Chapter 1.0: In My End is My Beginning

It's October 6, 2000, and I am going to work early, as I want to make sure everything is right for today's big meeting. I had to fight to book the nice boardroom on the ninth floor, since I am not that high in the pecking order; besides, everyone knows that I am between managers and that I have no job role assigned for 2001, which makes little slights more frequent. My team was disbanded despite our positive achievements, because of the yearly round of musical chairs supposed to reorganize people and tasks more efficiently. Whatever. The experience is far from uncommon: reorganizations come and go, teams are made and unmade all the time, and people spend quite a large amount of their time and energy trying to land a safe position in a team they can work with and for. After a short, panicky flurry of resumes and interviews, calm returns and we can all start paying attention to the work at hand again: mostly trying to catch up with the time wasted on the whole exercise, or to learn whatever new role we've ended up with. When people caught in the shuffling do have some choice over where they land, their primary criteria of choice are their manager's and team-mates' personalities: and wisely so. You have to work with them for the largest part of your waking day, and spend way more time with them than with your spouse.

However, I am in a rather special position. It's been months, and I have not seen any sign of interest in me on the part of possible obvious takers, which in my case are the various Lotus teams involved with distance learning. I have been

working for Lotus for almost two years, and in that time I have always been a "dedicated distributed learning resource"; in other words, I have worked on nothing but distance learning, in various capacities—and I fully intend to keep doing it, no matter how dysfunctional a team I land into, as I have a vested interest in the subject. While I do not fool myself into thinking that I accepted a corporate job for idealistic or scholarly reasons, I still am holding a rather pathetic torch for academia. Even if my dissertation attempts are languishing away in a dusty heap of printouts since before 1998, I still have a somewhat nebulous idea that I might take it up again: I scrupulously keep up with my readings; I take field notes as best as I can; I put down some rather awful paragraphs, and then it all flops down again like an overcooked soufflé. Something is missing. But now that my future in Lotus seems to be on hold or even on the rocks, the idea of taking up writing again is gaining momentum in my head. In fact, it is directing my search for a so far elusive new role in the organization: if I have to write on distance learning in Lotus, I have to keep working on it in some capacity or other.

I've let it be known, directly and through the grapevine, that I want to deal with e-learning, no matter what. After all, I reason, Lotus has been investing in distance learning for a long time now, and it's just a matter of time before something turns up: I refuse to believe this might be the beginning of the end for it. This is actually a rather hazardous belief: in the larger scheme of Lotus things in 2000, distance learning is not a significant area of revenue (quite the opposite in fact), even if there is a lot of talk about doing more, pushing forward with bold initiatives, "spearheading the market"... I know enough about marketing not to be

entirely at ease, and the dearth of available distance learning positions is not a good sign—yet I am overall rather optimistic. I do believe that we have a good distance learning tool, that we have done some interesting work, and that we might do a great deal more: and above all I have my dissertation at stake. I am still young enough not to care overmuch about the alternative, unemployment—at least throughout the summer, when I have disregarded several possible offers of a role in a different area of expertise.

Now it's October and still there's nothing on the horizon. Young, yes: stupid, no. Maybe it's time to update my resume. Except we're starting to hear this rumor about "a new cross-functional team being formed to manage an innovative e-learning initiative". Part of me is dubious: it's very unclear who is heading the initiative, what is going on with it, and why. But again, this is not unusual: I am at the periphery of the empire, tucked away in a rather insular and overall xenophobic office in Paris, away from the Lotus HQ in Cambridge, MA. We always get things piecemeal and in need of decryption, so it might just be that the usual noise has obscured a clearer and more reassuring message. And anyway, I have no choice: the year is ending, there's nothing else in sight, and a big bunch of important IBM and Lotus managers are coming to Paris to discuss this new group with the local heads. I am volunteered to organize the meeting, as the "local dedicated resource for distance learning": from the sound of it, I surmise that local managers are not really interested but have to play along, so they shuffle the task over to me, as I am not a very important pawn. And if the rumors are true, this meeting is the place to be if I want to keep working on distance learning.

