Empirical production management enquiry as an expatriate researcher

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Abstract: This paper explores the myriad methodological, practical and cultural challenges experienced by foreign researchers when conducting empirical management research overseas. It also provides a methodological solution to address many of the issues in the form of a research instrument which enables systematic and rigorous data collection via a combination of face-to-face interviews and survey, together with general observation. The paper builds upon an extensive study which deployed two survey instruments to obtain key information from senior and middle level managers respectively within the UK tableware industry. The survey was complemented with semi-structured interviews and observational intervention via random plant visits. This methodology generated significant and extensive data sets, this paper reflects upon the issues and lessons learnt. The use of a mixed methodology combining survey, interview and observational techniques, provided an enriched qualitative dimension to empirical research that could not have been obtained by using a survey alone. The proposed methodology has wide application and can be deployed beneficially by expatriate researchers.

Keywords: empirical management research; expatriate researcher; lean manufacturing; production.


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1 Introduction

The conduct of management research is always a demanding experience for foreign nationals, especially when it involves the collection of empirical data. Methodological issues and challenges abound and it is the purpose of this paper to identify and explore these issues and how they might be addressed and eventually overcome.

Research in a different country is always challenging, and is a widespread phenomenon. Not only are experienced researchers engaged in international research activities, but each year there are many Doctoral and Master research students actively involved in enquiry whilst studying overseas. In management research, this ranges from fieldwork research for fundamental and theoretical enquiry through to highly applied research. It is, therefore, very surprising to find that there is an absence of literature in the field, which endorses the contribution of this paper. In the view of the authors it is critical that the expatriate researcher understands the various cultural issues and nuances of fieldwork research conducted in different countries and organisational settings that are alien to him/her. This paper draws on the dual experiences of the authors, two of whom have conducted research as Doctoral students from overseas in the UK, and all of whom have extensive supervisory experience of such students.

The data collection phase is crucial in any empirical research study and so the authors of this paper, either in their capacity as overseas researchers and as the supervisors of such research, have designed effective strategies to ensure that it is completed successfully. The range of difficulties an expatriate researcher faces in field of data collection are myriad, and include barriers of communication and language, culture, seasonal changes, location and transportation issues. In particular, problems arise from
having to communicate in a language other than their native tongue, and from working in a very different culture. Unique and unfamiliar dialects provide a very special challenge; often the researcher has good English and is well versed in standard British or American English, but has not had exposure to the unique dialects and vernacular spoken by local people, for example, in specific parts of the UK.

2 The case of a foreign researcher project

This paper drew its initial inspiration a number of years ago from a study which looked at lean manufacturing techniques in a sample of producers and suppliers in the North Staffordshire tableware industry, historically located around Stoke-on-Trent in the UK. This area, known as ‘The Potteries’, comprises the towns of Burslem, Longton, Hanley, Tunstall, Fenton, Stoke and the surrounding districts. Originally, the main reason for this conglomeration was the abundant supply of raw materials in the region (Day, 1999). These included red clay, which is four times more plentiful and easier to extract than in other parts of the UK (Whipp, 1990). The area was also rich in coal and wool, both essential elements in the firing and decoration of porcelain and ceramic products, and in sand, which is indispensable to the vitrification and finishing of this type of products. Relationships among firms in the industry have been changing owing to various factors (see Piore and Sabel, 1984; Markusen, 1996; Paniccia, 1998). Industrial contraction has resulted from increasing foreign competition and the globalisation of markets. This, in turn, has necessitated the introduction of new product designs and implementation of process improvement methodologies to avoid falling behind competitors (Weightman, 1996; Soriano-Meier and Forrester, 2002). In particular, Soriano-Meier and Forrester (2002) argue that lean manufacturing, also known as lean production, has been successfully applied in the tableware industry as an approach to gain competitive strength.

Lean manufacturing is a management approach which helps organisations to become more competitive by reducing operational costs through the elimination of non-value adding steps and inefficiencies in their processes (Garza-Reyes et al., 2012; Motwani, 2003). Although Andersson et al. (2006) argue that lean manufacturing is by no means as new as its large scale introduction dates back to the 1950s to the shop floor of Toyota Motors Corporation in Japan, Hines et al. (2004) consider it nowadays as the most influential new paradigm in manufacturing. For example, Forrester et al. (2010) argue that, around the world, lean manufacturing is now considered as ‘best practice’ for manufacturing, and other industries. Similarly, Taj (2008) comments that different principles and tools of lean manufacturing have been adapted to the needs of industries such as food and beverage, electronics, plastic, petroleum, aviation, chemical, printing and glass.

