Entering the customer’s domestic domain: Categorial systematics and the identification of ‘parties to a sale’

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Entering the customer’s domestic domain: Categorial systematics and the identification of ‘parties to a sale’

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ABSTRACT

This paper showcases work in ‘categorial systematics’ (Stokoe, 2012) and the sequential analysis of categories in interaction, in the context of current developments in membership categorization analysis. It shows how, in a corpus of sales calls, categorial matters are initiated and managed as salespeople elicit information about prospective customers. In particular, our interest is in the turn design of sellers’ requests for names, and how men and women customers are asked for their titles (e.g., “is it miss, missus or ms?”). We show that these activities precipitate talk about the customers’ domestic domain regarding who comprises ‘the buyer’ within the membership categorization device ‘parties to a sale’. While such requests are apparently mandated by the company, they can produce turbulence as salespeople imply, or attempt to avoid implying, the nature of customers’ domestic relationships. The analysis also shows that and how such requests sustain the gendered nature of forms of address. We discuss the implications of the research findings for training salespeople to communicate more effectively with their customers.

1. INTRODUCTION

How does one set about capturing and analysing categorial matters of identity – of, say, matters of gender or sexuality – in a systematic way? What are the
consequences for participants in particular kinds of encounters – in this case, in sales encounters between customers and salespeople – for the way they are explicitly or implicitly categorized? What does the category work done in everyday sales encounters tell us about “the world”, “society”, and “culture-in-action” (Fitzgerald, Housley and Butler, 2009: 47), and how do categories figure in the “the normative structuring and logics of particular courses of social action and their organization into systems” (Heritage, 2005: 104)? And, finally, what are the practical implications – for training salespeople and constructing sales ‘scripts’ – of designing categorial projects in different ways? This paper will address each of these questions through a study of telephone calls between members of the public and a double-glazing company, in which potential customers call salespeople to initiate the process of buying new windows, doors or conservatories.

1.1 Categorial systematics

In 2012, Stokoe argued that, in order to grow and thrive as a methodological approach, membership categorization analysis (MCA) should consider embracing (or, at least include as a substantial subset of its range of empirical outputs), a collection or corpus-based approach to data collection, much like its sibling, conversation analysis (Stokoe, 2012a, b). While conversation analysis (CA) works principally across large datasets to identify robust regularities in the design and sequential organisation of turns of talk, MCA has more routinely produced localised case-studies of ‘identities-for-interaction’, moralities, or cultures. In this way, slowly, over time, Stokoe suggested that an artificial ‘division of labour’ developed, such that
‘sequence’ and ‘categorization’ fell into different, and hierarchically organized, methodological terrains.

An often-cited reason for avoiding a collection-based approach in MCA has been the assumption that categorial phenomena are in some way ‘disorderly’ and ‘uncapturable’.

“We cannot simply go into the field and observe how, when, where, and with whom people talk with others about [identity] groups…Finding data…would amount to a search for the proverbial needle in the haystack” (Van Dijk, 1987: 18, 119).

“Because we cannot know in advance when a person will explicitly invoke a…category, there is no way to plan data collection of them…collections…in all likelihood, would not be instances of the same interactional phenomena” (Pomerantz and Mandelbaum, 2005: 154).

And so conversation analysts argued that “establishing the mechanisms by which a specific identity is made relevant and consequential in any particular episode of interaction has remained…elusive” (Raymond and Heritage, 2006: 677). However, in recent years, there has been something of a rapprochement between the two ‘camps’. For example, Raymond and Heritage (2006) demonstrate how, through a set of interactional resources, the identity of ‘grandparent’ becomes relevant and consequential in a particular episode of interaction. And many conversation analysts attend to categorial matters such as race and ethnicity (e.g., Hansen, 2005; Stokoe, 2015; Stokoe and Edwards, 2007; Whitehead, 2013; 2015; Wilkinson, 2011) or
gender (see Speer and Stokoe, 2011). Indeed, in a recent paper focusing on the core CA topic of ‘action formation’, Heritage (2013) argues that phenomena such as ‘identity’ are at “the heart of action formation” and should be “reflexively incorporated into the analysis of what contributions to interaction are accomplishing in terms of meaning and action” (p. 573).

In this paper, we continue to make the case for the systematic analysis of membership categories and related phenomena, and show that the apparent ‘disorderliness’ of ‘category relevances’ is a methodological artefact, and not an empirical reality. Taking up Sacks’s (often idiosyncratic) observations about membership categories, we show how to track categorial concerns in the same way that CA pursues sequential practices. As we (Stokoe, 2012a, b) have shown elsewhere, by focusing on a large corpus of institutional materials, which have distinct overarching sequential organizations, we can show how matters of identity crop up, with similar turn designs, across similar action-oriented environments. Furthermore, we show that the architecture of membership categorization practices, involving rules of application, devices, inferences, and so on, is not theoretical but an oriented-to set of resources for participants.

