of a passage of qualitative data. It is appropriate for all qualitative studies, but particularly for beginning qualitative researchers learning how to code data, ethnographies, and studies with a wide variety of data forms. (e.g., ECONOMIC-HOMES)</li><li>2) In Vivo Coding: also called “literal Coding” and “Verbatim Coding.” In Vivo’s root meaning is “in which is alive,” and as a code refers to a word or short phrase from the actual language found in the qualitative data record. It is appropriate for all qualitative studies, particularly for beginning qualitative researchers learning how to code data and studies that prioritize and honor the participant’s voice. In Vivo Coding is one of the methods to employ during grounded theory’s Initial Coding but can be used with several other coding methods. (e.g., HARD TO EXPLAIN, I DON’T KNOW, HAVE PEOPLE LIKE ME)</li><li>3) Process Coding: uses gerunds (“-ing” words) exclusively to connate action in the data. It is appropriate for all qualitative studies, but particularly for those that search for ongoing action/interaction/emotions taken in response to situations, or</li></ol>
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problems, often with the purpose of reaching a goal or handling a problem. Also appropriate to conduct during grounded theory. (e.g., MANAGING BEHAVIOR, FINDING OUT WHO YOUR REAL FRIENDS ARE)

- 4) Initial Coding: also called “Open Coding.” Used for breaking down qualitative data into discrete parts, closely examining them, and comparing them for similarities and differences. In grounded theory studies, the goal of Initial Coding is to “remain open to all possible theoretical directions indicated by your readings of the data” (Charmaz, 2006, p. 46). It is appropriate for all qualitative studies, but particularly beginning qualitative researchers. In Initial Coding, the researcher searches for processes—participant actions that have antecedents, causes, consequences, and a sense of temporality in addition to a search for the properties and dimensions of categories. (e.g., CRITERIA FOR FRIENDSHIP: WHO THEY ARE)

#### **Affective Coding Methods:**

- 1) Emotion Coding: Labels the emotions recalled and/or experienced by the participants or inferred by the researcher about the participants. It is appropriate for all qualitative studies, but particularly for those that explore intrapersonal and interpersonal participant experiences and actions. (e.g., EXCITING, REVENGEFUL, LONELY)
- 2) Values Coding: the application of codes onto qualitative data that reflect a participant’s values, attitudes, and beliefs representing his or her perspectives or worldview. It is appropriate for all qualitative studies, but particularly for those that explore cultural values and intrapersonal and interpersonal participant experiences and actions in case studies. (e.g., V: FAME, B: FUTURE OPTIONS, A: FUTURE IS SCARY)

#### **Second Cycle Coding Methods**

- 1) Pattern Coding: pattern codes “are explanatory or inferential codes, ones that identify an emergent theme, configuration, or explanation. [*sic*] a way of grouping those summaries into a smaller number of sets, themes, or constructs” (Miles & Huberman, 1994, p. 69). It is appropriate for developing major themes; searching for rules, causes, and explanation in the data; examining social networks and patterns of human relationships; and forming theoretical constructs and processes. (e.g., SHE DOESN’T COMMUNICATE, YOU NEVER TOLD ME, MASS-COMMUNICATION= ONE PATTERN)  
Theoretical Coding: also referred to as “Selective Coding.”

Functions like an umbrella that covers and accounts for all other codes and categories formulated thus far in grounded theory analysis. In Theoretical Coding, all categories and subcategories become systematically linked with the central/core category, the one “that appears to have the greatest explanatory relevance” for the phenomenon (Corbin & Strauss, 2008, p. 104)

### **Themeing the Data**

Themes can consist of such ideas as descriptions of behavior within a culture, explanation for why something happens, iconic statements, and morals from participant stories. Thematic analysis or the search for themes in the data is a strategic choice as part of the research design that includes the primary questions, goals, conceptual framework, and literature review. (e.g., BELONGING MEANS A SPECIFIED PLACE, BELONGING IS WHERE THERE ARE GOOD MEMORIES, YOU CAN BELONG SOMEWHERE WITHOUT ACTUALLY BEING THERE)

*Figure 4.* The coding methods used for analyzing the meetings. Adapted from *The Coding Manual for Qualitative Researchers*, by J. Saldaña, 2009, p. 70-167. Copyright 2009 by Sage Publications.

### **Stage 4: Actual Coding, Categorization, and Theming**

In this study, data were analyzed using the coding methods outlined in Figure 3, whereby word, sentence, and paragraph segments of the transcribed business meetings were examined thoroughly to choose the different codes, categories, and themes that would exhibit the social meanings and behaviors produced by participants. Also, data were examined with caution to explore and describe the social organizational role of language in establishing business meetings discourse. I considered the following guiding questions to ensure the rigor in coding and accurate categorization:

- (A) What are people doing? What are they trying to accomplish?,
- (b) How, exactly, do they do this? What specific means and/or

strategies do they use?, (c) How do members talk about, characterize, and understand what is going on?, (d) What assumptions are they making?, (e) What do I see going on here? What did I learn from these notes?, and (f) Why did I include them? (Emerson, Fretz, & Shaw, 1995, p. 146).

The guidance of these questions provided more objective analysis and motivated the search for appropriate coding and categories. In fact, by reflecting on these questions, I came to realize how difficult it is to examine and code language segments that were not in my area of expertise. This is why I applied specific steps to resolve this issue and to perform a proficient coding process. Those steps were:

- 1) I used the same coding methods in both the Kuwaiti and American data.
- 2) I adopted the same coding decisions in both the Kuwaiti and American data.
- 3) Because of the large number of business acronyms of financial institutions and events, I decided not to code any of the acronyms to protect participants' identities, and, most importantly, the identities of business organizations under study. To solve this shortcoming, I only coded the meaning unit as BUSINESS ACRONYM. Also, I did not code any exclusive business plan, activity, or deal to the organization for the same reason.
- 4) Similarly, when coding the actual amount of revenue obtained and

expenses paid, I did not reveal any financial information, and I coded numbers as REVENUE or EXPENSES.

- 5) I coded short and long segments of words and phrases to show the rigor of participants' social meanings.
- 6) Each meaning unit is coded by words, not numbers.
- 7) Although I did not create an actual audit trail of my data, I managed to track participants and actions by the numbered lines in verbatim transcriptions in addition to my own colored highlighted notes.

### **Coding the Kuwaiti and American Meetings**

Here, I will draw on the careful coding processes I implemented in the Kuwaiti and American business meetings. I will begin first with the Kuwaiti verbatim transcripts and then discuss the American ones. In the Kuwaiti section, I describe each meeting separately, showing how I coded and categorized the data by referring to one example from the verbatim transcript. Following that, I present the American meetings data by outlining the overall themes in the meetings. I conclude by summarizing the findings on the potential social systems and relationships found in both field site meetings.

**Coding Meeting 1.** In this meeting, Innovative Kuwait Co.'s business ethics/law department staff members (Zeeshan, Kamyra, Deshna, and Muneerah) met together to discuss different compliance issues with the vice president of the business management department, Kumar. The verbatim transcript for this meeting includes 22 pages with a total of 7088 word tokens. Overall, coding units of meanings and behaviors in this one-hour meeting was not very difficult when



participants had the opportunity to discuss what they needed to discuss. Taking an inductive grounded theory perspective, I read the transcript repeatedly, and listened to everyone’s turn, which allowed me to construct and reconstruct codes and, then, to form categories and subcategories in the Second Coding Cycle. When coding, first, I looked at each line in the transcript and examined it carefully according to the coding methods I mentioned earlier, as illustrated in this example:

Line	Speaker	
21	Zeeshan	So that’s getting modified now, all right (0.1), it
22		is just a difference between this pocket and this
23		pocket but the difference will be in the
24		BUSINESS ACRONYM when are some
26		securities didn’t go directly to the funds
27		and some securities go direct to equity. So, it
28		doesn’t treat the (BUSINESS ACRONYM).
29		So investors are supposed to be rational
30		and supposed to look at both, but we will
31		typically look at the funds then which is
32		why it’s important to get this piece right.
33		So, there is one update probably long meeting
34		in the morning, also everything related to this
35		now the external auditor is coming.

This particular example includes different participants, actions, and behaviors. For example, in line 21, Zeeshan referred to an in-progress “modified”

action, and later he explained that this modification is going through several stages and actions, such as “this pocket” and “this pocket.” Also, “security” was another issue involved in the modification action, in which external parties, “investors,” were involved. Zeeshan also described the participation and role of investors and how they were supposed to act upon this modification action. Thus, he revealed an affective reaction regarding why it was important to choose reliable investors in line 29 and 30. He also reminded everybody of a coming meeting and a visit by an external party, the “auditor.” By breaking this passage into meaning units, and understanding what happened and who the involved participants were, I established a preliminary set of codes for the First Cycle Coding process, which are indicated in Table 7.

Table 7

*First Cycle Coding in Meeting 1, Kuwait City*

Examples of preliminary Codes	Coding method Used	Category of meaning
BUSINESS ACRONYM	Descriptive	Organizations and participation
GETTING MODIFIED	In Vivo, Process, and Initial	Cultural practice, role, and action/behavior
SECURITIES DIDN'T GET THROUGH	Descriptive, Process, and Initial	Episodes, states, and condition
DIRECTLY INTO	Descriptive and Initial	States and condition
GO DIRECT TO EQUITY	Descriptive and Initial	Episodes, states, and condition
BETWEEN THIS POCKET AND THIS POCKET	Descriptive and Initial	States and relationships

INVESTORS TO BE RATIONAL AND LOOK AT	Descriptive, Initial, and Emotional	Encounters, participation, and emotions
WHY IT'S IMPORTANT	In Vivo, Initial, Values, and Emotional	Emotions and meanings
ONE UPDATE	Descriptive	Cultural practice
LONG MEETING IN MORNING	Descriptive	Cultural practice, activities, conditions, and relationships
EXTERNAL AUDITOR IS COMING	Descriptive, Process, and Initial	Cultural practice, events, encounters, relationships, participation, and states

The purpose of identifying these preliminary codes and categories was not only to try out the First Cycle Coding methods but also to learn how to develop inductive reasoning when examining the data. Berg (2001) explained, “The development of inductive categories allows researchers to link or ground these categories to the data from which they derive” (p. 246). Additionally, these codes were the result of investigating each line segment in the verbatim transcriptions from which I gained a better understanding of coding small units of meanings to create representative categories of meanings. Seale, Gobo, Gubrium, and Silverman (2004) clarified that the process of coding starts with coding as many incidents as possible from the data; then, as qualitative researchers progressed in analyzing the transcripts, the incidents are assigned to different meaningful categories and subcategories. Also, codes are compared to one another for similarities, differences and specific patterns. This was where I conducted Second Cycle Coding methods establishing coherence, synthesis, and modification in the

preliminary codes data. Table 8 includes a summary of modified categories and subcategories using several Second Cycle Coding methods.

Table 8

*Second Cycle Coding Process in Meeting 1, Kuwait*

New modified codes	Coding method used
ACTION OF MODIFICATION	Pattern
SECURITIES INVOLVED	Pattern
DIRECT TRANSACTION	Pattern
EQUITY	Pattern
SHARED MONEY	Pattern
EXTERNAL AUDITOR VISITS	Pattern
IMPORTANT TO GROUP	Pattern
COMING UPDATES	Pattern

These particular modified codes in Table 8 were arranged into more refined meaningful categories in order to achieve coding coherence, and most crucially, to define themes from categories and subcategories (Bryman, 2004). Through the use of Pattern Coding, I was able to reduce codes into smaller units of meaning and create relationships by forming thematic patterns across all preliminary and secondary codes and categories. Thus, coherent themes gradually emerged as an outcome and evidence of the different cultural incidents and interactions developed in the meeting data, as indicated in the following thematic results:

**I. Action/or event of MODIFICATION means:**

A. Involving in securities

B. Making direct transaction

C. Targeting equity

**II. Action/or event of MODIFICATION involves:**

A. Shared money

B. Possible visits of external auditors

C. Group needs

**III. Action/ or event of MODIFICATION generates:**

A. Follow-up meetings with involved parties

By rereading the verbatim transcript several times and listening to all the participants' turns, I noted the complexity of coding all the numerous business acronyms and incidents found in the meeting. Therefore, I needed to code recurrently as I carefully examined my coding decisions and sought objectivity. This objectivity was substantiated by my field notes, in which I wrote a detailed description of all meetings. Overall, I found ten major themes developed in the first meeting at Innovative Kuwait Co. Figure 5 represents the themes in sequential order, as they appeared in the meeting discussion, including the following: MOVING ASSETS, ACTION OF MODIFICATION, AUTHENTICATION, RIPPLE EFFECT, AUDITING, INSURANCE, ESTABLISHING A NEW SMALL COMPANY, SOFTWARE AND OPERATIONS, CUSTODY PORTFOLIO, AND RECOVERY SYSTEM.

Figure 5.

*Summary of Themes Found in Meeting 1, Kuwait*

Meeting 1, Kuwait

**Theme 1: MOVING ASSETS mean:**

- A. Boxes affected
- B. Bonds affected
- C. Equity/income affected
- D. Re-evaluation is needed

**MOVING ASSETS involve:**

- A. Calculation
- B. Banks
- C. Treasury
- D. Neutral referee

**Theme 2: Action/or event of MODIFICATION means:**

- A. Involving in securities
- B. Making direct transactions
- C. Targeting equity

**Action/or event of MODIFICATION involves:**

- A. Shared money
- B. Possible visits of external auditors
- C. Group needs

**Action/ or event of MODIFICATION generates:**

- A. Follow-up meetings with involved parties

**Theme 3: AUTHENTICATION means:**

- A. Original certificates
- B. Salary slip
- C. Bank account

**Theme 4: RIPPLE EFFECT means:**

- A. Provisions all over

**RIPPLE EFFECT involves:**

- A. CEOs
- B. Banks
- C. Clients

**Theme 5: AUDITING means:**

- A. Selection of random departments
- B. Looking at outstanding issues
- C. Looking at records
- D. Assets management
- E. Transactions

**AUDITING involves:**

- A. Local HR
- B. Audit department
- C. External auditors
- D. Audit plan

**Theme 6: INSURANCE means:**

- A. Renewal of old quote
- B. Total gigantic mess
- C. Re-insurance
- D. Status of insurance

**INSURANCE involves:**

- A. The customer
- B. The proposal
- C. Terms and conditions

**Theme 7: ESTABLISHING A SMALL COMPANY means:**

- A. Small investment
- B. Do buy of shares
- C. Segregation of assets

**The Process of ESTABLISHING A NEW COMPANY involves:**

- A. Small investors
- B. Population

- C. Board approval
- D. Related party transaction approval
- E. Sign up on the memo
- F. Ministry clearance
- G. Open an account
- H. Submit to ministry
- I. Do stakeholder advance

**ESTABLISHING A NEW COMPANY generates:**

- A. Subscription to companies
- B. Publicly listed
- C. Open/ended and closed fund

**Theme 8: SOFTWARE AND OPERATIONS mean:**

- A. Final cost
- B. Per day
- C. Per consultant
- D. Per extra

**SOFTWARE AND OPERATIONS involve:**

- A. Risk
- B. Asking questions
- C. The developers
- D. Private equity money
- E. Training people

**Theme 9: CUSTODY PORTFOLIO means:**

- A. Evaluation services
- B. Existing debt settlement
- C. Incorporation to evaluation services

**CUSTODY PORTFOLIO involves:**

- A. Risk management policies
- B. Treasuries policies
- C. Concerned departments

**Theme 10: RECOVERY SYSTEM means:**

- A. Incoming and outgoing of funds

**RECOVERY SYSTEM involves:**



- A. Treasury
- B. Client
- C. Portfolio manager
- D. A review
- E. Mediators

**Coding Meeting 2.** Similar to meeting 1, this meeting discussion included the business ethics/law department staff members in addition to an internal staff from another department. Unlike the first meeting, this one lasted only 30 minutes. Coding this meeting was fairly easy. I used the same coding methods and strategies employed during meeting 1 to create the final thematic structure of meeting 2's codes and categories/subcategories for meeting 2. The following is an excerpt from meeting 2, followed by Table 9 that shows some of the First Cycle codes and categories.

Line	Speaker	
66	Ayman	So, the agreement doesn't say that. The agreement
67		says you are responsible [ <i>sic</i> ] for those cash
68		management. If there is a surplus cash I will tell them
69		to place it in overnight deposit. I am not going to tell
70		them to place at so-and-so bank.

Table 9

*First Cycle Codes and Categories in Meeting 2, Kuwait*

Examples of preliminary Codes	Coding method Used	Category of meaning
-------------------------------	--------------------	---------------------

AGREEMENT DOESN'T SAY	Descriptive and Initial	Condition
AGREEMENT SAYS	Descriptive and Initial	Condition
RESPONSIBLE FOR CASH MANAGEMENT	Descriptive, Initial, and Values	Roles, cognitive aspect, and participation
IF THERE IS SURPLUS CASH	Descriptive	Events, states, and consequences
TELL THEM	Descriptive	Roles
TO PLACE IT OVERNIGHT DEPOSIT RATES	Descriptive and Initial	States, activities, and participation
NOT GOING TO TELL THEM	Descriptive	Roles and participation
SO AND SO BANK	Descriptive	Organizations

In the Second Cycle Coding process, I arranged the above Initial codes into the following refined patterns as illustrated in Table 10:

Table 10

*Second Cycle Codes and Categories in Meeting 2, Kuwait*

New modified codes	Coding method used
AGREEMENT RULES	Pattern
RESPONSIBILITY OF CASH MANAGEMENT	Pattern
SURPLUS CASH SITUATION	Pattern
ACTION OF PLACING CASH	Pattern
MODE OF PLACING CASH	Pattern
CHOICE OF BANKING	Pattern

Afterward, the data contained in those categories were grouped together to form solid thematic meanings:

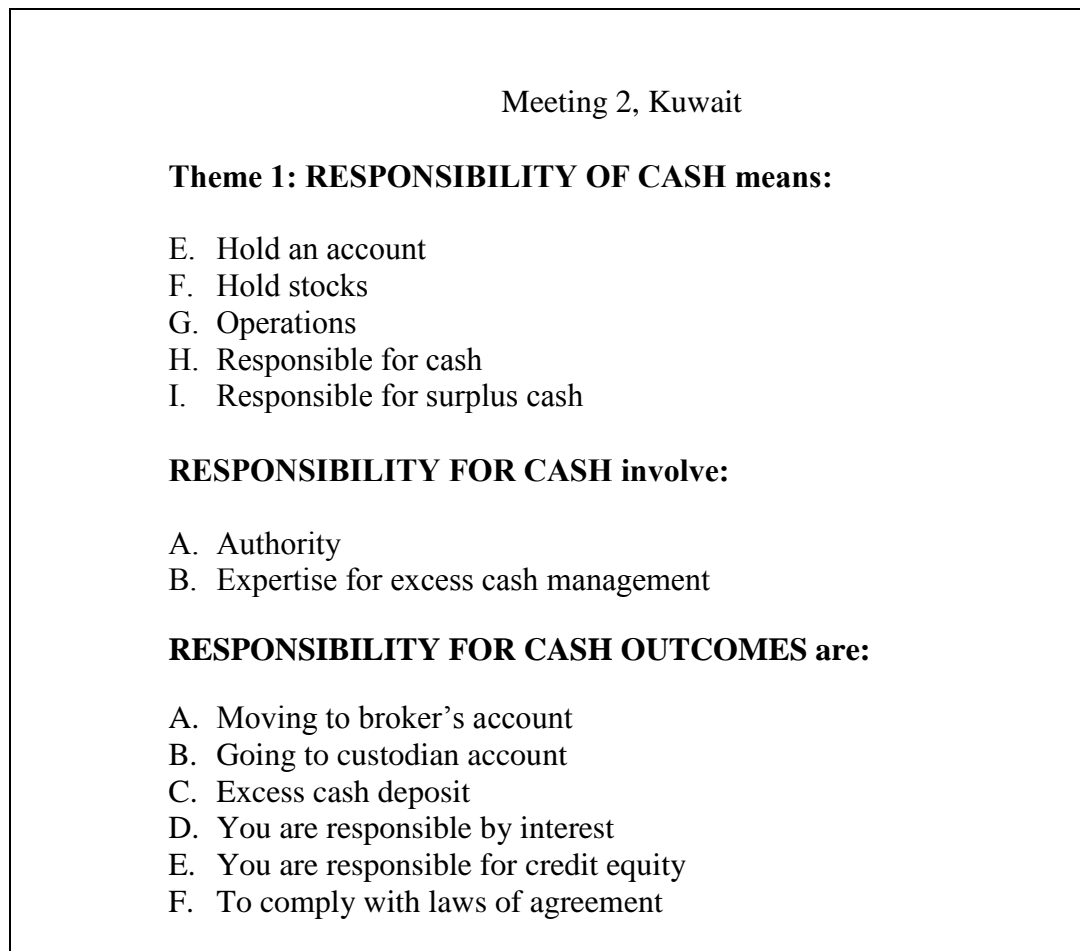
**I. AGREEMENT OF CASH means:**

- A. Responsibility for cash management
- B. Handling situations in which surplus cash is accrued
- C. Placing cash
- D. Choosing the bank

Unlike the first one, the second meeting at Innovative Kuwaiti Co. had four central themes that participants developed during the meeting discussion. Figure 6 summarizes meeting 2 final themes.

Figure 6.

*Summary of Themes Found in Meeting 2, Kuwait*



**Theme 2: AGREEMENT OF CASH means:**

- A. Responsibility of cash management
- B. Handling surplus cash situations
- C. Doing/placing cash
- D. Choosing the bank

**Theme 3: TRANSFER OF CASH/MONEY means:**

- A. Come with a bunch of managers
- B. Take money and buy assets
- C. Follow agreements
- D. Deployment of cash

**Theme 4: FUNDS mean:**

- A. Investment funds
- B. Calculation of fees**

**FUNDS involve:**

- A. Fixed expenses/revenues/fees
- B. Annual fees expense
- C. Rules of calculation
- D. Amendments
- E. Weekly evaluations

**Coding Meeting 3.** Coding meeting 3 was challenging. Zeeshan, Kamya, Deshna, and Muneerah along and two senior managers from Innovative Kuwait Co. met with the external auditor and his assistant. The meeting focused on examining compliance and audit agreements made by two parties. This two-hour meeting produced a verbatim transcript of 56 pages with a total of 17,122 word tokens. I used the same coding mechanisms for analyzing the meeting data. Table 11 reveals some of the First Cycle coding stages extracted from Kamya's speech.

Line    Speaker



As I progressed in analyzing the discussion that occurred in meeting 3, I soon constructed new categories and relationships and finalized the coding process to show the patterns and themes used by participants to organize and maintain the meeting discourse. Figure 7 summarizes the main 20 themes that emerged from the third meeting at Innovative Kuwait Co.

Figure 7.

*Summary of Themes Found in Meeting 3, Kuwait*

<p style="text-align: center;">Meeting 3, Kuwait</p> <p><b>Theme 1: AUDIT MONTHLY ACCOUNTANT means:</b></p> <ul style="list-style-type: none"><li>A. Coordinate with ethics/laws management team</li><li>B. Communicate with internal office</li></ul> <p><b>Theme 2: SUBSIDIARIES OWNERSHIP means:</b></p> <ul style="list-style-type: none"><li>A. Meeting up requirements</li><li>B. Structuring of entities</li></ul> <p><b>SUBSIDIARIES OWNERSHIP involves:</b></p> <ul style="list-style-type: none"><li>A. The administration</li><li>B. Other shares</li><li>C. The market</li></ul> <p><b>Theme 3: SHAREHOLDING STRUCTURE means:</b></p> <ul style="list-style-type: none"><li>A. Decision-making</li><li>B. Finalizing reports</li></ul> <p><b>Theme 4: DOING AUDIT means:</b></p> <ul style="list-style-type: none"><li>A. Different departments</li></ul>
---

B. Cross checking date

**DOING AUDIT involves:**

- A. Finance management department
- B. Extension through departments

**Theme 5: INVESTMENT EVALUATION means:**

- A. Ordered process
- B. Shared responsibility
- C. Booking in financial statements
- D. Taking into consideration

**INVESTMENT EVALUATION involves:**

- A. Checking figures
- B. Annual evaluation for documents
- C. External auditors
- D. Priorities
- E. Providing information
- F. Analyzing
- G. Publishing annual reports
- H. Using evaluation techniques

**INVESTMENT EVALUATION types:**

- A. Evaluation of investment
- B. Evaluation done by department

**Problems with INVESTMENT EVALUATION:**

- A. Private equity funds
- B. Not much negotiations
- C. Impact coming to finance
- D. Possibility of renewal

**Theme 6: SYSTEM ISSUE means:**

- A. Issuing agreed upon

**SYSTEM ISSUE involves:**

- A. Management
- B. New system in place
- C. Policies and procedures to mend

**Problems with SYSTEM ISSUE:**

- A. Current system does not modify

**Theme 7: CHART OF ACCOUNT means:**

- A. Standard account
- B. Owned by investment company

**CHART OF ACCOUNT involves:**

- A. Various chartered accounts
- B. Income express record
- C. Account entry
- D. Interest income and interest expenses

**Rules in CHART OF ACCOUNT:**

- A. Have placement
- B. Have the warnings
- C. Open or close account
- D. Invest in different sources

**Problems with CHART OF ACCOUNT:**

- A. Cost
- B. Reconciliation
- C. Can't do modification

**Solutions for CHART OF ACCOUNT:**

- A. Make within boundary or objectives of company
- B. Post some entries

**Theme 8: INCOME EXPENSE means:**

- A. Transition everyday
- B. Checking
- C. Voucher signed
- D. Diverse reports

**INCOME EXPENSE involves:**

- A. A system
- B. Generating transactions
- C. Supporting person to check signatures



**Theme 9: CHECKS AFTER POSTING mean:**

- A. Internal personal posting vouchers

**CHECKS AFTER POSTING involves:**

- A. Authorizing system
- B. Equity report
- C. Posted transactions
- D. Growth of interest

**Outcome of CHECKS AFTER POSTING:**

- A. Salary account debited

**Theme 10: CHART UP ACCOUNT means:**

- A. Semi-annual review
- B. Amending policies and procedures

**CHART UP ACCOUNT involves:**

- A. Modification

**Theme 11: SYSTEM PART means:**

- A. Based on agreement

**SYSTEM PART involves:**

- A. Compensatory control

**Problems with SYSTEM PART:**

- A. Risk of deficiency in system

**Solutions for SYSTEM PART:**

- A. Highlights risks and key risks
- B. Maybe new system in place
- C. Revise system
- D. Add on policies and procedures

**Theme 12: CUSTODY OF DOCUMENTS means:**

- A. Custody of catch
- B. Signed of agreement

**CUSTODY OF DOCUMENTS involves:**

- A. Organization
- B. Operation
- C. Proper segregation of custody
- D. Authority to execute and perform
- E. Proper indication of duties and decisions of custody

**Theme 13: AGREEMENT is done with:**

- A. The clients
- B. The service providers
- C. Real estate title needs
- D. Inward/outward

**AGREEMENT involves:**

- A. A vault

**AGREEMENT controlled by:**

- A. A staff who's in charge of record keeping
- B. Accompanied staff for retrieval

**Theme 14: SAFE CUSTODY means:**

- A. Sending documents with the memo
- B. Documents kept under safe
- C. Registration
- D. Manual data process

**SAFE CUSTODY involves:**

- A. Signing/receiving
- B. Confirmation
- C. Account number
- D. Double control
- E. Corporate administration people
- F. Legal team

**Stages in SAFE CUSTODY:**

- A. Physically verified
- B. Divided into batches
- C. Keep originals in same custody
- D. Attested by third party auditor

**Theme 15: VARIANT ANALYSIS means:**

- A. For all departments
- B. Security in the variant
- C. Compiling whole report

**VARIANT ANALYSIS involves:**

- A. Deadline
- B. Finance report
- C. Whole year report
- D. Income/expenses

**Theme 16: IMPACT OF GLOBAL RECESSIONS AND POLITICAL AND ECONOMIC STABILITY:**

- A. Difficulty in training
- B. Budget problem
- C. Adjustment to new budget plan

**Theme 17: PERIOD CLOSING SYSTEM means:**

- A. A process
- B. Closing finance books
- C. Closing checklist and procedures

**PERIOD CLOSING SYSTEM involves:**

- A. A system
- B. Fixed assets
- C. Reporting
- D. Internal evaluation and investment
- E. Financial statements
- F. 10 days deadlines

**Theme 18: RECONCILIATION means:**

- A. Quarterly statements
- B. Balances/transactions recorded

**RECONCILIATION involves:**

- A. Book activity
- B. Changing books
- C. Banks sending statements
- D. Amount
- E. Companies

- F. Reconciliation for account
- G. Frequency of reconciliation

**Roles taken in RECONCILIATION:**

- A. Close the accounts
- B. Balances

**Theme 19: BUDGET COMMENT means:**

- A. Observation on the parallel
- B. Budgeting plan

**Problems with BUDGET COMMENT:**

- A. Whole budget failure

**Solutions for BUDGET COMMENT:**

- A. Accept reasonable flat

**Outcomes of BUDGET COMMENT:**

- A. Monitor budget
- B. Budget at interesting rate
- C. Cut down unnecessary expense

**Theme 20: BUDGET means:**

- A. Expenses in every slap

**BUDGET involves:**

- A. Adjustment in two quarters
- B. Preparing a budget
- C. Senior management
- D. Budget for staff
- E. Budget for expenses
- F. Review of budget

**Results of BUDGET:**

- A. Revenues will be generated
- B. Departments monitor performance
- C. Justification

**Coding Meeting 4.** Unlike the first three meetings, meeting 4 had a different meeting genre. It was a discussion of new data software by four participants. Zeeshan, Kumar, and Ayman from Innovative Kuwait Co. met with a senior data programmer. Therefore, meeting 4 included a great deal of technical and computer terms that facilitated the flow of business discourse among all participants. In coding this meeting, I employed similar coding methods to examine how internal staff members of Innovative Kuwait Co. organized and maintained the meeting. The following example of the data programmer’s speech demonstrates the First Cycle coding stage, and Table 13 shows the preliminary codes used for words in this example.