For theoretical, methodological and practical reasons, the ceramic tableware industry in the UK provided a suitable and readily accessible selection of manufacturing companies for study. The main purpose of the study was to assess whether lean manufacturing could also be applied, besides the automated or semi-automated industries mentioned by Taj (2008), to a craft production based industry. The ceramic tableware industry was considered ideal for examining this theoretical issue. The ceramic tableware industry was characterised by a craft mode of production, which made it an interesting choice for research. The aim of the research was to conduct a case study intervention that
would test the claim of Womack et al. (1990) that lean manufacturing practices can be applied in craft production environments. Specifically, the study investigated the degree of adoption of lean manufacturing based on the degree of implementation of some of its concepts and tools, for example: (1) Just-in-Time (JIT), (2) Total Quality Management (TQM), (3) elimination of waste, (4) continuous improvement, (5) zero defects, (6) pull system, (7) multifunctional teams, (8) decentralisation, (9) integration of functions and (10) vertical information systems. In so doing, the study would deepen theoretical understanding of lean manufacturing.

The study complemented other research into the ceramic tableware industry within the department of management at Keele University, UK. The established link between Keele University and Ceram plc (formerly the British Ceramics Research Association) facilitated access to firms in this industry. This was a mature industry defined in terms of its process, and efficiency in the production function was vital for its survival and growth. At the time of the research, it was facing significant problems, especially in its role as a major employer in the region (the North Midlands of England). The high numbers of redundancies during the last 20 years and the poor performance in the industry were seen to warrant attention.

A research instrument capable of meeting two specific criteria was needed. One that could be tailored to assess the efficacy of the adoption of lean production principles and to this particular industrial sector; and one that could be easily and effectively deployed by the main researcher and first author of this paper, an expatriate Doctoral student working on a British Council funded research. Approaches to data collection in the tableware industry were influenced by different models. One model that operationalised the principles of lean manufacturing was originally tested in a firm producing mechanical and electronic office equipment (Karlsson and Åhlström, 1996). Another, designed by Boyer (1996), measured managerial commitment to lean manufacturing in the metalwork industries and was therefore suited to a craft setting.

What emerged was a research strategy and instrument based around a structured and comprehensive survey, largely administered face to face by the main researcher. Sources of information for the study were at two levels of the organisation: top management (i.e. CEOs and managing directors) and middle level management (i.e. production and operations managers). A different questionnaire was administered to each level. The questionnaire for production and operations managers was used to gauge the extent of adoption of lean manufacturing principles. Some sample questions of the specific survey instrument designed for production and operations managers are presented in Figure 1. The questionnaire for CEOs and managing directors was used to measure the level of commitment of management to lean manufacturing. Both questionnaires were self-administered in the presence of the researcher. The questionnaires measured different variables and, therefore, were analysed independently. A short structured interview was conducted after the questionnaire administration in order to gather more information about the firm and the manager. Appendix 1 presents the questions included in the structured interview. In addition, in order to attain triangulation advantages (Yin, 1994) fourteen plant visits were carried out to observe the production process closely. A structured pro-forma was used to record these observations. This broadened the information base at the plant and helped to supplement data from the questionnaires and interviews.
Figure 1  Sample questions of the instrument survey design for production and operations managers

PART II

Which description best matches your organisation. CIRCLE ONLY ONE

1. The organisation of improvement activities:
   - No explicit organisation
   - Formal suggestion scheme
   - Multifunctional teams, and spontaneous problem solving
   - Quality circles

2. Responsibility for identification of defective parts:
   - Workers identify defective parts and stop the line
   - Workers identify defects, but do not stop the line
   - Quality control department identifies defective parts and informs production management

5. The extent of Just-In-Time operation:
   - Sequential Just-In-Time possible
   - Type specific deliveries Just-In-Time possible
   - Batches are delivered Just-In-Time