1.2 Customers, categories and relationships

Categories are fundamental to the business of selling and buying, from company marketing tools, to consumer segmentation. Businesses know that they cannot sell their goods or services to just anybody (Wotruba, 1991). Through ‘prospecting’ – the initial categorization of potential customers (or ‘prospects’) – companies attempt to find out where and how to concentrate their selling efforts effectively. For instance, in
cold calls made by a home improvement company, salespeople tried to find out whether or not their interlocutors were ‘employed’ and ‘owner occupiers’ (Bone, 2006). These categories were considered relevant for assessing prospects’ interest in and ability to purchase the company’s products, independent of what they declared on the phone. In his ethnographic study, Bone (2006) showed that covert category identification was done through question designs such as “is a day or an evening appointment better for you both?”. Answers involved disclosure of customers’ employment and marital status, although the actual interactional data were not presented.

In an activity called ‘consumer segmentation’ (Clarke, 2016), companies construct actionable consumer profiles. The literature on segmentation mostly focuses on ‘how to’ devise profiles, but category work features in particular ways. Consumer profiles bring together and link several categories from different sets into coherent consumer ‘types’. The profiles are then used to improve the prediction of purchasing behaviour and to design customized communication strategies, with the aim of increasing revenue from sales to those customers. Like any other activity, the construction of segments is accomplished in situ (Clarke, 2016). It involves the use of technology (e.g., statistical software and algorithms), quantitative representations of consumers (e.g., the number of buyers of product A with X, Y, and Z characteristics), and tacit knowledge of consumer categories and product characteristics. Consumer segmentation relies on “data” produced independent of the segmentation work (e.g., through surveys or consumer behaviour tracking), while in sales encounters, very much like in prospecting, the commercial agent is in charge of generating and using categorial information.
In sales encounters, categorization is an integral part of the selling activity, often seen as a key contributor to its successful outcome. From a marketing perspective, salespeople perform covert categorization work which enables them to adapt their presentation and closing strategies to fit the putative interests of their current interlocutors (Bone, 2006; Ylanne-Mcewen, 2004). Commercial agents often tailor their sales pitches based on prospects' incumbency in different categories. For instance, if, during a property viewing, potential buyers asked real estate agents about nearby schools, they would formulate different answers depending on whether the prospective buyers had children. If yes, their answer would emphasize the accessibility and proximity of the schools. If no, they would emphasize the distance between the property and any nearby schools (Clarke, Smith, and McConville, 1994).

Researchers with a closer relationship to ethnomethodology have also examined categorization practices in sales encounters. In their work on sales of various kinds of technological products, Darr and Pinch (2013) show how categories are invoked as part of the enactment of identity scripts, understood as patterned and recurrent performances of recognisable identities. Importantly, they argue that categorization work is not unilaterally carried out by commercial agents. Instead, both customers and salespeople can be seen to be actively engaged in the negotiation of relevant categories. This observation is even more clearly evidenced by Mazeland, Huisman, and Schasfoort (1995). Their analysis of an episode of talk between a customer buying a holiday and a travel agent reveals the intricate work of ascribing the membership category “child”. The category is first used by the prospective customer, without specifying age, to inquire about a potential gratuity. The category is then specified in terms of age boundaries by the travel agent and linked to particular services such as different types of accommodation and travelling, each
associated with specific restrictions. Thus, Mazeland et al. (1995) show that categories feature overtly in sales interactions and that categorization work is accomplished collaboratively in the course of negotiating sales-related matters. Relevant to our particular analytic focus, the collaborative performance of category work has been inspected for its contribution to the reproduction of taken-for-granted assumptions about everyday lifeworlds. Examining the use of reference terms in after-hours calls to the doctor, Kitzinger (2005) showed that and how people enact and reinforce a heteronormative worldview (“the mundane production of heterosexuality as the normal, natural, taken-for-granted sexuality”, p. 477) as well as pre-existing normative understandings of family relationships. Thus, callers’ and doctors’ references to patients through the use of family membership terms were routinely and unproblematically interpreted in accord with dominant normative assumptions of “family” as either blood-related or legally married, and co-resident. Furthermore, reference terms indexing romantic partnership were produced and heard as referring to heterosexual couples. Relatedly, Land and Kitzinger (2005) show how lesbian women deal with incorrect assumptions about their sexual orientation in routine service calls to insurance companies and the UK National Health Service: callers’ interactional choices were to go along with incorrect assumptions or correct the call taker by “coming out”. These conversation analytic studies further refine our understanding of the participants’ use of categories in commercial encounters. Kitzinger (2005) suggests that, due to their taken-for-grantedness, categories are recruited to accomplish mutual understanding, facilitate institutional interactions, and expedite service delivery. In line with Kitzinger (2005) and Mazeland et al. (1995), our study focuses on categories-in-use, showing how
participants in commercial interactions ascribe, acknowledge, or resist categories for specific interactional projects (Edwards, 1991).

