

Using scenarios to explore employee attitudes in retailing

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Abstract

Purpose: The aim of the paper is to explore how hypothetical scenarios can be used to study individual employee attitudes towards diversity and equality initiatives in retailing.

Design/methodology/approach: Forty semi-structured interviews were conducted with a range of staff working in three business units belonging to a UK retailer. As part of the interviews, respondents were asked to comment on four work based scenarios exploring customer and employee diversity issues.

Findings: The paper proposes that scenarios can be a useful method for exploring the hidden meanings retail employees have towards ethical issues such as diversity management. However, they may not always be useful for furthering knowledge of the area. This is because responses to the scenarios in this study frequently contradicted the respondent's real-life work experiences explored in the rest of the interview. This suggests that, when commenting on the scenarios, interviewees did not always ground their responses so that they reflected their role in the retailer and their own diversity.

Originality/Value: The study argues that hypothetical scenarios, if used in retail research or for retail training and development purposes, should have ecological validity. In order to obtain an accurate picture of individual attitudes and to tease out what an individual might do (the rhetoric) from what they have actually experienced (the reality), those researching in the retail industry should use a range of qualitative methods to study the same issue.

Keywords: Retail employees, diversity, scenarios, qualitative research

Type of paper: Research Paper

Introduction

Prompted by changes to the composition of the workforce, demographic shifts and the increased purchasing power of customers from minority groups, organisations including many retailers have shown increasing interest in 'diversity management' as a way of harnessing individual differences in staff and customers to create business benefits (Foster and Harris, 2005; Kandola and Fullerton, 1998). The UK home improvement retailer B&Q, for example, is frequently cited as an organisation that has appointed older workers in customer facing roles to improve levels of customer service in their stores (Hogarth and Barth, 1991; B&Q, 2010). Asda, the UK supermarket, has also implemented a number of initiatives which recognise the diversity of their staff including issuing calendars which recognise the diverse religious festivals celebrated by their employees (Foster, 2009). Despite this organisational interest, there is a paucity of research which considers how an organisation might actually recognise and manage the individual needs of customers and employees in practice, particularly given that the workplace equality legislation emphasises 'sameness of treatment' in order to ensure legal compliance (Jewson and Mason, 1986) and studies have suggested that creating

bespoke products and services for individual customers can be impractical and costly (Foster, 2005).

This paper reports on research conducted in three separate business units belonging to a well-known UK retailer which explored how the retailer took account of the different needs of their staff and customers. The focus of this paper is not, however, the findings relating to diversity management as these are reported elsewhere (Foster and Harris, 2005) but the findings concerned with the research methods employed. Specifically, this paper explores the methodological issues associated with using fictional scenarios as a qualitative projective technique to explore the attitudes and behaviours of individual retail employees towards the management of staff and customer diversity. It is anticipated that the paper will provide valuable insights into how to effectively research the 'individual' (in this case the employee) in a retail context. The paper begins by exploring the use of scenarios and projective techniques in qualitative research and then introduces the retail study conducted by the author which made use of scenarios in the semi-structured interviews. The paper ends by discussing the methodological findings and implications these have for studying individuals in a retail setting.

Using scenarios in qualitative research

It can be argued that qualitative research lends itself to the study of the 'individual' in a retail context since it has an emphasis on exploring respondents' interpretations whilst taking account of the research context (Bryman, 1989). Although not always associated with qualitative research, projective techniques can be used as a way of exploring the lost meanings individuals might associate with the issue being studied which may not be revealed through more commonly used qualitative methods such as direct interview questions (McGrath *et al.*, 1993). Used by market researchers since the 1940s, projective techniques have their roots in clinical psychology (Catterall and Ibbotson, 2000). By asking respondents to 'project' their thoughts and feelings onto something or someone, it is argued that the barriers associated with direct questioning can be overcome and a more open and creative discussion will transpire (Day, 1989). However, whilst the theory of projective techniques is well documented, Boddy (2005) argues that more discussion is required around the validity and reliability of projective techniques and in particular how a researcher should interpret the findings resulting from their use.