8. The mode of information provision:
   - Information is continuously displayed in dedicated spaces, directly in the production flow. There are regular meetings to discuss the information
   - Oral and written information provided regularly
   - Written information provided regularly
   - No information to employees

3  Issues in the conduct of the study

The fieldwork proved the most complex, difficult and challenging part of the study. Geographically, most of the firms were concentrated in North Staffordshire, but some were more distant. The plan was to visit each of the 33 firms on at least two occasions – one visit to each level of management – but this had to be changed owing to the frequent requests to change pre-arranged times for questionnaire and interview administration by the respondents. Taking account of plant visits and this re-scheduling, the majority were visited in three or more occasions.

The population of the study comprised 36 firms of the tableware industry, each with more than 35 employees. Reports of similar studies within the industry suggested that the response rate was unlikely to be more than 40%, a level too low for the statistical analysis needed. To avoid this problem, the research instruments were subjected to rigorous content validation and pre-testing (Litwin, 1995). A pilot study was conducted in the tile industry, which is arguably similar to the ceramic tableware industry (Fink and Kosecoff, 1998). Piloting of the questionnaires in a different sector of the industry avoided data contamination in the full study. The pilot study suggested that replacing precise figures by interval scales would improve the response rate (Soriano-Meier and Forrester, 2002). Following this pilot study, a pre-test took place in Ceram plc to refine the instruments (Sapsford, 1999) and to re-write them in colloquial language suited to the industry in question.
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Once reliable instruments had been developed, the next step was to motivate and gain the cooperation of the respondents (Oppenheim, 1998). As postal questionnaires tend to produce low response rates, it was decided to administer the questionnaire in person thus transforming the study into a structured interview approach. Despite the extra expense, this approach was viable because the population was of a manageable size. Ultimately, a response rate of over a 90% was obtained, pleasingly an improvement of over 50% compared to similar studies. Efforts were also made to harness the support of Ceram plc to help introduce the main researcher to the managers of the firms participating in the study (Black, 1999).

A major issue was that of gaining access to the targeted production organisations and to the required data. Even when a gatekeeper was identified (i.e. in this case an operations manager and CEO/managing director) and initial access secured, the main researcher had to overcome communication and cultural barriers with respondents within the organisation. Interviews and surveys had to be conducted in the local language, which constituted a major challenge to the non-native speaking researcher. Moreover, he had to make sure that local etiquette and cultural understandings did not hinder the collection of data during fieldwork and lead to misinterpretations of the various disclosures.

Target firms were identified from a list provided by ‘Business Link Staffordshire’ that gave the address, and contact details for the senior staff in each firm to be surveyed. This list was revised and corrected by three experts from Ceram plc, who excluded firms who were no longer in business, sister companies and firms from other sectors that were wrongly included in the list (i.e. firms that manufacture miscellaneous products and refractories). Other firms were included that were not in the list but in their opinion were relevant to the study (Soriano-Meier, 2001). The revised list contained 36 firms that then had to be validated. The first step was to telephone each of the firms from the list of 36 in the selected sample, so as to check the address, the names of the operations manager and the CEO/managing director, and the exact title of the position they held. Using the updated list, a letter of introduction supported by Ceram plc was presented to each of the two executives of every firm. From the finalised list, a template for recording telephone calls, appointments and visits was devised. It included the names and positions of all the managers being surveyed as well as relevant comments, as given in Appendix 2.

All firms were contacted and 33 (92%) agreed to participate. Czaja and Blair (1999) suggest that when looking for information it is vital to identify the gatekeeper or source of precise and accurate information. Similarly, Czaja and Blair (1999) point out that specific types of information need to be collected from different individuals and levels within a firm. It was decided, therefore, that the operations managers (also known as plant manager, operations director, work manager, etc.) would be the first to be contacted by telephone. It was thought that they would be more likely to be available on site, unlike the CEOs/managing directors who would more likely be off-site, for example, visiting clients. This prediction was indeed confirmed as data collection progressed. Another reason for attempting to gain access to operations managers first was that they would probably be more attracted to the research project as it was directly connected with their work (Buckles and Boissoneau, 1984). Also, the operations manager could be a key individual to open the door to a meeting with the general manager (i.e. CEO, managing director, etc).