2. DATA AND METHOD

We analyse a collection of 250 telephone calls, collected by the first author, between potential customers of a double glazing sales company and the salespeople who answered the phone. The project was set up as part of work for the ‘Conversation Analytic Role-play Method’ (Stokoe, 2011; 2014). CARM is an evidence-based, bottom-up approach to communication training that develops workshops and produces guidance to organizations on the basis of conversation analytic research about the sorts of problems that can occur in interaction, as well as the techniques and strategies that best resolve these problems. We were approached by a sales company who funded a project to better understand real time, live sales encounters, with a view to developing innovative and research-based training. Such encounters, despite the prevalence of being ‘recorded for training / quality / evaluation purposes’, are seldom studied in any detail by practitioners. They are also, still, rarely studied by academics in, say, business schools (with notable exceptions, e.g., Clark, Drew, and Pinch, 1994; Clark and Pinch, 2001; see also conversation analytic work by Kevoe-Feldman, 2015; Lee, 2009; Mazeland, 2004).

Callers to the company consented to have their calls recorded for quality and training purposes. The recorded data were anonymized digitally (to remove / transform names and other identifying features, and to change the pitch of voices) and transcribed using Jefferson’s (2004) system for conversation analysis (see
Hepburn and Bolden, 2013). The system does not just attend to what is said, but how it is said. It encodes detailed information to capture, forensically, the way talk is delivered, such as its pacing and timing, the start and end of overlapping talk, and other interactional features. As we will show, such features are consequential for understanding the subtle and nuanced ways in which categories become relevant to the conduct of the data we analyse.

Across the gamut of research methods textbooks, there is an absence of ‘how to do’ membership categorization analysis. Indeed, as Housley and Fitzgerald (2015) point out, “MCA has not tended to establish a fully worked out set of methodological tools to be applied to data” (p. 6). This is in contrast to conversation analysis, for which numerous much-used and much-cited textbooks exist, allowing new generations of scholars to learn about the approach and conduct their own work. Stokoe (2012a) pointed out that although a small number of books, articles and chapters include descriptions of categorization methodology (e.g., Baker; 2000; Hester and Eglin, 1997; Silverman, 1998; 2001), there is still little to help new scholars pick up and use MCA. Indeed, it is noteworthy that it is a paper by Schegloff, obviously associated with CA rather than MCA, whose ‘tutorial on membership categorization’ has far more citations than, say, Lepper’s (2000) textbook or Hester and Eglin’s (1997) edited collection. Unfortunately, the politics of, and divisions between, ethnomethodology, CA, MCA (and, in that mix, the (mis)representation and exclusion of discursive psychology; e.g., Button & Sharrock, 2016; Coulter, 1999) does not help promote MCA.

To address the lack of ‘how to do’ MCA, Stokoe (2012a) offered five steps for the study of categorial systematics:
1. Collect data across any (same or different) sorts of domestic and institutional settings; collect either/both interactional and textual materials depending on the focus of the study. Data collection may be purposive (e.g., gathering together instances of particular categories in use because of an a priori interest in that category) or unmotivated (e.g., noticing a category’s use and pursuing it within and across multiple discourse sites).

2. Build collections of explicit mentions of categories (e.g., man, human, boy-racer, anarchist, teacher, Australian, pianist, prostitute, lesbian, etc.); membership categorization devices (e.g., “occupation”, “parties to a crime”, “stage of life”, “sex”, “family”, etc.) and category-resonant descriptions (e.g., the descriptions “she’s eighty-nine years old” and “don’t be so testosterony” do not mention categories explicitly but are attributes that “convey the sense ... of being deployed as categories” Schegloff, 2007a: 480).

3. Locate the sequential position of each categorial instance with the ongoing interaction, or within the text.

4. Analyze the design and action orientation of the turn or text in which the category, device or resonant description appears.

5. Look for evidence that and how recipients orient to the category, device or resonant description; for the interactional consequences of a category’s use; for co-occurring component features of categorial formulations, and for the way speakers within and between turns build and resist categorizations.

Having ascertained the overall macro-organization of ‘buying’ calls (our data are not cold-call sales calls; prospective customers initiate contact with the company to set up appointments with salespeople, ask for quotes for new windows, etc.), for this paper we focused on a seemingly mundane feature of the calls, but one which
happened in almost all first encounters between customer and company: asking for the customer’s name. We collected instances across the dataset, organized them into different turn design types, and tracked their trajectory into related activities of establishing the parties to any ensuing sale via questions about titles or forms of address. As a membership categorization device, ‘parties to a sale’ partitions into ‘customer’ and ‘seller’, and our interest was in how the ‘seller’ established just who the ‘customer’ was. In the analysis that follows, we show how the seller’s questions enter the customer’s domestic domain in ways that become problematic for both parties, often in terms of understanding the seller’s reason for asking, and also by being forced to provide an account for not belonging to a mister-missus union.