So, on October 6, I get myself to the office and rush around for a while, fixing a couple of minor emergencies, doing about five things at once and finally ushering in the participants in the meeting. As usual, I have a rather unclear position, due to my having a rather vague job description and a middling rank in HR terms. On one hand I am the host of the meeting, and as such I get to introduce people, to act as a diplomat and to moderate the debate, managing a bunch of rather high-up executives. On the other, I am the one literally fetching coffee, providing flipcharts and fixing problems with incompatible electrical adapters and capricious network cables. Schizophrenia 'r' us.

I can tell immediately that the meeting will be a difficult one: there is tension in the air, and too many different groups from within IBM and Lotus are there—groups who mostly dislike and mistrust each other. I grit my teeth and do my utmost to be nicely diplomatic, an arduous task for me at best. I should be entirely involved in the meeting, in the struggles and the fighting that are taking place, and at some level I am: it is a captivating match and I am fascinated by the complexity of the dynamics. More than that: I can see this is the end game for distance learning as I have known it in the past year and a half. A radical change in the approach is coming. This is not just a matter of shuffling teams around and going on more or less as before: this is the revolution. No wonder people are upset: and I should be upset too, as this might well spell the end for me as a Lotus employee. Now it is quite clear why my team was disbanded and why I wasn't offered something similar as a matter of course. It was the beginning of the end: what was coming may not have been death, but it surely was reincarnation. Yet

there is a part of me that is thinking something else entirely: I am fascinated by the historical dimension of the event. I am watching from a first row seat the end of an era. The scholar in me is licking her lips: this is what a really interesting dissertation is made of.

Most of what happened during that meeting was about stating the new rules and getting the local managers to play within them. The IBM mother house had decided that it was time to move to a more structured and orthodox way of doing things, and it was thus pulling together a new group that would run in a new way. But much of it was also dedicated to reviewing the past, and laying it to rest as unfit and even vaguely indecorous. The new order was the end of a relatively unchecked, experimental period: a time where the distance learning staff gravitated to it on the basis of their interest and passion more than their official qualifications; where early customers adopted a new tool at their own risk and often through trial and error; and where there was a strong feeling that the peculiar combination of the tool, its makers and its users were indeed a subject of study—the study that is this dissertation.

Not all of the change was bad, I would find out later: thanks to my being at the meeting, I achieved my goal to find a distance learning role, together with many others from the old distance learning team: we had to adapt, but we were still there. I was given a job that would prove extremely engaging and satisfying, and I got to work with really memorable people, many of whom have since become friends. During the meeting I was not so happy, though: I thought that the new team was led by ruthless businessmen who had no idea whatsoever about

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teaching or learning, and who kept harping on their bottom line of running a viable business, a business that makes money. When someone objected, the head of the new team disparagingly answered that previous distance learning activity in Lotus "has been an academic research project so far; but now we are turning it into a proper business."

When the meeting finally ended, after two long days, I had a new job and a new obsession. I was utterly fascinated with having witnessed the end of an era: and ironically, it was only now, at the end of all things, that I could see what I had been trying unsuccessfully to comprehend and put on paper for so long. The phenomenon I wanted to study was now *perfectus*: finished, and perfect. I could explore it and write about it now just because it was done with; and above all because, if I didn't, it would go away: utterly, terribly, totally. I had witnessed with dismay the impermanence of things past in the industry. Each January kick-off buries the previous year: rewritten and forgotten is the systematic approach to the past. Documents are shredded, objectives realigned, people "repurposed" or left on the wayside. A largish Lotus team had been working on distance learning for more than five years, and I had personally contributed for one and a half. Now it was all going to go away, unthanked and unsung. Except I could not let it go. So, here it is: with love.

Chapter 1.1: Introduction

[LearningSpace] has been an academic research project so far; but now we are turning it into a proper business.

—Laura Sanders, Senior VP of Mindspan

This dissertation is an ethnographical study of a "community of practice" (Wenger) inside Lotus Development, the well-known high-tech corporation producing software and related services, and owned by IBM. I will call this community of practice the LearningSpace Group. My analysis is concerned with the years 1995 to 1999, from the Group's birth to the point after which it was subsumed under a radically new organization, named Mindspan. My study examines the discourse, practices, structures, relations and processes taking place in and around the Group as they designed, developed and marketed the LearningSpace distance learning software application.