The questionnaire took about 20 minutes to complete, and was deemed reasonable by most respondents (Eunkyu et al., 2004). The short interview took only 15 minutes to complete. In total, each meeting lasted about an hour. However, in some cases, it
extended up to three hours, as some interviewees were very enthusiastic and interested in the subject matter. On these occasions, the main researcher sought to maximise the data richness and understanding from the managers concerned. As well as responding to the questionnaire and the questions in the short structured interview, some operations managers also provided insights into their work and the industry. The success of meetings with the operations managers was vital to data collection. This is because these managers not only provided their share of information but also acted as gatekeepers to other sources of information. Most of them were asked to mention the research project and some to give the letter of introduction (also from Ceram plc, but addressed to top management) to their CEO/managing directors. Although some appointments were made with the help of the operations managers, most were obtained directly by the main researcher. This was not an easy task, as the majority of top management executives were often away from the office or simply ‘too busy’. As pointed out by Fowler (1993), interviewers have to be available and persistent enough to make contact with hard-to-reach respondents, and for in-person interviews they have to be able and willing to go where the respondents are. Only with great patience and perseverance it was possible to make an appointment with each and every one of them. Out of 33 managing directors, only one eventually proved impossible to contact.

Five managing directors were unable to meet in person, but contributed their information via a telephone interview. In these cases, they requested the questionnaire to be sent to them with a self-addressed envelope for its return. This represented a departure from direct administration of the questionnaire, but it was deemed necessary in view of the small quantity of firms comprising the population and the value of the data that these respondents would provide. All these managing directors completed and sent back the questionnaire as promised, but two had to be re-contacted for clarification. The main disadvantages of this approach were that respondents could not seek clarification from the interviewer on points of confusion, nor make an immediate check of their responses to enable problems/ambiguities to be detected and resolved on the spot. However, this alternative was very helpful in gathering the information necessary to complete the data set, as the information from the operations managers was readily available.

In the case of one firm, the managing director was responsible for marketing and selling the firm’s products, and the operations manager absorbed some of his responsibilities, including filling in his questionnaire. It was exceptional for the same executive to complete both questionnaires. However, because the questions asked in each questionnaire were from a different perspective, it was assumed that the bias (if any) was minimal, thus not affecting the results of the study.

On the record form, the date of calling each firm and the time and date fixed for the meeting with each of the managers were noted. New calls and follow-up calls took place daily with the objective of achieving the necessary appointments and completing the meetings as soon as possible. A guideline of not calling more than once a fortnight was applied, to avoid causing feelings of tiredness, harassment or eventual rejection by the firm. This part of the work was carried out in a meticulous way, with tact and consideration, trying always not to cause people inconvenience. The managers’ secretaries played an important role in this phase of the data collection as they were the ones who looked after the diaries and helped to fit appointments in. The fact that the researcher was foreign and was conducting research in their country had an impact on them as these interactions/dealings were unfamiliar to them and awakened their curiosity.
The main researcher proceeded to introduce himself mentioning the two supporting institutions (i.e. Keele University and Ceram plc) as they were well known by the firms, and to request an appointment with the manager.

Once the appointment had been obtained, the main researcher prepared to visit the manager. At the meeting the researcher first presented a letter from Ceram plc guaranteeing that information provided by the firm would be confidential and governed by code of research ethics. Then, he proceeded to introduce himself and explain in a few words the objectives of the study. The first five minutes were very stressful as it was necessary to break the ice and communicate clearly that the objective of the visit was to collect data that could be useful both for academic purposes and to the firm.

4 Issues for the expatriate researcher

Initially, it appeared that the fact that the researcher was foreign might give rise to objections and obstruct the data collection. However, the managers were impressed that someone from overseas had come to do this type of research on a specialised industry in the UK. Thus, a possible handicap was turned into an opportunity to break the ice and open a fluent and productive conversation and to generate rapport. At first, the managers felt a little uncomfortable and reticent: many of them questioned whether the researcher was benchmarking all firms in the sector. The letter from Ceram plc helped to counteract this suggestion and to create a climate of trust on both sides. Moreover, total confidentiality was promised over all information supplied to the researcher. The managers became less guarded when they realised that the research was focused on manufacturing processes and not on strategies to obtain commercially sensitive information.