Typical projective techniques include word association, sentence completion, picture response and mental scenarios but may also include more unusual techniques such as taste tests and respondents telling jokes (Pettigrew and Charters, 2008). Scenarios or mini case studies, which are the focus of this paper, are particularly useful when trying to understand how an individual makes a decision and how a respondent might approach an ethical dilemma or sensitive matter (Simms, 1999; Smith and VanDoren, 1989; Weber, 1992). They can also be used as a tool to help people think or act differently about a particular issue

(Evans, 1995) and, in the case of the Delphi method, even help to generate forecasts and manage complex problems (Linstone and Turoff, 1975). Indeed, scenarios have been used in retail research to not only explore consumer decision making in different retail contexts (Park *et al.*, 2005; Doherty and Nelson, 2008) but also to investigate ethical issues such as fraudulent consumer behaviour (Wilkes, 1978). However, the use of scenarios appears to be less apparent in retail research which explores issues from the retailer's perspective. This is perhaps unsurprising given that projective techniques have a long association with market research exploring consumer rather than organisational opinions (Haire, 1950).

The study

A total of forty semi-structured interviews were conducted with head office, regional and store level retail employees across three business units belonging to a UK retailer. Although these employees had different levels of responsibility in the organisation, respondents were selected on the basis that their job roles meant they were either involved in generating policies relating to how customer and employee differences were managed in the retailer and/or responsible for implementing them across the different levels of the retailer. Specifically, interviews were conducted with twenty head office HR and marketing specialists who were responsible for setting the relevant policies and strategies, five regional managers responsible for disseminating the policies and strategies across the three business units and fifteen store managers, supervisors and shop floor staff who were responsible for implementing the policies and strategies at an operational level. Each interview explored the following themes: the role of their business unit and other units in the retailer, the respondent's job role and career progression, equality and diversity initiatives in the retailer and approaches to equality and diversity management more generally. These themes were explored through direct questioning and through a discussion of four scenarios. Throughout the interview, respondents were encouraged to talk about their real-life experiences by providing examples from the perspective of their own working context. In addition to the interviews, qualitative observations were made by the researcher whilst visiting the stores and head offices. This included, for example, observational notes made in relation to the types of products sold in the stores and the visible diversity of customers and staff.

Template analysis was used to identify important themes from the interview and observation materials (University of Huddersfield, 2010). This technique involved the development of a coding 'template' by the researcher which highlighted broad themes and then more narrow specific themes important to the study. So, for example, a broad theme of the study was 'the business case for diversity management'. This theme was an *a priori* theme because it was an issue already identified by the researcher in the literature. The 'business case' was then separated further into a specific sub-theme of 'marketing related business benefits'. This was also an *a priori* theme as these benefits are well-established in the literature and so the researcher expected this theme to arise in the data. It was also a theme discussed specifically

in the interviews. Based on the interview materials further categories were then developed inductively so that the theme of 'marketing benefits' was broken down into the 'the employer brand' which had as a sub-theme 'the role of front line staff in communicating the employer brand'. These were themes not explicitly identified in the literature. Codes were therefore developed using a 'top-down' approach leading to the emergence of "...a hierarchical coding tree..." (Morison and Moir, 1998:109). This method of coding is described as "...partway between a priori and inductive approaches..." in that it creates "...a general accounting scheme for codes that is not content specific, but points to the general domains in which codes can be developed inductively" (Miles and Huberman, 1994:61). Once the template was fully developed, the researcher then applied this to all the interview transcripts to guide the interpretation of the data.