As the team pursued its goal, the widespread perception inside Lotus and IBM at large was that this project was exceptionally peculiar, and not very successful. Many people expressed, more or less openly, the hope that it "just would go away". This uneasiness was usually expressed informally in hallway conversations, but there were instances of more formalized discontent, such as a student writing on the course evaluation for a seminar on how to sell LearningSpace, "I don't want to touch LearningSpace with a bargepole, it's always been a nightmare!"; or a manager sending an e-mail about LearningSpace, titled

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"LSpace: the Kiss of Death." Yet, between 1999 and 2000, senior managers in IBM and Lotus decided that distance learning and LearningSpace were to feature prominently in the future Lotus and IBM strategy. To this end, they pulled together people from several divisions of Lotus and IBM and created a new, much larger and better funded, business unit: Mindspan.

My research questions stem from a sentence uttered by the Senior Vice President of Mindspan, Laura Sanders, on the occasion of a planning meeting in Paris, on October 6, 2000. The discussion was about attitudes of Lotus employees towards LearningSpace, and to give an example of the prevalent opinion in the ranks that LearningSpace was a problematic, difficult product for them to deal with, I quoted the student evaluation where LearningSpace was dubbed "a nightmare." After some silence, Laura Sanders said, as an explanation, that of course people in Lotus didn't trust LearningSpace, because "this has been an academic research project so far; but now we are turning it into a proper business". The explanation was readily understood and accepted by all, and the discussion moved on to plans to counteract the historically negative perception.

As the meeting continued around me, I realized that I had just found a vantage point and a perspective that would allow me to better shape and interpret my data and observations. Now that the LearningSpace Group was becoming part of the past, I could look backwards to chronicle and analyze its five years of history, and in doing so attempt to answer questions such as: was the LearningSpace Group really so different, that it had to be dubbed "academic"? Why there was such a slippage between the discourse around the Group and in the

Group itself, where the status of the word "academic", while ambivalent was not as damningly negative as for the rest of the organization? What were the ideological and theoretical underpinnings of these contrasting discourses, and how did the LearningSpace Group enact their discourse, both in their daily working practices and in designing, creating and marketing the LearningSpace tool? Was the Group an example of the fabled "evolving convergence of academia and the enterprise", if indeed there is such a thing beyond the slogans and hype of marketing departments? How did the different levels of discourse, ideology, practices, paradigms of and around the Group mapped themselves out in relation to each other? What results and consequences did the Group's practices ultimately yield, beyond the limited and binary perspective of "failure" and "success"?

METHODOLOGY

> Until we have some knowledge of the situation a posteriori, our ability to understand the prior situation is hopelessly lacking. (Kirsch and Sullivan 16)

My position is a very clear, albeit somewhat difficult one, which presents certain methodological benefits and also some constraints: I am an insider. I have worked in various capacities for the LearningSpace Group and for Mindspan since March 1998, and to this day I am a Lotus Development employee. I fully realized the ambivalence of my participant-observer status in the office of my dissertation advisor, shortly after my Eureka moment during the October 2000 meeting. I had launched myself in an animated description of the LearningSpace

Group, trying in my excitement to convey more than two years of observations in one sentence: and coming to a sputtering halt when I realized that pronouns had betrayed me. I heard myself alternatively using "us" and "them" to describe the LearningSpace Group. My theoretical agenda might have been relatively clear, even at that early stage of the game—but where was my personal, emotional one?

While today's ethnography has long dispensed with the myth of the impartial observer, the researcher's degree of belonging to the community under examination must be explicitly discussed and problematized, as it influences not only the investigations techniques being used, but above all the type of research questions and therefore their answers. I can liken my case to that of Beverly Moss, who studied the language patterns of her own church community: Moss was part of the community even before starting her ethnography, and would still be part of it thereafter. Moreover, she had a strong emotional investment in it, that in my case can be paralleled to the issue of confidentiality. I have to contend with. Moss balances advantages and disadvantages of the insider's view: on one hand, being integral part of a community, especially over a long time, gives the observer considerable more insight; on the other hand, the observer will run the risk of being blinded by familiarity and missing patterns, or misinterpreting the events altogether, failing to maintain the insider and outsider perspective at the same time (163 ff.). The most interesting point Moss makes is that the observer should be at the same time insider and outsider (159): a comforting conclusion, validating my pronominal and territorial confusion. That which had worried me at

first is in this perspective a good thing, a positive symptom of my having reached a dual position as insider and outsider.