Following Fowler’s (1993) recommendation, before administering the questionnaire, a glossary of key terms was given to the manager, which included exact definitions of the principles behind lean manufacturing, see Appendix 3. This would guarantee that all respondents would understand exactly what they were being asked, avoiding possible misinterpretations and inconsistencies. Some managers seemed indifferent at the beginning but were encouraged by the experience of the research process to provide the information required. Others were pleased to see that Keele University and Ceram plc were concerned about the difficult times that the sector was going through on account of the increased globalisation of markets. Sometimes, the managers’ interest in exchanging ideas with specialists in operations extended the meeting by up to three hours. Likewise, many production managers facilitated access to the general manager by arranging an impromptu meeting. However, some general managers were very difficult to contact as they were involved in overseas travel.

The data collection process was extended to around six and a half months due to the difficulty of contacting and meeting the general managers. In few cases, the main researcher had to return twice to the same firm as the general manager was not able to attend because of an emergency. Although the main researcher could have taken offence at this, by being patient and understanding he succeeded in gaining even more information. In fact, some managers apologised for postponing the agreed meeting once or twice and seemed inclined to collaborate more fully.
5 Results and discussion

The objective of this study was to assess the degree of adoption of lean manufacturing concepts and tools in the tableware industry.

In general, it was observed that the firms that had successfully adopted this production system collaborated more readily with the research than those who followed the traditional mass production approach (Liker, 2004). The data was collected using structured questionnaires at two levels of the organisation. All the firms that had participated in the research filled out both questionnaires with the exception of one general manager who, despite careful negotiation, refused to collaborate. After administering the questionnaire a short structured interview was conducted with each manager to obtain additional information about the firm. This was essential to identify common themes related to the study; most managing directors expressed their concerns and consequences as a result of adopting sooner or later the so called ‘Japanese’ approach. Some of the firms, already in financial difficulties, expressed that those ‘Japanese’ initiatives could not be adapted in a labour intensive production business, arguing that most potters were small in size and this lean approach was not viable among these types of firms. Others admitted to have adopted some of the principles only in a partial way, they expressed that there was not enough information and training on how to apply these principles in this industry.

In relation to the 11 lean manufacturing concepts and tools specifically investigated in relation to their degree of adoption in the tableware industry, see Section 2, the study indicated that this industry had a high degree of commitment towards the adoption of the following lean manufacturing concepts and tools: TQM, elimination of waste, continuous improvement, zero defects, multifunctional teams, integration of functions and vertical information systems. On the other hand, JIT, pull system and decentralisation were found to have a moderate degree of emphasis within the tableware industry. Therefore, the study concluded that the adoption of lean principles in the UK tableware industry was high. As extensive evidence suggests that lean manufacturing do help organisation to become more competitive, it was expected that the tableware industry benefits from the adoption and application of such lean manufacturing concepts and tools. In addition, the study also corroborated the claim of Womack et al. (1990) that lean manufacturing practices can be applied in craft production environments.

6 Implications for foreign researchers

Experience of the study identified a number of unique challenges that were specific to foreign researchers; it must be stressed that these challenges offered both positive and negative impacts.

Firstly, there were cultural issues to consider, namely those of language, custom and practice. The research was conducted in a particular part of the UK, North Staffordshire, an area replete with a distinct vocabulary, dialect and culture. The main researcher initially found this alien such was the level of unfamiliarity and apprehension. This presented considerable obstacles to the study by slowing down the process (i.e. information and responses had to be continually cross checked and confirmed to ensure that the correct meaning was understood) and by increasing the probability of questions being misunderstood and/or responses made that did not address the intended question.
Furthermore, there was the potential for annoyance and fatigue on behalf of the respondents caused by the resulting length of the process and the need to constantly recapitulate.

Annoyance and frustration was also experienced by the researcher as a result of cultural unfamiliarity. Once again, the chief impact was one of adding to the time taken to complete the study. For example, the researcher was not well acquainted with the industry’s workloads and responsibilities, which often meant interviews had to be cancelled owing to sudden alterations to the schedules and diaries of the respondents. As well as time delays, these frustrations also substantially increased the costs of the study via additional travel costs, postage costs and the opportunity costs of the researcher’s time.