Line	Speaker	
1	George	From a number of different providers, we have
2		benchmark data from the estimate ownership.
3		But then our main strength is to bring in your data,
4		so it could be the portfolio holdings, it could
5		be the performance risk side. Do you have internal
6		analysts who have their own recommendations and
7		securities?

Table 13

*First Cycle Codes and Categories in Meeting 4, Kuwait*

Examples of preliminary Codes	Coding method used	Category of meaning
NUMBER OF DIFFERENT PROVIDERS	Descriptive	Participation

BENCHMARK DATA FROM ESTIMATE OWNERSHIP	Descriptive	Condition and setting
MAIN STRENGTH TO BRING DATA	Descriptive and In Vivo	Roles, participation, and values
PORTFOLIO HOLDINGS	Descriptive	States
COULD BE THE PERFORMANCE RISK SIDE	Descriptive	States and condition
INTERNAL ANALYSTS WHO HAVE RECOMMENDATIONS AND SECURITIES	Descriptive	States, activities, roles, and participation

The next step was to code for articulate sets of patterned categories and relationships. The Second Cycle coding stage led to those coding results:

Table 14

*Second Cycle Codes and Categories in Meeting 4, Kuwait*

New modified codes	Coding method used
BENCHMARK DATA	Pattern
ESTIMATE OWNERSHIP	Pattern
BRING THE DATA	Pattern
PORTFOLIO HOLDINGS	Pattern
INTERNAL ANALYSTS	Pattern
PERFORMANCE RISK SIDE	Pattern
RECOMMENDATIONS AND SECURITIES	Pattern

During the Second Cycle coding stage, I observed and linked numerous personal and business actions and behaviors of Zeeshan, Kumar, Ayman, and George and I classified the final structural themes of meeting 4, as shown in Figure 8.

Figure 8.

Meeting 4, Kuwait

**Theme 1: BENCHMARK DATA means:**

- A. Estimate ownership

**BENCHMARK DATA involves:**

- A. Bring the data
- B. Portfolio holdings
- C. Internal auditors with recommendations and securities
- D. Vendor
- E. Portfolio analysis

**BENCHMARK DATA STEPS:**

- A. Set a number of attributes
- B. Have actual holdings
- C. Have different baits
- D. Create separate portfolios
- E. Know how you group
- F. Know which price sources
- G. Know benchmark pricing

**BENCHMARK DATA outcomes:**

- A. Benchmarks
- B. Segregate

**Theme 2: PORTFOLIO OPTIMIZER means:**

- A. Use risk models
- B. Put criteria in terms of restrictions

**Theme 3: FUND-TO-FUND means:**

- A. Fund level
- B. Information ratio
- C. Equalizer turn

**FUND-TO-FUND involves:**

A. Analyzing by historical performance and risk

**FUND-TO-FUND outcomes:**

- A. Dashboard of all portfolios
- B. Application of compliance

**Theme 4: INDEX VALUES mean:**

- A. Getting rate up

**Theme 5: PORTFOLIO ANALYSIS MODEL means:**

- A. Separation
- B. Depending on needs
- C. Holding or return space

**PORTFOLIO ANALYSIS MODEL involves:**

- A. Fixed components
- B. Secure pass key to work email

**PORTFOLIO ANALYSIS MODEL location:**

- A. Installed on computer

**PORTFOLIO ANALYSIS MODEL use:**

- A. Anywhere

**Theme 6: CONCERN OF SECURITY means:**

- A. Potentiality of client's information
- B. Two big servers with capacity to move clients if something happened

**CONCERN OF SECURITY involves:**

- A. Storage of data holdings
- B. No extra cost
- C. Whole security team
- D. Security people

**Theme 7: CITRIX SYSTEMS mean:**

- A. Downloading the plug-in

**CITRIX SYSTEMS involves:**



- A. Access to full features
- B. Send a secure world time pass key to work data
- C. Composite portfolio of sectors, countries, dividends, and yield buckets

**CITRIX SYSTEMS tasks:**

- A. Create composites
- B. Look for criteria securities
- C. Calculate things
- D. Look at performance data
- E. Look at attribution for holdings
- F. Selection of stocks with group or allocation

**Theme 8: WHAT TO LOOK IN PORTFOLIO means:**

- A. Get the characteristics, performance, and risk
- B. Do some stress testing
- C. Affect vs. benchmark
- D. Look for predicative tracking
- E. Change of allocation between funds
- F. Overall exposure change
- G. Value and growth portfolio

**Theme 9: FTP means:**

- A. Look at data from certain schedule
- B. Push system from sending
- C. Availability of data
- D. Pump out performance

**FTP involves:**

- A. Holdings
- B. Benchmark data

**Theme 10: DATA FEED SIDE means:**

- A. For clients to build their own applications

**DATA FEED SIDE involves:**

- A. Some tools to call data depending on needs
- B. Tools for pulling data straight

**Theme 11: FAX IT means:**

A. Grouping data by sector/country-based

**FAX IT involves:**

- A. Having all information at one click
- B. Seeing benchmarks
- C. Seeing holdings

**Theme 12: STOCK SELECTION means:**

- A. Change of groupings
- B. Decision-making tool

**STOCK SELECTION involves:**

- A. Looking at allocation
- B. Doing analysis of finance
- C. Flexibility
- D. Choosing risk provider
- E. Risk characters
- F. Pre/post trade analysis

**STOCK SELECTION outcomes:**

- A. Have whole integration
- B. Advantage of audit ability

**Coding Meeting 5.** Meeting 5 was the last session I audio recorded and included in the Kuwait meetings data. Similar to meeting 4, meeting 5 was attended by two external staff members who were not part of Innovative Kuwait Co; Wael, who attended the second meeting, and Kamal, another senior auditor. Because of the many voices in the recording shared and incidents of interruptions during a discussion of numerous business topics, this meeting was difficult to code. However, I managed to code almost all actions, behaviors, and emotions involved after rereading the verbatim transcript more than ten times. Table 15 illustrates my First Cycle coding attempts taken of the speech of Reham, a female

senior manager at Innovative Kuwait Co.

Line	Speaker	
18	Reham	I think management had a meeting regarding the
19		bonds. They had a bond issue. Other meetings, no,
20		the lawyer has been visiting them, you know,
21		dropping by just to ask questions. I've been asking
22		for a meeting with the registration and listing
23		department.

Table 15

*First Cycle Codes and Categories in Meeting 5, Kuwait*

Examples of preliminary codes	Coding method used	Category of meaning
MANAGEMENT HAD A MEETING	Descriptive	Participation, activities, roles, and condition
HAD A BOND ISSUE	Descriptive	Condition and setting
LAWYER VISITING DROPPING BY AND ASKING QUESTIONS	Descriptive and Process	Activities, condition, and states
ASKING FOR A MEETING WITH REGISTRATION AND LISTING DEPARTMENT	Descriptive and In Vivo	States, condition, and roles

While cautiously I continued coding and categorizing with caution the different social actions and behaviors in meeting 5, I was able to discern definite patterns across codes, and then to form a final definite picture of the way participants communicated during the discussion. Table 16 shows the Secondary Cycle coding stage of Reham's speech, and Figure 9 indicates the overall themes

found in meeting 5.

Table 16

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*Second Cycle Codes and Categories in Meeting 5, Kuwait*

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New modified codes	Coding method used
MANAGEMENT	Pattern
MEETING	Pattern
BOND ISSUE	Pattern
LAWYERS VISITING	Pattern
ASKING QUESTIONS	Pattern
ASKING FOR MEETING	Pattern
REGISTRATION AND LISTING DEPARTMENTS	Pattern

---

Figure 9.

*Summary of Themes Found in Meeting 5, Kuwait*

<p style="text-align: center;">Meeting 5, Kuwait</p> <p><b>Theme 1: BONDS ISSUE mean:</b></p> <ul style="list-style-type: none"><li>A. Asking questions</li><li>B. Registration and listing departments</li></ul> <p><b>BONDS ISSUE involve:</b></p> <ul style="list-style-type: none"><li>A. Lawyers dropping by</li><li>B. Auditing firms/brokerage firms</li><li>C. Investment companies</li></ul> <p><b>Theme 2: GREY AREAS OF FUNDS mean:</b></p> <ul style="list-style-type: none"><li>A. Questions of foreign funds and companies</li><li>B. Who's subject to accountancy</li><li>C. What are the requirements</li><li>D. Fund fees</li><li>E. Applicable investment</li><li>F. Outsourcing functions</li></ul>
--

**Theme 3: REGISTRATION/SUBMISSION OF FILES means:**

- A. Waiting to get approved

**REGISTRATION/SUBMISSION OF FILES involves:**

- A. Comments/changes of articles
- B. Nomination of people
- C. Board members
- D. Internal assessment process
- E. Policies and procedures to change

**Theme 4: EVALUATION POSITION means:**

- A. Bylaws mention certain functions are subject to tests

**EVALUATION POSITION involves:**

- A. Providing names
- B. Providing detailed CVs
- C. Explaining experiences for persons
- D. The documentations

**Problems with EVALUATION POSITION:**

- A. Not setting exams of evaluation or requirements

**Theme 5: REPORTING OF ACCOUNTANY means:**

- A. Should be in Arabic
- B. All communication, letters, and documents

**REPORTING OF ACCOUNTANY involves:**

- A. Formal communication in Arabic
- B. Receiving English and Arabic documents
- C. Foreign fund agreements in English

**Theme 6: MERGER AND ACQUISITION mean:**

- A. Certain requirements
- B. Certain disclosures

**MERGER AND ACQUISITION involve:**

- A. Management/asset management
- B. Shareholders
- C. Other companies

- D. Responsibility of board
- E. Human resources

**Theme 7: EXECUTIVE REGULATIONS mean:**

- A. Having many internal presentations

**EXECUTIVE REGULATIONS involve:**

- A. Compliance
- B. Legal and fund administration

**EXECUTIVE REGULATIONS outcomes:**

- A. Compliance production presentations analyzing each chapter
- B. Updating policies

**Theme 8: COMPLIANCE REGISTER means:**

- A. To educate company
- B. About the owners and salaries of executive management
- C. Maintained as requirement by law

**COMPLIANCE REGISTER involves:**

- A. Maintaining a register
- B. Share giving access to people
- C. Shareholding

**Factors affecting COMPLIANCE REGISTER:**

- A. Risk management
- B. Legal/foreign asset management
- C. Operation

**COMPLIANCE REGISTER outcomes:**

- A. Having a business implication
- B. Assessment covering business, operational, and reporting system requirements system

**Theme 9: GREY AREAS OF LANGUAGE means:**

- A. Leaving room for interpretation

**Problem with LANGUAGE:**

- A. Different directions

**Solutions for GREY AREAS OF LANGUAGE:**

- A. A need for clarifications

**Theme 10: Steps of INCREASE/DECREASE IN CAPITAL:**

- A. Get approval of accountancy
- B. Asking ministry of commerce to hold
- C. Get clarification

**INCREASE/DECREASE IN CAPITAL involves:**

- A. All joint venture companies
- B. All shareholding companies
- C. Listed/unlisted companies

**Theme 11: SELLING UNITS means:**

- A. Estimate and decide how many units to distribute
- B. Non-refundable

**SELLING UNITS involves:**

- A. Marketing
- B. Private equity
- C. Making commitments

**Rules of SELLING UNITS:**

- A. 3 months of raising capital
- B. Not a lot of flexibility

**SELLING UNITS outcomes:**

- A. Intend to market/distribution
- B. Make it in sigma
- C. Marketing and business targeted together

**Theme 12: BOARD OF DIRECTORS FOR FUNDS mean:**

- A. Having it from holding company

**Steps to form a BOARD OF DIRECTORS FOR FUNDS:**

- A. Hire a board from holding company
- B. Follow no specific requirements

- C. Follow the law
- D. Invest in the funds
- E. Disclose

**Types of BOARD OF DIRECTORS FOR FUNDS:**

- A. Fund manager to identify
- B. Eligible and independent directors
- C. Unit holder to propose candidates

**Rules of BOARD OF DIRECTORS FOR FUNDS:**

- A. Board members shouldn't own securities
- B. Apply with name and CV of nominations
- C. Get approval
- D. Instruction to hold unit holders association meetings

**Theme 13: DEPARTMENT STRUCTURE means:**

- A. A hierarchy
- B. Head of department
- C. Fund managers

**Theme 14: FUND PERSONS involve:**

- A. Custodian
- B. Trustee
- C. Controller

**Roles of FUND PERSONS:**

- A. Monitor/report to the regulator
- B. Hold all assets and all bank accounts

**Theme 15: INFORMATION LEAKAGE means:**

- A. Upon license activities

**INFORMATION LEAKAGE involves:**

- A. Department
- B. Access to fund information
- C. Internal policy
- D. Achieving information and physical security



## **Coding the American Meetings**

In the previous section, I described the coding process and overall thematic summaries found in the Kuwaiti meetings. This section complements the first. The purpose of this section is to report only on the overall themes found in each meeting without referring to Initial and Secondary Cycle coding stages. I used identical coding methods and techniques to discern patterns and relationships among codes and categories. I began by outlining the thematic results of the first meeting that consisted of ten participants in addition to a few other participants from Global Phoenix's branch in Colorado.

Figure 10.

*Summary of Themes Found in Meeting 1, Phoenix*

<p style="text-align: center;">Meeting 1, Phoenix</p> <p><b>Theme 1: HUMOR goals:</b></p> <p>A. Open the meeting/discussion/turn</p> <p><b>HUMOR examples</b></p> <p>A. They are little late, let's donate \$10 for every minute they are late</p> <p><b>Theme 2: MEETING WITH REPRESENTATIVE/SENATOR involves:</b></p> <p>A. An agenda B. Polist meeting C. Co-hosted operation D. Meeting with a senator</p> <p><b>Goals of MEETING WITH REPRESENTATIVE/SENATOR:</b></p> <p>A. Achieve debt ceiling issues</p>
--

B. Reach staff affecting industry

**Problems with MEETING WITH REPRESENTATIVE/SENATOR:**

- A. Meeting cancelled
- B. Senator is in Afghanistan
- C. Government affair committee members rescheduling meeting

**Solutions found for MEETING WITH REPRESENTATIVE/SENATOR:**

- A. Setting up small group meeting

**Theme 3: MEETING WITH CHAPTER means:**

- A. Meeting with a non-association chapter
- B. Setting individual meetings
- C. Re-affiliation
- D. Examining issues

**MEETING WITH CHAPTER involves:**

- A. A general council
- B. A lot of expertise

**Theme 4: ROLE OF EXAMINER means:**

- A. Point out something wrong
- B. Train members of examination process

**ROLE OF EXAMINER involves:**

- A. Talents and expertise in training
- B. Examination process background

**Theme 5: SHARED-BRANCHING MEETING goals:**

- A. Get game plan for future
- B. Get input
- C. Benefit solutions

**Theme 6: ASSOCIATION NEWSLETTER means:**

- A. Different naming for branches
- B. Released and dispensed to membership

**Theme 7: HR ISSUE roles:**

- A. Training session
- B. Working on some sponsorships
- C. Working on foundation school requests
- D. Conference in Colorado

**Theme 8: GOVERNMENT AGENCIES involve:**

- A. New CEO
- B. New affiliate
- C. Disaffiliate in past

**Theme Results of Meeting 2**

Figure 11.

*Summary of Themes Found in Meeting 2, Phoenix*

Meeting 2, Phoenix

**Theme 1: NEW AUTHORIZATION LIST goals:**

- A. Payment
- B. Writing a PO

**NEW AUTHORIZATION LIST needs:**

- A. Approval of company your writing it for

**NEW AUTHORIZATION LIST involves:**

- A. New expense report online
- B. Car daily log
- C. Expense reports

**Theme 2: PTO SLIPS mean:**

- A. Balance at end of every payroll

**PTO SLIPS involve:**

- A. Balances
- B. Car daily logs

**Steps of using PTO SLIPS:**

- A. Take off old PTO forms
- B. Replace with new ones

**Theme 3: LEADERSHIP DEVELOPMENT generates:**

- A. Very successful
- B. Excited making an impact
- C. Compliance school coming up

**Theme 4: BOWLING TOURNAMENT goals:**

- A. Sponsor school
- B. Keep kids in school
- C. Supply backpacks and school books

**Theme 5: ACCOUNTING involves:**

- A. Five people
- B. Cross-training**

**ACCOUNTING roles:**

- A. Make sure to answer questions
- B. Create acronyms for companies
- C. Do research notes end of month
- D. Accounting services of AP, vouchering, and payroll

**Problems with ACCOUNTING:**

- A. Wrong classification of coding
- B. Taxes

**Solutions provided for ACCOUNTING:**

- A. Codes cleaned up
- B. Provided correct taxes

**Theme 6: SUBMISSION OF PAYROLL means:**

- A. 10<sup>th</sup>-25<sup>th</sup> of month

**Changes in SUBMISSION OF PAYROLL:**

- A. Went to a laser check printer
- B. IT systems hook up

C. Sending accounting email

**SUBMISSION OF PAYROLL goals:**

A. Sending automatic send invoices

**Theme 7: PINK FORMS mean:**

A. Different wordings

B. A lot of similarities

C. In employee resource folder

**Theme 8: PO SERVICES involve:**

A. Similar format

**PO SERVICES goals:**

A. Generated for company

B. Shared positions

**PO SERVICES roles:**

A. Billing sheet

B. Account payable sheet

C. Check-to-deposit sheet

**Theme 9: INVOICE means:**

A. Can mark as AP

B. Purchase order form

**Steps in using INVOICE:**

A. Done within 24 hours

B. Give instructions at bottom

C. Sending overnighted

**Theme 10: DISTRIBUTION PROCESS involves:**

A. Copying

B. Filling it

C. Leaving dates black

D. Keeping it as an attachment

E. Printing it

F. Entering into accounting system

**Theme 11: ACCOUNT DIGITS mean:**

- A. Based on department
- B. Based on individual people
- C. Based on state

**ACCOUNT DIGISTS involve:**

- A. Auditor doing taxes needs

**Theme 12: PRINTING PO means:**

- A. With invoice
- B. Keeping originals

**PRINTING PO involves:**

- A. Senior VP, controller as authorized signer

**Theme 13: EXPENSE REPORTS involve:**

- A. 3 types
- B. A lot of people and companies
- C. Client solutions
- D. Business purpose events
- E. Visa statements
- F. Cash reimbursement

**Theme 14: AUTO-RELATED EXPENSE involves:**

- A. Gas
- B. Taxi
- C. Parking
- D. Tolls
- E. Car washes

**Theme 15: RECEIPT DOUBLING means:**

- A. Buying cash advance
- B. Buying 2 gift card with cash
- C. Receipt for gift cards
- D. Charging for cash advance

**Theme 16: EMPLOYEE ADVANCE means:**

- A. Cash advance taken off

**EMPLOYEE ADVANCE needs:**

- A. Employee signature
- B. Date
- C. Authorized approver

**Theme 17: CAR LOGS mean:**

- A. Company cars

**CAR LOGS are done:**

- A. Quarterly basis
- B. Online

**CAR LOGS involve:**

- A. Vehicle name
- B. Person who has it

**CAR LOGS generate:**

- A. Automatic calculations
- B. New mileage
- C. Business miles
- D. Personal miles

**Theme 18: TAXES mean:**

- A. Different tax rules
- B. Sales tax

**Problems with TAXES:**

- A. Need of receipts

**Theme Results of Meeting 3**

Figure 12.

*Summary of Themes Found in Meeting 3, Phoenix*

Meeting 3, Phoenix

**Theme 1: UNI-STAFF MEETING means:**

- A. Keep scheduling
- B. Always the same time

**UNI-STAFF MEETING involves:**

- A. Board planning session
- B. Board planning meeting
- C. Management report
  - Pretty impressive report
  - Thank you everyone
  - A lot of hard work
  - A lot of anxiety/frustration
- D. Discussion of outsourcing services
- E. Regrouping
- F. Continual lending
- G. Promotion announcement
- H. New staffing

**Theme 2: ASSOCIATION THINGS mean:**

- A. A planning meeting
- B. International dinner

**Theme 3: GENERAL GOVERNMENT RELATIONS mean:**

- A. 2012 elections
- B. Lunch with congressmen
- C. Hotel for staff members
- D. Students helping

**Theme 4: BUSINESS LENDING means:**

- A. Making contacts with creditors
- B. More communication
- C. Switching to online system

**Theme 5: UPDATES mean:**

- A. Presentation at meetings
- B. Various vendors to present revenues



C. Alliance members attending

**Theme 6: IT means:**

A. Telephones and networking

**IT involves:**

- A. Annual meeting
- B. Volunteers
- C. Arizona Co-officers meeting
- D. Developing collateral
- E. Scholarship for sponsorship

**Theme 7: PARTNERSHIP means:**

- A. Being familiar with both relationships
- B. Different organizations

**PARTNERSHIP involves:**

- A. Review of accounting
- B. Refining budget
- C. Income statement
- D. Set of financials that is value to board and staff
- E. Use of technology for more efficiency
- F. Working overtime

**Theme 8: MOVING OUT means:**

- A. Offices moved
- B. Moving everybody

**MOVING OUT procedures:**

- A. Cubicles will be done
- B. Remaining space to lease it out
- C. Phone systems nailed
- D. Vendors coming
- E. Install configuration
- F. Connectivity between two offices

**MOVING OUT generates:**

- A. Easier transition

## Theme Results of Meeting 4

Figure 13.

*Summary of Themes Found in Meeting 4, Phoenix*

### Meeting 4, Phoenix

#### **Theme 1: REGULATORY AREA means:**

- A. Setting meetings with regulators
- B. Both state and federal level

#### **Theme 2: COMPLIANCE SOLUTIONS involve:**

- A. Proposals offered

#### **COMPLIANCE SOLUTIONS generate:**

- A. Some signed proposals
- B. Fruitful results

#### **Theme 3: SERVICE CORPORATION means:**

- A. Service corporation meetings via telephone

#### **SERVICE CORPORATION involves:**

- A. Chat about future service corporations
- B. Merger
- C. Taking time and expense
- D. Cost involved
- E. Value of certain programs and assets

#### **SERVICE CORPORATION GOALS:**

- A. To liquidate Arizona to mother corporation
- B. To be able to keep up and benefit

#### **SERVICE CORPORATION generates:**

- A. A lot of questions
- B. Follow up board meeting

C. Working on budget

**Theme 4: LEGISLATION means:**

A. Attending legislative executive council

**LEGISLATION involves:**

- A. Doing a lot of brainstorming
- B. Legislators coming from all states
- C. State dinners
- D. Inviting CEOs

**Theme 5: FACE-TO-FACE TRAINING involves:**

- A. A number of webinars
- B. New network model
- C. Blending different models

**Theme 6: BUDGET REPORT means:**

- A. Reviewing the budget report with staff
- B. Board members identified strategic planning session

**BUDGET REPORT involved the following points:**

- A. Goals of organization:
  - Unity and affiliation
  - Financial strength and innovation
  - Mergers
  - Identifying key performance indicators
- B. Budget highlights of dues and dues factors
- C. Governing body expense
  - For board meeting
  - For board travel
  - For committee meeting
  - Achieve economies of scales
  - Find savings
  - Significant savings in staffing area
  - Savings in health insurance
- D. Staff allocation in different departments
- E. Capital expenditures
  - Invest in technology
  - Implement different strategies
  - Reasonable values
  - Good trade-in pool cars

F. Income

- Dues
- Other income from education and interest income
- Expenses
- Administration salaries and benefits

G. Education and events

- Preparing for annual meeting
- Education programs

H. Government relations

- A lot of activities

I. Communication/Marketing/Public relation

- Bunch of communication, marketing, and public relation activities
- Made some savings
- Combined efforts

J. Regulatory affairs

- New department
- No prior budget
- Involves new compliance solution program
- Involves compliance and regulatory assistance
- Involves meetings with regulators

K. Building/office expenses

- Operational-based
- Made some nice savings
- Combining efforts
- Arizona office moved and rent is lower

**BUDGET REPORT generates:**

- A. Huge improvement over prior year

**Theme 7: SUBSCRIPTIONS involve:**

- A. The organization magazine  
B. Getting the magazine free as part of membership  
C. Couple copies

**Theme 8: LEADERSHIP PROGRAM targets:**

- A. All CEOs

**LEADERSHIP PROGRAM targets CEOs because:**

- A. Get their experiences  
B. For leadership skills  
C. Buy-in to recommend it

D. Retain some of those talented CEOs

**LEADERSHIP PROGRAM involves:**

- A. 2 days event
- B. Sizable cost

**Theme Results of Meeting 5**

Figure 14.

*Summary of Themes Found in Meeting 5, Phoenix*

Meeting 5, Phoenix

**Theme 1: SERVICE CORPORATION involves:**

- A. Proposing
- B. Preparing a board meeting
- C. Awards program
- D. Foundation meetings
- E. Kids breakfast

**Theme 2: LEGISLATION MEETING involves:**

- A. Reserving hotel rooms
- B. Participants coming from all organization branches
- C. Legislators
- D. Congressional leadership
- E. Senators
- F. Small business owners
- G. Congressmen

**Goals of preparing the LEGISLATION MEETING:**

- A. Push at federal level
- B. To co-sponsor
- C. To discuss mortgage issues and foreclosures

**Theme 3: RUNNING A BILL involves:**

- A. Campaign endorsement
- B. Talking to state lobbyists
- C. Many competitive races
- D. Pinning to incumbents against each other
- E. Involving in government affairs
- F. Involving in relation committees
- G. Some delicacy

**Goals of RUNNING A BILL:**

- A. To endorse grassroots efforts
- B. To do finance control
- C. To fundraise

**Theme 4: E-SCAN INFORMATION involves:**

- A. Sending to all organization branches with attachment

**Questions of concern in E-SCAN INFORMATION:**

- A. How I sign up
- B. Sign me up

**Theme 5: LEVELS OF SUBSCRIPTIONS mean:**

- A. Subscription at basic level

**Problems with LEVELS OF SUBSCRIPTIONS:**

- A. The basic level does not have CEO salary report
- B. CEO salary report in a different level, not free of charge

**Theme 6: EMPLOYEE RESOURCE FOLDER means:**

- A. A board member list
- B. Service for board members

**EMPLOYEE RESOURCE FOLDER involves:**

- A. League board members
- B. Assistant board members

**EMPLOYEE RESOURCE FOLDER format is organized:**

- A. One-page format
- B. Includes all information of board members
- C. Includes name, branch name, asset members, email address

**Theme 7: REGULATORY SUBCOMMITTEE goal:**

- A. Proposing rules on emergency liquidity

**REGULATORY SUBCOMMITTEE involves:**

- A. 400 pages rule

**REGULATORY SUBCOMMITTEE generates:**

- A. First-in-compliance package

**Theme 8: ANNUAL MEETING involves:**

- A. 40 booths sold
- B. Opening up registration
- C. Branch attendees

**Theme 9: LEADERSHIP PROGRAM involves:**

- A. 9 signed up
- B. Waiting on 3 others to sign up
- C. Information going to participants

**Problems with LEADERSHIP PROGRAM:**

- A. Struggle in Arizona to find participants
- B. 3 packed out

**Solution for Arizona's LEADERSHIP PROGRAM:**

- A. Go with what we got

**LEADERSHIP PROGRAM might generate:**

- A. Going to be a good class
- B. Going to be very successful
- C. Excitement of those signed up

**LEADERSHIP PROGRAM organizers hope for:**

- A. Push harder next year

**Theme 10: NETWORKING EVENT goals:**

- A. Hosting the event
- B. Getting crew back together

**NETWORKING EVENT involves:**

- A. Discussing new strategic partners logo

**Theme 11: CELEBRATION OF MANAGER’S BIRTHDAY involves:**

- A. Surprise cake
- B. Group singing happy birthday
- C. Manager expressed “VERY INTERESTING; HARMONIES BETWEEN TWO OFFICES”

**Theme 12: CLOSING THE MEETING involves:**

- A. Group Goodbye to a staff member who’s leaving the organization
- B. Talking about group communication by showing a short YouTube video

**Framing Potential Social Systems and Relationships from the Meeting Data**

Based on the coding process stages and the final theme results in both the Kuwaiti and the American meeting data, I was able to develop two potential business schemas that indicate the key social structures and elements of the inner and outer shell of the event of a business meeting in Kuwait and Phoenix. These schemas also serve as a socio-cultural indicator of how Kuwaiti and American meetings are established, organized, and maintained by staff members, who are the major social agents in communicating and performing the norms of interaction in the meeting discourse (Hymes, 1947; Saville-Troike, 1989). Above all, I created the schemas according to Hymes’ ethnography of communication perspective and SPEAKING model (1974) in addition to other methodologies that I used (nonverbal language, turn taking and interruptions, identity, and social action network) to exhibit the manner in which both field sites might establish a business community of practice and a corporate culture of their own. I first outline the



Kuwaiti meetings schema in Figure 15, followed by the American meetings schema in Figure 16.