The advantage of being an insider in my case has also to do with the specific perception of academia and academics in the community under examination. As we have seen, "academic" is a loaded word for the LearningSpace Group, as it is in many corporate environments: the people who dubbed the Group "academic" were using the adjective in the way prevalent in the community: as a synonym for woolly-headed, fuzzy, impractical, useless. In March 1998, during my final interview taking place in Paris just before being hired, my background was discussed at length, and I was explicitly warned that "this is not academia here: we don't waffle, and we get things done". Under these conditions, I realized that one of the prerequisite to carrying out my research successfully was to be able to gain acceptance as part of the community, and not be seen as an academic studying it. As in 1998 I only had a vague idea of what exactly I wanted to write about anyway, I put all dissertation writing on hold, and concentrated on fitting in. I did make observations, kept notes and worked on accumulating primary source material—however, for the first two years of my life at Lotus, I refrained from questioning colleagues explicitly, and I also avoided formulating a firm and fixed research hypothesis. Such an approach is not without methodological problems. It can be argued that the researcher has to go in with a strong working hypothesis, a necessary set of criteria to guide data collection: knowing what questions we want to ask will influence what we consider relevant

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data and ultimately our answers. Yin makes much of the necessity for a precise research design, that is:

> a "blueprint" of research, dealing at least with four problems: what questions to study, what data are relevant, what data to collect, and how to analyze the results […] Purpose of the design is to help to avoid the situation in which the evidence does not address the initial research questions (20).

The paradox of course is that at the beginning of the investigation the researcher's questions will most likely be considerably different from what they will become later on, reshaped by a growing understanding of the object of the research, as the researcher becomes more and more of an insider into the community being examined. The early snapshots might therefore prove to be irrelevant, or misleading, while the data that should have been selected instead is not. Lauer and Asher point out how initial hypotheses are necessarily reshaped by the progress of the investigation: "Though guided by theory and questions or hypotheses, investigators withhold initial judgements, allowing the data to determine particular research directions" (48).

I therefore stand by my methodological choice: in order to frame and situate her hypothesis correctly the researcher first needs to know its field intimately, to avoid cultural imperialism in the way the research question is posed. Research hypotheses are necessary, if only as implicit or empirical criteria that attend what data to gather and how: however, they should be regarded as strictly temporary and almost certainly to be discarded, once a sufficient perspective is gained.

At some point, the initial observation phase is over, be it in a flash of insight or in some less dramatic way: research questions firm up, structures coalesce, writing can start in earnest. The whole process becomes recursive: as the perspective of the researcher evolves, so should the research questions, and consequently the type of data collected. I started a second pass at data gathering, in light of my now stronger hypotheses: this time the point was not so much to explore at random, but to go back for something more specific, all the while trying to confirm my hypotheses without losing sight of the inherent bias of any interpretation (Yin, 10).

This dissertation has an obvious rhetoric and composition slant, which I think is reflected also in my methodology. Most of my data consists of text constituting a discourse; the latter can be seen as a primary constituent of what makes, shapes and binds a community of practice. In this light, the journey the researcher goes through in becoming an insider to the community is the same journey someone goes through when moving to live abroad (a situation with which I am personally very familiar, which makes it a favorite metaphor). The language is the key through which a foreigner learns the discourse and the culture of her new place of residence: the voyage to a place is a voyage through language. The researcher starting her itinerary inside a new thought community is then in the situation of the language learner. As such, she will go through stages comparable to those a language learner faces: including, towards the beginning, a "silent phase"—an apparently non-productive period in which the learner keeps mostly silent. The silent phase is in reality an extremely productive and intense

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time, in which the learner steeps herself in the language and the culture, and absorbs it until she is ready to start producing in her own voice. I believe this is what happened in my case: I spent the time from 1998 to 2000 in a silent phase of preliminary observation, not making much noise in terms of hypotheses or theories, but gathering and piecing a perspective together. At some point, which I have pinpointed in the October 2000 meeting described above, everything finally converged, and I was eventually able to formulate a viable research framework.