The researcher found that in some instances these cultural impediments were advantageous. Communication breakdowns and differences sometimes led to advantages though that enhanced rather than detracted from the research process. One such example was the use of humour resulting from the amusing misunderstandings of local languages and dialects. Another was the icebreaker effect when first meeting respondents and gatekeepers arising from the fascination of meeting someone from a different culture.

7 Lessons learnt

Through an iterative process that involved considerable frustration and also patience, the main researcher was able to devise a series of counter measures to combat these potential threats to the validity and reliability of the study: the use of gatekeepers and mentors, the use of humour in discussion, tenacity and the deployment of a mixed-method approach.

The researcher learnt from an early stage the value of using mentors and guides in order to gain access to the key respondents. This was done in two ways. Firstly, the researcher forged links with Ceram plc UK in order to acquire the necessary understanding of the industry so that credibility could be achieved with the respondents and to arrange personalised introductions based upon existing relationships with the target firms, which maximised the response rates (Gummesson, 2002). Special care was also used to cultivate the secretaries and personal assistants of the respondents. Secondly, the researcher allocated significant time towards acculturation. This was achieved by contacting and discussing the study with British researchers and local industrialists to identify and understand local cultural nuances and idiosyncrasies. The researcher also carried out painstaking academic research into the cultural and communication barriers that were apt to arise.

The researcher also endeavoured to turn misfortune into advantage by converting the inevitable frustrations and confusions caused by cultural differences into advantages by using ploys such as humour, rapport building and cross-checking in data gathering. For example, a general manager offered a very fine coffee to the researcher that he had brought back from Brazil on one of his trips. Making a literal translation from Spanish, the researcher exclaimed “Oh how smelly!” The manager frowned first but then understood that there was a cross-cultural communication problem. He explained that in English it is proper to say “How aromatic!” but that smelly means rotten. In fact ‘oler’ in English means to smell, but the adjective ‘oloroso’ should not be translated literally as ‘smelly’, due to the fact that it implies ‘rotten’ or ‘unpleasant’ smell. This had the beneficial effect of promoting rapport in the initial meetings with secretaries and
respondents and breaking the ice via the introduction of a novel conversation topic (i.e. different country of origin). It was therefore important to show tenacity and patience in all dealings as these approaches had the effect of extending the time frames. Similarly the researcher used cross-checking in order to verify findings. For example, after leaving the site, the researcher wrote a summary of the meeting with the manager, reviewing the information obtained and writing annotated comments on the back of the questionnaire. This captured important details that it would have been awkward to write down in front of the manager and would have interrupted the flow of the interview. An example of a comment noted down after the interview was the observation of a general manager that workers in that type of industry think of themselves as highly qualified specialist craftsman. Owing to massive redundancies in the industry, it seems that nowadays pottery workers are more aware of the need to safeguard their jobs. Managers, however, are aware of the need to continue to treat them as specialists in order to motivate them to do the job properly.

An argument is thus made for the adoption of a more relaxed approach to data gathering in cross cultural research contexts; researchers also need to factor in more time in order to complete their studies and to resist the temptation to rush and display urgency which will increase the potential for misinterpretations and threaten study validity.

Finally, the main researcher accepted that cross cultural research generated risks to validity and reliability. Whilst these risks were anticipated and handled by use of the above interventions it was accepted that a triangulated approach would further benefit the study. Triangulation improves reliability by collecting data in multiple formats. This can be via: multiple sources, projects, respondents or even research approaches (Yin, 1994; Alam, 2005). In this study, therefore, the researcher adopted a mixed-method approach involving the design and administration of two instruments, the collection of data from two respondent groups (i.e. production and operations managers and CEOs/managing directors) and the use of observational research. A key advantage of this approach is that managers’ responses can be crosschecked and inconsistencies and confusions resolved at an early stage (Alam, 2005). The addition of observational research also worked to prevent informant bias (Patton, 1990; Alam, 2005). It is therefore argued that the use of a triangulated approach has extra value and benefit within a cross-cultural research setting where cultural and language confusion is more likely to lead to unsatisfactory validity and reliability.