Figure 15.

*Potential Schema of Social Systems and Relationships Found in the Kuwaiti Meetings*

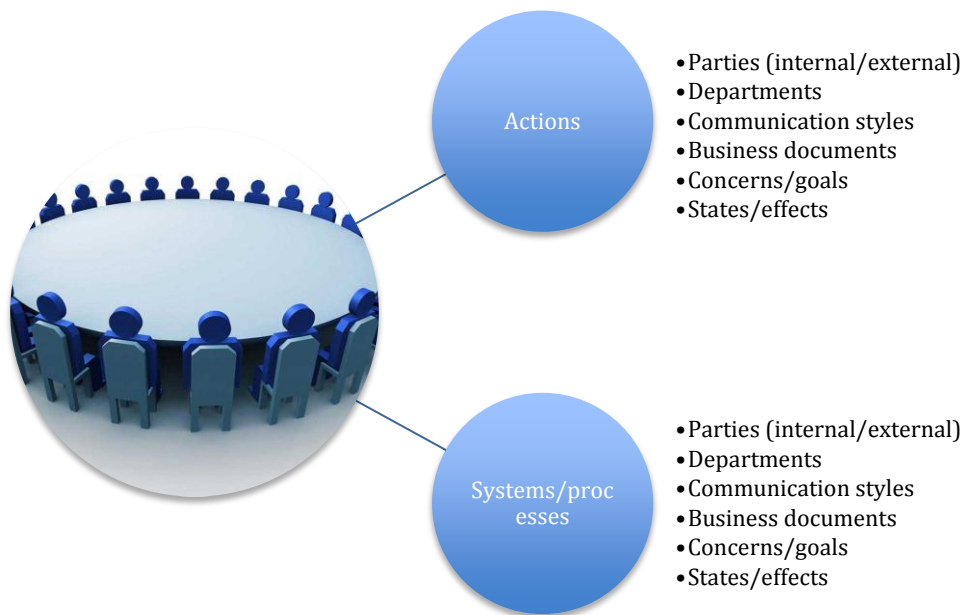


Figure 15 demonstrates the two major structures that establish the meeting event at Innovative Kuwait Co.: actions and systems/processes. In the structure of actions, different parties are involved in the meeting, such as internal departmental staff and external parties, present a variety of communication styles, perform many business actions, and discuss business documents, including staff members' concerns and goals. Additionally, these performed actions have states and effects. Similarly, in the systems/processes structure, staff members, who are the major social agents, attend the meeting as individuals or groups to talk about business

using different communication styles and organize the numerous concerns, goals, states, and effects of business actions.

Moreover, this type of schema manifests two essential constituents in the ethnography of communication: (1) norms of interaction and (2) norms of interpretation. In terms of the norms of interaction, Innovative Kuwait Co. staff members, produced “prescriptive statements of behavior, of how people should act, which are tied to the shared values of the speech community” (Saville-Troike, 1989, p. 154). Likewise, Innovative Kuwaiti Co. staff members in addition to external parties involved in the meeting, use norms of interpretation through which they demonstrate the cultural knowledge required to comprehend the entire scenario of a business meeting by referring to past systems, processes, and business activities performed inside and outside the company (Saville-Troike, 1989).

Figure 16.

*Potential Schema of Social Systems and Relationships Found in American Meetings*



Figure 16 shows that the social system found in American meetings is somewhat different from the one performed by Innovative Kuwaiti Co. staff members. The American meetings included two new structures: (1) types of meetings and (2) benefits to members and community. In all five recorded meetings, Global Phoenix staff members talked about organizing and attending legislative, federal, and political meetings with different parties, such as congressmen, senators, and political and community leaders. In addition, in these meetings staff members used many communication styles in addition to discussing business documents. As for the actions structure, Global Phoenix's meetings focused more on the discourse of programs and activities happening inside and outside the Phoenix area, whereby every member had a specific business task to acknowledge and perform in the program or activity (Saville-Troiike, 1989). Interestingly, the topic of merging with the Colorado office was commonly discussed during Global Phoenix meetings. Additionally, unlike Innovative

Kuwait Co.'s meetings, the emphasis of Global Phoenix meetings was to benefit staff members through newsletter subscriptions, convenient technology and communication, and organizing social gatherings between the Arizona and Colorado offices. Moreover, Global Phoenix staff members discussed the benefits offered to local communities, specifically to children in schools and hospitals.

### **Supplementary Language Behaviors Frequency Counts**

Throughout the previous sections, I provided detailed descriptions of the manner which I analyzed and classified the recorded meeting data in both Kuwait and Phoenix. Specifically, I relied on Saldaña's (2009) coding manual and recommended coding methodologies and techniques to finalize the coding process results. By doing so, I created two potential schemas that elucidated the organizational structures and components of business meetings in Innovative Kuwait Co. and Global Phoenix. Another potential procedure that I had in mind was to examine meaningful language and communication elements relevant to this dissertation's core linguistic units, agency, power, and identity. Two fundamental goals drove this procedure. First, I sought for a better understanding of the meaningful language behaviors underpinning the linguistic units employed in the research questions. Second, I wanted to follow Saldaña's (2009) recommendation to conduct frequency word counts to expand the analysis of coding process and results. He also suggested implementing several other techniques to further examine the collected data, such as the use of ground theory, case studies, thematic analysis, longitudinal qualitative research, political analysis, survey research, and others (Saldaña, 2009).

Therefore, these two goals were intended to help me develop a base knowledge for answering the four research questions I proposed in this dissertation. More importantly, by expanding the coding results into word frequency counts, I was able to comprehend the overall findings of the Kuwaiti and American meetings, which I will further discuss in the next chapter. I chose two language elements that demonstrate the agency, power, and identity of staff members at both field sites: (1) the use of “I” and “we” among staff members, and (2) interruption occurrences found in the meetings. I first begin by explaining the use of “I” and “we” in both field sites, along with their frequency counts. I did not include the pronouns "me," "my," "us," and "our" in the frequency counts.

### **(1) The Use of “I” and “We” in Business Meetings**

Observing and analyzing the verbatim transcripts in both field sites made me realize a distinct explanation existed for the use of “I” and “we” in business meeting discourses. I noticed that the first-person singular pronoun of “I” indicates individual self-representation, ownership, and stance of maintaining turns in the conversation, whereas “we” was used to show a collaborative stance of an individual staff member speaking about the entire group’s actions and behaviors (Brewer & Gardner, 1996; Davis & Brock, 1975; Na & Choi, 2009). I could also sense the collaborative “we” within the business meeting discourse when staff members in both field sites met with external parties. The use of “I” and “we” were also connected to the different communication styles performed by staff members at Innovative Kuwait Co. and Global Phoenix. By focusing on “I” and “we,” I would likely uncover interesting findings about how staff members

perform their individual and collective agency in addition to exploring action verbs appearing next to “I” and “we,” which might show the power and identity of staff members. Table 17 lists the frequency count of “I” and “we,” produced by Innovative Kuwait Co. staff members.

### **Use of “I” and “We” in Innovative Kuwait Co. Business Meetings**

Table 17

*Percentage of Using “I” and “We ”to Total Words Used in Innovative Kuwait Co. Business Meetings*

Meeting Number	Total Words	I	I %	We	We %
1 (5 Participants)	6470	101	1.56%	93	1.44%
2 (5 Participants)	9344	54	0.58%	20	0.21%
3 (8 Participants)	26077	246	0.94%	356	1.37%
4 (4 Participants)	37063	376	1.01%	537	1.45%
5 (9 Participants)	48439	478	0.99%	708	1.46%
Total	127393	1255	0.99%	1714	1.35%

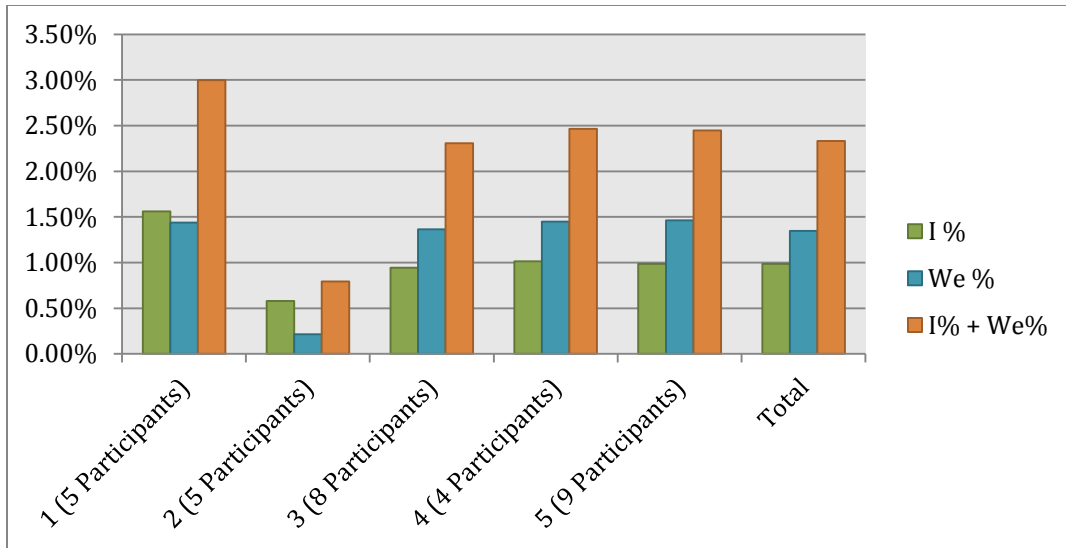
As Table 17 indicates, all internal and external staff members used “I” and “we” extensively. In meeting 1, the average use of “I” and “we” was approximately the same (I=101 times; we=93 times). A reasonable explanation for this occurrence relates to participants’ structure where Zeeshan and his staff members met with a familiar internal manager, Kumar, who often joins them in most of their weekly meetings with internal and external business parties. On the contrary, Innovative Kuwait Co. staff members used fewer personal pronouns in

meeting 2 because the meeting was short and only two participants controlled the meeting's conversation. Meeting 3 reflected similar results to meeting 1, in which Innovative Kuwait Co. staff members and the external auditor and his assistant produced consistent amounts of "I" and "we" (I= 246; we= 356).

The last two meetings had different results. In meeting 4, staff members met with George, the data agent from Dubai, producing a total of 376 "I's" and 537 "we's." This kind of use is expected, especially in a meeting that focused on one party who joined the meeting to direct Kuwait Innovative Co. staff members and present them with a new data program. Unsurprisingly, meeting 5 included significant use of "I" and the highest use of "we" (n= 708 times) among all recorded meetings. Again, the explanation for this derives from participants' structure, knowing that three senior managers at Innovative Kuwait Co. have the meeting to discuss an important budget report with an external auditor. Specific tables explaining who used "I" and "we" in the Kuwaiti meetings will be given in the findings chapter. Figure 17 illustrates the overall percentages and consistency/inconsistency levels of using "I" and "we" in Innovative Kuwait Co. meetings.

Figure 17.

*Percentages and Consistency/Inconsistency Levels of "I" and "We" Use in Innovative Kuwait Business Co. Meetings*



### Use of “I” and “We” in Global Phoenix Business Meetings

I also looked at the use of “I” and “we” among staff members in the American meetings. Recalling the coding process and results, I assumed that Global Phoenix staff members would use more “I’s” and “we’s” in their business conversations because of the large amount of verbatim transcript data as well as a discerning collaborative nature of business discourse both in the coding process and in my own field notes. Table 18 shows the frequency counts of using “I” and “we” in Global Phoenix business meetings.

Table 18

#### *Percentage of Using “I” and “We” to Total Words Used in Global Phoenix Business Meetings*

Meeting Number	Total Words	I	I %	We	We %	I% + We%
1 (18 Participants)	51049	376	0.74%	537	1.05%	1.79%
2 (11 Participants)	66578	192	0.29%	148	0.22%	0.51%
3 (8 Participants)	70524	287	0.41%	239	0.34%	0.75%



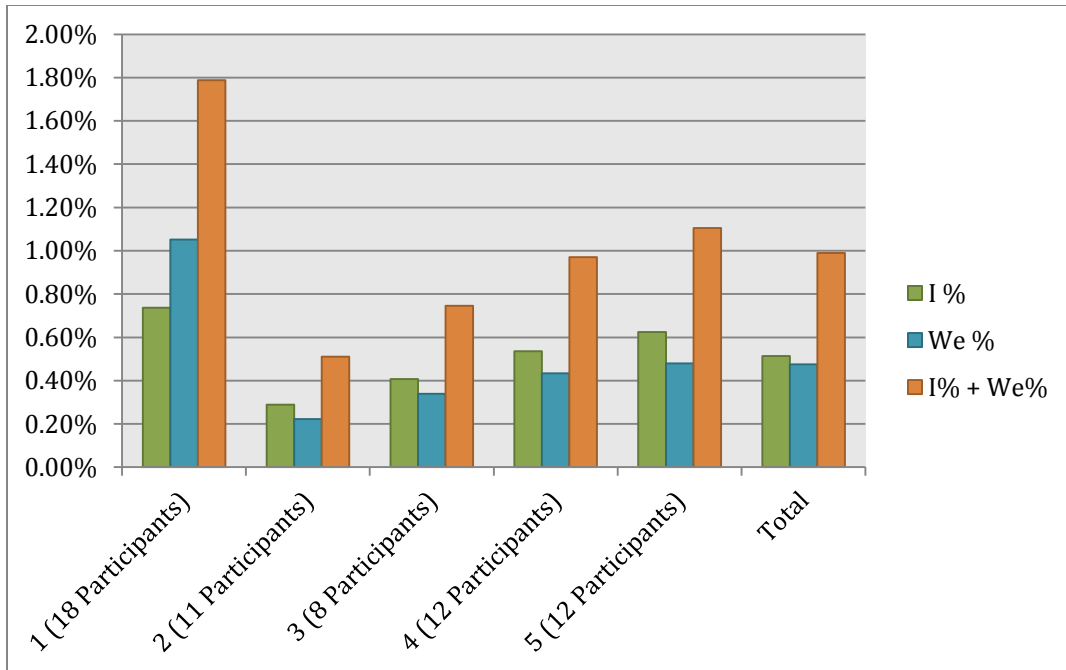
4 (12 Participants)	78037	418	0.54%	339	0.43%	0.97%
5 (12 Participants)	84332	527	0.62%	405	0.48%	1.11%
<b>Total</b>	<b>350520</b>	<b>1800</b>	<b>0.51%</b>	<b>1668</b>	<b>0.48%</b>	<b>0.99%</b>

In Table 18, I found more consistency in the use of “I” and “we” among Global Phoenix staff members, except in meeting 1, which revealed that staff members used more “I’s” than “we’s” during the meeting (I=376 times; we= 537). Thus, the data collected through fieldwork observation and notetaking have validated my hypothesis that the American meetings were collaborative and characterized as group talk conversations. Among meetings 2 through 5, the frequency of “I’s” is roughly the same, as is that of “we’s.” For example, in meeting 2, the frequency of staff members’ use of “I” and “we” is similar given that the difference is only around 44, which is statistically insignificant.

Equally, the difference between “I” and “we” in meeting 3 is almost equivalent to that of meeting 2 (= 40). Meetings 4 and 5 included higher numbers. The difference in the frequency of the use of “I” (= 418) and “we” (= 339) is 79, whereas in meeting 5 it is 120. I will discuss who used the “I’s” and “we’s” in the next chapter. Figure 17 graphically depicts these data and highlights each meeting’s results.

Figure 18.

*Percentages and the Consistency Levels of “I” and “We” Use in Global Phoenix Meetings*



### Interruption Occurrences Found in the Meetings

From the work of conversation analysis, turn taking, and maintaining floors in conversations (Edelsky, 1981; Sacks, Schegloff, & Jefferson, 1974; Sidnell, 2010), I selected the language behavior of interruption for its vital role in showing the overall construction of speech turns and maintaining the floor in conversations. The language behavior of interruption has many definitions developed by numerous linguists, conversational analysts, and sociologists (Coates; 2004; Johnson, 1997; Schegloff, 2002; Tannen, 1992; Zimmerman & West, 1975). For instance, Coates (2004), who published in-depth sociolinguistic accounts on men and women's mixed conversations, perceived interruption as a language situation where the next speaker starts to talk by taking over the current speaker's turn.

According to Saks, Schegloff, and Jefferson (1974) and Zimmerman and West (1975), interruption violates turn-taking rules and breaks the symmetry of the

conversation. Coates (2004) also related interruption to competitive speech style in conversation and dominance aimed at maintaining the entire floor of a conversation. For Johnson (1997), interruption is a language strategy that is linked to competitive conversational style and masculinity. Johnson characterized interrupted speech as speaking in high pitch and amplitude, showing interruption signals to gain control, and dominating the conversation's floor. Tannen (1992), who also conducted extensive research in the area of gendered conversations, argued that interruption is an individual habit that speakers present while taking turns in the conversation. Tannen also labeled it a violation of turn taking. She further explained that interruption can be both collaborative and competitive language behavior, depending on the speaker and topic of conversation.

Based on these definitions, I defined the language behavior of interruption as the conversational act of preventing the current speaker from finishing his turn in the conversation. This act can be either collaborative, as an attempt to support the current speaker's position, or competitive, as an attempt to take over the turn and maintain it for a longer period of time. Hence, the next speaker will hold the floor (Edelsky, 1981). I also perceived interruption as a valuable language behavior that has different goals and tasks in the conversation, which I will outline in detail in the next chapter. Additionally, I identified the interruption occurrences in the meetings by pinpointing language discourse criteria that caused interrupted speech, including short/long pauses after the current speaker turn; supportive tags of *hms*, *yes*, and *ok*; shift of topics; and elaboration on topics overlapping speech and questions between staff members. In the coming sections, I discuss the

frequency count of interruptions in Innovative Kuwait Co. meetings, followed by Global Phoenix's interruption occurrences.

Table 19

*Interruption Frequencies in Innovative Kuwait Co. Meetings*

Meeting Number	Interruptions
1 (5 Participants)	53
2 (5 Participants)	8
3 (8 Participants)	46
4 (4 Participants)	14
5 (9 Participants)	21

Table 19 indicates interruption frequencies in Innovative Kuwait Co. business meetings. In meeting 1, Zeeshan and his staff members, including Kumar, produced the highest number of interruptions (= 53 times). This further suggests that meeting a familiar face, such as Kumar, might not necessarily promote a collaborative type of meeting; instead, Zeeshan and Kumar acted competitively in terms of handling the topics of the conversation. Interestingly, meeting 2 included fewer interruption occurrences between Zeeshan and another senior manager at Innovative Kuwait Co. Unlike meeting 2, meeting 3 involved a high frequency of interrupted speech (= 46 times). This is perhaps related to the competitive style used while conversing with the external auditor and his assistant. The meeting with the Dubai data programmer in meeting 4 included fewer interruptions since the data programmer maintained the overall conversation floor through his comprehensive data presentation about a new financial security program. For this reason, Innovative Kuwait Co. staff members listened carefully

and only occasionally interrupted the data programmer. As for meeting 5, there was an average number of interruption occurrences (= 21) between Innovative Kuwait Co. staff and the external auditor.

### **Interruption Occurrences Produced by Global Phoenix Staff Members**

Table 20

#### *Interruption Frequencies in Global Phoenix Meetings*

Meeting Number	Interruptions
1 (18 Participants)	1
2 (11 Participants)	19
3 (8 Participants)	0
4 (12 Participants)	4
5 (12 Participants)	6

Compared to Innovative Kuwait Co.'s meetings, the number of interruption occurrences found in Global Phoenix's meetings was insignificant. In meeting 1, I only detected one interruption; however, in meeting 2, I found 19 interruptions between staff members and the visiting accountant from Colorado office. In this particular meeting, staff members were listening most of the time, and interruption was used as a question strategy for clarification. As for meeting 3, I did not notice any type of interruption in the conversation. In meetings 4 and 5, I found few occurrences of interruption. These smaller frequencies might be related to the collaborative nature of Global Phoenix's meeting structure and the systematic order of giving each member his or her turn of speech to share what he or she

performed.

### **The Data Analysis Findings**

This chapter discusses the coding process stages along with the different methodologies implemented to examine the recorded meetings in both Kuwait and Phoenix. The chapter further analyzes the coding results by incorporating the use of figures, frequency tables, and supportive with descriptions. Data findings from the coding stages and coding results provide an in-depth understanding of how the Kuwaiti and American meetings were established, organized, and maintained by staff members in both organizations. On the whole, coding and categorizing the recorded meetings into smaller pieces of meanings have enabled me to discover potential social systems performed within the meeting discourse and, most crucially, strengthen my understanding of the agency, power, and identity of staff members. Another vital impact of the data analysis findings was distinguishing the mutual relationship between what I coded and what I observed and wrote in my field notes. These findings have also helped me acknowledge some of the language behaviors observed in the recorded meetings in addition to their frequent uses in business meeting discourse.

Therefore, this chapter is, arguably, the initial analysis phase of an in-depth examination of the codes and categories found in the meetings, which attempts to further explore the actual business discourses from a communicative sociolinguistic perspective. Hence, the next chapter, the discussion of the meeting discourses, provides a detailed explanation of the research questions as well as in-

depth descriptions of ethnographic examples from field notes and language examples extracted from the recorded meetings.

## CHAPTER 5.

### DISCUSSION AND FINDINGS

The previous chapter presented the data analysis and coding process conducted for the collected business meetings in response to the four research questions posed for this dissertation. In light of that, this chapter reinforces what I observed, analyzed, and described in Chapter Four and generates an in-depth analysis and discussion of Kuwaiti and American business meetings. The long-term goal of this dissertation is to establish a sociolinguistic theoretical perspective toward exploring the interplay between corporate culture, business meetings, and staff members working in organizational settings. In addition, a further overarching goal is to provide a communicative sociolinguistic account of how staff members determine their language choices and behaviors of agency, power, discourse and social identities when communicating in organizational business meetings.

Accordingly, this chapter will familiarize the reader with a thorough representation of this particular meeting by addressing two major discussion sections: (1) exploration of research questions, and (2) focus group results. In section one, I provide a variety of examples from the recorded meetings, along with references to different qualitative and linguistic methodologies (i.e., social action network model, turn-taking model, and nonverbal language). Most importantly, I will discuss the findings in section one by using the Hymes' SPEAKING model (1974) and the Sherzer and Darnell (1986) guide of



ethnographic study of speech use.<sup>1</sup> Another essential method that will be incorporated in discussing section one is my ethnographic field notes observation in both field sites.

Prior to discussing the research questions section, I will explain very briefly the language analysis topics used in the Hymes' (1974) SPEAKING model and the Sherzer and Darnell (1986) guide of ethnographic study of speech use. By doing so, the reader will be able to have an initial look at the two linguistic methods and make easier connections while reading the coming discussion. Beginning with the SPEAKING model, Hymes created this ethnographic speaking method to explore the many language patterns and meanings related to a speech act, event, and community. The SPEAKING model is an acronym designed to identify eight major components that language researchers look for when examining the speech act, event, and community. **S** refers to the *setting* of the act, event, and community in addition to the *scene*, which includes the time and place and overall physical/psychological circumstances behind establishing the speech act, event, and community. **P** stands for *participants* and different types of audience involved. **E** describes the *ends* performed in the speech act, event, and community, including purposes, goals, and outcomes.

The fourth component in the model is the *act sequence*, represented by the initial **A**. The act sequence describes the form and order of the speech act, event, and community. Next is the *key* component identified as **K** where language researchers investigate the tone, manner, and spirit performed. The initial **I** refers

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<sup>1</sup> Detailed descriptions of the Hymes' SPEAKING model (1974) and the Sherzer and Darnell (1986) guide of ethnographic study of speech use are provided in Appendix F and Appendix G.

to *instrumentalities* represented, including forms and styles of speech. The last two components are *norms* (N) and *genre* (G). Norms are the social rules that organize and govern the speech act, event, and community besides the different actions and reactions performed by participants. Genre identifies the kind of speech act, event, or community.

Because this study is arranged as an ethnographic case study, using a similar thorough language guide, such as Sherzer and Darnell (1986), was effective in developing valuable connections with the Hymes' SPEAKING model. In fact, Sherzer and Darnell's guide was made under Hymes's supervision. The guide includes five sections of inquiry: (a) analysis of the use of speech, (b) attitudes towards the use of speech, (c) acquisition of speaking competence, (d) the use of speech in education and social control, and (e) typological generalizations. In the coming sections, I only used the first three units of Sherzer and Darnell's guide. First, the analysis of the use of a speech unit describes a diversified speech community that is composed of different ways of speaking and norms of interactions. Here, language researchers, especially ethnographers are required to ask analysis questions related to speech use components, relationships and rules governing speech components, linguistic varieties used; identities performed in speech; and verbal and non-verbal codes. Ethnographers should also relate to topics discussed and channels of communication in addition to Hymes' SPEAKING components.

As for the attitudes toward the use of speech unit, Sherzer and Darnell (1986) explained that attitudes in speech are one of the important parts in showing

the place of communication and certain rules performed by participants. When looking for attitudes, Sherzer and Darnell suggested language researchers ask about the general features of speaking related to certain conceptions and ideologies (i.e., particular roles of participants and ideal/typical roles). In addition, they must explore if the use of speech is connected to these roles, as in the example of locating roles linked to membership. The social marking of roles is also significant to examine. A second subcategory of questions in this unit relate to the characteristics of speaking well. Sherzer and Darnell identified two elements to look for: a focus on the performance of the message and the participants to figure out how they spoke and used speech.

Sherzer and Darnell (1986) also recommended asking more questions on the permissible range of speech by locating two exceptions and speech defects; examine if speaking is a satisfying activity and when the participants tend to be silent or talkative. To find these two exceptions and speech defects, Sherzer and Darnell provided questions related to personality traits and characteristics of participants and if there are differences linked to the many roles performed in the speech. The last category in this unit addresses the different attitudes toward languages, dialects and language varieties. The unit of acquiring speaking competence refers to the categories that societies recognize and validate as acceptable or unacceptable. For example, Sherzer and Darnell (1986) suggested asking questions in regard to the relationship between these categories and society's conception and acquisition and finding a theory associated with the acquisition of speaking competence, interpretations about the categories, and the

characteristics and practices of the categories. This unit of analysis also includes questions about the transmission of speaking skills and how these skills are conducted and realized by speakers and the general place of such category in communication (Sherzer & Darnell, 1986).