3. ANALYSIS

Across the analytic sections, we examine, firstly, how sellers ask customers for their names, via three main turn designs:

a) Yes-no interrogatively formatted questions (e.g., “Can I take your surname?”);

b) Wh-questions (e.g., “What’s your name?”), and

c) Compound TCUs (e.g., “you’re mister…?”).

Sometimes questions about names generated titles as part of the customer’s answer, but if not, we show, second, how sellers establish the ‘parties to the sale’ via questions about titles and relationships via:
a) Yes-no questions (e.g., “Is it mister and missus?”);
b) Listing options and preferences for titles (“Is it miss, missus or ms”; “what do you prefer?”), and
c) Asking directly about a second party (“Is there a mister as well?”).

Finally, we show that and how asking for names, titles, and establishing ‘parties to a sale’ amounts to entering the customer’s domain, and how trouble can arise from categorial presumptions built into sequences that begin with the seemingly straightforward request for their names. We also show an example in which the seller manages to elicit relevant information without using forms of address that encode assumptions about marital status or sexuality.

3.1 Asking for names and titles

When callers take the first step towards becoming a customer (e.g., asking for a quote, or making an appointment for windows measurements to be taken), the seller must establish the name of their new customer. In the extracts below, we can see the main ways in which sellers accomplish this project. In the first two examples, sellers (S) ask yes-no interrogative (YNI) formatted questions, specifying that the customer (C) supply their surname. In general, YNI questions take a grammatical form which make relevant a ‘yes’ or a ‘no’ in response. But YNI questions are often also a vehicle for an action, such as requesting someone’s name. Consequentially the YNI question makes relevant a response to the action (or function) as well as (or instead of) the grammatical form of the question, with ‘yes’ being the preferred response in interactional terms (Raymond, 2003).
Extract 1: WC-39

1  S: C’n I take your s:urname please.
2  (1.0)
3  C: I’t’s Hanks.=Aitch ay en kay es.
4  (0.8)
5  S: ”#Aitch ay en kay es. #”

In Extract 1, the customer supplies her surname in response to the YNI, thus responding to the function of the question, rather than its format. She also, immediately, spells out her surname, in an additional turn construction unit (line 3). In Extract 2, C responds to both the form (“Yeah.”) and function (“Gibson.”) of the YNI. In response, the seller proposes a spelling (line 4) and treats the short gap at line 5 as confirmation (line 6).

   Based on the perceptually available pitch of their voices, the customers are categorizable as women, although, of course, they might not be (Edwards, 1997;
Jayyusi, 1984). The relevance of asking for a customer’s surname rather than anything else will become apparent as the analysis unfolds. However, consider the next two examples, which also involve YNI formatted turns.

Extract 3: WC-222

1 S: ^Can I just- (0.5) take your: (s-) (0.2) name please, =First,
2   (0.7)
3 C: Yeah.=It's Annie Wilkins.
4   (0.7)
5 S: Okay Annie? (. ) A- (0.2) Wilkins#-=And what's the address please,

Extract 4: WC-43

1 S: And u:mm: can I take y’surname please ^si:r.
2   (0.4)
3 C: Ye:h mister Churwater.

In Extract 3, the customer again responds to both format and function of the seller’s question, but note the repair at line 1. S appears to start asking for C’s surname, but repairs it to ‘name’: “(s-) (0.2) name”. In response, C supplies her given and surnames (line 4). In Extract 4, we return to the surname format; however, in response, C also supplies his title “mister” (line 3).

So far, we have examined instances in which callers supply what they have been asked for, and sometimes give more information than was required by the
interrogative formatted question (e.g., spelling out their surname or supplying their titles). In the next extracts, sellers use a different format in their question to accomplish the same project of establishing customers’ names.

Extract 5: WC-5
1  S: What’s your name please.
2       (0.5)
3  C: It’s Heidi Marshall.

Extract 6: WC-194
1  S: Okay? And uh what’s the name please.
2       (0.2)
3  C: Nella Rovia=I’ll spell that for you,
4       (0.2)
3  S: Thank you,

Extract 7: WC-6
1  S: hh uh:m ↑what’s your name madam please?
2       (.)
3  C: It’s missus Burn:s, bee you are en es.=

Extracts 5-7 show a second way to establish customers’ names, through wh-questions. In each case, C provides more than their surname, with both given and surnames (Extracts 5-6) and surname plus title in Extract 7. Note that, in both Extracts 4 and 7, S includes a form of address (“↑what’s your name madam”; “can I
take y’surname please ʔsɪˈr.ː/”) and, in response, customers supplies their title (“mister Chur:chwater”; “missus Burn:s”). This seems an efficient way to get both name and title in one adjacency pair of turns although, as we will see later, the use of ‘madam’ can be problematic.