The scenarios

During the interview each respondent was asked to read four fictitious scenarios that described how a company might manage individual customer and employee differences in practice (see Appendix 1). After reading the scenarios, the interviewees explored the advantages and disadvantages of each scenario with the researcher. Participants were allowed to refer back to and re-read the scenarios if necessary during this discussion. Two of these scenarios related to the HR function and the other two related to the marketing function since, according to the literature, these are the two main organisational functions most likely to be involved in equality and diversity initiatives (Kirton and Greene, 2009; Robinson and Dechant, 1997). These scenarios were developed by the researcher as a useful supplement to aid the interview, as it was felt that some interviewees might be unfamiliar with the diversity management approach, particularly as existing research suggests that implementation of the approach in practice is patchy (Mavin and Girling, 2000). Providing a realistic example of how different approaches to managing individual differences might operate in practice, prompted the interviewee to discuss and evaluate the different approaches to equality and diversity more easily. Furthermore, it was recognised by the researcher that for some interviewees, articulating their thoughts on equality and diversity issues may be difficult due to the potentially sensitive nature of the topic. Presenting scenarios for respondents to comment on enabled the interviewee to 'project' their attitudes on to the fictional situation and thus mitigated any problems which may have arisen from more direct questioning.

The scenarios tried to encapsulate the essence of the managing diversity approach and the equal opportunity approach as described in the literature. The literature suggests that there are conceptual differences between a diversity management and equal opportunities approach (Foster and Harris, 2005). Essentially the diversity management proposes that staff and customer diversity should be embraced and hence individual differences and needs should be recognised in order to gain business benefits. In contrast, the equal opportunities approach emphasises 'sameness of treatment' when managing staff and a tendency to focus

on HR initiatives rather than company-wide activities. Whilst the literature suggests a conceptual difference between the two approaches, the literature lacks examples of how these conceptual differences might operate in practice. Scenarios therefore provided a useful way to explore with participants these conceptual differences because the researcher used familiar work based illustrations to highlight the alternative approaches. Based on the researcher's previous research and industry experience in retailing, the researcher was aware that an HR policy common to most retail staff concerns benefits/rewards. Using this as an illustration also enabled the conceptual differences between diversity management and an equal opportunities approach to be highlighted. Consequently, the two HR scenarios emphasised how an organisation might choose to either treat staff the same as an equal opportunities approach aims to do (Scenario 1) or differently and at an individual level as typified in the managing diversity approach (Scenario 2). The equal opportunities HR scenario, therefore, described how a fictitious company issues the same benefits/rewards to each member of staff irrespective of their individual needs. In contrast, the managing diversity HR scenario described how the fictitious company allows their staff to select which 'benefit/reward' they feel best meets their individual requirements.

The two marketing scenarios explored how a diverse or non-diverse workforce might influence the marketing strategies adopted by an organisation since this is how the literature tends to frame the marketing related diversity issues (Cox and Blake, 1991). The first scenario (Scenario 3) describes a fictional organisation that has very little staff or customer diversity, particularly in management roles. In this scenario it is recognised that given that few women are in decision-making roles, it is not necessarily treating people the 'same'. However, this situation does reflect the reality of many organisations that comply with equal opportunities legislation yet still have little diversity in senior roles (Dickens, 2007). The fictitious organisation in this scenario does not recognise the marketing benefits that might be attained from employing a diverse workforce and has a marketing strategy that aims to meet the needs of a majority, rather than minority customer base. In contrast, the other marketing scenario (Scenario 4) depicts a hypothetical organisation committed to a managing diversity approach. This fictitious company exploits the knowledge of their diverse workforce to develop marketing strategies to satisfy the needs of a diverse customer base.

The scenarios and interview questions were pilot tested with four individuals. The first test involved asking three associates to 'sense-check' the questions and scenarios. One colleague had an HR background, another a retail marketing background and the other a retail business owner with responsibilities for staff. The work experiences of these associates therefore reflected the different elements of the interview questions and scenarios i.e. the retail context and the impact of diversity and equality initiatives on the HR and marketing functions. A full pilot interview was also conducted with a head office HR employee from the case retailer to check their understanding of the questions and scenarios. This person was

selected because they had responsibilities for generating equality and diversity policies in the case retailer. As a result of the pilot tests, two minor alterations were made to the interview questions.