In conclusion, the response rate in the study was 92% (i.e. it gained the cooperation of 33 out of 36 firms that made up the population), which was exceptionally high compared with similar research studies in other industries (see, for example, Forza, 1996). All production managers of the 33 firms answered questionnaire one and 32 of the general managers of the same firms completed questionnaire two. This high rate of response was attributable to the careful application of procedures described above: refinement of the instruments for data collection through content validation and pre-test of the questionnaire and the decision to administer the questionnaire face-to-face; the design of the strategy to enter and gain access to the firm; the utilisation of the record form to monitor the fieldwork activity; the design of a plan for the meeting with the objective of gaining the trust of participating managers, including the promise of total confidentiality over the administered information and feeding back of the results of the study; and finally a recapitulation of what happened during the meeting, including the revision of information and the making of detailed notes. These procedures are good research practice but need to be applied with special rigour in the case of a foreign researcher because of the handicap of being in an unfamiliar context.
In the one-to-one interview, the foreign researcher needs to be especially skilled in interpersonal relationships in order to counterbalance the inherent handicap of not belonging to the context where the research is taking place. It is important to be very observant, patient and optimistic and to show charisma or charm; to be intuitive in interpreting attitudes, fears and reactions of the interviewee; and to manage adequately unexpected issues arising in the interview. The most important quality of the foreign researcher should be tenacity, in other words, staying firm, persevering and focused on the objectives. Likewise the foreign researcher should never show anxiety or urgency about collecting the data. He should act as an understanding and caring professional, genuinely interested in the problems of the interviewee.

In the conduct of this research, it could be observed that, despite cultural and other communications barriers that may arise, careful planning, application and control of procedures by the foreign researcher turned a handicap into an opportunity. It resulted in collection of the required information and a response rate of over 90% and was the basis for the success of the research. The objective of this publication has been to describe procedures that could be used by other researchers who wish to develop a research study in a foreign country.

Conducting research in overseas organisations can be very challenging. Barriers of language which lead to literal miscommunication may be compounded by cultural misunderstandings arising from different assumptions on the part of the researcher and the researched. Different national backgrounds, customs, cultures and practices make it easy to misinterpret the behaviour of those of other cultural backgrounds. For example, Northern Europeans often appear serious and reserved, but these initial observations should not lead one to surmise they are angry, unfriendly or impolite – a frown or a short period of silence often means they are thinking hard and concentrating prior to responding to a question.

It is important that foreign researchers, like any other expatriate workers, take time to observe and get to know the cultural nuances, and the way in which they manifest in the country or region where they are conducting their work. There are often conventions and procedures that, though alien to the researcher, may need to be followed to ensure success in terms of accessing organisations, and then extracting high quality research data.

The role of a local mentor is important in ensuring effective ‘acculturation’. In this study the main researcher got to know British researchers and some of the industrialists he would be working with, and was inquisitive of any seemingly different practices. This was done both in a professional and social setting. For most research students, the obvious prime mentor is the research supervisor. The supervisor should have a duty of care and should assist the researcher in the planning and conduct of their research. Other immediate mentors are fellow researchers. In this case, the main researcher made an effort to get to know his fellow research students in the academic department within which he was working, as well as faculty members other than his supervisor. This paid additional dividends, as it eventually became apparent that fellow researchers would aid and assist in enabling the researcher to gain access to appropriate organisations. Finally, following an introduction to the industry research organisation, Ceram plc, the researcher was able to work with a number of Ceram’s UK employees. They assisted the main researcher to understand not only the technical aspects of research, but also the specific conventions and procedures existing within the UK tableware industry.
This paper has outlined the ways in which researchers can address the difficulties that are liable to occur when conducting research in a country other than their own. There is much literature which covers the very general cultural issues that expatriate workers and non-natives are liable to face whilst on overseas assignments, but very little has been written concerning the specific methodological and practical concerns of the foreign student. This paper has raised these issues and has illustrated how the research methodology may be adapted to address them and, hopefully, ensure a successful outcome. Moreover, it has used the actual example of a successfully completed PhD study, conducted by a Venezuelan national in the UK, to illustrate these points.

The main conclusion is that there is no substitute for hard work and tenacity on the part of the researcher. A process of cultural adjustment or ‘acculturation’ is necessary to enable the researcher to ‘tune in’ to local norms. Likewise, it is important to mix with locals professionally and socially from an early date, as well as conduct self study and work on one’s foreign language skills.