Finally, sellers might initiate the first part of a collaboratively built compound turn construction unit (Lerner, 1991) to elicit names. That is, the seller constructs the first part of a TCU and the customer supplies its second and completing part. Extract 8 is an example.

Extract 8: WC-45
1 S: #Let# me take some details,=You’re mister,h
2 (0.2)
3 C: Mister Cai:n?

C completes the TCU, although he repeats ‘mister’ rather than just supply ‘Cain’. We found that compound TCUs requiring surname completion from customers occurred only with hearably male customers. That is, sellers did not routinely ask hearably female customers, “You’re missus…?” Rather, they asked women customers to provide their titles. Thus, we found continuing evidence of what feminist linguists (and cultural observers more generally) have objected to for many years: that ‘mister’, used across the dataset as a generic title for men, supplied no information about sexual orientation or marital status: it was used without risk of ‘error’ (see Weatherall, 2015). However, for women, ‘missus’ and ‘miss’ (and ‘ms’) were in regular use across the dataset, each containing a presumption about the woman’s relationship status and/or sexual orientation. We also found that women’s titles became
accountable in ways that men’s did not. We will address these issues in more detail in the following sections. Consider first the following extracts, in which sellers attempt to elicit women customers’ titles.

Extract 9: WC-39
1  S: and ar- ↓sorry are you ↑miss missus or ↓mizz. Which do you ↓prefer.£
2      (0.4)
3  C: Missus,
4      (0.3)
5  S: #Lovely.#

Extract 10: WC-50
1  S: And uh- ↑so- ↑so is your name: i- is it Bedford.=is that your ur[name.
2      [Yes.=it is.
3  C:      [(Which do you] prefer).
4  S: Bed- uh- sorry is it ↑↑miss ↑missus or ↓mizz.
5      [(Which do you prefer).
6  C: [It’s missus. ]
7      (0.3)
8  S: °#Missus.#°

Extract 11: WC-140
1  S: Lovely,=Are you m- a(m-) is it ↑missus miss or
2      ↓mizz.=Which [do you prefer.
In each of Extracts 9-11, the seller asks the customer what their preferred title is, from a selection of ‘miss’, ‘missus’ or ‘ms’. However, note that establishing preferred titles is not a straightforward activity – each extract contains trouble of some kind: an apology for asking, inserted under repair in Extract 9 (“and ar- ↓sorry are you…”), and hesitations, repair initiators and an apology in Extract 10 (“uh- sorry is it…”). In these cases, S selects the title ‘missus’. In Extract 11, however, C selects ‘mizz’ (line 3), and some disaffiliation follows. S confirms C’s selection at line 5, with emphatic and extended pronunciation followed by a laughed-through acceptance (“A(h)ll ri(h)ght.=nh nh nh?”) and continued laughter particles (line 5). C confirms ‘mizz’ with somewhat delayed reciprocal laughter (lines 6, 7), thereby not being in strong affiliation with C. S closes the sequence with “Right. No problem.” (line 9), displaying readiness to move on, but also – notice there is no laughter this time - the “No problem” can be hearable as minimizing any perceived deviance in C’s response, and thereby doing exactly that; that is, highlighting marital status, and belonging to the ‘ms’ category, as an issue.

3.2 Establishing the ‘parties to a sale’
Our study revealed that the double glazing company ask about customers’ titles in order to establish who the parties to the sale are. That is, although callers, as the party initiating contact with the double glazing company, are default incumbents of the category (prospective) ‘customer’, sellers’ questions about customers’ titles implied that they may not be the sole party to any subsequent sale of doors, windows or conservatories. Sellers treated customers’ titles as potential evidence of the existence of a husband, wife or partner; that is, a second ‘party to a sale’.

Consider Extract 12, in which the customer’s name has been established (see Extract 8: ‘Mr Cain’), and now the seller seeks confirmation of his particular domestic situation.