Methodological findings

The scenarios achieved their original intention in that they acted as a discussion aid, prompting interviewees to consider managing diversity and equal opportunity issues in more detail. The scenarios also enabled the respondents to articulate thoughts which would not have necessarily emerged through direct questioning (Day, 1989). Direct questions such as 'What do you think the advantages are for retailers who proactively manage the diversity of their staff and customers?' generated limited answers compared to the more detailed, lengthy responses interviewees made to a similar question based on Scenarios 2 and 4 which showed how the diversity management approach might work in practice. More detailed analysis found, however, that many interviewees discussed the issues raised in the fictional scenarios from a different perspective to that which they were using to discuss real-life retail situations in the rest of the interview. Although a small number of interviewees grounded their responses to the scenarios by exploring the issues raised in the fictional situation in relation to, for instance, their role in the retailer or their previous work experiences, most respondents explored the scenarios from a detached and neutral perspective. These interviewees did not consider the scenarios from a point of view that reflected, for example, their organisational role or their individual diversity/needs, such as being female and having childcare responsibilities. Instead they appeared to give an intuitive response that did not take into account organisational or personal constraints that the interviewee would experience if they were faced with a similar situation in practice. When commenting on actual experiences as a result of direct interview questions, the interviewees provided much more complex and often different interpretations to those they had given in relation to similar issues in the scenarios. In these real instances, the discussions were clearly grounded in, amongst other things, the respondent's organisational role and his or her own diversity.

This contradiction can be illustrated in interviewees' responses to which of the two HR scenarios was a better approach to equality. In the main, interviewees felt that allowing employees to select their own reward/benefit on the basis of their individual need was more 'fair' and more satisfying for the individual than treating all employees the same as in Scenario 1, the equal opportunities scenario. This can be illustrated in the following comments taken from two different retail HR managers:

'I think the plus point for that scenario [Scenario 2] is that staff can choose the things that are meaningful for them. It has more meaning than a blanket approach.'

'That scenario reflects individual needs whereas the other scenario [Scenario 1] is treating everybody much the same.'

Yet evidence from other interview materials collected by the researcher, which reflected people's real-life work experiences, including comments made by the same two HR managers quoted above, indicated that people preferred to be treated the same as most people perceived differential treatment as being 'unfair'. A store manager commenting on how staff were treated in her store stated that:

'We don't treat anybody differently, certainly in this store. We treat everybody exactly the same.'

Further evidence of the contradiction between the responses to the scenarios and 'real-life' experiences explored in the rest of the interview, arose when respondents explored the practicalities of a diversity management approach. From a 'neutral' standpoint where interviewees did not take account of, for example, their role in the retailer, many people were able to discuss the implementation aspects of the managing diversity scenarios in a straightforward manner. Complexities associated with implementing this approach, however, arose when people talked about real-life situations in the rest of the interview which they had experienced that were similar to those in the scenarios. So, for example, some interviewees responding directly to the marketing scenarios, felt that a managing diversity approach could improve communications within an organisation, since different individual contributions would be valued. One store manager commenting on the marketing managing diversity scenario (4) stated that:

'In this scenario nobody would be worrying about what they are saying and what they are doing. It [the work environment] is probably more relaxed.'

On the other hand interview materials gathered not in reaction to the scenarios, revealed that interviewees had experienced conflict which had a negative impact on communications as a result of the visible and non-visible individual differences of team members as demonstrated in comments made by a senior marketing manager who managed a diverse team:

'Diversity lends strength to being able to look at different things from different perspectives. It can also be a source of irritation...people have different styles and ways of thinking...so how do you get a consensus? That's quite hard.'

Similarly, another line manager working in an HR head office role explained how the personality of one member of staff caused problems in her team:

'He just didn't work with the rest of the people in any way. He couldn't pull as part of the team...he couldn't socialise as part of the team. The fact that his personality didn't fit with the rest of the team was a big issue.'

Commenting on the diversity management marketing scenario (Scenario 4) more generally, one respondent believed that selling products to meet the specific needs of different customers was important.

'[In Scenario 4] you are giving your customers what they need. If you're not a native English speaker, it's probably easier for you to listen in your own language or read in your own language.'