### **Exploration of Research Questions**

This section will address the findings related to the research questions proposed for this study. As mentioned in Chapter One, I established three research questions in an attempt to investigate the linguistic meaning units of agency, power, and identity performed by business staff members. In this study, I propose three research questions:

- 1) How does the agency of staff members reflect membership in the corporate culture of an organization as a whole?
- 2) How is power used in relation to the agency in business meetings?
- 3) How are discourse and social identities of staff members enacted in business meetings? I explain each meeting's findings in both field sites to make the comparison between the two business contexts.

#### **Research Question One**

*How Does the Agency of Staff Members Reflect Membership in the Corporate Culture of an Organization as a Whole?*

For this question, I wanted to investigate if Kuwaiti and American business individuals who are members of a group, and identify with it, perform agency according to their group membership. I perceive membership to be the social belonging of a group that involves access to sources of information and benefits

offered to group members in addition to actions signifying social and organizational identities. This membership also establishes a sense of group self image, power, commitment to collaborative goals and concerns, and a long-term social attachment among group members (Forsyth, 2010). Schwarz (2002), who is an organizational psychologist with a leading role in facilitating groups' communication and conflict, identified groups as the "basic unit of organizations" (p. 3). Larry Frey (1994, 2003), a communication professor has studied groups' interaction and organized groups facilitation, explained that the roles of groups in everyday life are vital to people and organizations, especially the small group structure that he described as "the tie that binds, the nucleus that holds society together (Frey, 1994a, p. ix).

Therefore, to answer question 1, I examined, with caution, all the possible language incidents showing the relationship of performing business agency in meetings and membership to the group. The next step was to explore what language behaviors constituted agency and reflected membership in this meeting. Here, I chose to focus on three language behaviors that might demonstrate actions related to members' agency: (a) the use of "we" by staff members with locating action verbs related to membership such as established, transferred, submitted, and wanted, (b) humor and laughter during the meeting, and (c) idiomatic expressions and statements of the group's membership in the organization.<sup>2</sup> Keith Richards, a Professor of applied linguistics, in his book, *Language and Professional Identity:*

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<sup>2</sup> Idioms: a style or form of artistic expression that is characteristic of an individual, a period or movement, or a medium or instrument (Merriam-Webster Online Dictionary, 2012)

*Aspects of Collaborative Interaction* (2006), recognized humor, common perspectives among group members, and constructing the others as elements of creating group interaction and membership. Bargiela-Chiappini and Harris (1997) have also looked at the choice of “I” and “we” in comparing Italian and British business meetings.

**Findings from Meeting 1: Kuwait**

Meeting 1 at Innovative Kuwait Co. included five members in a conference room sitting at a circular table, including two members who maintained the floor of the overall business conversation. Female staff members were the hearers and they rarely spoke during the meeting. I also found the meeting to be formal in terms of tone and ways of speaking among staff members and that the two male managers who maintained the floor produced a high number of interruptions (= 53 times). Meeting 1’s genre was a business discussion involving topics on financial compliance issues and future projects (Hymes, 1974).

When looking at the results of participants’ details for who produced utterances containing “we” in Meeting 1, the Vice President, Zeeshan, produced the highest number of “we” utterances compared with the other members. Table 21 indicates the amount of “we” utterances produced by Meeting 1’s participants.

Table 21

*Innovative Kuwait Co. Staff Members Use of “We” in Meeting 1*

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Participants	We (times used)
Zeeshan	53
Kumar	39
Muneerah	1

Kamya	0
Deshna	0
Total	93

The results of Table 21 were not surprising since Vice President Zeeshan was in charge of organizing this meeting with another senior manager at Innovative Kuwait Co. That is why the second highest number of uses of “we” came from by Kumar. Some of Zeeshan’s “we” utterances were “we have a natural referee...,” “we will look at...,” “we found that...,” “we may get custody...,” “we will have a lot of systems...,” “we did a lot of homework...,” and “we go and submit.” In observing Zeeshan’s utterances of “we” during Meeting 1, I also explored agency and membership by analyzing the kinds of action verbs used to indicate collaborative group work and membership. I adopted Van Leeuwen’s (2009) social action network model to find the action verbs and discover their meanings in a business meeting’s discourse. The following examples exhibit Zeeshan’s agency and reference to the membership’s actions and behaviors in Meeting 1:

- We *established* the company
- We *transferred* the money
- We *submitted* the money
- We *put* principal value on it
- We *got* a list of obligations
- We *found* it
- We *liked* it

- We *wanted* it
- We *did a* stakeholder advance

Not only did Zeeshan produce verbs referring to membership and group actions in transferring and submitting money, putting principal values, doing stakeholding, and presenting different psychological/emotional states of these actions, he also used modalized discourses to show the ability of acting and modality in the meeting. Van Leeuwen (2009) explained that the use of modal verbs shows what social agents can do and their eligibility to take the action itself. Zeeshan provided some of the following examples in Meeting 1:

- We *will* remind everybody
- We *may* end up with this
- We *will* figure out how to handle
- We *will* have a lot of system issues
- We *will* go ahead
- We *can* go through the list of obligations
- We *will* need to find out about their energy
- We *may* get custody
- We *will* relate to the terms and conditions

While this was the case of Zeeshan's business discourse, Kumar also produced a high number of "we" utterances (= 39 times). Kumar, who joined Meeting 1 from another department at Innovative Kuwait Co., used similar action verbs to Zeeshan, but his actions focused on different performance modes, resources, eligibility, motions, and reactions than the ones Zeeshan addressed in his speech.



This was due to the opposing goals of parties between Zeeshan's party and his staff members and Kumar's department and potential goals. Also, there might be other purposes for using "we," as Bargiela-Chiappini and Harris (1997) mentioned. In their study, they found that Italian and British staff members using "we" to signify the presence of members perceived the group as an entity and referred to the role or function of group member and the organization. Examples of Kumar's overall "we" utterances are illustrated below:

- We *went* around
- We *provided* them with information
- We *brought* the mediators
- We are *going* to do the evaluation
- We *wrote* hand written comments
- We *will* have another meeting
- We *will* have the approval

What I also found worth noting was that the three female staffers in Meeting 1 did not say anything related to the agency of membership, except Muneerah who confirmed her boss's statement by saying, "We have asked about it."

Actually, this was an important observation that caught my attention and I stated it in my field notes. An entry in my field journal on July 17, 2010 revealed this observation. I wrote: "In this meeting, female staff members are not engaging in the conversation; rather, they only show agreement by nodding their heads and using exclamation markers of *oh*, *ah*, and *um*." This finding is equivalent to what sociolinguists and discourse analysts have documented in the area of gendered

speech in the workplace and professional settings (Holmes, 2003a; Holmes, 2006; Mullany, 2007).

The second language behavior I looked at in Meeting 1 was humor and laughter by staff members that might reflect group membership. Meeting 1 only included one humorous episode when Kumar interrupted Zeeshan to remind him of an organization's name he missed during his turn. Hence, this was one norm of interactions (Hymes, 1974) that showed the close relationship between Zeeshan and a familiar individual in the same organization, and, most importantly, that identified his role as a member of Innovative Kuwait Co. staff (Sherzer & Darnell, 1986).

As for the idiomatic expressions about agency and membership in Meeting 1, Zeeshan was the only participant who uttered some idioms during the business conversations. He expressed three idioms, of which the first was "We end up playing good combat cop. Kamyia is a bad cop." Here, Zeeshan manifested his personal attitude (Sherzer & Darnell, 1986) describing his role as the vice president with collaborative interaction that resulted in the group's teamwork, which he called "combat," and then distinguished Kamyia as the "bad cop" member in the group. The second idiom was "boss got chicken." Interestingly, this idiom strongly indicated that Zeeshan was not the only person with power at Innovative Kuwait Co. and there were other "big bosses" who might get frightened. The third idiom was "homework for next time." Zeeshan used this expression as a specialized business term to remind members to do their group work for next meeting (Sherzer & Darnell, 1986).

Statements referring to group's membership in the organization were also evident in Meeting 1 and came from Zeeshan and Kumar. For example, Zeeshan mentioned the following utterances in reference to what he and his group members own, "we have a neutral referee," "we have this loan report," "we have this structural deal," and "we have a balance sheet." On the other side, Kumar stated different resources and channels of communication (Hymes, 1974) managed by his department at Innovative Kuwait Co.; "we have approval," "we have conference call," "we have our own circulars," and "we have different emails."

### **Findings in Meeting 1: Phoenix**

Meeting 1 at Global Phoenix is characterized by a different psychological and physical setting than Meeting 1 at Innovative Kuwait Co. The conference meeting room was large and had no windows. Staff members sat at a rectangular table, which included two teleconference phone devices to communicate with the Colorado office. Participants included Phoenix and Colorado staff (= 18 people) who met to discuss several updates regarding administrative, social, and political issues related to Global Phoenix and its two offices. The purposes, goals, and ends of both Phoenix and Colorado staff members were collaborative and aimed at benefiting both offices. The act and order of the meeting was sequential in which the staff members with higher positions would call on a particular member to share his or her business task. Generally, the language used in the meeting was formal but also involved lots of joking and laughter, especially when a member started his turn at speaking. Norms of interactions in the meeting were evident in staff members' laidback personalities and the way they collaborated with one another to

discuss the business tasks during the entire meeting. This meeting's genre was a business discussion between the staff members scheduled for every Monday (Hymes, 1974).

In looking at the use of "we" among Global Phoenix staff members to reveal membership and action verbs related to membership, I was surprised to find a high usage of "we" in the meeting. This finding is of interest because it is corroborated by what I audio recorded and what I observed before and after joining Meeting 1. In my field journal, I explained: "I came to Global Phoenix as someone who never attended American business meetings and who had little knowledge about how to approach American business meetings. However, these feelings completely departed after noticing how staff members were collaborative most of the time by making jokes everywhere." Both Phoenix and Colorado staff members used "we" in Meeting 2. Table 22 shows Phoenix and Colorado staff members and their use of "we" in Meeting 1.

Table 22

*Global Phoenix Staff Members Use of "We" in Meeting 1*

Participants	We (times used)
Molly	100
Sarah	30
John	154
Sean	55
Gary	20

Brandon	120
Judy	28
Oliver	130
<hr/>	
Total	537
<hr/>	

The scores indicated in Table 23 revealed only the staff members who uttered “we” during Meeting 1. Molly, who is a vice president, and John, an executive vice president, produced almost similar numbers of “we” utterances. Staff members from both offices had the opportunity to speak in the meetings and share with everyone. For example, Sarah from Global Phoenix administration used “we” 30 times, whereas Sean and Gary from Colorado scored 55 and 20. Also, Brandon from Phoenix produced 120 “we” utterances when he shared his political endeavors with senators and congressmen and congresswomen from Phoenix, Washington, D.C., and Colorado. Laura and Oliver from Colorado participated, as well scoring 28 and 130 “we” utterances. Not surprisingly, I found a great deal of action verbs showing collaborative agency among the Global Phoenix and Colorado office and member actions. The following examples were some of the action/modal action verbs (Van Leeuwen, 2009) used to demonstrate agency and membership in Meeting 1.

- “We *invited* her; we *can’t* hear you; we *attended* the seminar” (Molly)
- “We *invited* 25 people; we *called* the hotel; we sent emails” (Sarah)
- “We *want* to meet with somebody; we *talked* with him; we *discussed*

benefits” (John)

- “We *talked* to some affiliates; we *can't* give them that; we are *going* to stand there” (Sean)
- “We *managed* the issue; we *called* them back; we *looked* at many issues” (Gary)
- “We *attended* the meeting; we *saw* the senator; we *met* professional groups” (Brandon)

Humor/laughter was evident in this meeting. Global Phoenix staff members and their colleagues from Colorado laughed and threw out some jokes referring to absent members. For instance, at the beginning of Meeting 1, Oliver from Colorado opened his turn saying, “We’re still waiting for folks to gather here. They’re a little late. What we thought we might do with latecomers is ask them to donate \$10 for every minute they’re late.” The reaction of this language behavior/action was that everybody laughed, and Chris from Phoenix said, “Sweet.” Interestingly, Oliver continued the joke after Chris’s turn; “We’ve collected \$20 so far, so that’s great.” Sarah reacted by saying “Awesome.”

Technical issues in the teleconferencing system sparked a language episode that caused laughter. After introducing all staff members, Molly joked about the microphone problem, “We’ve gotta get you a microphone. We’re gonna get you a lavalier to wear on your shirt.” Also, when Molly asked a staff member about whether he submitted a document, his humorous response was, “Well, I can’t believe that since I didn’t submit anything.” Molly replied, “Oh, you’re so funny.”

Molly also joked with another staff from Colorado, saying, “I am just teasing you.” In *Laughter in Interaction* (2003), Glenn argued that the language behavior of humor shows how groups unite and became aware of their own unity. Glenn also explained that humor in collective discussions is “a psychic connection of all the laughter. It can be induced as a means of displaying this group togetherness” (p. 30).

Furthermore, in relation to humor and laughter in the meeting, Global Phoenix staff members and their Colorado colleagues expressed only two utterances of idiomatic expressions in reference to their membership in the two organization’s offices. Molly, for instance, said “we’ll make it right” expressing her collaborative work with John in planning administrative sessions between the two offices. The second example was from Oliver, “been percolating over the last couple of months, including debt ceiling issues and stuff that could affect our industry.” As for statements showing membership, most staff members continued repeating the same statements of “we have a meeting” and “we have issues to discuss.”

### **Findings from Meeting 2: Kuwait**

Another source of data is Meeting 2 at Innovative Kuwait Co. In this meeting, Zeeshan and his staff members met with a senior manager from another department. The location of the meeting was in the same conference room as meeting 1 but the meeting only lasted for 30 minutes. Similar to Meeting 1, female staff members were present in the meeting; however, they did not participate in the speech event. I noted it in my field journal, June 9, 2011: “Zeeshan and Ayman are the only staff members speaking in the meeting and the

other female staffers are only listening and taking notes.” The purposes, goals, and outcomes of this meeting involved two opposing business views presented by Zeeshan and Ayman; that is why the meeting began with an argument and a serious tone from both. Norms of interactions were organized between two participants only and the rest of the members did not have a chance to be part of the business meeting discourse. The meeting genre was about a cash and banking issue that needed some solutions from both Zeeshan and Ayman (Hymes, 1974).

Thus, the use of “we” was only between Zeeshan and Ayman. Each staff member represented his department’s membership and group work. In addition, the number of times was used “we” between the two was almost the same. Table 23 illustrates the number of “we” utterances used by Innovative Kuwait Co. staff members in Meeting 2.

Table 23

*Innovative Kuwait Co. Staff Members Use of “We” in Meeting 2*

Participants	We (times used)
Zeeshan	40
Ayman	53
Muneerah	0
Kamya	0
Deshna	0
Total	93

The results indicated in Table 23 were expected because Zeeshan and Ayman controlled the floor in Meeting 2. Nevertheless, both of them sought to defend their collective “we” to show group work and membership within the cash problem. For example, Zeeshan acknowledged the action of complying with



regulations and rules concerning cash by saying, “We are complying with rules.” In addition, he validated his collective agency and membership in the business ethics and law department through expressing, “We discussed it with the auditor, so you should go and check that,” “We are not responsible for this cash problem,” and “We took action to stop this problem.” In fact, Zeeshan and Ayman used different action verbs (Van Leeuwen, 2009) to identify with group work and membership, as in the examples I extracted from Meeting 2:

- “We *deposited* money right away” (Zeeshan)
- “We *moved* our guys when this problem happened” (Zeeshan)
- “We *contacted* many banks” (Zeeshan)
- “We *made* an agreement” (Ayman)
- “We *agreed* together to solve the problem” (Ayman)
- “We *can* send them some solutions” (Ayman)

Based on the Hymes’ SPEAKING model (1974), this meeting was argumentative with a serious tone of speaking. However, I found two incidents of laughter produced by Ayman. In the first humor example, Ayman asked Zeeshan to hold a conference call with some financial personnel who were responsible for the cash problem. What caused the laughter was when Ayman joked about recording the conference call, “If we all agree. Then, let’s just do the conference call with them and let’s record that conference call.” The other example concerned calling an Innovative Kuwait Co. manager who was involved in managing the cash money solutions with Zeeshan. Ayman humorously said: “I think you have

personal contact with him. I will not quit, so call him.”

Idioms and statements related to collective agency and membership were few in this meeting. There was one idiomatic expression expressed by Zeeshan where he described how his department and staff members suffered from this cash problem: “We were jumping and we were batting in this issue.” Statements of membership in a department to a department were “I have authority from my department to deal with this issue” (Ayman); “My department is responsible for cash not your department” (Ayman); “We have no problem with your department” (Zeeshan); “You don’t have the expertise to do excess cash management, we will do it” (Zeeshan).

### **Findings from Meeting 2: Phoenix**

Like Meeting 2 in Kuwait, Meeting 2 in Phoenix also involved a visiting internal staff member from another department. In this meeting, Global Phoenix staff members invited their Colorado accountant colleague, Monica, to join the meeting in order to discuss a new accountancy document that would be deployed by both the Phoenix and Colorado offices. The physical scene of this meeting was in a new building because Global Phoenix staff members have decided to move out of the old building. Regardless of that, the new room was almost the same in size and seating arrangement with a rectangular conference table. Monica controlled the floor due to her detailed description of the new service but that did not prevent staff members from asking questions. The language used was formal with little laughter (Hymes, 1974).

From this meeting, staff members showed some uses of the collaborative

“we” during the conversation with Monica. As might be expected, Monica scored the highest usage of “we” since she continued talking about the new accounting document. Table 24 shows the use of “we” by four staff members: Molly, John, Sarah, and Monica.

Table 24

*Global Phoenix Staff Members Use of “We” in Meeting 2*

Participants	We (times used)
Molly	20
John	15
Sarah	10
Monica	103
Total	148

So how did Molly, John, and Sarah use “we” to show collective agency and membership in Global Phoenix? Molly expressed coming issues, including “We’ll be having a planning session,” “We are going into new things soon,” and “We’ll be using this form in our organization.” John also referred to membership where he said “We want you to show us how it works” and “We bought it together when we travelled to Colorado,” in addition to Sarah, who expressed “We want you to teach us” and “We are going to learn it together.” Some of Monica’s examples of “we” were: “we as people wanted to do this for you,” “we are going to teach you how to use it,” and “we tried to create this for you.” Action verbs used with “we” in these utterances described different past and future action events that Molly, John, Sarah, and Monica sought to act upon. This meeting included actions of “using this document,” “using allocation sheets,” “writing up memos,” “depositing

money,” “debiting money,” “signing your sheet,” “requesting payment,” “print bills,” “paying taxes,” and others.

Although this was a dense meeting of description and detailing a new service to both offices, staff members laughed and joked together during the meeting. Richards (2006) argued that collaborative groups use humor in the workplace when doing business together to relieve stress and tension, tease one another, tell in-jokes, and use outside members as the topic of the in-jokes. Meeting 2 had several incidents of laughter and joking, especially by Monica. For instance, one Global Phoenix staff member stepped out of the room to bring some handouts, so Monica noticed his absence, saying jokingly: “PAC checks are important to know. We don’t want you to miss it like Chris who’s still not back.” Another joke that Monica used with Sarah was about a Colorado staff member, “I think she’s enjoying our weather now.” Global Phoenix staff members have also produced jokes during the meeting, as in John, who responded to Monica’s statement about giving everybody extra copies of the new document. She started the joke with, “I’ll give you a new copy. I’ll send you one.” John replied, “Find the perpetrator and we’ll find my copy.”

This meeting had one idiomatic expression produced by Monica, in which she referenced to her Colorado membership and how the Colorado office is handling the new accounting service: “We’re still working on your sheets behind the scenes.” As for direct statements referring to group membership, Monica also mentioned plenty in the meeting, including “We have updated our sheets and now I want to update yours in Phoenix,” “We are here to help you and you can visit us

in Colorado at anytime,” “The Colorado office wants to help,” and “The same procedure works for your office and our office.”

### **Findings from Meeting 3: Kuwait**

Meeting 3 at Innovative Kuwait Co. was held in the same conference room as Meetings 1 and 2. The participants at this meeting included Zeeshan and his three female staff members in addition to two senior managers at Innovative Kuwait Co. This meeting was organized to meet with Wael, the external auditor and his assistant Aishwarya. Purposes, goals, and outcomes of this meeting were viewed differently because there were three parties at the table: Zeeshan’s department, the two internal managers, and the auditor. Therefore, the tone of speech during this meeting was serious and the norms of interactions involved several interruptions and argumentative episodes, especially when staff members had a disagreement over a business idea or solution. Despite that, participants in this meeting had some laughter together (Hymes, 1974).

As expected, these three parties showed numerous examples of “we” followed by action verbs indicating collaborative agency and membership. In addition, the use of “we” seems to reflect the different purposes, goals, and outcomes of all parties. Actually, in this meeting, I realized Sherzer and Darnell’s (1986) assumption of analyzing a diversified speech community that consists of many ways of speaking. I recalled this entry from my field journal: “Everyone wanted to take more turns of speech to defend his or her point and membership to group’s goals. Although the two senior managers at Innovative Kuwait Co. supported Zeeshan’s department, they had different goals as well.” Table 25

summarizes participants' use of "we" in Meeting 3.

Table 25

*Innovative Kuwait Co. Staff Members Use of "We" in Meeting 3*

Participants	We (times used)
Zeeshan	28
Raj	87
Babu	97
Wael	37
Aishwarya	41
Muneerah	0
Kamya	0
Deshna	116
Total	356

As shown in Table 25, every participant in Meeting 3, except for Muneerah and Kamya, has his or her share of exhibiting a collaborative agency related to his or her in-group membership. A remarkable finding in this meeting was observing the participation of Deshna, who was "voluble" during the meeting, as Sherzer and Darnell (1986) mentioned in their guiding question. They argued that speakers become talkative or silent due to many personality traits and roles. In Deshna's situation, she used a large number of "we's" in order to approve her role as a member of Zeeshan's department as well to take responsibility upon achieving the department's goal in finalizing the auditing report. Similarly, Wael's assistant, Aishwarya, has also used the collaborative "we" to support her membership in Wael's and her audit company. This meeting consisted of many action verbs (Van Leeuwen, 2009) that relate to collaborative agency and membership, as in the examples: "We *want* to tell you about it" (Deshna), "We *will modify* the

management report for you (Aishwarya),” “We *would* like to know the general rules (Raj),” “We *will* record it for you (Babu),” “We *can* get the document justified and approved (Zeeshan),” “We *can* manage the report (Wael).”

In addition to the serious nature of this meeting, different instances of collaborative humor existed among Innovative Kuwait Co. staff members and the auditor’s party. In one instance, Babu addressed the importance of risk management in the audit report, and Wael agreed. Babu then said that: “...risk everywhere and in all organizations”; Wael replied jokingly: “If something happened to me then your department is responsible for that.” Another instance that caused laughter in Zeeshan’s party as well as the two managers was Aishwarya’s telling them how she was scared at the time she visited the safe room for keeping critical documents: “It was very dangerous. I went with someone and we actually were outside, there were so many documents inside.” Zeeshan also had his share of humor, telling the auditor’s party how his department is “I am in search for a guy who has to be a suitably qualified person” to help them keep critical documents.

There were no examples of idiomatic expressions linked to membership in this meeting. However, there were few direct statements showing collaborative agency and membership. One example was from Zeeshan, who delivered the statement to Wael: “You know, we are very senior managers here, so we have other things to look for.” In addition, when explaining the corporate culture at Innovative Kuwait Co., Zeeshan told Wael “We have many departments here, and they all want photocopies of this agreement.” Similarly, Babu referred to corporate

culture, while speaking to Wael, when he said: “The board of directors here has the budget, not us.”

### **Findings from Meeting 3: Phoenix**

Meeting 3 was similar to Meetings 1 and 2. The meeting was held in the same room using the same teleconference calling system. It lasted for only 30 minutes. Participants were few; a total of eight staff members from Phoenix and Arizona. The forms and styles of speech, in addition to norms of interactions, were identical to those at Meetings 1 and 2, including a relaxed tone of speech, organized turns set up by calling everyone’s name, and many jokes during the meeting, which was about updates and coming events in both the Phoenix and Arizona offices (Hymes, 1974).

Raymond, Vice President of the Colorado office, opened this meeting, followed by Molly. Raymond and Molly gave everyone a chance to speak about his or her business updates, which is why most participants in this meeting produced a moderate number of “we” utterances when talking about collaborative agency and membership. Below is Table 26, showing Global Phoenix staff members’ use of “we.”

Table 26

*Global Phoenix Staff Members’ Use of “We” in Meeting 3*

Participants	We (times used)
Molly	20
John	35
Raymond	120
Oliver	34
Allison	30



The participants presented in Table 26 used a variety of action verbs (Van Leeuwen, 2009) related to group work and membership. For instance, Raymond articulated the following actions performed by his group in the Colorado office: “We were working on this issue,” “We talked about it in Colorado,” “We are going to proceed,” “We made a call,” and “We will have some good results in Colorado.” Global Phoenix staff members have also talked about their group actions, such as “we are still working on it here” (John), “we want to make it a user-friendly form” (Allison), and “we managed a lot of issues lately” (Molly).

In spite of the short duration of this meeting, Global Phoenix staff and their Colorado colleagues shared some laughter together. Oliver, from Colorado opened his speech by joking about a staff member in the Phoenix office, saying: “I found Brandon wandering this morning. I picked him up and brought him in.” When ending the meeting, Raymond joked about moving out one of his group members: “Is there any chance that we can move your office somewhere else?” and she replied: “As long as I am going like to Hawaii or the Bahamas, yeah. I can leave you guys and go.”

Also in this meeting, staff members at Global Phoenix and Colorado offices expressed few idiomatic expressions related to collaborative agency and group membership. Allison from Phoenix, produced two examples: “We should be pretty much over the hum of getting all these companies to be with us,” and “We were rocking and rolling to finish the compliance issue.” Interestingly, in this

meeting Raymond expressed a number of direct statements referring to the merger between the Phoenix and Colorado offices, “We have common elements between the two chapters of our organization,” “Our partnership together is going pretty well,” and “We have a lot to do together.”

#### **Findings from Meeting 4: Kuwait**

Explaining a financial data program using PowerPoint and visual aids was the topic of this meeting. The meeting consisted of four participants: Zeeshan, Ayman, Kumar, and a visiting data programmer from Dubai, United Arab Emirates. Unlike Meetings 1, 2, and 3, this meeting took place in the IT department at Innovative Kuwait Co. The conference room was small but had large windows displaying downtown Kuwait City. All Innovative Kuwait Co. staff members joined this meeting with one goal: to find an effective and reliable data program for keeping their financial data. The data programmer’s major purpose was to give a detailed presentation of the financial program and ask Innovative Kuwait Co. staff to try out the program. The language used was formal and explanatory; the data programmer maintained most of the conversation in this meeting to explain the program he was offering (Hymes, 1974).

Not surprisingly, because his turns were longer, the data programmer used the highest number of “we’s” during the meeting. George used “we” 228 times, in many utterances, explaining his company goals for using the data program in Kuwaiti financial companies. Table 27 indicates the consistent use of “we” among participants in Meeting 4.

Table 27

*Innovative Kuwait Co. Staff Members Use of “We” in Meeting 4*

Participants	We (times used)
Zeeshan	119
Kumar	111
Ayman	79
George	228
Total	537

Instrumentalities included in this meeting were different than the ones used in Meetings 1, 2, and 3. Here, the forms and styles of speech were of technical genre related to the data program presented; therefore, the action verbs (Van Leeuwen, 2009) in this meeting revealed numerous technical actions and process that are often utilized when dealing with computer programs. Examples of these action verbs related to technicality and George’s membership to his computer company were: “We can be screening at the fund level,” “We run this program in many neighboring companies,” “We click on the return space,” “We send your portfolio with a pass key,” “We install this program into your computer” and “We create composite in a separate Excel file.” Innovative Kuwait Co. staff members also participated, expressing examples such as: “We want you to give us a system view look at the program,” “We aim to use the program to help our company,” and “We worry about security issues of our finances.”

Another characteristic of this meeting was the use of laughter at the end of some utterances but without making jokes. I found out that George tried to entertain staff members in the meeting by bringing laughter; he sometimes laughed

by himself and smiled most of the time, which I noted in my field journal. One joke that might be of interest to understanding a larger hidden membership of an outside party dealt with the American government and its security team. George commented: "I can get you guys on a call without a security team in Dubai, so I'll ask them about your inquiry about the US data because I haven't been asked about the snooping US government." This joke caused laughter in the group.