Extract 12: WC-45

1 S:  .hhh Is it mister an’ missus, 

2  (0.2)  

3 C:  Uh- no it’s just mister. 

The seller’s question treats ‘mister’ as the correct and sole form of address for the customer. This is possible because, as noted above, the default title for an adult man (unless corrected to, say, ‘doctor’) is ‘mister’. The title is ‘correct’ for both single and married men as it does not specify marital status, unlike ‘missus’ and ‘miss’. The fact that S asks, “Is it mister an’ missus,” tells us that he does not want to know C’s title so that he can subsequently refer to him as ‘Mr Cain’. Rather, he wants to know if there is a second ‘party to the sale’: a ‘Mrs Cain’.
The seller’s YNI prefers a confirming ‘yes’ response (Raymond, 2003); that C is heterosexual, and married to a woman who may be a second ‘party to the sale’. Note that C produces a dispreferred response: there is a slight delay at line 2 and the turn-initial ‘uh’ marks S’ question as inapposite. Finally, C produces a disconfirming ‘no’, followed by a correction of the seller’s incorrect presumption that the customer is married, and married to a woman. In fact, the caller is “just mister” (line 3). The semantics of ‘just’ in this case pertains to its “restrictive” function (Lee, 1987: 384), and is further evidence for an orientation to married as default. Here, the particle is used to disambiguate between ‘mister’ as a title applicable to any man and ‘mister’ as a part of the relational pair ‘mister and missus’. As we will see, this is not the only way ‘just’ is used in the data.

In Extract 13, the seller starts with a wh-question about the customer’s name, and immediately adds another TCU to the turn to establish title, using the same YNI format as the seller in Extract 12.

Extract 13: WC-61

1  S: Right what’s your name, (. ) is it
2         [mister and missus: ]
3  C: [ #uh-#]
4  C: It’s missus:
5           (0.2)
6  S: Just missus:
7           (0.2)
8  C: #Yeah#(p)
9           (0.4)
The seller launches two actions in his first turn, asking both for the customer's name and whether it is “mister and missus”. C starts to respond to the first action in overlap at line 3 (“#uh-#”) and then supplies her title at line 4. S treats this as addressing the second TCU and as a correction to the presumption built into this question (at least in that the question prefers a ‘yes’ response) that she is part of a ‘mister and missus’ couple. Instead, she states, “It’s missus,” deleting ‘mister’ as a party to the sale. S then checks her response that there is just one party at line 6: “Just missus;”, which C confirms. S’s use of ‘just’ is the same as in Extract 12; an understanding check due to the ambiguous status of ‘missus’ with regards to encoding (potentially) marital status and numbers of parties to a sale. Finally, but only having now established that C is a ‘missus’, S uses the compound TCU format to elicit her surname (lines 10-11; compare to Extract 8).

Other sellers asked a series of interrogative formatted questions to establish ‘parties to a sale’, with presumptions of membership of ‘heterosexual’ and ‘married’ categories built into them. Consider Extract 14.

Extract 14: WC-43

1  S:  Okay, is it just your self? Or is it mister’n
2    missus? or. .hh
3  C:  Mister an’ missus yeh.
4  S:  #Lovely.#
The seller, having elicited the customer’s name, proceeds to ask a more complex question about C’s marital status, relevant to ‘parties to a sale’. S’s turn is built from two complete YNI TCUs and a trail-off ‘or’ at the end. While the trail off ‘or’ manages the delicacy involved in answering S’s question (Stokoe, 2010), the first complete TCU, “is it just your↑se:If?” prefers a ‘yes’, and one might argue that as this is the first option, and S’s ‘best guess’ at C’s status. S uses ‘just’ differently in this first TCU. The particle features disjunctive categories: is C either single or married. As such, ‘just’ plays a role in the hierarchical construction of these alternatives, and implies that being single is somehow ‘less than’ being in an officially/legally ratified relationship. We will see further instances of this use of ‘just’ prefacing references to singlehood throughout the data.

Before C responds, S formulates a second TCU which, together with the first, builds an alternate interrogative with options (“or is it mister’n ↑missu↓s?”), and a further trail-off “↓or.” that C could complete if neither possibility has yet been named by S. S therefore offers, in pursuit of C’s ‘marital status’ category membership, different possibilities for him to select, confirm or reject. These redesigned questions handle the epistemic asymmetry between C and S; that is, while S displays stereotypical categorial knowledge about how the world is organized in terms of heterosexual couples living together and buying windows, only C knows about his actual living arrangements and, furthermore, is entitled to do so; as in other examples, S is not entitled to make a ‘best guess’. S’s subsequent questions both prefer a ‘yes’ confirmation, but the ‘or’ handles the possibility that C occupies an alternative category. But the questions, and their order of presentation, reveal what S takes to be the most likely category that C is a member of – single or heterosexually married. In 10, C confirms that he is “Mister an’ missus yeh.”.
In the following four extracts, the sellers ask the customers, both hearably male and female, similar questions to that in Extract 14. That is, the questions are multiple TCUs, multiple interrogatives, often with a trail-off ‘or’ to open up the possibility of types of relationship, vis a vis ‘parties to a sale’. Each extract starts after the seller has elicited the customer’s name.

Extract 15: WC-17
1 S: That’s lovely, =is it- ↑is it jus’ your↑↑self or is it mister an’ ↑missus that we’re ↑see[ing or. ]
2 C: [It’s mister]
3 (it’s/just) misterh
4 S: Just mister Higgins, =[that’s great stuff u:m, .hh ]
5 C: [Yep.