Yet, a customer services manager who was discussing the marketing strategy of the retailer explained how he had actually experienced customer complaints as a result of selling products which were deemed to be offensive by one set of customers but not by another. This suggests that recognising the different needs of all customers in practice, as the diversity management approach suggests, was not as straightforward as proposed as it could lead to some consumers boycotting the organisation.

Discussion and Conclusion

The findings suggest that whilst the realistic yet hypothetical scenarios acted as a useful discussion aid in the interviews, respondents largely suspended their own organisational realities when considering the scenarios. This indicates, therefore, that there was a separation between the *proclaimed* behaviour and attitudes of the participants and the *actual* behaviour and attitudes of interviewees. Furthermore, this discrepancy was only highlighted as a result of using scenarios as part of a wider interview which encouraged participants to draw upon their work related experiences. It is beyond the scope of the study to explore in detail why respondents considered the issues in the scenarios from ungrounded or grounded perspectives but it is likely to be as a result of a variety of factors. It could, for example, be an outcome of the nature of the topic studied. Interviewees may have felt that they should provide a response which was one that the interviewer wanted to hear, leading to a reply which did not acknowledge their real experiences (Denzin, 1989). Indeed dealing with socially desirable responses can be a common problem when researching ethical issues such as diversity and equality in the workplace (Nancarrow *et al.*, 2001). Future research could investigate the extent to which this assumption applies by using scenarios to explore less sensitive subjects in a retail setting.

Whilst it is recognised that the sample included employees with different levels of responsibility, their job titles meant that all participants had involvement in and knowledge of generating and/or implementing equality and diversity initiatives in the same retail group.

Nevertheless, the inconsistencies in responses to the interview questions and scenarios could be a result of the participants' inability to relate to situations which they had not yet experienced in their working life. Working as a store manager does not necessarily mean that, for example, the individual has actually had to deal with a case of discrimination. Caution should therefore be exercised in future research when selecting participants based on their official job title as it may not necessarily mean the participant has experience of the topics being explored by the researcher. It could be reasonably concluded then that the more grounded responses generated in this research are because the person had been exposed to a similar real-life situation to that described in the scenario. Work conducted by Edmonson *et al.* (2001) appears to support this notion. Their study explored how new technology had been introduced into cardiac surgery in US hospitals. They found that the responses to their fictional scenarios "...yielded strikingly varied responses, typically grounded in specific behavioural examples that captured what people actually did as well as how they perceived the team's interpersonal climate." (Edmonson *et al.*, 2001: 693). The 'grounding' of these responses can therefore be attributed to the fact that these respondents were asked to comment on scenarios that they were also encountering on a daily basis in their hospital work.

This implies then that if scenarios are to be used effectively in retail research they should closely reflect the realities of working in a retail environment. Scenarios should therefore have 'ecological validity', that is these data collection methods should have 'naturalness' (Bryman and Bell, 2007:42) and their content should reflect the real-life situation under investigation (Bateson and Hui, 1992). This assumes that to generate suitable scenarios in the future, the researcher should have in-depth knowledge of the retail topic and context under study from both academic and 'real-life' perspectives. Yet this is potentially problematic given that qualitative researchers should avoid 'over rapport' with participants and contamination of the phenomenon under study (Johnson *et al.*, 2006). Although the scenarios were pre-tested and developed based on the previous research and industry experience of the researcher, on reflection the content of the scenarios did not perhaps refer enough to the competitive, customer-driven work environment experienced by retail employees and the pressures faced by retail managers to comply with head office requirements and meet performance targets (Burt and Sparks, 2002; Broadbridge, 1999).

Based on the findings of this study, responses to fictitious organisational scenarios alone may not necessarily reflect the lived and meaningful experiences of the individuals being studied and so scenarios may not always help to further knowledge in the area. This finding reflects wider concerns with the validity (specifically, how well the research measures what it sets out to study) of projective techniques reported in the literature (Boddy, 2005; Catterall and Ibbotson, 2000). Furthermore, it was not until the responses to the scenarios were compared to the rest of the interview data that this became apparent. This suggests that when using projective techniques such as scenarios, the data collected in response to this should be

triangulated with other qualitative research methods such as interview materials to ensure that the reported findings reflect the actual realities of the individual and both what the respondent might do (the rhetoric) and what they have actually experienced (the reality). By doing this the researcher in this study was able to build a more representative picture of the experiences of the retail managers and employees in relation to the management of employee and customer diversity and go some way to address the limited ecological validity of the scenarios.