It can be seen in this particular research that the systematic procedures followed in data collection, including meticulous planning, scheduling, coordinating and following-up of appointments and other details were very important. It seems that all the attention in the organisation and execution of this fieldwork paid off and was crucial to the success of this challenging project. In addition, despite the researcher’s initial misgiving that it was unlikely that firms would give out information to a foreign national, this turned out to be a positive factor instead. Indeed, it acted as a stimulus to break the ice with the interviewee and helped decrease any feelings of threat, improving rapport and access during the meeting. A handicap was turned into an opportunity, achieving high quality and rich data with a response rate of over 90%. On reflection, the great majority of executives interviewed were very cooperative which made all the effort very worthwhile and productive.

In summary, the main purpose of this paper was to emphasise the importance of an appropriate fieldwork, particularly when the researcher is a foreign national, and present a methodological way to effectively conduct it. Meticulous planning and a fieldwork that took six and half months successfully accrued the necessary data to support the main claim of the research: “Can lean operations be applied to a craftsman type organisation and if so to what extent?” The unexpected results were very determined as 33% of the potteries were already using lean manufacturing, 33% were in transition to apply same and 34% remained working under the traditional production method.

Though this paper has described procedures that could be used by other researchers who wish to develop a research study in a foreign country, it claims neither to be exhaustive nor to provide a recipe. Other researchers may wish to adapt these procedures to their own studies, applying them in different industries and contexts and thereby adding weight to the development of this increasingly prominent aspect of methodology.

References
Empirical production management enquiry as an expatriate researcher


Appendix 1  Structured interview questions

**Short Structured Interview Questions**

1. How long have you been working in the industry?

2. How long have you been working in this firm. How long as a Production Manager?

3. Have you received formal training (management seminars, management courses, University lectures, University degree, on-the-job training, etc.) for your job?

4. Is your main market abroad or internal? If both, in what proportion?

5. What is the size in square meters or square feet of the production layout?

6. Workers are paid by the hour or by the piece, in which percentages?

7. How is the level of absenteeism in your firm?

8. Do you have a factory shop?

9. When was this firm founded?

Appendix 2  Companies’ information recording form

1. **FIRM “AA”**
   
   **Mr. H. Red General Manager**
   
   Calls: 15/05/98  30/05/98
   
   Appointment: 27/06/98
   
   Visit: 27/06/98
   
   **Mr. J. Deen Production Manager**
   
   Calls: 11/03/98  23/05/98  12/04/98
   
   Appointment: 22/04/98
   
   Visit: 22/04/98
   
   Telephone: (01782) 777-777
   
   Plat visit  Yes  No
   
   Address:  

   Observations:  

Appendix 3  List of precise definitions of Lean Manufacturing concepts and tools

1  Just-in-Time (JIT): Each process is provided with the right part, in the right quantity at exactly the right point in time.

2  Total Quality Management (TQM): A management approach for an organisation, centred on quality, based on the participation of all its members and aiming at long-term success through customer satisfaction, and benefits to all members of the organisation and to society.

3  Elimination of waste: Anything that does not add value to the product is a waste. Sources of waste include: unnecessary motion, excess inventory, waiting, quality defects, over-processing, unnecessary transport and over production.

4  Continuous improvement: The production system is constantly improved.

5  Zero defects: All parts and products are fault free from the very beginning.

6  Pull system: The way in which material is scheduled, through pull (i.e. producing against customers orders) instead of push (i.e. producing to forecast) along the manufacturing process.

7  Multifunctional teams: A group of employees who are able to perform many different tasks (i.e. employees are able to perform more than one task in the team, and the tasks are rotated in the team).

8  Decentralisation: The multifunctional team is also expected to perform supervisory tasks previously performed by indirect/support departments.

9  Integration of functions: The multifunctional team also performs tasks previously carried out by indirect/support departments such as: procurement, materials handling, planning and control, maintenance and quality control.

10  Vertical information systems: The multifunctional team receives timely information continuously, directly in the production flow. The team receives operational type of information about the performance of the team, and also more strategic information such as market plan, production plans, process development plans and financial performance.