Participants here did not produce any idiomatic expressions related to their collaborative agency and membership. Nevertheless, George made many statements demonstrating his agency and membership to his computer company, such as: "We are here to work for you" and "We have skilled people at our company that want to help you." Innovative Kuwait Co. staff members expressed similar statements as well, including "We have a security issue that we want to fix," "We have regulators in our company," "We have data to secure," and others.

#### **Findings from Meeting 4: Phoenix**

Setting and scene in addition to ends and act sequence were equivalent to meetings 1, 2, and 3. Participants in this meeting involved a total of 12 staff members from both offices, who met to discuss updates, upcoming events, and programs managed by the two offices. The merger topic was direct in this meeting and referred to by many staff members. Forms and styles of speech were relaxed and informal with lots of laughter and joking. Every staff member had his or her turn at speaking. Molly organized the meeting by calling on each member to speak and share his or her business task (Hymes, 1974).

Use of collaborative "we" utterances was evident in this meeting. Five

staff members out of twelve used “we” in their utterances. These participants were the ones who had longer turns during the meeting, including Molly, John, Sean, Oliver, and Allison. The remaining staff members participated in the meeting but their speech turns did not include any “we” utterances. Table 28 lists the number of “we” utterances produced by Global Phoenix staff members.

Table 28

*Global Phoenix Staff Members Use of “We” in Meeting 4*

Participants	We (times used)
Molly	30
John	50
Sean	90
Oliver	100
Allison	69
Total	339

Action verbs (Van Leeuwen, 2009) found in this meeting were equal of meanings to those in Meetings 1, 2, and 3. Molly, for example, who was in charge of organizing this meeting performed her collaborative agency and membership to all staff members by saying, “We’ll just get started everybody.” Here she positioned her authoritative role as well as addressed her audience as “everybody,” including both offices’ members (Hymes, 1974; Sherzer & Darnell, 1986). John also used the actions of “We want to set up two board meetings” and “We are going to set up an association meeting.” Actions of “expanding leadership programs,” “blending different models into Global Phoenix,” “finalizing conference procedures,” “inviting guest speakers,” “meeting with senators and congressmen,” “making connections with many locals,” “building operational

communication between the two offices,” and “providing savings for everyone” were present in Sean’s, Allison’s, and Oliver’s turns of speech.

This meeting was also filled with numerous examples of humor and laughter related to collaborative agency and membership. In fact, a Colorado staff member opened the meeting by making a joke about their missing group leader, who went out for lunch. The staff member told Molly: “You’re in charge here; our boss is missing. No comment.” During the middle part of the meeting, Molly and Judy, from Phoenix shared a joke; Molly said: “Everybody got the information about our coming Albuquerque retreat information. Looking forward to see all of you in Colorado;” Judy responded, “Oh, everyone is excited to see you, too, and meet your group.” When ending the meeting, Global Phoenix staff joked about the weather in New Mexico by saying that they did not own any winter clothes.

Furthermore, a variety of idiomatic expressions and statements of membership were evident in this meeting. One Colorado staff member used “knock wood” while talking about his success in meeting with different state and federal regulators across Colorado and the Washington, D.C., area John also used “We rolled all that out” in describing his collaborative work with Global Phoenix staff in talking to the board of directors. To describe the success of her group work in managing the CEO’s leadership program, Molly happily expressed “Just praise it to the skies.” Similarly, John continued praising how hard all Phoenix staff members had worked in the leadership program and referred to the participating CEO’s reaction, saying: “If we go to the next level down, CEO’s are left out of it, they may put the kibosh on it. So, we’re trying to get the buy-in to see if there’s

interest.” As for statements showing group membership, they addressed mainly the merger between the two offices, “We all want to work for our mother organization” (John), “Our budget is one” (Judy), and “Our building and office expenses” (Allison).

### **Findings from Meeting 5: Kuwait**

Meeting 5 was the last meeting I attended at Innovative Kuwait Co. The meeting was located at the same conference room as Meetings 1, 2, and 3. Nine participants attended this meeting, and they were from three departments: Zeeshan’s department, Kumar’s, and the legal team department, including a senior female manager and a lawyer. All Innovative Kuwait Co. staff organized this meeting to collaborate with an external auditor who was in charge of their audit report. Their former auditor Wael was also present but without his assistant. The meeting’s language and norms of interactions were equal to those in Meeting 3. Staff members used a serious tone and interrupted one another during the meeting. Despite that, the attendees shared laughter. In addition, Arabic-speaking staff members translated some English terms that were implemented in the audit report (Hymes, 1974; Sherzer & Darnell, 1986).

One remarkable finding in this meeting was that the external auditor, Kamal, commanded most of this meeting’s floor by taking longer turns to explain the audit document under discussion. That is why Zeeshan and his staff, in addition to Kumar produced a limited number of “we” utterances throughout the meeting. Another noteworthy outcome of this meeting was the only female manager, Reham, taking charge of the discussion, along with Kamal, which might

be of interest when considering the gendered speech styles observed at Innovative Kuwait Co. (Coates, 1995; Mullany, 2007). Table 29 shows the use of “we” among Innovative Kuwait Co. internal and external staff members in Meeting 5.

Table 29

*Innovative Kuwait Co. Staff Members Use of “We” in Meeting 5*

Participants	We (times used)
Zeeshan	16
Kumar	19
Reham	377
Kamal	270
Wael	3
Muneerah	10
Kamya	0
Deshna	1
Deena	12
Total	708

On the whole, Innovative Kuwait Co. staff members with their external parties uttered “we” with similar frequency, as in the previously discussed meetings, except in Reham’s case. Action verbs (Van Leeuwen, 2009) were used to describe similar business tasks and activities. Beginning with Kamal, he identified his collaborative agency of “we” and membership to his audit company with many examples, such as “We managed meetings with several companies,” “We did financial policies and procedures,” and “We wrote the internal assessment for you.” Reham mentioned the actions of “We provided them with names,” “We should have an internal assessment exercise,” “We can give you a brief presentation about what we did in our legal team work,” and more. Other Kuwait Innovative Co. staff members also stated, “We will distribute investments”



(Zeeshan), “We will mimic the procedure” (Kumar), and “We will inform him of this update” (Muneerah).

In this meeting, I found only three instances of laughter but these instances had no relationship to the attendees’ collaborative agency or membership. For example, Zeeshan joked about the confusion of defining members of a new company, which was one business activity that Innovative Kuwait Co. mentioned in the audit report. He humorously said, “We’ll call it Mr. Similar,” when discussing what to call a new CEO.

There were no instances of idiomatic expressions in this meeting—only instances of using a new linguistic code, which was the use of Arabic to translate English business terms found in the audit report. In fact, Kamal, Reham, Deena, and Muneerah, who were the Arabic speakers in this meeting, all participated in back translation, especially Kamal and Reham. Statements related to agency and membership were numerous. One example was expressed by Kumar, who described his authoritative role with Zeeshan at Innovative Kuwait Co., as follows. “We as portfolio managers will not be aware that the client has the same security.” Hence, Kumar wanted to confirm his work authoritative status as a senior portfolio manager as well as confirming Zeeshan’s position.

### **Findings from Meeting 5: Phoenix**

Meeting 5, held at Global Phoenix was also the last meeting I recorded for the American meeting data. This meeting was different from all the previous meetings. The channel of communication between the two offices was video conferencing. This meeting was a try out for this new technology. It included

most participants in both offices. The form and order of the event started with the Colorado office staff wearing colored hats because they wanted to surprise their Arizonian colleagues because this was everyone’s first use of videoconferencing. Unlike the previous meetings, this meeting was more relaxed in terms of language use and ways of speaking, in addition to Raymond, who was visiting Global Phoenix; therefore he opened the videoconference meeting, instead of Molly. The genre of the meeting was updates and upcoming events and activities in both organizations (Hymes, 1974).

Because this was a relaxed type of business discussion between both offices, the use of “we” utterances was consistent, whereby everybody had the opportunity to share his or her contributions to group’s actions. Action verbs (Van Leeuwen, 2009), in this meeting, included similar results as those observed in Meetings 1, 2, 3, and 4. For example, Raymond mentioned the action of “doing service corporation,” while Molly said that “We can get all the arranged awarded programs.” John expressed his group actions of “providing the basic- level information” to signing up for subscriptions. Other staff members referred to different actions, including “looking forward to the volunteer conference” (Judy), “pushing harder for next year’s conference” (Allison), and of “staying out” (Brandon).

Table 30

*Global Phoenix Staff Members Use of “We” in Meeting 5*

Participants	We (times used)
Raymond	80
Molly	85

John	70
Oliver	50
Sarah	50
Judy	20
Brandon	20
Gary	30
<hr/>	
Total	405
<hr/>	

Humor and laughter features prominently in this meeting, especially at the beginning when the videoconference screen was switched on and at the end of the meeting. Instances of humor and laughter to collaborative agency and membership included an opening joke by Raymond, who said of Colorado’s snow, “I don’t know if anybody beats that snow total. But I’m throwing it out there as the championship snow total.” Another instance of humor occurred when Raymond teased Sarah, who was in charge of preparing a 400-page document for both offices; so he told her, “We are looking forward to read your document,” and she responded jokingly, “Light reading.” One noteworthy instance of laughter in this meeting occurred at the end, when Colorado and Phoenix staff members prepared a surprise birthday cake for Raymond and sang him happy birthday.

Meeting 5 did not include any idiomatic expressions but there were a number of statements related to collaborative agency and membership. One significant example came from Raymond, who demonstrated the close and in-group relationship between the two offices. He said after his birthday celebration, “I just want you to know that there is a very interesting harmony between the two offices.” Furthermore, at the end of the meeting, Phoenix staff members wanted to share a short YouTube clip showing communication styles between people. As

Raymond described it, “this video is to try to get our offices together building communication with all of us.”

### **Summary of Findings for Question 1**

*“How does the agency of staff members reflect membership in the corporate culture of an organization as a whole?”*

According to the detailed descriptions I provided about each meeting in both field sites, I can determine that agency is reflected in the way staff members appear to act as social agents in the meetings. Staff members join the meetings to accomplish goals and outcomes related to group work and their group’s membership in the business speech community or small business communities of practice (Hymes, 1974; Lave and Wenger, 1991; Saville-Troike, 1989; Van Leeuwen, 2009). In particular, staff members reflect their agency of establishing and managing business tasks and activities through three language behaviors: (1) a reflection of membership by the use of “we” utterances, indicating collaborative group work; (2) sharing humor and laughter in reference to group work and membership; and (3) employing idiomatic expressions and direct statements in reference to group work and membership (Richards, 2006). Most importantly, the ultimate end goal for these meetings was that social agents from both field sites wanted to validate their agency by presenting themselves as active members of a larger social system—that is, the corporate culture of their organization. From the ethnography of the speaking perspective (Hymes, 1974; Saville-Troike, 1989), staff members reflected their agency by acting in a situated business speech community that aimed to strengthening membership and the identity of the

organization.

Additionally, this performance of agency reflected a larger social organization, as I indicated in the direct statement examples. Saville-Troike (1989) explains, “The ethnography of communication extends understandings of cultural systems to language, at the same time relating language to social organization, role-relationships, values and beliefs, and other shared patterns of knowledge” (p. 8). Following the Sherzer and Darnell’s (1989) ethnographic guide, in both field sites, staff members identified themselves in their perspective business communities by using their occupational positions and referring to group work to reflect social relationships and shared agency in the group. By doing so, they all established what I call “collaborative agency” performance, which facilitated their efforts to govern the various norms of interactions in meetings, such as organizing speech turns, making jokes and laughing together, and explaining business tasks and activities. One finding of interest was the norm of gender and how female staff members favored using non-verbal cues of agreement and sometimes silence (Sherzer & Darnell, 1986).

The overall findings of how staff members reflected membership in their meetings are substantiated by similar linguistic accounts of business discourse in the workplace, including the pioneer study by Bargiela-Chiappini and Harris (1997), as well as Richards’s (2006) examination of collaborative interaction in the workplace. Other studies that might be relevant are papers published by the New Zealand LWP group (Holmes, 1998; Holmes & Stubbe, 2003; Holmes, Stubbe & Marra, 2003; Holmes & Schnurr, 2005; Stubbe & Brown, 2002; Vine, 2004).

There is also the intercultural study of Yamada (1992), who examined Japanese and American business meetings in San Francisco, California. Above all, conducting a case study that aimed to compare two cultural systems helped me to build an achievable outline to understand the similarities and differences between two business speech communities. Below, I outline these similarities and differences by using (+) and (-) to show existence or absence and (\*) to describe few/some existence.

Innovative Kuwait Co.	Global Phoenix
(+) Opening meetings by managers	(+) Opening meetings by managers
(+) Shared floor between male staffers only, except in meetings 3 and 5	(+) Shared floor between male and female staffers
(+) Use of “we” utterances	(+) Use of “we”
(*) Humor/laughter	(+) Humor/laughter
(*) Use of idioms	(+) Use of idioms
(+) Statements	(+) Statements

### **Research Question Two**

*How is power used in relation to the agency in business meetings?*

To fully understand how the agency of staff members was performed in the meetings and in what way they granted the privilege to act and to speak about group members, it is noteworthy to examine the performance of power throughout

the meeting data. As mentioned in Chapter One, I adopted a critical discourse analysis definition of power for this study. I define power as the social power of groups and institutions to determine who has the privilege to control the social actions and minds of group members (Van Dijk, 1998). This critical discourse definition is based on Van Dijk's (1998) perception of power as the institutional possession of accessing resources, social and work status, force, money, fame, information, and knowledge. For this reason, I considered looking at language behaviors/actions that might illuminate some of these power components. I decided to focus on staff members with the highest uses of the following language behaviors:

- (1) The use of "I" and "you" utterances to show opinions/thoughts, directions, commands, advice, compliments, and apologies with reference to non-verbal cues from fieldwork observations;
- (2) Instances of argument caused by staff members and resolutions put forward by staff members of a higher position (agreement vs. disagreement); and
- (3) Instances of interruption and their relationship to turn taking and maintaining the floor, in addition to purposes of interruption.

Similar to the previous section, I outline the findings from both field sites by sequential order of the meeting occurrences.

### **Findings from Meeting 1: Kuwait**

As discussed in question 1, two senior managers—Zeeshan, one Vice President, and Kumar, the Vice President of another department at Innovative

Kuwait Co.—controlled Meeting 1 in the Kuwaiti data. Accordingly, Zeeshan and Kumar performed agency through the use of “I” when discussing different actions, directions, commands, and advice throughout the meeting. They both also employed “you” to indicate power of direction. Zeeshan used his individual agency of “I” 65 times, whereas Kumar used it 32 times. Some of Zeeshan’s uses of “I” involved these language acts: (uncertainty) “I don’t know about this issue”; (opinion) “I think either HR or IT is responsible for it” (action); “I’ll send an email and tell them we are going ahead”; and (command) “I need to end the meeting now.” Zeeshan also used “you” to direct his staff members, saying that “what you can do for next time’s homework is to set up the calendar.” Kumar expressed similar utterances. For example, in one instance he apologized to Zeeshan and joked about it, saying, “You are forgetting this company. I am sorry. So ripple effect.” In another instance, he stated his uncertainty, “I don’t know; I have no information.” In most of all these instances, I noticed that Zeeshan and Kumar used eye contact to look at one another, besides using hand movements, when expressing these utterances, especially when Zeeshan directed his female staffers to do homework for next time (field journal entry, July 2010).

Agreement and disagreement instances were evident in this meeting, as the argumentative tone of both managers increased throughout the meeting discourse. In one example, Zeeshan described the issue of lawyers visiting financial companies in the Arabian Gulf area; Kumar disagreed by interrupting Zeeshan because he thought that there were no ultimate investors in these companies, as illustrated below:



Line	Speaker	
30	Kumar	The lawyer announced questions of money. Who'll
31		be involved in this question?
32	Zeeshan	I don't know
32	Kumar	Who is the non-Gulf Arabic country?
33	Zeeshan	Mr. Ahmad is a subscriber. I am not sure who's 34
34		exactly involved but it doesn't matter. What Abu
35		Dhabi guys are doing is good. They want to select a
36		fund
37	Kumar	[NO. The thing is that I don't agree with you. If
38		the investment company is publicly listed, and
39		then they have issues with it

This was just one example of argumentative speech also, one interruption instance happened between Zeeshan and Kumar. The purposes of interruptions that occurred between them included acts of adding information and clarifying, opening new topics, offering suggestions and solutions, and agreeing and disagreeing. Zeeshan and Kumar also interrupted one another or to confirm their knowledge/and expertise. For example, in the following example,. Kumar interrupted Zeeshan to repeat the same sentence and confirm the fact discussed:

Line	Speaker	
45	Zeeshan	I'll send email to the bank and tell them ok fine
46		we're fine with it (0.1)... I'll tell them we're going
47		ahead with you and please send us the proposal, the

48 final quote  
49 Kumar [Final quote  
50 Zeeshan Yes, final quote and we'll relate the terms and  
51 conditions too

### **Findings from Meeting 1: Phoenix**

Not surprisingly, in this meeting, staff members from both offices used “I” to refer to their own business tasks and activities, and sometimes even to uncertainty. However, the ones in a higher position, including Molly and John used “I” to show the power of apology, a compliment, direction, and advice. Molly, for example, apologized for forgetting to introduce one staff member, “I am sorry. I did not see you coming.” Another important performance of power that Molly consistently enacted during the meeting was complimenting each staff member after he or she spoke, saying, “awesome,” “terrific,” “wow, good job,” “that’s good,” or “thank you for that.” Molly also showed care when a Colorado staff complained about not hearing the Phoenix group; she responded, “I love you. We can all hear you now.” John mostly used utterances related to his business activities and opinion/thought-related utterances. In this meeting, I also noticed Molly and John’s consistent eye contact when addressing staff members (field journal entry, June 2011).

Because this meeting was organized to give every member a turn to speak, interruptions did not occur, except for once at the beginning of the meeting, when John interrupted Molly’s turn to introduce one staff member. Additionally, no one maintained the floor; the floor was open for every member to ask questions and to

add information.

### **Findings from Meeting 2: Kuwait**

Similar to meeting 1, this meeting was also controlled by two senior managers, Zeeshan, and Ayman from the finance department. Muneerah, Deshna, and Kamyra were present but did not participate verbally; they only nodded in agreement with Zeeshan and took notes during the meeting. Zeeshan expressed 39 instances of “I” utterances, and Ayman, 39 instances. Zeeshan, for example, used commands to ask Ayman to prepare a letter: “amend it again,” “go write a letter,” and “tell them you’re responsible.” Ayman also used (the power of accusations), expressed as “you guys don’t understand us”; the (power of taking positions); “I take this position”; and more.

In fact, most of their performances of power manifested agency of responsibility and of handling business activities. The opening of this meeting started with an argument of accusation between the two managers, which caused an agency conflict with regard to taking responsibility. This example is extracted from the opening of Meeting 2:

Line	Speaker	
3	Ayman	Business-wise, we have no problem with the person
4		you recommended but the problem is with you
5		guys, you deglamorized it and now there are many
6		issues, which I don’t really understand
7	Zeeshan	Why don’t you understand the issue?
8	Ayman	I am an investment manager here. I do not hold an

9 account. I do hold stocks in my name

10 Zeeshan EXACTLY. You are responsible for cash. You are

11 responsible for operation (anger)

12 Ayman True. I am responsible for cash

13 Zeeshan But you're not responsible for surplus cash

14 Ayman You just said I am responsible for cash

15 Zeeshan The cash is not with you. It's with someone else

16 Ayman I have authority to use the cash in deposits or

17 Zeeshan No. The cash is not with you. Let me tell you.

18 Departmentally you guys don't have the expertise to

19 do excess cash management

This type of argument was resolved when Zeeshan performed his knowledge power by telling Ayman that as a whole, his department and his membership to the finance department do not give him enough privilege to use the cash; rather, the cash can be used by someone else in the department. Although the topic of cash excess management appeared later in other speech episodes in this meeting, both managers agreed to solve the issue by asking for collaborative departmental work. Furthermore, there were several instances of interruptions in this meeting aimed at expressing disagreement, offering solutions, opening new topics, and adding information.

### **Findings from Meeting 2: Phoenix**

Although this was a meeting, in which Monica from the Colorado office, maintained the floor of the meeting by explaining a new accounting service,

Global Phoenix staff members were yet able to engage and use “I” when asking for information about the new service. As expected, Most of Monica’s performance of power included acts of “I want to show you” (knowledge),” “I do your accounting service” (ability),” “I need to give you” (offering information),” “I apologized for not making this clear” (apology),” “I am trying to make it as easy as possible” (endeavor),” “I mean this is what you need to use” (opinion/thought),” “I would send it to the accounting email address” (access),” and more. In the same way, Molly complimented Monica and other staff members during the meeting, using “that’s wonderful,” “awesome,” “wow,” “terrific,” and “that’s cool.”

While listening to Monica’s presentation of the new service, Global Phoenix staff members produced a number of interruptions (= 19) but without any instances of argument. Interruptions in this meeting had several purposes. For example, in one instance, Molly interrupted Monica to add information about the coding system in the new service. Other instances of taking Monica’s speech turns were due to staff members seeking information, adding clarification, and sometimes to repeat what said.

### **Findings from Meeting 3: Kuwait**

The results found in this meeting are equivalent to those from Meetings 1 and 2; however, a noteworthy finding was the active participation of Deshna, who was in charge of explaining Innovative Kuwait Co.’s audit report to the auditor and his assistant. Muneerah and Kamyra have used few examples of “I” as well. Despite the presence of Zeeshan, who had the highest work status of all participants, four members (the two Innovative Kuwait Co. senior managers,

Deshna, and Wael) controlled the meeting’s discourse. Therefore, “I” was used to show different power positions in the meeting, such as the (power of authority) by Wael, (“I come here to assist you in your audit report”); (power of accusation and command), by Deshna addressed to Wael (“you have removed this issue, now you should write it again”); (power of advice) by Babu, (“you have to wait on our assessment”), (power of suggesting solutions) by Zeeshan, (“can you put like something about our accounts”); and others.

Arguments between Innovative Kuwait Co. staff members and Wael and his assistant were evident in this meeting, as well as were instances of interruptions within arguments. In many of these argument and interruption instances, Innovative Kuwait Co. staff members wanted to achieve successful outcomes related to the audit report, whereas the internal managers had different outcomes in mind. For instance, in one argument, Zeeshan and Deshna wanted Wael to agree to include the holding percentage in the report, but Babu disagreed, as illustrated below:

Line	Speaker	
70	Zeeshan	Look at the kind of percentage holding we have
71		and we want you to include. We don’t have much
72		negotiation problems
73	Babu	[The impact of this holding is
74		coming to our finances. This is
75		an important factor to consider
76		and it is going to be comprehensive



from Dubai. As expected, George maintained the floor of the entire meeting speaking in longer turns and answering all questions. He also produced the highest number of “I” utterances (= 231) displaying his power of explaining and validating the effectiveness of it. For instance, he began the meeting by introducing himself to present Innovative Kuwait Co. staff, Zeeshan, Kumar, and Ayman. On the other hand, Ayman approached him saying, (“I am in charge of the financial systems here”). George expressed different roles of power, including power of knowledge, (“I want to teach you how to use this program”), power of access (“I can get you with the details”), power of suggesting/directing/advising (“you can choose any portfolio,” “you go here and choose this Excel file,” and “when you use this program, you’ll find it easy to check your financial transactions”).

Innovative Kuwait Co. staff members in this meeting did not argue with George; rather, they only interrupted him several times in order to ask for clarification and seek more information about the data program. Interruption instances to confirm agreement with the current’s speaker turn were also evident in this meeting, as in this example:

Line Speaker

88 George It wasn’t such a bad idea to invest in the sector but

89 what really us was the stocks problem

90 Kumar [Stock selection, right

#### **Findings from Meeting 4: Phoenix**

This meeting was equivalent to Meetings 1, 2, and 3. All staff members



from Global Phoenix and Colorado office had the opportunity to take turns and speak freely at the time Molly called their names. The use of “I” utterances was therefore employed in a variety of power roles, such as Molly stating her power of organizing the meeting (“I am in charge not Raymond”), power of swearing (“Oh crap I forget to do that”), power of knowledge (“I know that for sure”). Molly also used compliment words to praise everyone’s individual work (“good job,” “great,” “wow,” and “awesome”). She was also the one in charge of closing the meeting.

Arguments did not occur in this meeting, but there were only four instances of interruptions. The first instance was between Judy and Molly. Judy interrupted Molly to add information. The second instance was between Sarah and Brandon, who also interrupted for clarification. Another instance was to ask a question, and the last one was to add information.

### **Findings from Meeting 5: Kuwait**

Meeting 5 resulted in a remarkable finding regarding the norm of gender in the workplace (Mullany, 2007). This meeting was indeed controlled by two members, Reham, a senior female manager at Innovative Kuwait, and Kamal, a senior auditor. Reham and Kamal produced high numbers of “I” (= 126; = 130). Reham, for example, was performing power in relation to her legal department through using different “I” and “you” utterances, as in the examples “I am responsible for conversations with investment companies” (authority), “I think something has been done” (knowledge), and “If I may ask, the development on registering custodians (politeness), and others. Another significant finding that might be related to the origin and identity of the speech community was the use of

translation, whereby Arabic speakers translated business English terms mentioned in the audit report. The translation episodes involved all Arabic-speaking staff members, particularly Reham and Kamal, the ones who started it. In this meeting, I also observed eye contact and hand movement; Reham, Kamal, and Zeeshan used substantive hand movements while addressing one another, along with keeping eye contact (field journal entry, October 2011).

Opposing parties in this meeting had some arguments; specifically, between Zeeshan and Kamal. The small arguments started when Kamal opened the topic of buying units in another country and what the permissions and rules to buy these units. Zeeshan showed disagreement in all his responses until Kamal convinced him that buying units must have approval. This was the example where the argument started:

Line	Speaker	
100	Zeeshan	So, let's say I incorporate a 10 million dollar fund
101		this country, okay, and out of which I market 5
102		million to another country and I market 1 million
103		units in Kuwait, so I come to Kuwait and pay 1%
104	Kamal	1 million, but you will inform what you distributed.
105		1 million units in country one and you will pay 1%
106		of this unit ... ahh (0.1)
107	Zeeshan	[NO. I don't want to do that. Why
108		taking permissions?
109	Kamal	You should tell them. You should have an account

110                               with them

111    Zeeshan            No. Another strategy would be, I apply for 100

112                               units at a time

113    Kumar                Yes. But then you have the procedure to have the

114                               approval. Get the approval then do it

115    Zeeshan            No, then I gain I have to go through currency notes

116    Kamal                Distribution of units will be processed once you get

117                               the approval

In addition to the instance of interruption in the previous example, a few other examples occurred in this meeting (= 21), often between Kamal and a staff member at Innovative Kuwait Co. Purposes of interruption were to seek information, add information, express disagreement, and open a new topic.

### **Findings from Meeting 5: Phoenix**

Raymond rather than Molly, took in charge of opening this meeting. Raymond also produced the largest number of “I” and “you” utterances during the meeting. His examples manifested power roles of including (“appreciating everyone’s working with his schedule”), (“not knowing where to look”), (“not deciding”), (“thanking everyone for the birthday cake”) and more. Likewise, all staff members from both offices managed to discuss their individual power of doing business tasks and activities, and sometimes they gave advices/reminders, as in Brandon’s example (“Don’t forget the Republican meeting tomorrow night”). At the end of the meeting, Raymond performed his power of membership and appreciation by showing staff members in both offices a funny YouTube clip

displaying two group members who were in a conflict and managed to regroup afterward.

This was not an argumentative meeting. Staff members were happy and relaxed. However, there were six instances of interruptions aimed at adding information, seeking clarification, and giving goodbye wishes. Molly, for example, interrupted Raymond at the time he was wrapping the meeting to wish a staff member a happy journey after leaving Global Phoenix:

Line	Speaker	
120	Raymond	We probably should give him my birthday cake ...
121		ahh
122	Molly	[Happy trails
123	Raymond	And sing to him. Let's all sing (laughter)

### **Summary of Findings from Question 2**

*“How is power used in relation to the agency in organizational business meetings?”*

Based on Van Dijk's (1998) definition of power as the social privilege enacted in institutions and organizational, I found that the performance of power was used in relation to agency throughout staff members' performance of different language behaviors, including:

- (1) The use of individual agency of “I” and sometimes “you”, which granted staff members the individual power of directing, advising, commanding, complimenting, suggesting, confirming, repeating, appreciating, thanking, asking for information/clarification, expressing thinking/opinions/uncertainty/ability/inability, and others.