The findings reported here also have wider implications for the retail industry. Scenarios, vignettes or case studies are frequently used as a training tool to explore an individual's response to a particular retail issue (Skillsmart Retail, 2010). Relying on these to train retail employees may lead to an unrealistic view of how an issue might be managed in practice. Indeed Weber (1992:147) has stated that "scenarios are only *facsimiles* of real situations and the subjects' responses to the scenarios demonstrate *intended* reasoning, decisions, or behaviour" (emphasis in original). This, therefore, creates uncertainty about the benefits to be gained from using fictitious situations for retail training and development purposes and once again reinforces the point that the ecological validity of scenarios is crucial in order to gain realistic responses (whether they be for research or training purposes) from individuals working in retail.

To conclude, this paper has argued that although scenarios are a useful discussion aid in qualitative research, in order to properly understand the individual attitudes and behaviours of retail staff, scenarios should be triangulated with other research methods. Furthermore, scenarios should have ecological validity by reflecting the 'real-life' retail experiences of the participants, particularly when used as a retail training tool. The paper has also highlighted limitations of the study, specifically the difficulties of achieving ecological validity and the importance of selecting participants not just on the basis of their job titles but also their experience of the issue being studied.

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Appendix 1

Scenario 1 (HR - Treating people the same approach)

The following scenario relates to an organisation's benefits and rewards scheme. Every employee at the organisation receives all of the following benefits:

- Free membership at a nearby gym

- Automatic membership of the company pension scheme, which is transferred to the employee's spouse in the event of the employee's death
- 25 days holiday entitlement per year – 5 days must be taken at Easter and 5 days at Christmas
- Crèche facilities for employees with children

Scenario 2 (HR - Treating people differently approach)

The following scenario relates to an organisation's benefits and rewards scheme but has adopted an alternative approach to the previous scenario. Employees are entitled to choose a "benefit" or "reward" which meets their individual requirements, so for example, an individual may enrol on a college course, obtain a health check or take out an insurance policy. In order to ease administration of this benefits system, the organisation has fixed the amount of money staff can claim towards the costs of these benefits. In addition to this, each member of staff receives 25 days holiday per year and are free to choose when they want to take this entitlement.

Scenario 3 (Marketing – Treating people the same)

The profile of employees working in the marketing department consists of an equal split between male and female workers. In terms of their roles, all middle and senior marketing managers are men and all secretaries and junior marketing managers are female. All marketing staff are aged between 25 and 35 years, able-bodied, heterosexual and white. The organisation complies effectively with equal opportunities legislation and as a result has had no discrimination claims made by members of staff. The products the company sells are targeted at males and females aged between 20 and 65. The department has adopted a successful standardised marketing strategy so that all male and female customers aged between 20 and 65 are treated the same in terms of promotional activity and products offered. However, research has indicated that a small amount of haphazard sales are generated from disabled and ethnic minority customers. Currently, this section of the target market remains unexploited, as the organisation does not have enough resources to target these customers specifically and feels that if they were to target these markets they may alienate their main customer base.

Scenario 4 (Marketing – Treating people differently approach)

The culture of the organisation is such that the diversity of the staff it employs and the diversity of the customers it serves are highly valued and crucial to the current success of the business. Part of this success can be attributed to the marketing department who utilise the diverse knowledge and skills base of their staff in order to serve the requirements of the customer base more effectively. Currently the marketing department has male, female, ethnic minority, homosexual and disabled staff in addition to college leavers and employees aged over 60. The products sold by the company are targeted at males and females aged between 20 and 65. The marketing department, as a result of utilising the diverse knowledge of their staff, have increased sales by segmenting this target market further and developing aspects of their marketing strategy to appeal to the more specific individual needs of males and

females aged between 20 and 65. For example, product literature is available in several languages and Braille.