STRUCTURE

This dissertation is structured into five sections, each including one or more chapters. In the first section I have included this introduction, and in the last one I will conclude by summarizing my findings, and pointing to possible directions for further research. In each of the three main sections I have analyzed my case study from a different perspective, thus hoping to give a comprehensive and coherent portrait of the discourse, history, practices, actors, structures, relations and processes of a complex ecology. Section 2 takes the perspective of the people using the distance learning tool developed by the LearningSpace Group; I show how diverse historical, pedagogical and cultural influences worked to shape and direct the practices of people as they interacted in various ways within the system, and how and what learning happens in the always rich, complex, and unprescriptible coordination process that is learning in and with a system. Section 3 looks primarily at the LearningSpace tool, its origins, design and architecture, metaphors, affordances and constraints; I show how a tool does

not come into existence in isolation, through a linear process where only technological considerations come into play; but how on the contrary it is the result of a multiplicity of forces, needs, historical antecedents and systemic, socio-political and economical considerations. Section 4 takes the perspective of the LearningSpace Group as an organization; I reconstruct the Group's five-year trajectory, its struggles, objectives, mythopoietic narratives, and the structures, relations and processes through which they were enacted, both within it and in relation to the larger organizational, ideological, socio-cultural and political system. Throughout the text, I have also intercalated short narrative vignettes, intended to exemplify and encapsulate the points I make in each of the main sections.

SOURCES

Much of the primary source material for this study is in the form of written text, stored in documents, e-mails and databases. Yet is it not possible to consider this material like ordinary, published text, with a specific date and an individual author: the type of text, in a word, most familiar to academia. Coming to realize the different nature of this text was an essential part of my induction process into the corporate culture of the LearningSpace Group, and is a very important concept to keep in mind throughout this dissertation.

In May 1998, two months after joining Lotus, I was asked to give a rather important presentation to a mixed audience: clients, business partners, academics. Since this was my first major presentation, I asked my manager for input. She

replied by sending me copies of a presentation by a colleague, and suggesting I use that. I studied the presentation, which to me looked remarkable: so much so that I picked up the phone and called the "author" to ask for permission to quote from her slides. The conversation was a study in misunderstanding—she could not fathom why I was asking, and neither could she get why I was complimenting her on "her" slides. First I thought she was exceedingly modest and generous, as she insisted I just cut and paste the whole presentation; but I was also starting to realize there was something off in the whole conversation. I hung up, and opened my e-mail again. My manager had sent me more presentations by other colleagues, she said, which could help me further. I opened the files: most of the slides were identical to the ones I had so eagerly admired. What was going on? I went to our TeamRoom, the database where we held and shared materials of interest, and started systematically opening all the presentations I could find. They were all variations on a theme, with slight differences in the slide order and sometimes in the wording. I reeled under the shock of discovering what I could only call—from my academic point of view—extensive and cheerful plagiarism.

This is just a one-sentence example of what I found:

- Distance learning: any approach to education delivery that replaces the same time, same place traditional classroom

- Broadly defined, distance learning is any approach to education delivery that replaces the SameTime, same-place face-to-face environment of a traditional classroom.

- Distance learning is any approach to education delivery that replaces the same-time, same-place face-to-face environment of a traditional classroom.

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The first sentence comes from the slides I had phoned my colleague about; the second comes from a brochure by Lotus Education; the third is from the Lotus web site. I could continue with more variants, but I think I made my point.

In my heartache, I mentioned the issue to my office mate, and she said: "oh yes of course—there are only three presentation slides all over Lotus, and they just get cut and pasted and passed around." This was apparently a very popular in-joke, which I have since heard (and eventually repeated myself) many times. Through this experience, I had realized that the concepts of text and authorship held in Lotus, and indeed in the industry, were vastly different from mine. The basic rule is that the organization's official messages have no individual authorship: everyone and anyone can just cut and paste whatever they think useful from pre-existing documents. Promotional materials, descriptions of products and services, presentation slides: anything goes. Small changes in the wording are frequent; sometimes someone will paraphrase the meaning, and the new version becomes incorporated in the text. This type of "collective" text usually originates from the marketing department, but it can also come from a variety of different sources—often it is impossible to tell where the document was born. Much like a medieval manuscript or palimpsest, the text is copied and modified over and over: parts can be cut, marginalia be incorporated in the text, portions erased and overwritten.