- (2) The use of argument episodes among staff members, especially by staff members with higher positions, and sometimes by external parties who were the subjects of a meeting. On a few occasions, women engaged in argument episodes
- (3) The power of interruption to maintain longer speech turns and the overall floor in addition to justifying interruption goals
- (4) Existence of consistent eye contact and hand movement by staff members with higher positions during argument episodes

The vast majority of the business discourse and business meeting literature validated the results found in question 2 (Bargiela-Chiappini & Harris; 1997; Holmes & Stubbe, 2003; Mullany, 2007; Poncini, 2004; Vine, 2004; Yamada, 1992). In Bargiela-Chiappini's (1997) investigation of Italian telecommunication meetings, she found that textual coherence, in which staff members create local coherence textually while communicating in meetings in addition to producing global coherence through producing situational and contextual knowledge in meetings, was established to reflect power by organizing chairs. Another linguistic behavior that Bargiela-Chiappini explored was textual pointers that indicated power and powerful roles in meetings. She observed staff members using both direct and indirect references to the meeting chair or manager, concluding that Italian meetings incorporate an atmosphere of social relationship on a power-solidarity continuum where Italian staff members use two major roles: the chair and the group. Bargiela-Chiappini also explained that Italian chairs control the meetings by starting with the official agenda and maintaining this throughout the

meetings, as evident in the Kuwaiti and American meetings (1997).

The use of Arabic in Meeting 5 at Innovative Kuwait Co. might be related to Bargiela-Chiappini's (1997) finding of Italian managers using English. She argued that a powerful role in the Italian meetings was of contextual expertise power, where Italian managers or chairs use foreign expressions to convey their proficiency in English or other languages. "Knowledge of a foreign language, which is an Italian business environment very often means English, is considered an attribute of an educated and professional individual" (Bargiela-Chiappini & Harris, 1997, p. 80). Some of the English business terms that Italian managers or chairs have adopted are: checklist, two steps, and list.

Bargiela-Chiappini (1997) also examined the role of "I" and "we" in building and maintaining local coherence within meeting talk, explaining that personal pronouns between Italian staff members "construct local and global relational and meaning networks through which meetings are embedded in precise socio-historic environments" (p. 82). Moreover, the quantitative data of the Italian quality assurance internal meetings show that Italian staff members use "I" or "io" more frequently than "we" or "noi" because of competing strong self-referencing and personalities, as Bargiela-Chiappini found.

In looking at power and politeness, Holmes and Stubbe (2003) observed how business personnel with higher work status, such as managers deliver, imperatives and directives to their staff members. They found that managers use power to make staff members perform the required business task by uttering the directive statements of "give it to X," "check it with X," "send them to X," and

others, which were also found in Innovative Kuwait Co. and Global Phoenix meetings. Managers also used “I” and “you” to state their power to staff members to do business tasks. Holmes and Stubbe concluded that managers intensify their directives by using many linguistic devices, such as speaking loudly and increasing their volume, adding stress to words and utterances, and repeating the directives many times. This was something I observed in the Kuwaiti meetings but in few occasions, particularly in stressing directive statements.

Different kinds of power may be manifested in the interaction of managers with equal work status, as Holmes and Stubbe (2003) illustrated. The authors indicated that staff members with equal work status usually use politeness when asking one another to perform a business task or activity. However, in some cases, staff members may utilize direct forms of asking, especially “when there is a recognized emergency or unexpected deadline, [in addition] at the end of a discussion where the next steps have been negotiated and agreed” (p. 40). Other related accounts that might explain the norm of gender in the workplace (Mullany, 2007).

As for interruption and turn taking, many researchers characterized interruption as a violation of the turn taking model (Coates; 1986; Saks, Schegloff, & Jefferson, 1974; Tannen, 1992; Zimmerman & West, 1975). In question 2, interruptions and taking over turns were violated in nature but aimed for positive purposes of seeking information, adding clarification, confirming the current’s speaker speech, and sometimes for laughter. However, in the Kuwaiti meeting data, on some occasions, I found staff members taking over someone’s turn to

continue to talk and hold the floor. Arguments have negative connotation but are of great benefit to collaborative interactions, as Richards (2006) stated. He explained that argumentative involvement in group interaction represents “a challenge to the collaborative identity” (p. 55) in addition to establishing “shared understandings and resources [that reform] collaborative positioning which reorient individual differences within a broader common purpose” (2006, p. 55). This type of challenge and reorientation existed in the arguments examined within the Kuwaiti meetings.

### **Research Question Three**

*How are discourse and social identities of staff members enacted in business meetings?*

I found that the enactment of discourse and social identities was manifested in accordance with Zimmerman’s (1998) definitions of discourse and social identities during the different language behaviors that both staff members showed in the meetings. Specifically, staff members at both field sites showed a self-image in a unified whole and an integration of collaborative categorical identity as part of their membership to the group.

### **Identities Found from Innovative Kuwait Co. meetings**

Based on Zimmerman’s sociological account of identities, each staff member of Innovative Kuwait Co. and Global Phoenix represented his or her identity or identities according to the business speech community/community of practice. To elaborate in the ways in which speaking discourse and social identities were enacted in the meeting data, it is best to describe each definition



with reference to examples from the meeting discourses. First, is discourse identity, which involves the moment-by-moment organizational background of the interaction in which members are engaged in a variety of sequential tasks and roles: speaker, listener, storyteller, negotiator, question seeker, answerer, repair initiator, and so on. People orient themselves to this identity by a proximal context of developing turn-by-turn sequences of actions and by a distal context of social activities in the interaction. In Innovative Kuwait Co., the findings of questions 1 and 2 revealed that in the five meetings audio recorded, male staff members identified themselves as business negotiators who sought to open a discussion, and talk about a problem or an issue under examination, then find solutions. There were also few instances of social activities including humor and laughter, especially during argument episodes. In addition, I could argue that male staff members enacted a “transportable social identity” (Zimmerman, 1998) that demonstrated their visible and assigned identities contingent on physical and cultural categorization, as in the example of Kumar telling the auditor that he and Zeeshan are “senior managers in the meeting.”

To the contrary, female staff members at Innovative Kuwait Co. performed their discourse identities presenting themselves as hearers, question/answerer, and note takers of the meeting’s significant points. Zimmerman (1998) explains, “Discourse identities emerge as a feature of the sequential organization of talk-in-interaction, orienting participants to the type of activity underway and their respective roles within it” (p. 92). Therefore, it is probably the case that female staff members enacted a passive type of identity without such actions or social

activities due to the sequential order of their work role and position in the meeting, where there was not much to argue about, or even laugh at. However, this contradicts Deshna's active participation in Meeting 3 and Reham's dominant participation in Meeting 5. This might be related to Zimmerman's (1998) social identity of "situational identity" orientation. Deshna and Reham situated and shifted their discourse identities to the role of a defender of Innovative Kuwait Co.'s critical business documents. Zimmerman expressed, "oriented-to situated identities circumscribe and make available those extra-situational resources participants need to accomplish a particular activity by articulating with the discourse identities embedded in the sequential organization" (1998, p. 95). It is also possible that Deshna and Reham presented a transportable gender identity of invisibility during the meeting discourse; particularly, Reham, who is a senior manager with experiences similar to those of her male counterparts. To see how this situational identity enacted by Deshna and Reham, I extracted two examples from Meeting 3 that showed how Deshna first enacted a visible passive discourse identity, then shifted to an active situated identity during her argument episodes with two senior managers at her organization and Wael, the external auditor.

#### Visible passive discourse identity

Line	Speaker	
30	Babu	Let's look at it from another point of view. Can you
31		post entries or can you like put something that
32		shows our account or maybe you can put some
33		money

34 Wael I can't do that. It's an error, as you know

35 Babu It's not a question of a child

36 Deshna ahh ... (taking notes)

37 Wael I think the concern is (0.1)

38 Raj [The concern is that like you

39 know the account is inactive

40 for a period of time, okay and

41 by mistake you posted that

Active situated identity

Line	Speaker	
130	Raj	Too many documents here. It's not possible
131	Wael	Well, that's what you asked for, right?
132	Raj	Yes. Actually, we wanted full documents
133	Deshna	[Because you
134		know every
135		year we keep
136		adding new
137		documents into
138		it, so that will
139		never finish
140	Wael	Yes. We saw that (0.1)
141	Deshna	We looked into the issues in these documents and I found
142		one inadequate issue about document safety

143 procedure, which may result in loss or theft of  
144 documents from the safe room. This shouldn't be  
145 the case  
146 Raj I agree, this is not the case  
147 Wael We can probably look into that once we get the full  
148 document  
149 Deshna When will you do this? Can you tell us the  
150 deadline?

### **Identities Found from Global Phoenix meetings**

Staff members at Global Phoenix enacted discourse and social transportable identities by using of sequential organization of business tasks and programs put in an agenda for each staff member. They identified themselves as information seekers, actions makers, and questioner/answerers. As for indicating the distal context of their identities, Global Phoenix staff members enabled an array of social activities between the two offices. In fact, the topic of a merger was one significant change in the organization that facilitated staff members to perform discourse identities related to strengthening rapport and business collaboration across Phoenix and Arizona, as in Raymond and Monica's visit to Global Phoenix. One excellent example that proved how Global Phoenix staff members aimed at enacting their discourse identities during the meeting was through not violating the turn taking model and maintaining the sequential order of the overall meeting. Members with the highest power performed this, including Molly and Raymond, who gave staff members a turn to speak and share his or her business action. The

following excerpt displays the sequential order of discourses during Meeting 4:

Line	Speaker	
1	Molly	Ok. Let's get started. All right, let's see, who's got
2		the most important stuff to talk about today? Sean,
3		I bet you do, Sean what do you got?
4	Sean	Well, there's not much to report. So, we're still
5		kind of slow in the regulatory area, which is great.
6		We are in the process, as you know Molly, of
7		setting up meetings with regulators at both state and
8		federal level. Judy and I will be talking to some
9		senators soon. That's all
10	Molly	Thank you Sean. John do you wanna go ahead?
11	John	Sure. I guess about last week, uh, in regards to
12		service corporation it was uh kind of a backed in
13		week for only two to three days. We had two
14		service corporation board meetings via
15		telephone and we chatted about the future of the
16		outcome of the service corporation

In addition to discourse identities, Global Phoenix staff members, with their Colorado colleagues, have enacted visible transportable identities that traveled with them across many situations, and they therefore they oriented themselves to their physical and organizational role in order to represent their discourse identity of relaxed action makers who enjoyed group work and laughter

together. Global Phoenix staff members have also used question/answer sequences to manage the sequential order of the meetings.

### **Similarities and Differences between Innovative Kuwait Co. and Global Phoenix**

The above findings from Innovative Kuwait Co. and Global Phoenix reveal that there are several language similarities and differences in terms of the staff members' performance of agency, power, discourse, and social identities. One topic of interest is the language behavior of interruption. As discussed earlier, interruption was common among Innovative Kuwait Co. staff members, whereas Global Phoenix staff members rarely interrupted one another. Zeeshan and his staff members and external business people visiting Innovative Kuwait Co. interrupted each other's speech to open a former or new topic in the conversation, add information, or to agree or disagree. For example, in Meeting 4, Innovative Kuwait Co. staff members interrupted George, their guest from Dubai, to ask for clarification and add information, as shown in the next excerpt.

Line	Speaker	
88	George	So it is your choice to pick the timeline you need for your
89		finance folder and how much the weights are, then create your
90		own financial composites ((pause)). Similarly with the
91		benchmark, you can select your benchmark number and
92	Kumar	[This does
93		not require
94		us to do

95 another

96 subscription

97 right?

98 George No, once you have the portfolio analytic module, then you can

99 use this tool. The only question is, in terms of benchmarks and

100 what not, uhm (0.2), does it have a relationship with other

101 benchmarks in my portfolio. You can upload your own data if

102 you have all the holdings and returns of

103 Ayman [of our company. But

104 do we have to get a

105 new subscription

106 as well?

107 George Yes, you basically need to access your data by subscribing to a

108 new portfolio benchmark page, then all your data will feed in

109 automatically without your having to worry about corporate

110 actions or returns. What you need to do is to

111 Zeeshan [to ask you more

112 about the risk

113 models

113 George Yes, the risk models. It all depend on which models you want

Another function of interruption in the Kuwaiti meetings was to take one's speech turn to open a topic and continue explaining ones business task or point of view, as indicated in the following example taken from Meeting 1:

Line	Speaker	
50	Zeeshan	They are the managers so anyway it's still back and forth. I think
51		it will take another week before it's finalized (0.2) but you know
52		the structure is being managed and that's because the real state
53		people and department in Abu Dhabi were helping and they
54		wanted us to study the investor pool as soon as possible to see
55		who is the one to choose as the ultimate investor
56	Kumar	[The lawyer
57		announced a
58		question about
59		money of who
60		will suspend
61		this on, is there
62		any non-GCC?
63	Zeeshan	((nods)) I don't know about this an-
64	Kumar	[And this is exactly what we are
65		focusing on right now
66	Zeeshan	Mr. X is a subscriber. I am not sure whom exactly but it doesn't
67		matter what the Abu Dhabi guys are doing these days if they are
68		okay with adopting a new fund. I know they are currently
69		looking for one but the thing is
70	Kumar	[The thing is that I don't agree
71		with you, if the fund is publicly



72 listed, then they have an issue  
73 with us and if it's open ended  
74 fund, they have also an issue  
75 Zeeshan [yes, but  
72 Kumar [But your investor base is fixed and it won't  
73 change unless you say so ((laughs))  
74 Zeeshan I agree with you

In contrast to the great amount of interruption in Innovative Kuwait Co. business meetings, Global Phoenix staff members rarely interrupted one another. Because of the sequential meeting order whereby staff members were called upon and had their own speech turn to explain what they had done during the week. There were a few instances of interruption during Meeting 2 of Monica, from Colorado, who introduced a new financial form to the Phoenix office group. Similar to George and Innovative Kuwait Co. staff members, Global Phoenix staff members interrupted Monica a few times to ask for clarification about the new form. The following example is from Meeting 2:

Line	Speaker	
50	Monica	We have two different codes going because ours is actually
51		through ADP until the end of the year, you know, you stay
52		with the old form for now because it's a year-to-year contract
53		
54	Molly	EXACTLY
55	Monica	So that's what

56 Molly [They had to put a new code in? They just took  
57 it out, right?  
58 Monica Right. Right. They used an existing code is what they did.  
59 We ended up sending your portion, you know (0.2), group  
60 that handles yours. So, the process got delayed. I apologized  
61 Brandon [Did  
62 everybody  
63 know  
64 about  
65 that?  
66 Molly No. Because we didn't, we never heard back if that was.  
67 Allison said she would be getting to us. I never knew if it that's  
68 what it was or not  
69 Monica [Friday we found out that  
70 Molly Friday. Well, this is Monday, so ((pause))  
71 Allison [I actually looked mine  
72 up online. I was  
73 wondering why it was  
74 less than it should have  
75 been  
76 Molly So you realized it, too

Agreement and disagreement were two additional language behaviors that differed at the two companies. Agreements over business actions and goals were

similar in Innovative Kuwait Co. and Global Phoenix; however, the staff members used different agreement expressions to indicate agreement. For instance, Innovative Kuwait Co. staff members used direct expressions, such as "I agree" when explaining a business action or goal, whereas staff members of Global Phoenix used conformational expressions of "That's right," "Correct," and "Yes" to indicate their agreement. The first example illustrates agreement expressions produced by Innovative Kuwait Co. staff members and is followed by an excerpt showing agreement expressions by Global Phoenix staff members.

Example 1 (Innovative Kuwait Co., Meeting 5)

Line	Speaker	
99	Reham	I guess like as Zeeshan was mentioning the language issue
100		leaves room for interpretation in different directions, for,
101		sometimes in certain articles in the law or the bylaws and this is
102		the gray areas where we need clarifications from the
103		accountancy association directly or if you can help us (0.2), if
104		you do already have the answers from them
105	Kamal	I agree. Language is a grey area and we can help you in this 106
106		regard
107	Reham	Yes, this is the one area we can cooperate in terms of seeking
108		clarifications on specific questions
109	Kamal	We are normally ((0.2)), it was all of our plans and we are

110 sharing it with you today. If we have the answers, we will give  
111 it to you, and if we don't have, we get the answers from the  
112 accountancy association and we share it together with the client  
113 as well as I can share with you the questions from our last  
114 meeting

115 Zeeshan [We want to know what kinds of questions we need to  
116 offer

117 Kamal I agree. You have the right to know all the expectations before  
118 you offer your company's questions

119 Reham I think you have the major role with respect to this matter and  
120 you have the ministry approval to provide all regulators with  
121 the required questions by due date

122 Kamal EXACTLY. I am responsible for this aspect and we have just  
123 agreed to prepare the necessary questions and provide them by  
124 due date

125 Zeeshan Yes, let's solve the language and the questions' matter as soon  
136 as possible

#### Example 2 (Global Phoenix, Meeting 4)

Line Speaker

43 John Well (0.2), there's not a lot to report. We're still kind of slow in  
44 the regulatory area, which is great, knock wood. Um, we are in the  
45 process, as you know Molly, of setting up meetings with (0.2) um

46 regulators at both the state and the federal level. Allison and I will  
47 be talking with the regulatory guy soon  
48 Allison Yes, on the 12<sup>th</sup>  
49 John Correct. On the 12<sup>th</sup>, thank you Allison. We'll be meeting our state  
50 regulatory here in Colorado. Molly, I know, you were helping us  
51 um get a meeting with uh the regulatory folks  
52 Molly Right. I did hear back and I did hear from the regulatory people.  
53 They called me today and now we are trying to set up the next  
54 appointment  
55 John Thanks. SUPER

Furthermore, disagreement was common in Innovative Kuwait Co. business meetings but not in Global Phoenix ones. This difference relates to the meeting context and organization. The meeting data showed that American staff members set up the meetings to discuss weekly updates and business tasks, while Innovative Kuwait Co. staff members joined the meetings with the goal of succeeding in such business tasks and projects. In fact, disagreement was one reason for interruption. For example, in the following excerpt from Meeting 2, Ayman interrupted Zeeshan and disagreed with him after he accused him of not being responsible for the cash surplus issue:

Line	Speaker	
30	Ayman	I am not the one responsible for the cash. The committee is doing
31		all the work
32	Zeeshan	No, you're responsible as per the agreement you are the

33 Ayman [No I am  
34 not. I don't  
35 have control  
36 over the cash

37 Zeeshan The agreement says you are

38 Ayman No, only the custodian has control over the cash and the bank.  
39 This is a custodian problem (0.2)

40 Zeeshan No, it's your problem too because you are responsible for  
41 surplus cash management. So, if the custodian places money  
42 with any bank and this bank was bankrupt then you are  
43 responsible

44 Ayman Okay. Then we agree to disagree ((laughs)). Let's move on.  
45 Let's not sign-off on this

Innovative Kuwait Co. staff members also disagreed in their business meetings when discussing a business plan or task, as in the next example from Meeting 5:

Line	Speaker	
177	Kamal	What you need to know is that the management of the fund is
178		independent of the board and that there is a manager for fund A
179		and he or she can be a board director in fund B as well
180	Raj	So this manager should not have any interest in the asset of the
181		fund?
182	Kamal	Yes, that's correct

183 Zeeshan Then how would you prove that? That's very difficult

184 Reham By board members who are part of the interest conflict and part  
185 of the fund

186 Zeeshan No, No but the way he said it fund A, fund B. Fund A's  
187 manager  
187 can be a director in fund B and fund's B manager can be a  
188 director in fund A. It's confusing

189 Reham No, it's not (0.2). You know because they are exercising in one  
190 fund management role and the other supervisory role and in  
191 different enterprise, they should be independent funds

192 Zeeshan It's for the same individual, right? So we will spend some time  
193 managing the fund and sometime overseeing the board of the  
194 other fund. There will be no conflict

195 Reham No, it's not our responsibility, it's the internal planning's staff  
196 and they have certain policies and rules internally to provide  
197 the funds information as long as the accountancy department  
198 approves it

199 Kamal Ma'am I am just trying to find out about the finances of the  
200 two funds and what the accountancy department is trying to  
201 avoid

The last language behavior of interest is laughter and humor among staff members. In a relaxed business environment like that of Global Phoenix, staff members were able to laugh often and joke together without worrying about

business deals and deadlines. This was not the case at Innovative Kuwait Co. where staff members talked formally and performed according to regulated deadlines and future updates. Despite that, Innovative Kuwait Co. staff members laughed and joked together on a few occasions, especially during arguments and disagreements. The first two examples indicate how Global Phoenix produced laughter and humor in their business meetings and are followed by an example from the Kuwaiti meeting data.

Example 1 (Global Phoenix, Meeting 1):

Line	Speaker	
77	Daniel	We have a young professionals group for the coming conference.
78		The sponsoring people are coming this Thursday I believe. I am
79		uh glad Brandon's reminded me of that. So I guess I will wear a
80		suit and tie that day and end up having to go bowling. But yeah,
81		that's really it as far as meetings go on our end. And I will be up
82		in Denver for that pole meeting and can talk with Colorado
83		folks about some strategic planning for moving forward
84	Raymond	There we go
85	Molly	Okay. Thanks Daniel
86	Daniel	YEP
87	Molly	How about you Sean?
88	Sean	Did you get what I submitted?
89	Molly	No
90	Sean	Well, I can't believe that since I didn't submit anything



91 ((laughter by everyone))  
92 Molly Oh, you're so funny  
93 Sean Just a quick update. I'm going to attend a neighboring  
94 association to talk with the group. This is really in advance of  
95 Judy and I going over in two weeks

Example 2 (Global Phoenix, Meeting 4):

Line	Speaker	
105	Raymond	Well, the folks that are in association services are handling
106		the conference administration, so Gary, Allison, Brandon, and
107		let's see, who else? Who am I missing? ZOHEY
108	Molly	Who else?
109	Raymond	Zoey
110	Molly	No, Laura
111	Raymond	Zoey and Laura, um, anything you guys, uh wanna touch on
112		that Brandon would have brought up this morning?
113	Laura	Um (0.2), I guess the only thing – this is Laura – that I will
114		say is that, um, this weekend, Molly and Allison and Sarah
115		and myself will be heading to Las Vegas. We hope that you
116		don't bring the snow with you Raymond ((laughter by
117		everybody))

Example 3 (Innovative Kuwait Co., Meeting 2)

Line	Speaker	
15	Zeeshan	What we need to do is to make out our solution to the
16		problem and see their reaction
17	Ayman	But we already sent an email with the solution and we are
18		waiting for them to react. They have to know this is what we
19		are asking
20	Zeeshan	Yes, inputs are needed. It is eventually a legal war, and we
21		are jumping and we are batting in but this is not our area
22	Ayman	If we all agree, then we need to do the conference call with
23		them and see their reaction ((laughter by everyone))

In sum, interruption, agreement and disagreement, and laughter and humor are important language behaviors that can be further studied to explore the similarities and differences between financial organizations, especially those with profit, as in Global Phoenix example. The previous examples show that, although staff members at both organizations perform similar language behaviors in relation to their agency and power in the organization, they acted differently according to the corporate culture of their organization. One future study that can be developed based on these examples could conduct an in-depth examination of the word choice and speech acts produced by staff members. The goal, therefore, will be to determine whether there is a relationship between language choice and corporate culture. The focus group technique, also relates to the language behavior similarities and differences found at Innovative Kuwait Co. and Global Phoenix.

## Focus Groups Results

Focus group technique was used at the end of fieldwork and observation to increase research validity and ask participants for verification of the overall findings and interpretations including coding process results, potential social systems found, and results of research questions. By forming a focus group session at both Innovative Kuwait Co. and Global Phoenix, I sought to give participants an opportunity to express what they felt was right or wrong or applicable or unrelated to their business speech community and corporate culture. I also believed that I had the responsibility to provide my participants with the research findings in return for their active and supportive participation in fieldwork and observation, which is why I decided to provide a comfortable, informal environment in which to conduct the focus group dialogue.

In both field sites, I used the same procedures to conduct the focus group dialogue. First, I used the same conference room where the meetings were held. Second, I gave participants a short PowerPoint presentation that consisted of outlines referring to focus group goals, transcription and coding process and results, and research questions findings. The focus group dialogue lasted one hour and only English was used in the dialogue. The dialogue was audio recorded. Following the short presentation, I opened the dialogue by asking participants the focus group question: “*What do you think about it?*” To help them comprehend the question, I also asked the sub-questions of “*Are you surprised?*”, and “*Did you expect similar/different results?*” In what comes next, I present Innovative Kuwait Co. focus group findings, followed by the findings concluded from Global

Phoenix's dialogue. Last, I summarize terms discussed by both participants in relation to findings in addition to reaction themes emerging in both dialogues.

### **Innovative Kuwait Co. Focus Group Findings**

The focus group dialogue I conducted with my participants from Innovative Kuwait Co. dealt with the great outcomes with regard to the gender norm/identity enacted by female staffers and the power of senior managers in the workplace. I met with Zeeshan, Deshna, Kamyra, and Muneerah. Although I assumed that this kind of non-business dialogue and non-work conversation would encourage Muneerah, Deshna, and Kamyra to speak freely and express their business points of view, I received only silence and soft laughter along with the comment, "Wow." Interestingly, Muneerah and Deshna started to talk when Zeeshan encouraged them to do so; however, Kamyra kept quiet, perhaps because she was a quiet person in general with a sometimes inaudible voice.

Zeeshan was the one who first opened the dialogue by saying that he was surprised at what I had found, realizing that the use of personal pronouns could relate to language and agency of staff members. He commented on his uses of "I" and "we": "You know, I never thought that this is language and this is important to explore. I always thought of these pronouns as things I use to communicate and that's it, but I know I use them a lot when I am with other people coming to our company." Zeeshan also mentioned that he used "we" to "talk about group work and what we did during the week." As for Muneerah, Deshna, and Kamyra, they did not express their opinions on the use of personal pronouns; rather, they were fascinated by the coding summaries. Muneerah, for example, opened the dialogue

of the coding results with the evaluation that “they seem okay to me, but I can add more to your summaries and maybe delete some of your component points.” She justified her opinion by saying, “Sometimes for people with no business knowledge, like you, do not have the full ability to process specialized business terms, so confusion and overlap might exist.”

Muneerah was also surprised at labeling argument, interruption, turn taking, humor, laughter, and “I” and “we” utterances as language behaviors and remarked, “Now I know why you wanted to observe us. Now I understand what linguists do and find in conversations.” Here Zeeshan commented, “Let me tell you something.” Zeeshan evoked discussion in the group by sharing his personal experience of arguing and interrupting his manager colleagues and external parties. He looked at me saying, “You know, Fatma, we do this all the time but we are not aware of it and that’s okay. We do business here and this is the business way. We sometimes talk in side conversations too, did you look at that?” I answered, “No, I did not, but I found a couple in the data and I thought you guys were speaking Indian.” Zeeshan laughed and replied, “Yes, few times.”

The last part of the dialogue revolved around the coding summaries and potential systems found in the meeting. Zeeshan told me not to worry if I included unrelated business terms, because what was in the summaries referred to business actions performed in his department. He took the lead in explaining his point of view: “I can tell you managed well to explore interesting results about our company.” He elaborated:

“As Muneerah and Deshna pointed out, business is hard to understand, so

we need to be careful, and I know you're not judging us. This is for you to understand. I agree with you. We are problem solvers and we like to negotiate at all times. This is not bad because this is business and we do it all the time. I always want to solve and give suggestions. Oh and sometimes we end our meetings without solutions, so we set up followup meetings; we do that with auditors. You know, we all have different minds and we argue all the time" (March 15, 2012).

### **Global Phoenix Focus Group Findings**

I enjoyed the dialogue with Innovative Kuwait Co. staff members but not as much as I enjoyed the second focus group I conducted with Global Phoenix staffer members. Actually, this dialogue started with laughter and excitement about the PowerPoint. The dialogue included Phoenix office staff only. Molly was the one who asked everybody to share his or her point of view, but she did not take a turn to tell hers. Towards the beginning of discussion, staff members were surprised at what I looked for, especially in terms of their uses of "we" utterances and humor. "Oh no, you found out that we're funny," Molly said jokingly. Molly explained why humor is important:

"I agree. We're fun and we laugh together. We work for the community and we meet many local people, but you know we also do some financial services like the company you got in Kuwait. What is important about our group is that we care about each other and we don't focus on who got more power in the meeting. I think we got better as a group when we stopped using agendas. Sometimes we forget to include some staff, so we decided

to organize the meetings by ourselves and let everyone talk” (March 27, 2012).