Extract 16: WC-75
1 S: .HHHHH £okay£.=And is it- is it just yourself?= 
2 =Is it miss:=?(m-)or is it_ mister and missu:s?= 
3 =o[r:.
4 C: [Uh::[: miss]us:.
5 S: [( )]
6 (0.5)
7 S °M:issus°.

Extract 17: WC-64
1 S: .pthhh (. ) °Right. .hhh °is it just your_self Missus
Floats ↓ or is there a Mister Floats as well?
(0.3)
C: There’s a Mister as well yeah,
( .)
S: Alrighty?

Extract 18: WC-194
S: Okay dokey? An:’ is it: just yourself?=↓or is there a mister as well.
(0.2)
C: Mister as well.
(0.4)
S: °Mister and missus°

Each extract starts with a sequence-closing turn that completes the prior action of eliciting names and/or titles (“That’s lovely,”; “.HHHHH £okay£.”; “.pthhh (. ) Right.”; “Okay dokey?”), and marks a boundary between that and the next activity. In Extract 15, S asks an alternative interrogative formatted question “↑is it jus’ your↑↑self or is it mister an’ ↑missu:s that we’re ↑seeing or.”, with the trail-off ‘or’ at the end of the turn (cf. Stokoe, 2010). The relevance of this question for establishing ‘parties to a sale’ is particularly clear given the inclusion of “that we’re seeing” (i.e., that the salesperson will see when they visit the customer’s home). C’s response comes in overlap with “that we’re seeing”, however, and appears to be responsive to the first part of the question, much like Extracts 12 and 14 (“It’s mister”). C then redoes his
answer ‘in the clear’, outside of the overlap, either by inserting the word ‘just’, or ‘it’s’; the first of which would show that, within the category ‘customer’, there is ‘just’ him; there is only one ‘party to a sale’ (compare to Extracts 13 and 14).

The prosodic features of the first part of her question, “is it jus' your↑↑↑self”, is hearably ‘positive’, perhaps conveying that being ‘just yourself’ is ‘no problem’ and not a marked category. This analysis is supported by assessment of S’s confirmation that it’s “just mister↓↓”: “=that’s great stuff”. So the fact that C is a sole party (and possibly ‘single’, widowed, or divorced) is not a problem for S; S has no stake in C’s category membership as a single man / sole party.

In Extract 16, S constructs a multi-TCU turn rather than an alternative interrogative, but it still has the trail-off ‘or’ at the end, cancelling the preference for any particular option (see Stokoe, 2010). Like all of our other extracts, S’s turn starts with the possibility that S is “just yourself”, before offering alternatives. In Extract 16, the options include ‘miss’; C confirms that she is ‘missus’ after the ‘mister and missus’ is supplied. Extracts 17 and 18 establish ‘parties to a sale’ with the same opening proposition that it is “just yourself” but asks the women customers if there is a “mister as well”. In both cases, C confirms that there is. Note, again, the gendered norms for forms of address: customers are asked about being part of ‘mister and missus’ not ‘missus and mister’; it is also presumed that both parties share a surname.

In the next extract, we return to the conversation in Extract 13. S has established that C is a ‘missus’ and then elicited her name via a subsequent compound TCU.

Extract 19: WC-61 (contd.)
At line 14, S moves on from establishing the name and title of the customer, and begins to inquire about ‘parties to a sale’. Note the repair initiators and hesitations that preface his question “is there two of ye?” (line 15). The turn is evidence of another way that sellers can establish ‘parties to a sale’, and it also shows that the seller treats ‘missus’ as not necessarily equating to two parties and the presence of a ‘mister – although the question prefers, and receives, a confirmation of the normative status quo (‘mister and missus’ go together as a standardized relational pair).

In the final extract, the customer has provided her name, ‘Heidi Marshall’, but no title, and the seller has not pursed it. Extract 20 provides an alternative way of establishing ‘parties to a sale’.
Extract 20: WC-5

1  S:  Were you thinking of the daytime or an evening?
2
3  (0.4)
4
5  C:  It doesn’t matter.
6  (0.4)
7
8  S:  .hh doesn’t matter, =>okay, =yeah, =.hhh ↑#uh ’ave# you
9  got any partner or anybody you want to be there.=’caus:e there’s obviously lots of choices and:
10  (.) sometimes I go and see people and they say ohhh: I
11  _wish my so and so (with) partner was here, =becaus:e
12  (.) I didn’t realise there was so much choice.
13  (.)
14  S:  (.h[hh] ]
15  C:  [(oh/no)] we’re both he::re. hh
16  (0.2)
17  S:  All r(h)ight, =(h)okay. (hh)=