In the same way, the notion of author in the corporate context is much closer to the medieval than to the modern one: the author's name may be attached

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to the document or not, although most often it is not what we would call the author's name, but the copyist's. The usual practice of attaching one's name at the front or at the end of a corporate text, in fact, does not connote authorship: it is merely a way of identifying the spokesperson for practical purposes such as contacting him or her. Hence my embarrassing misunderstanding: I assumed that the name on the first slide of document I was reading was the author's, when in fact she had put her name there as the speaker's contact information.

Two types of document are, however, partial exception to this general rule: personal communications, like e-mail or discussion databases; and R&D (research and development) documents. The latter are usually authored by specialists, and fall under the "academic paper" category: they have an individual author, footnotes and all the usual features of such texts. It should be noted that we still have consider this text "academic" in inverted commas: we are not in the presence of independent research. Even "independent" studies commissioned from external sources are paid for by the corporation, and therefore their total independence has to be questioned. For example, the series of three research papers on distance learning developed by the Lotus Institute in 1999 (Penuel and Roschelle; Penuel et al; Penuel): they are actually written by an external firm, and a disclaimer points out that "SRI International performed research and prepared a report as an account of work for Lotus Development Corporation. Neither SRI International […] make any representations with respect to the use of the information contained in SRI's report, nor does SRI endorse, expressly or by implication, Lotus' use of any SRI provided information" (Penuel and Roschelle

31). However, the paper also cites a Lotus employee as "editor" of the text (1), and the firm was chosen and paid by Lotus.

The former type of text, which I have called "personal communication", is actually a variety of different texts, spanning a range of rhetorical goals and devices. The connecting factor is indeed the "personal" nature of such text: people state their opinions, agree or disagree, give suggestions, ask or give orders, plead or threaten… All of these textual strategies are generally a means to reach the community's objectives, "get the job done". To this end, personal authorship is signaled (typically, a chain of e-mail messages answering each other will give a pretty precise idea of who said what in the ongoing dialogue), since it is necessary to know who asked what to be able to grant the request, just to make an example. Even those texts that start with a "real" author, though, are not immune to the general text appropriation activity: research papers will be quoted without attribution, and often without inverted commas, and an e-mail that is considered especially effective can likewise be incorporated in the "official" corporate discourse, the "voice of Lotus".

As I detail in my dissertation, especially in section 4, this collective authorship has important implication for the ideology and the discourse in the industry workplace. However, in this introductory section I am not attempting a thorough analysis of all the implications of the state and status of text and discourse in a corporate organization: the bulk of my work will of course come to terms and deal extensively with the implication of the phenomenon as I am briefly describing it here. My aim in this section is a strictly methodological one: I want

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to point out that the mass of my primary documentation is like a huge sandbox where anyone can play—or a sort of giant collaborative palimpsest where text is written and rewritten, and the only constant is that the text has been manipulated, at some unknown moment in time, for a precise persuasive purpose. Extensive triangulation, an essential technique of field data analysis, still won't be necessarily able to extricate the history or the "original meaning" of the message: indeed the whole idea of original text or meaning is irrelevant under these circumstances. In the end, the analysis must cope with the inevitability of the fact that all my written, "archival" data form one large text expressing the unified, collective corporate discourse. The partial antidote, and relatively firmer ground on which to proceed, is my attempt to probe deeper through a series of interviews with the original members of the LearningSpace Group—most of whom are not working for Lotus anymore; and of course in my personal observations and dialogue with colleagues in the course of my years at Lotus. Throughout my exploration, I will triangulate individual and corporate discourse; I hope I will thus be able to go beyond the simplistic, unifying corporate discourse and grasp the complexity and richness of voices of all the actors in the complex, ecological system of the LearningSpace Group community of practice.