Molly also referred to the coding summaries, confirming “I had captured it all” and commenting “That’s amazing. You know what we talked about, yes I agree, I can look at these and recall our meetings.” Additionally, Molly stated by saying:

“Yes, we are very close and we cooperate to make it happen. The merger has brought us together as one family. I remember when this merger happened everyone was concerned about regrouping and membership but now it’s all fine! I think if we merge again with another organization, then maybe we’ll have the same concern” (March 27, 2012).

More importantly, Molly and John, and the staff members expressed that because they like to work together and give everyone a chance to speak, “We don’t really argue or interrupt; rather, we like to ask questions and seek information.” I received an interesting question from Brandon, “What did you think of us when you first came here? Did we really change? Did you get to see our membership and how?” I explained to Brandon that at the time I approached them, I was unaware of the close attachment between all staff members until I recorded the third meeting, when I concluded that Global Phoenix was a comfortable speech community that unites members through work and social activities.

### **Similar and Different Reaction Themes Emerged in Focus Groups**

Based on both focus group dialogues, I found that staff members were satisfied with the dialogue questions and responses and appreciated being

addressed as significant individuals in the research. I summarized the reaction themes and concepts discussed by participants in the dialogues, categorizing them as positive, negative, or maybe based on participants' reactions. Table 31 lists all the themes found in the focus group dialogue.

Table 31

*Themes Emerged in the Focus Group Dialogue*

Themes Emerged in the Focus Group Dialogue	Innovative Kuwait Co.	Global Phoenix
Results of coding summaries	Maybe	Positive
Use of "I"	Positive	Maybe
Use of "we"	Positive	Positive
Interruption	Positive	Negative
Argument	Positive	Negative
Humor/Laughter	Maybe	Positive



## CHAPTER 6.

### CONCLUSION AND FUTURE IMPLICATIONS

This dissertation started with an exposition in which I presented an ethnographic case study comparing two business meeting speech communities, a Kuwaiti financial company (Innovative Kuwait Co.), and a Phoenix-based trade organization (Global Phoenix). Specifically, I wanted to explore the linguistic units of agency, power, and discourse as well as the social identities of staff members. The research's long-term goal is to establish a theoretical groundwork that explores the interplay between corporate culture, business meetings, and the staff members who are involved in organizational meetings. In particular, I sought to provide a communicative sociolinguistic account of how staff members determine their language choices, behaviors of agency, power, and discourse, and social identities when communicating in organizational business meetings.

More importantly, I attempted to follow Schwartzman's (1986) call to initiate ethnographic fieldwork and develop theoretical grounds on the structure and impact of organizational meetings, in order to look examine the social meaning and construction of business organizational meetings. Accordingly, this dissertation project adopted ethnography to offer a robust description of the cultural immersion experience at two different speech communities, in which I audio recorded business meetings and examined the socio-cultural contexts, meanings, and worldviews of participants under study (Geertz, 1974; Gumperz, 1972; Gupta & Ferguson, 1997; Gumperz, 1972; Hymes, 1964, 1974; Narayan, 1997; Saville-Troike, 1986; and Watson, 1999).

This cultural immersion experience involved eight months of fieldwork conducted in 2010, 2011, and 2012 at Innovative Kuwait Co. and Global Phoenix, whereby I used the qualitative methodologies of participant observation, audio recording, and focus group technique to answer the research questions proposed for this dissertation: (1) How the agency of staff members reflects membership in the corporate culture of an organization as a whole; (2) how power is used in relation to agency in organizational business meetings?; and (3) how discourse and social identities of staff members are enacted during organizational business meetings? First, I provided detailed descriptions of fieldwork ethnography, participants, and meeting data findings to create an in-depth picture of how staff members at both organizations make meanings and construct business organizational meetings in their business speech community/community of practice. In addition, I provided descriptions of each meeting recorded at both field sites, perceiving it as a speech event of its own, but substantially connected to the entire business speech community and corporate culture.

Furthermore, the use of sociolinguistics and sociolinguistic anthropological methodologies, such as Hymes' SPEAKING model (1974), Sherzer and Darnell's ethnographic guide (1986), Zimmerman's identity analysis (1998), Van Leeuwen's social action network Leeuwen (2009), and Edelsky's turn taking and interruption analysis (1981), helped to examine how staff members at both organizations construct meetings and perform actions of agency, power, discourse, and social identities. Another effective decision was the use of method/data triangulation, which facilitated the delivery of a clear picture of the business meeting events at

both field sites.

Interestingly, using a focus group as a research tool to increase the rigor and validity of findings confirmed some findings, and yielded insights from the participants. Also of great significance were the schemas on social systems and relationships I concluded from examining dense verbatim meeting transcripts and coding process stages. By establishing these schemas, I connected between my field journal entries, meeting verbatim transcripts, and the feedback from the focus group dialogue.

This dissertation's findings contribute to expand the business discourse literature on business organizational meetings and support similar linguistic accounts in regard to agency, power, discourse and social identities (Bargiela-Chiappini & Harris, 1997; Holmes & Stubbe, 2003; Spencer-Oatey, 2003; Vine, 2004; Yamada, 1992). At Innovative Kuwait Co., the agency of staff members was reflected in the way staff members joined the meetings as social agents aimed at accomplishing goals and outcomes related to group work and their group's membership in the business speech community (Hymes, 1974; Lave & Wenger, 1991; Saville-Troike, 1989; Van Leeuwen, 2009).

In particular, staff members reflected their agency throughout using collaborative "we" utterances to show group work and action verbs were used to complete business tasks and activities; in addition, they shared a few instances of humor/laughter, a few idioms about group work, and many statements related to membership and corporate culture (Richards, 2006). Other linguistic accounts incorporated findings similar to those of the agency performed at Innovative

Kuwaiti Co. (Bargiela-Chiappini & Harris, 1997; Holmes & Stubbe, 2003).

Innovative Kuwait Co. staff members also acted as powerful social agents by using I utterances to represent their individual speaking power in the meeting. Staff members, in particular the senior managers, represented a number of roles of power such as power of knowledge, power of advice, power of expressing opinions and thoughts, power of command, power of asking, and power of accusation (Bargiela-Chiappini & Harris, 1997). They used sharp eye contact and hand movements while delivering these expressions of power. Of great advantage to the meeting's construction and goal were the many uses of argument episodes between Innovative Kuwait Co. staff members and their internal and external parties. Staff members with higher positions created argument episodes when meeting with external parties. The power of interruption was also evident in Innovative Kuwait Co. meetings because of the different opposing parties and their goals. Interruption goals were to hold the floor, ask a question, add information, and defend a position. Staff members also identified themselves as business negotiators who sought to open a discussion, talk about a problem or an issue under examination, then find solutions. This discourse identity helped them to perform agency and power during the meeting. Female staff showed limited participation during the meeting, except for two cases of a senior manager, and a senior analyst who dominated the conversation for specific purposes. This might be related to Mullany's (2006) findings of female senior managers using authoritative speech styles during business meetings to enact powerful work status to keep pace with their male counterparts.

As for the findings from Global Phoenix business meetings, staff members used similar language behaviors to those found at Innovative Kuwait Co., but the performance of power and identities were different. In contrast to Innovative Kuwait Co., Global Phoenix staff members organized their meetings to allow each staff member his or her turn at speaking. Similar to Innovative Kuwait Co. meetings, staff members of higher positions were responsible for opening and closing the meeting. Global Phoenix staff members, along with their Colorado colleagues spoke highly of collaborative actions and business tasks. They all managed to share the floor when speaking, and primarily, make jokes and laugh together. Much of the business discourse of Global Phoenix meetings involved a variety of jokes that aimed to tease a staff member, relate to a group work's action, and refer to the prevailing weather conditions. Unlike Innovative Kuwait Co. staff, Global Phoenix staff also used a great deal of idiomatic expressions in relation to group work and membership.

Global Phoenix staff members' roles of power focused on seeking information, seeking clarification, and complimenting staff members' work. In particular, the vice president and executive vice presidents maintained eye contact while addressing staff members. Arguments did not take place at Global Phoenix meetings due to the relaxed and collaborative nature of the meeting discourse; staff members joined the meetings to discuss updates of past and future business activities, not to solve problems and defend positions, as occurred in the Kuwait meetings. Instances of interruption were also infrequent, except for a few occasions when staff members interrupted to ask for clarification or add

information. In terms of discourse and social transportable identities, Global Phoenix staff members identified themselves as information seekers, actions makers, and question/answerer people.

Hence, the findings from Innovative Kuwait Co. and Global Phoenix business meetings were of great contributions to the field of business meetings discourse (Bargiela-Chiappini & Harris, 1997; Holmes & Stubbe, 2003; Spencer-Oatey, 2003; Vine, 2004; Yamada, 1992), linguistic anthropology (Duranti, 1997; Hymes, 1974; Saville-Troike, 1974), and intercultural communication (Trompenaars & Woolliams, 2004; Scollon & Scollon, 2000). The findings also contribute toward offering business personnel and organizations a language perspective of the way staff members perform and achieve actions in meetings. By following Bargiela-Chiappini and Harris's (1997) intercultural study comparing Italian and British staff members, this dissertation project has also sought to explore language choices and behaviors related to agency, power, discourse, and social identities of staff members.

However, all social science studies of human interaction have some limitations; this dissertation is no exception. One area of limitation involved the different cultural backgrounds of Innovative Kuwait Co. staff members. I was perplexed as to how to identify staff members in the meetings' data. Thus, I have chosen not to focus on their cultural backgrounds; rather, I only identified them as business people working at Innovative Kuwait Co. Another limitation concerned the shortage of time available to finish this dissertation project. My scholarship regulations forced me to complete the last three chapters in three months. In fact,

with the dense meeting verbatim transcripts at hand, I would expect to find more substantial and systematic linguistic findings for future publications.

Regardless of the limitations, this dissertation brought a modest sociolinguistic exploration and understanding of two business speech communities. By deliberately focusing on two different speech communities, the language patterns and behaviors that emerged from the findings have created a venue for framing a communicative sociolinguistic account of how staff members at Innovative Kuwait Co. and Global Phoenix determine their language choices and behaviors of agency, power, discourse, and social identities when communicating in organizational business meetings. In addition, it would be reasonable to assume that this communicative sociolinguistic outcome has attempted to establish a theoretical base of developing an initial schematic frame of the social construction and social meanings performed in organizational business meetings (Schwartzman, 1986).

This communicative sociolinguistic outcome also offers business personnel and organizations an effective avenue for establishing language business pedagogical and workshop materials. Below, I provide two schematic frames in Table 32 showing a communicative sociolinguistic account of how staff members in both organizations socially constructed their business meetings and determined their language choices and behaviors of agency, power, discourse, and social identities as social agents in the meetings.

Table 32

*A Communicative Sociolinguistic Account of How Staff Members Construct*

*Business Meetings*

Innovative Kuwait Co.	Global Phoenix
<ul style="list-style-type: none"><li>• Manager/supervisor opens the meeting</li><li>• The topic of discussion is to argue about an issue, solve a problem, or find reliable programs for the organization</li><li>• Staff members use formal/serious tone and act as negotiators/problem solvers</li><li>• Staff members also ask questions in regard to the meeting topic</li><li>• On a few occasions, staff members laugh or make jokes/use idioms</li><li>• Manager/supervisor ends the meeting with a solution or homework for next time, and sometimes organize a followup meeting</li></ul>	<ul style="list-style-type: none"><li>• Manager/supervisor opens the meetin</li><li>• The topic of discussion is to discuss updates and upcoming events</li><li>• Staff members use informal/relaxed language and act as information seekers and action makers</li><li>• Staff members focus on asking questions and adding information</li><li>• During the meeting, staff members recall their group work and make jokes</li><li>• On a few occasions, staff members may interrupt to ask a question</li><li>• Staff members use many idioms</li><li>• Manager/supervisor ends the meetings with coming updates and jokes</li></ul>



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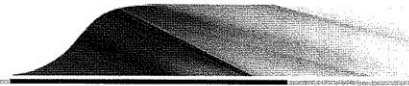
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APPENDIX A

FIRST IRB EXEMPTION APPROVAL





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Office of Research Integrity and Assurance

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**To:** Karen Adams  
LL

**From:** *for* Mark Roosa, Chair  
*CR* Soc Beh IRB

**Date:** 05/18/2010

**Committee Action:** Exemption Granted

**IRB Action Date:** 05/18/2010

**IRB Protocol #:** 1005005127

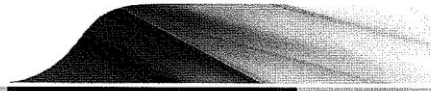
**Study Title:** Exempt Research

The above-referenced protocol is considered exempt after review by the Institutional Review Board pursuant to Federal regulations, 45 CFR Part 46.101(b)(2) .

This part of the federal regulations requires that the information be recorded by investigators in such a manner that subjects cannot be identified, directly or through identifiers linked to the subjects. It is necessary that the information obtained not be such that if disclosed outside the research, it could reasonably place the subjects at risk of criminal or civil liability, or be damaging to the subjects' financial standing, employability, or reputation.

You should retain a copy of this letter for your records.

APPENDIX B  
SECOND IRB EXEMPTION APPROVAL





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Office of Research Integrity and Assurance

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**To:** Karen Adams  
LL

**From:**  Mark Roosa, Chair   
Soc Beh IRB

**Date:** 02/21/2011

**Committee Action:** Exemption Granted

**IRB Action Date:** 05/18/2010

**IRB Protocol #:** 1005005127

**Study Title:** Agency, power, contextual and situational knowledge in American business meetings: a case study

The above-referenced protocol is considered exempt after review by the Institutional Review Board pursuant to Federal regulations, 45 CFR Part 46.101(b)(2).

This part of the federal regulations requires that the information be recorded by investigators in such a manner that subjects cannot be identified, directly or through identifiers linked to the subjects. It is necessary that the information obtained not be such that if disclosed outside the research, it could reasonably place the subjects at risk of criminal or civil liability, or be damaging to the subjects' financial standing, employability, or reputation.

You should retain a copy of this letter for your records.

APPENDIX C  
RECRUITMENT LETTER

I am a doctoral student under the direction of Dr. Karen Adams in the English Department in the College of Liberal Arts and Sciences at Arizona State University. I plan to conduct a study examining managers' and employees' language and communication styles used during task and report-oriented business meetings. This will be a cross-cultural research study comparing two different research sites: American employees in the Phoenix metropolitan area, and Kuwaiti employees in Kuwait City. I am interested in collecting data related to the following language and communication styles used in task-and report-oriented business meetings in your company, and in comparing these data to Kuwaiti data gathered in the past two summers:

The information I want to collect relates to the interaction styles of staff members, and looks at the following. This study is interested in interactional styles of how meetings take place, and not in the actual substance of the meeting in terms of business activities.

- a. How managers and employees negotiate the meanings of business tasks and activities; how one asks for and gives clarification. How the final form of the task is negotiated.
- b. How managers use orders and requests when asking employees to complete business tasks and activities; and how people respond to these requests.
- c. Which communication styles are utilized in the business meetings.

I am requesting your consent to collect the data at your organization. Ideally, I would like to be present in the room to observe the ongoing interactions. I would like to attend the business meetings in order to see the overall physical setting of the room, the seating arrangements, the meeting board table location, furniture placement, spaces within the room, and visual and auditory stimulation, and the ways that technology such as power point presentations might be part of the event. I also want to explore some of the non-verbal gestures, and cues relevant to language behavior.

I also want to audio record the meetings in an attempt to collect the linguistic data on the social dynamics of task and report talk between managers and employees. It is expected that this study will take approximately about two to three weeks, and that I would observe ten to fifteen meetings.

Participation in this study will be voluntary. If individuals choose not to participate or to withdraw from the study at any time, there will be no penalty. Their information will not be included in the analysis. Nor will it be a problem if at some point, members of the meeting ask for the recording to be stopped. I will audio tape the meetings, but the tapes will not be made public. Only I and the PI, Dr. Karen Adams, will have access to them. Also, the tapes will be erased upon the completion of the study if requested. Confidentiality will be maintained at all times,

and no real names will be used. Pseudonyms will be utilized for participating members and organizations.

Recorded meetings and interviews will be transcribed by the researcher, and assigned language codes and themes for in-depth analysis. Any sensitive materials related to your identity, or the identity of your corporation will be automatically omitted from the research.

The purpose of this study is to contribute to the development of business communication toolkits and workshops for organizations in order to increase staff members' awareness of language as a social action in business meetings. Comparative studies between businesses in other countries have been conducted on the style of business meetings to explore the language, and the communication aspects of task and report interactions in business meetings. The results of this study will be compared to them. Although participants in your business may not receive direct benefit, the findings of this study will provide insights about the language and communication styles more generally. In addition, this study will help researchers and business people to understand the value of language in shaping organizational identity and action.

If you have any questions concerning the research study, please call me at (480) 478- 5489 or at my email [fatma.haidari@asu.edu](mailto:fatma.haidari@asu.edu)

Sincerely,

Fatma M. Haidari

APPENDIX D

PARTICIPANT OBSERVATION CONSENT LETTER

Dear potential participant:

I am a PhD student under the direction of Professor Karen Adams in the Department of English (linguistics) College of Arts and Sciences at Arizona State University. I am conducting a research study to examine how language shapes the actions and relationships of corporate supervisors and subordinates of a Kuwaiti and an international financial corporation in Kuwait City.

I am inviting your participation, which will involve observing you and your colleagues talking and making corporate actions during meetings. I plan to only take field notes during the meetings and audio-record the meetings for further analysis. You have the right to ask any questions before the meetings and refer to the human resources department of your corporation for full details of the permission that was granted for this research.

Your participation in this study is voluntary. If you do not feel comfortable being observed and audio-recorded, you have the right to inform the researcher.

The benefits of your participation in this research may be rewarding and advantageous to you at a personal and at a group level. On a personal level, you may be able to better understand your communication skills at corporate meetings and at a group level you may improve your language in group meetings and teamwork. There are no foreseeable risks or discomforts in terms of your participation.

Please be advised that there will be two audio-recorders present in the room, a triangular microphone in the middle of the meeting table and accompanied a small digital recorder. It is necessary for the researcher to audio-record your meetings in order to develop a better understanding of how language and actions are utilized in corporate conversations.

During the observations and audio-recording of the meetings, the confidentiality of every participating member will be the researcher's first priority. To protect your identity, the researcher will not publish your name or any personal information about you. The name and location of your corporation and corporation staff will not be used. The researcher will use pseudonyms (false names). If you would your real name to be published, please refer to the researcher for details. Only the researcher will have access to the audio-recording of the meeting.

I would like to audiotape the full meeting. The meeting will not be recorded without your permission. Please let me know if you do not want the meeting to be taped; you may also ask questions about the importance of audio-recording in observation



studies. You and your coworkers have the right to stop the recording if needed because of confidential materials. There will be no audio-taping of the meeting if you and your coworkers do not agree to be audio-taped. The audio files will be used for research purposes only, and your corporation has the right to access these files, if necessary. The researcher will analyze the files during the summer and fall of 2010, preparing full transcriptions of the meetings. The audio files will be kept with the researcher in a safe cabinet/or destroyed upon corporation request.

If you have any questions concerning the research study, please contact the research team at: + 001(480) 965-3013, Professor Karen Adams, and Fatma Al-Haidari +965- 993-27027. If you have any questions about your rights as a subject/participant in this research, or if you feel you have been placed at risk, you can contact the Chair of the Human Subjects Institutional Review Board, through the ASU Office of Research Integrity and Assurance, at +001 (480) 965-6788. Please let me know if you wish to be part of the study.

Date -----

APPENDIX E  
IRB FEDERAL REGULATION ON THE PROTECTION OF HUMAN  
SUBJECTS

IRB federal regulation on the protection of human subjects

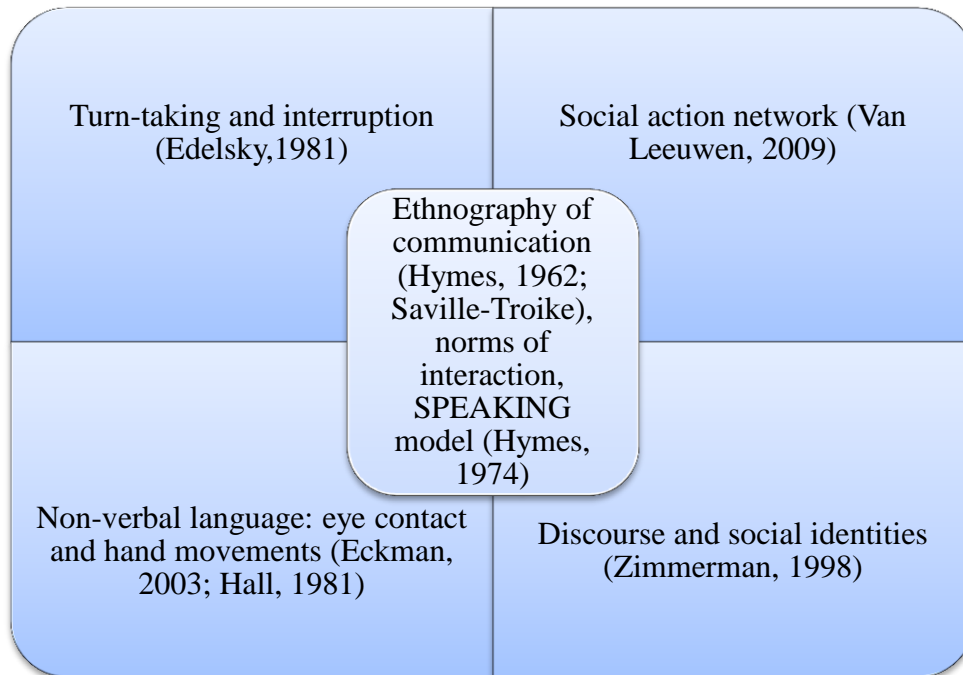
Go to:

<http://www.hhs.gov/ohrp/policy/ohrpreulations.pdf>

APPENDIX F

DESCRIPTION OF METHODOLOGIES USED

Description of methodologies used:



**Ethnography of communication: (Saville-Troike, 1989, p. 1-47)**

Ethnography is a field of study, which is concerned primarily with the description and analysis of culture, and linguistics is a field concerned, among other things, with the description and analysis of language codes. In spite of long-standing awareness of the interrelationship of language and culture, the descriptive and analytic products of ethnographers and linguists traditionally failed to deal with this interrelationship. Even anthropological linguists and linguistic anthropologists until the 1960s typically gave little attention to the fact that the uses of language and speech in different societies have patterns of their own which are worthy of ethnographic description, comparable to – and intersecting with – patterns in social organization and other cultural domains. The realization of this omission led Dell Hymes to call for an approach, which would deal with aspects of communication, which were escaping both anthropology and linguistics.

With the publication of his essay “The ethnography of speaking” in 1962, Hymes launched a new synthesizing discipline which focuses on the patterning of communicative behavior as it constitutes one of the systems of culture, as it

functions within the holistic context of culture, and as it relates to patterns in other component systems. The *ethnography of communication*, as the field has come to be known since the publication of a volume of the *American Anthropologist* with this title (Gumperz and Hymes 1964), has in its development drawn heavily upon (and mutually influenced) sociological concern with interactional analysis and role identity, the study of performance by anthropologically oriented folklorists, and the work of natural-language philosophers. In combining these various threads of interest and theoretical orientation, the ethnography of communication has become an emergent discipline, addressing a largely new order of information in the structuring of communicative behavior and its role in the conduct of social life.

As with any science, the ethnography of communication has two foci: particularistic and generalizing. On the one hand, it is directed at the description and understanding of communicative behavior in specific cultural settings, but it is also directed toward the formulation of concepts and theories upon which to build a global meta theory of human communication. Its basic approach does not involve a list of facts to be learned so much as questions to be asked, and means for finding out answers. In order to attain the goal of understanding both the particular and the general, a broad range of data from a large variety of communities is needed.

### **Scope and Focus**

The subject matter of the ethnography of communication is best illustrated by one of its most general questions: what does a speaker need to know to communicate appropriately within a particular speech community, and how does he or she learn to do so? Such knowledge, together with whatever skills are needed to make use of it, is *communicative competence*. The requisite knowledge includes not only rules for communication (both linguistic and sociolinguistic) and shared rules for interaction, but also the cultural rules and knowledge that are the basis for the context and content of communicative events and interaction processes.

The focus of the ethnography of communication is the *speech community*, the way communication within it is patterned and organized as systems of communicative events, and the ways in which these interact with all other systems of culture. A primary aim of this approach is to guide the collection and analysis of descriptive data about the ways in which social meaning is conveyed: "If we ask of any form of communication the simple question what is being communicated? the answer is: information from the social system" (Douglas 1971: 389). This makes the ethnography of communication a mode of inquiry which carries with it substantial content.

Among the basic products of this approach are ethnographic descriptions of ways in which speech and other channels of communication are used in diverse communities, ranging from tribal groups in Africa and the Amazon regions, to nomadic herdsmen, to highly industrialized peoples in Europe, Asia, and North America. Hymes repeatedly emphasizes that what language is cannot be separated

from how and why it is used, and that considerations of use are often prerequisite to recognition and understanding of much of linguistic form. While recognizing the necessity to analyze the code itself and the cognitive processes of its speakers and hearers, the ethnography of communication takes language first and foremost as a socially situated cultural form, which is indeed constitutive of much of culture itself. To accept a lesser scope for linguistic description is to risk reducing it to triviality, and to deny any possibility of understanding how language lives in the minds and on the tongues of its users.

### **Significance**

While the goals of ethnography are at least in the first instance descriptive, and information about diverse “ways of speaking” is a legitimate contribution to knowledge in its own right, the potential significance of the ethnography of communication goes far beyond a mere cataloging of facts about communicative behavior.

For anthropology, the ethnography of communication extends understandings of cultural systems to language, at the same time relating language to social organization, role-relationships, values and beliefs, and other shared patterns of knowledge and behavior which are transmitted from generation to generation in the process of socialization/enculturation. Further, it contributes to the study of cultural maintenance and change, including acculturation phenomena in contact situations, and may provide important clues to culture history.

The principal concerns in the ethnography of communication, as these have been defined by Hymes and as they have emerged from the work of others, include the following topics: patterns and functions of communication, nature and definition of speech community, means of communicating, components of communicative competence, relationship of language to world view and social organization, and linguistic and social universals and inequalities.

### **Patterns of Communication**

It has long been recognized that much of linguistic behavior is rule-governed: i.e., it follows regular patterns and constraints, which can be formulated descriptively as rules (see Sapir 1994). Thus, sounds must be produced in language-specific but regular sequences if they are to be interpreted as a speaker intends; the possible order and form of words in a sentence is constrained by the rules of grammar; and even the definition of a well-formed discourse is determined by culture-specific rules of rhetoric. Hymes identifies concern for pattern as a key motivating factor in his establishment of this discipline: “My own purpose with the ethnography of speaking was . . . to show that there was patterned regularity where it had been taken to be absent, in the activity of speaking itself” (2000: 314).

Sociolinguists such as Labov (1963; 1966), Trudgill (1974), and Bailey (1976) have

demonstrated that what earlier linguists had considered irregularity or “free variation” in linguistic behavior can be found to show regular and predictable statistical patterns. Sociolinguistics and the ethnography of communication are both concerned with discovering regularities in language use, but sociolinguists typically focus on variability in pronunciation and grammatical form, while ethnographers are concerned with how communicative units are organized and how they pattern in a much broader sense of “ways of speaking,” as well as with how these patterns interrelate in a systematic way with and derive meaning from other aspects of culture. Indeed, for some, pattern *is* culture: “if we conceive culture as *pattern that gives meaning to social acts and entities* . . . we can start to see precisely *how* social actors enact culture through patterned speaking and patterned action” (Du Bois 2000: 94; italics in the original).

Patterning occurs at all levels of communication: societal, group, and individual (cf. Hymes 1961). At the societal level, communication usually patterns in terms of its functions, categories of talk, and attitudes and conceptions about language and speakers. Communication also patterns according to particular roles and groups within a society, such as sex, age, social status, and occupation: e.g., a teacher has different ways of speaking from a lawyer, a doctor, or an insurance salesman. Ways of speaking also pattern according to educational level, rural or urban residence, geographic region, and other features of social organization.

Some common patterns are so regular, so predictable, that a very low information load is carried even by a long utterance or interchange, though the social meaning involved can be significant. For instance, greetings in some languages (e.g. Korean) may carry crucial information identifying speaker relationships (or attitudes toward relationships). An unmarked greeting sequence such as “Hello, how are you today? Fine, how are you?” has virtually no referential content. However, silence in response to another’s greeting in this sequence would be marked communicative behavior, and would carry a very high information load for speakers of English.

### **Communicative Functions**

At a societal level, language serves many functions. Language selection often relates to political goals, functioning to create or reinforce boundaries in order to unify speakers as members of a single speech community and to exclude outsiders from intragroup communication. For example, establishing the official use of Hebrew in Israel functioned to unify at this level in building the new nation-state, while the refusal of early Spanish settlers in Mexico to teach the Castilian language to the indigenous population was exclusionary. Members of a community may also reinforce their boundaries by discouraging prospective second language learners, by holding and conveying the attitude that their language is too difficult – or inappropriate – for others to use.

Many languages are also made to serve a social identification function within a society by providing linguistic indicators, which may be used to reinforce social



stratification, or to maintain differential power relationships between groups. The functions which language differences in a society are assigned may also include the maintenance and manipulation of individual social relationships and networks, and various means of effecting social control. Linguistic features are often employed by people, consciously or unconsciously, to identify themselves and others, and thus serve to mark and maintain various social categories and divisions. The potential use of language to create and maintain power is part of a central topic among ethnographers of communication and other sociolinguists concerned with language-related inequities and inequalities.

At the level of individuals and groups interacting with one another, the functions of communication are directly related to the participants' purposes and needs (Hymes 1961; 1972c). These include such categories of functions as *expressive* (conveying feelings or emotions), *directive* (requesting or demanding), *referential* (true or false propositional content), *poetic* (aesthetic), *phatic* (empathy and solidarity), and *metalinguistic* (reference to language itself).

The social functions or practices of language provide the primary dimension for characterizing and organizing communicative processes and products in a society; without understanding why a language is being used as it is, and the consequences of such use, it is impossible to understand its meaning in the context of social interaction.

### **Speech Community**

Since the focus of the ethnography of communication is typically on the speech community, and on the way communication is patterned and organized within that unit, clearly its definition is of central importance. Many definitions have been proposed (e.g. Hudson 1980: 25–30), including such criteria as shared language use (Lyons 1970), shared rules of speaking and interpretation of speech performance (Hymes 1972c), shared attitudes and values regarding language forms and use (Labov 1972), and shared sociocultural understandings and presuppositions with regard to speech (Sherzer 1975).

All definitions of *community* used in the social sciences include the dimension of shared knowledge, possessions, or behaviors, derived from Latin *communitae* 'held in common,' just as the sociolinguistic criteria for speech community enumerated above all include the word 'shared.' A key question is whether our focus in initially defining communities for study should be on features of shared language form and use, shared geographical and political boundaries, shared contexts of interaction, shared attitudes and values regarding language forms, shared sociocultural understandings and presuppositions, or even shared physical characteristics (e.g., a particular skin color may be considered a requirement for membership in some communities, a hearing impairment for others). The essential criterion for "community" is that some significant dimension of experience be shared, and for "speech community" that the shared dimension be related to ways in which

members of the group use, value, or interpret language.

While sociolinguistic research has often focused on the patterning of language practice within a single school, a neighborhood, a factory, or other limited segment of a population, an integrated ethnographic approach would require relating such subgroups to the social and cultural whole. There is no necessary expectation that a speech community will be linguistically homogeneous, nor that it will be a static entity, which necessarily encompasses the same membership over time or situations – although degree of fluidity will depend on the nature of bounding features and attitudes concerning their permeability.

At any level of speech community selected for study, the societal functions of language will include the functions served by such bounding features, of *separating*, *unifying*, and *stratifying*. The interactional functions, which are present will be dependent on the level of community studied, with a full complement of language functions and domains present only at the level defined as including a range of role opportunities. At this more inclusive level, a speech community need not share a single language, and indeed it will not where roles are differentially assigned to monolingual speakers of different languages in a single multilingual society (e.g. speakers of Spanish and Guaraní in Paraguay, discussed in chapter 3).

### **Communicative Competence**

Hymes (1966a) observed that speakers who could produce any and all of the grammatical sentences of a language (per Chomsky's 1965 definition of *linguistic competence*) would be institutionalized if they indiscriminately went about trying to do so without consideration of the appropriate contexts of use. *Communicative competence* involves knowing not only the language code but also what to say to whom, and how to say it appropriately in any given situation. Further, it involves the social and cultural knowledge speakers are presumed to have which enables them to use and interpret linguistic forms. Hymes (1974, 1987) augmented Chomsky's notion of linguistic competence (knowledge of systematic potential, or whether or not an utterance is a possible grammatical structure in a language) with knowledge of appropriateness (whether and to what extent something is suitable), occurrence (whether and to what extent something is done), and feasibility (whether and to what extent something is possible under particular circumstances). The concept of communicative competence (and its encompassing congener, social competence) is one of the most powerful organizing tools to emerge in the social sciences in recent years.

Communicative competence extends to both knowledge and expectation of who may or may not speak in certain settings, when to speak and when to remain silent, to whom one may speak, how one may talk to persons of different statuses and roles, what nonverbal behaviors are appropriate in various contexts, what the routines for turn-taking are in conversation, how to ask for and give information, how to request, how to offer or decline assistance or cooperation, how to give

commands, how to enforce discipline, and the like – in short, everything involving the use of language and other communicative modalities in particular social settings.

### **Units of Analysis**

In order to describe and analyze communication it is necessary to deal with discrete units of some kind, with communicative activities that have recognizable boundaries. The three units suggested by Hymes (1972) are *situation*, *event*, and *act*.

The *communicative situation* is the context within which communication occurs. Examples include a religious service, a court trial, a holiday party, an auction, a train ride, or a class in school. The situation may remain the same even with a change of location, as when a committee meeting or court trial reconvenes in different settings, or it may change in the same location if very different activities go on there at different times.

The *communicative event* is the basic unit for descriptive purposes. A single event is defined by a unified set of components throughout, beginning with the same general purpose of communication, the same general topic, and involving the same participants, generally using the same language variety, maintaining the same tone or key and the same rules for interaction, in the same setting. An event terminates whenever there is a change in the major participants, their role-relationships, or the focus of attention. If there is no change in major participants and setting, the boundary between events is often marked by a period of silence and perhaps a change in body position.

The *communicative act* is generally coterminous with a single interactional function, such as a referential statement, a request, or a command, and may be either verbal or nonverbal. For example, not only may a request take several verbal forms (*I'd like a pen* and *Do you have a pen?* as well as *May I please have a pen?*), but it may be expressed by raised eyebrows and a “questioning” look, or by a longing sigh. In the context of a communicative event, even silence may be an intentional and conventional communicative act, and used to question, promise, deny, warn, insult, request, or command (Saville-Troike 1985).

### **Hymes SPEAKING model (1974)**

#### *Setting and Scene*

"Setting refers to the time and place of a speech act and, in general, to the physical circumstances" (Hymes, 1974, p. 55). Scene is the "psychological setting" or "cultural definition" of a scene (p. 55).

#### *Participants*

Speaker and audience – speaker, or sender; addressor; hearer, or receiver, or audience; and addressee (Hymes, 1974, p. 54).

### *Ends*

Purposes, goals, and outcomes (Hymes, 1974, p. 56).

### *Act Sequence*

Form and order of the event.

### *Key*

To provide for the tone, manner, or spirit in which an act is done (Hymes, 1974, p. 57).

### *Instrumentalities*

Forms and styles of speech (p. 58). Forms of speech suggests more readily organizations of linguistic means at the scale of languages, dialects, and widely used varieties for use of speech forms. Speech styles more readily suggests an aspect of persons, situations and genres.

### *Norms of interaction*

All rules governing speaking. What is intended here are the specific behaviors and properties that attach—that one must not interrupt, for example, or that one may freely do so; that normal voice should not be used, except when scheduled, in a church service (whisper otherwise); that turns in speaking are to be allocated in a certain way (p. 60).

### *Genre*

Categories such as poem, myth, tale, proverb, riddle, curse, prayer, oration, lecture, commercial, form letter, editorial, etc. (p. 61).

## **Van Leeuwen (2009) social action network**

This theoretical model originates from Van Leeuwen's critical discourse analysis frame of perceiving discourse as a recontextualization of social practice. Van Leeuwen adopts Foucault definition of discourses. He refers to 'socially constructed ways of knowing some aspect of reality which can be drawn upon when the aspect of reality has to be represented, or, to put another way, context-specific frameworks for making sense of things' (2009, p.144).

Van Leeuwen also pictures discourses as social constructions that are ‘modeled on social practices’ (p. 145). From an evaluation of an online questionnaire designed to judge the work of managers and executives, Van Leeuwen critically examined how the discourse of leadership is constructed in the text. It is where he created his model of social action network, reviewing the literature of action and participants in sociology, anthropology, linguistics, and the work of social action by Halliday (1978, 1985).

In this model, all social actions include the elements of actions, performance modes, actors, presentation styles, times, spaces, resources, and eligibility. The model focuses on how discourses are recontextualized, and this recontextualization is brought about by three factors: deletion, substitution and addition.

Also, under social action network, discourses provide additional discursive resources for other discourses, are modalized and combined in certain ways. Van Leeuwen further explains the recontextualization of the actions and reactions, the materials and semiotic action in discourse, objectivation and descriptivization, de-agentialization, generalization and abstraction, in addition to overdetermination. Van Leeuwen also argued that action discourses are modalized showing that the action discourse is not so much about what actors actually do, but also about what actors are able/can do.

Van Leeuwen’s social action network includes the following elements: (Van Leeuwen, 2009, p. 148-160).

**Actions:**

The core of a social practice is formed by a set of actions, which may or may not have to be performed in a specific order. E.g., stepping up a conflict, reading situations, listening, and settling disputes and others.

**Performance modes:**

These actions may have to be performed in specific ways.

**Actors:**

Social actors participate in practices in one of a number of roles—as ‘agents’ (doers of actions), ‘patients’ (participants to whom actions are done) or ‘beneficiaries’ (participants who benefit from an action, whether in a positive or negative sense).

**Presentation styles:**

The way in which actors present themselves (their dress, grooming, etc.) is an important aspect of all social practices, even if it may be taken for granted in some presentations.

**Times:**

Social practices (or parts of them) will take place at more or less specific times. ‘Focused listening’, for instance, will happen in regular, scheduled face-to-face meetings with ‘direct reports’.

**Spaces:**

Social practices (or part of them) also take place in specific spaces, chosen or arranged as suitable environment for the practice.

**Resources:**

Social practices also require specific resources, specific tools and materials. ‘Providing information’, for instance, may require computers, an intranet and so on.

**Eligibility:**

Specific qualities of the concrete elements of social practices (the actors, settings and resources) make them eligible to function as actors, settings or resources in those practices.

**Deletion:**

Some elements of a social practice may not be represented in a particular discourse.

**Substitution:**

The key transformation is of course the transformation from an actual element of an actual social practice into an element of discourse, and this can be done in many different ways. Actors, for example, can be represented as specific individuals or as *types* of people, they can be referred to in abstract or specific terms, and so on.

**Addition:**

Discourses can also add *reactions* and *motives* to the representation of social practices. Reactions are the mental processes, which, according to a given discourse, will accompany specific actions of specific actors, for instance, the way the actors *feel* about specific actions.

The most important motives are *purposes* and *legitimations*. Different discourses may ascribe different purposes to the same actions. Legitimations provide *reasons* for why practices (or parts of practices) are performed, or for why they are performed the way they are.

### **Discourse and social identities (Zimmerman, 1998, p. 87-95)**

The concept of identity, particularly in relation to discourse, can be variously specified, for example, as an independent variable accounting for participants' use of particular linguistic or discourse devices; as a means of referring to and making inferences about self and other; as a constructed display of group membership, as a rhetorical device, and so on.

I propose to treat identity as an element of context for talk-in-interaction. Indeed, any of the previously listed applications of the concept would depend in some way on identity as contextual element of a given discourse. I note here that I use the term 'discourse' in this chapter as shorthand for referring to talk-in-interaction, the domain of concerted social activity pursued through the use of linguistic, sequential and gestural resources. In this usage, it is primarily a behavioral rather than symbolic domain, less a text to be interpreted than a texture of orderly, repetitive and reproducible activities to be described and analyzed.

I propose further than participants' orientations to this or that identity—their own and others'—is crucial link between interaction on concrete occasions and encompassing social orders.

The main focus of this chapter is how oriented-to identities provide both the *proximal* context (the turn-by-turn orientation to developing sequences of action at the interactional level) and the *distal* context for social activities (the oriented-to extra-situational agendas and concerns accomplished *through* such endogenously developing sequences of interaction).

Zimmerman (1998) proposed the following identities:

#### **Discourse, situational and transportable identities:**

Discourse, situational and transportable identities have different home territories.

Discourse identities are integral to the moment-by-moment organization of the interaction. Participants assume discourse identities as they engage in the various sequentially organized activities: current speaker, listener, story teller, story recipient, questioner, answerer, repair initiator, and so on. In initiating an action, one party assumes a particular identity and projects a reciprocal identity for co-participant(s). Such projects are subject to ratification (the recipient assuming the projected identity) or revision (in the case where, for example, a recipient of a

question locates some aspect of that action as a trouble source, becoming a repair initiator instead of the answerer).

Situated identities come into play within the precincts of particular types of situation. Indeed, such situations are effectively brought into being and sustained by participants engaging in activities and respecting agendas that display an orientation to, and an alignment of, particular identity sets, for example, in the case of emergency telephone calls, citizen-complainant and call-talker. In turn, the pursuit of such agendas rests on the underlying alignment of discourse identities.

Finally, transportable identities travel with individuals across situations and are potentially relevant in and for any situation and in and for any spate of interaction. They are latent identities that 'tag along' with individuals as they move through their daily routines in the following sense: they are identities that are usually visible, that is, assignable or claimable on the basis of physical or culturally based insignia which furnish the intersubjective basis for categorization.



APPENDIX G

SHERZER AND DARNELL (1986) ETHNOGRAPHIC GUIDE

# Outline Guide for the Ethnographic Study of Speech Use

JOEL SHERZER AND REGNA DARNELL

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This guide stems from a search of ethnographic literature to obtain information documenting the range of cross-cultural variability in the use of speech. Ethnographies seldom explicitly describe speech use, but information was obtained from some seventy-five societies (in different degrees of detail). On the basis of those examples, the questions presented here have been devised. The questions are intended to serve as a stimulus for much-needed fieldwork focused on speech, and to indicate lines along which such work might proceed. The questions are *not* a check list to be followed mechanically. The ways in which individual questions must be phrased will vary from society to society. Moreover, not every possible question about the use of speech has been included. Within the general range indicated by the questions in the guide, an investigator in a given society may well focus on certain areas of particular significance.

To avoid awkward phrasing, many questions appear in a "yes" or "no" form. All such questions should be understood to be asking not only for a report of presence or absence but also for details: under what circumstances or conditions, for what group, for what purpose, etc.? Thus, when it is asked, "Is speaking regarded as a satisfying activity?" the intended answer is not simply "yes" or "no". Probably, the answer is "yes" under some conditions for some persons in every society. A full answer might include "more so for older people than for younger," "for men but not for women," "during the winter ceremonial season," etc.

The questions are accompanied by paragraphs labeled ("Discussion"). These paragraphs indicate some of the motivation for the questions, and ways in which they might be interpreted.

<sup>1</sup> The original version of the full guide was prepared under an Office of Education Grant during 1966-1967 with Dell Hymes as the principle investigator. Research assistants were Regna Darnell, Helen Hogan, Virginia Hymes, Sheila Seitel, Joel Sherzer, and K. M. Tiwary. A full version of the guide (the questions presented here together with the ethnographic examples on which they are based) with more detailed theoretical discussion, is currently being prepared for publication. The authors alone are responsible for any shortcomings in the present version of the guide.

The guide is subdivided into five sections:

1. Analysis of the use of speech
2. Attitudes toward the use of speech
3. Acquisition of speaking competence
4. **The** use of speech in education and social control
5. **Typological** generalizations

### 1. *Analysis of the Use of Speech*

*Discussion:* Much of linguistic theory has been concerned with study of language in abstraction from its use in speech. Here we are concerned with the kinds of questions one would ask if language is not abstracted in such a way. We do not think that we are merely adding a level to the traditional linguistic description. Rather, we are looking at linguistic data from a different perspective, one which integrates language with the *other* components involved in its use: features of *setting, participant*, etc. Instead of postulating "an ideal speaker-listener, in a completely homogeneous speech-community" (Chomsky 1965), and describing what is in effect the code of a single, limited form of speech, we assume a diversified speech community and take our goal to be a description of the many different *ways of speaking* which exist in the community. These *ways of speaking* and the relations among them are structured, or "rule-governed," just as is language. The usual description of a language, from this point of view, deals with only a portion, sometimes a somewhat arbitrary portion, of the structure of speaking in a community.

The questions that follow are intended to suggest the analytical steps an ethnographer might take in attempting to characterize the use of speech among a particular group of people. (1) He or she must first discover the *components* (or dimensions) that are relevant to speech use, and what in the particular group count as instances of these. (2) He or she must describe the relationships or rules among the various relevant components.<sup>2</sup>

#### 1. What are the *components* involved in the use of speech?

*Discussion:* The potential components of speech use listed later have proven useful (necessary?) to analysis of the material on which the present guide is based. They are not to be used as a check list but rather as a guide to the kinds of factors which enter into the relationships or rules governing the use of speech. They stand to a complete analysis as does a phonetic grid to a phonological description; but at the present preliminary stage of work in this field the list cannot be either exhaustively specific or discrete. The items of the present list are clearly interdependent and possibly overlapping. They have been identified at a level sufficiently general to be maximally useful now.

In different cases, different components and different numbers of components will prove to be relevant. It is the task of the ethnographer to show which are relevant, and in what relationships, in the society under consideration. These various relationships among components are the ways of speaking for that society. The

<sup>2</sup> See Hymes, Chapter 1, for a more complete discussion of the problems involved in a description of speech usage.

present terminology is necessarily provisional. Work is still at a stage in which choice among existing terms, and creation of needed new terms, is problematic. One of the urgent tasks is development of an adequate terminology.

A. Linguistic varieties: What are the linguistic varieties in use in the community?

*Discussion:* The community, and its members, are conceived as having *linguistic repertoires*, composed of *linguistic varieties*. Varieties are defined in terms of their functional roles, independently of historical provenience (same or related languages, dialects) and of structural connection (Pig Latin, Mazateco whistle speech). Research has shown that the same contrast in function may be served, and the same underlying other relations entailed, by what in one case are wholly unrelated languages, in another related dialects, in another shift in phonological styles or in just certain elements (e.g., pronouns) within a single dialect and style. What is asked for here, then, are the linguistic varieties which function in the community, placed first of all in terms of such dimensions as formal/informal, public/private, out-group/in-group, etc.

1. To what extent are the identities and relationships of the linguistic varieties known or conscious?
2. What language-derived verbal or nonverbal codes are in use (i.e., Pig Latin, thieves' cant, whistle speech, sign language, drum signaling, etc.)?

B. Linguistic units of description: What are the local categories of speech acts, speech events, speech situations, and genres?

*Discussion:* Neither linguists nor anthropologists have as yet developed adequate units of description for speech use. The sentence, as ordinarily treated by linguists, is valid only for a narrowly referential function of language. It is abstracted from social meaning and relationships of use of concern to us here. And it is increasingly clear that limitation to the sentence misses generalizations, even of the narrowly syntactic sort. The text, or discourse, is more promising, but probably too gross. The various purposes accomplished in language—how people insult, show deference, command, request information, curse, greet, take leave, etc.—do not come in sentences or whole texts. We are not sure what they do come in, but would suggest the *speech act* as the minimal structural unity in a description of speech use.<sup>3</sup> In terms of conventional linguistic units (phonological, grammatical) it may range greatly in locus and size. *Speech acts* may be embedded in larger units such as genres, on the one hand, and discourse structures, speech events, and speech situations, on the other. It is clearly a task of the linguistic ethnographer, and also, we believe, of the linguist, to describe the structure of such units. Note that the *unit of description* (the speech act) is included among the components; this is because we believe that speech acts and speech events can be adequately described only in relation to the other components of speech use with which they interact.

- C. Topic: What is the *topic* (or *topics*) of the message, act, or event?
- D. Channel: Through what *channels* may a message be transmitted (i.e., spoken, written, sung, whistled, drummed, etc.)?

<sup>3</sup> See Hymes, Chapter 1, for a discussion of this and other terms needed for a description of speech usage.

- E. Key: What are the various *keys, tones, or manners* in which a message may be delivered?
  - F. Participants: What are the possible categories of *participants* in the uses of speech?  
*Discussion: Audience and spokesman* must be considered as well as the more traditional *sender and receiver, addressor, and addressee.*
  - G. Setting: What are the times and places which serve as bounds or contexts of speech usages?
  - H. Ends: What are the *ends, goals, or purposes* of the speech usage under consideration?
  - I. Norms of interaction: What are the specific behaviors and proprieties that accompany speech usages?
- II. Rules for the use of speech: What *relationships* exist among the components just described?

## 2. Attitudes Toward the Use of Speech

*Discussion:* It must be stressed that the answers to questions in this or any other section are often relevant to other sections as well. Thus a particular fact about the use of speech (e.g., that children may not speak on certain occasions) can be seen as

1. A *rule* for the use of speech which can be expressed in terms of relationships among components
  2. An attitude about the place of certain members of the community vis-à-vis communication or
  3. Part of the process of the learning of the use of speech
- I. General attitudes toward speaking
- A. What aspects of speaking (if any) are related to conceptions of the ideal or typical individual, man, woman, or child? Ideal exemplars of particular roles (i.e., chief, warrior, spokesman, herald, father, etc.)?
    1. Is the use of speech important in the definition of roles, i.e., is the use of speech part of the qualification for membership?
    2. Is the use of speech instrumental in the social marking of roles?
  - B. What are the characteristics of *speaking well*?  
*Discussion:* At least two foci seem possible here:
    1. Focus on the performance or message, i.e., what is it about the performance or message that makes it good or effective?
    2. Focus on participant, i.e., what personal characteristics of participants make them good or effective speakers?  
 These two foci are not intended to represent two different questions; rather they are put forth as two aspects of a single one.
  - C. What is the permissible range of speech behavior? Are there conceptions of idiosyncracies, exceptions, speech defects? What are the individual and/or societal consequences of aberrant behavior with regard to speaking?

- D. Is speaking regarded as a satisfying activity? Easy or difficult? Rewarding or not? What aspects of speaking are considered satisfying? Is speaking considered more satisfying under certain circumstances or for certain groups of people? Do people seek or are they given opportunities to display competence in speaking?

- E. When are people *taciturn* or *voluble*?

*Discussion:* Actually, we are asking here two different questions: (1) Are there cross-cultural differences regarding when people are *voluble* and when they are *taciturn*? and (2) is the dimension *taciturnity-volubility* relevant to the society under investigation, i.e., do such concepts exist?

1. What personality traits or personal characteristics are associated with differences on this dimension?
2. Are there differences associated with different roles, social categories, or different stages in the life cycle?

## II. Attitudes toward languages, dialects, varieties, etc.

- A. Are there beliefs concerning the nature and origin of language and speech? What are they?
- B. What are the attitudes taken toward each of the linguistic varieties used in the community? How are these attitudes expressed? Are there concepts of correctness (or other normative notions) with regard to the varieties in use? Is one variety considered *correct* or *standard*? What are the criteria of correctness? Who may judge correctness? Do hypercorrect forms arise?
- C. What are the attitudes taken toward neighboring languages or languages known to exist?

*Discussion:* The boundary between this question and the previous one is not always clear. If community A uses the language of its neighbor, community B, for certain functions (even if not all members of A speak B), we often would want to consider B one of the varieties in use in A.<sup>4</sup>

*Final discussion for section 2:* A full description of attitudes toward language and speech would include the relative importance of speech among other means of communication as well as of the place of speaking within social interaction as a whole. The question of over-all communication is considered here only when it clarifies the use of speech in a given society or when one culture does with speech what another does with facial gesture, another through body movements, etc.

### 3. Acquisition of Speaking Competence

*Discussion:* The use of the terms *infant* and *child* in italics in this section is intended to indicate that they are ethnocentric. Our own society expects a child to respond to training only when he can walk and talk; an infant is not expected to meet such demands. Other societies do not make this distinction in the same way. (See section 4, part I.) The terms thus are understood to refer to whatever categories the society recognizes, whether or not they are named.

- I. Is the notion *infant* (distinct from *child*) relevant to the society's conception of the life cycle with reference to the acquisition of speaking competence?

<sup>4</sup> For a fuller treatment of this problem, see Hymes 1968b:23-48.

- II. Is there an explicit native theory (or theories) with regard to the acquisition of speaking competence?
- A. How are an *infant's* first cries or words interpreted?
1. Is it believed that the *infant* will always utter certain words first? What are these words?
  2. What interpretation (if any) is given to an *infant's* crying?
  3. What interpretation (if any) is given to a *child's* first (or early) utterance (or utterances)?
- B. Are there ways of explaining or contributing to [apart from explicit teaching (see part III)] the distribution or acquisition of speaking competence?
1. Are any characteristics (physical, social, etc.) of the *infant (child)* or of its circumstances of birth, etc., thought to predispose or predetermine its later communicative behavior, especially its verbal ability? What and how?
  2. Are there practices [apart from explicit teaching (see part III)] thought to encourage or discourage, ensure or prevent particular kinds of communicative behavior? Particular speaking skills?
- III. How are speaking skills transmitted?
- A. How are skills in language (abstracted from use) transmitted? In other words, how are grammar and vocabulary acquired?
  - B. Are the various linguistic varieties used in the community learned in different ways, in a particular order?
  - C. How are skills in the use of language transmitted? In other words, how do people learn to greet, converse, curse, gossip, etc.?
  - D. Is the learning of speaking skills a source of pride, a focus of concern?
- IV. What is the general place of *children* in communication?
- A. Are there special varieties or uses of speech restricted to use among *infants (children)*? restricted to use between *children* and adults? Is there a special *baby talk*? Is it intentionally taught? Is it approved or disapproved?
  - B. Can *children* participate in all uses of speech? If only some, which ones? Are there some speech situations at which *children* may be present but not participate?

#### 4. *The Use of Speech in Education and Social Control*

*Discussion:* Much of the ethnographic literature dealing with children or acquisition of culture in general has been done from the point of view of culture and personality studies in anthropology. This section attempts to show how speech might be relevant to the description of socialization as well as how socialization might be relevant to the study of speech use.

- I. Life cycle
  - A. What is the relation of speech to the definition of stages, periods, or transitions in life? Are the stages named?

1. Is the use of speech important in the definition of stages, i.e., is the use of speech part of the qualification for membership in a class of persons at a given stage of the life cycle?
2. Is the use of speech instrumental to the social marking of stages in the life cycle?

## II. Learning and teaching

- A. Does the society have an explicitly formulated philosophy of education? For what purposes is it formulated (i.e., for use in child training or only in response to inquiry by the ethnographer)? What is the place of language and speech in the *native theory* of learning and teaching?
- B. What is the role of language (explicit verbalization) and speech in the actual transmission of knowledge or skills?  
*Discussion:* The distinction between learning by *participation and observation* and learning by *explicit verbalization* is not always clear-cut. Rather, we envisage here a continuum with societies tending toward one end or the other.
- C. Do methods of teaching vary with recognized stages in the life cycle? Setting? According to what is being taught?

## III. Social control

- A. Does the society have an explicitly formulated philosophy of social control?
- B. What is the role of language and speech in social control?
- C. Do means of social control vary with recognized stages in the life cycle, membership in various social categories, setting, etc.? Do they vary according to the offense?

## 5. Typological Generalizations

- I. What broad patterns in the use of speech emerge from analysis of a particular culture? Note especially attitudes toward speaking common throughout a given society, ritual idioms cross-cutting many speech events, certain social dimensions which are always relevant.
- II. Are there patterns of speech use characteristic of culture areas? Culture area is understood here to mean such broad areas as North America, South America, Africa, and Oceania.
- III. Are there patterns of speech use characteristic of particular kinds of speech community, e.g., societies with a particular level of sociocultural complexity or particular types of social organization?