Rather than ask about ‘parties to a sale’ via questions about forms of address, or
asking if there is a ‘mister’ to go with ‘missus’, in Extract 20 the seller asks in a
different way (“’ave# you got any partner or anybody you want to be there.”). Here,
S and C complete this project without making presumptions about, or disclosing,
marital status or sexuality: S uses the gender and sexuality neutral term ‘partner’,
and C refers to ‘we’ without specifying who ‘we’ are. Furthermore, S supplies an
account for asking this question in the first place: “’caus:e there’s obviously lots of
choices an:’ (.) sometimes I go and see people and they say ohhh: I wish my so and
so (with) partner...”. This serves to mitigate any possibility of the question being seen as illegitimately prying about C’s domestic status and living arrangements.

Extract 20 provides evidence for a potential ‘trainable’ item for salespeople: a method of establishing ‘parties to a sale’ without having to navigate the category work that risks making gendered and heteronormative assumptions about customers. It is important to uncover such alternative methods because they smooth the progress of sales calls. It is also important, when working in an applied setting, to provide users with evidence, where it occurs, of the trouble that is produced when they adhere to mandated interactional scripts – that they presumably do not realise are leading to problems between parties. In the next section, we focus further on how and what kind of trouble arises, and how sellers and customers build sequences that result in customers revealing details of their domestic and relational lives.

3.3 Category complications and the customer’s domain

In Extract 21, the seller has elicited the customer’s name (‘Ally Golding’).

Extract 21: WC-222

1  S:  So let me have a look on our diary then <madam>.
2  Now .hh it's got here the name um Ally: (g-) is it
3       (0.2) Golding.
4  (0.6)
5  C:  Yes[::: ]
6  S:  [Gold]ing. Okay,= .hhh and are you- a- Ally are you
7       a miss m:issus or [mizz::=Which do you (prefer)]
S asks for C's preferred title, using a format that requires C to place herself in one of three categories (note the use of the indefinite article: "are you a miss missus or mizz", line 7). C supplies a preferred response (“I'm a miss”) but prefaces her turn with signs of dispreference and an upcoming complex answer: an in-breath, “no” and “well” (Schegloff and Lerner, 2004). She expands her turn beyond answering S's question with the account that she is “a miss” but she lives “with her partner” (lines 7-8). S indicates an altered understanding of C's situation (“ah”, line 10), which is followed by laughter particles that are not reciprocated: S’s laughter might display an orientation to trouble which C is not receptive to (Jefferson, 1984) S formulates C’s situation (“it's partner as well”, lines 9-11), which C confirms.

In Extract 22, there is a similar lack of reciprocal laughter, as another customer selects ‘miss’ as the correct form of address.

Extract 22: WC-73

S: Lovely,=And is it ↑↑miss missus or ↓mizz.=
In Extract 23, S makes a series of incorrect assumptions about C on the basis of her title, ‘missus’.

Extract 23: WC-50
1 S: .hh awri:ght? So that’s my little checklist done.=
2 =So [.hh ↑↑when’s] a ↑good ↑time f’us t’pop along an’
3 C: [ Okay then, ]
4 S: see y’then or sort’f see you both ↓sorry.=If it’s
5 mister an’ miss#us#.
6 C: No no [it’s just me- yе[ah. It’s just me.
7 S: [perhaps- ↑↑Okay,
8 S: Or [if you’re (a lady on-)]
9 C: [Although it’s miss]us it’s just [me.]
10 S: [no ]; that’s
11 fine.

Immediately preceding the extract, C has given her name as ‘Mrs Bedford’. It is on this basis, then, that S proposes that the company will see them ‘both’. Note the position of “both” in line 4; it is in a repair of S’s initial proposal that the firm will see
just C. W then corrects herself, on the basis that it’s “mister an’ #missus,#”, leaving both options open. C then both confirms that it is ‘just me’, as well as correcting S that “although it’s missus it’s just me” (line 5). Note the use of the contrastive/depreciative ‘just’, as in Extracts 14-17: In Extract 23 it is even clearer because C could have answered in line 6 “it’s just missus”, which would have disambiguated her status without further implications about the hierarchical relationships between being single versus married. Instead, by answering “it’s just me” she contrasts her actual marital status with the expectations of couplehood pervasive in S’s prior turn. By responding “it’s just me” C also shows that she is the sole party to the purchase, which “it’s just missus” wouldn’t have done quite as clearly. Incidentally perhaps, it looks like C is one of the few who actually ‘gets’ why S asks. But even so, her response highlights the risks involved in asking: representing one party and not one of two might involve delicate matters such as recent illness or death in the family. Here, then, S and C jointly orient to the cultural assumption that a member of the category ‘missus’ is heterosexually married with a relevant ‘mister’.

In Extract 24, the seller’s use of ‘madam’ is problematized by the customer. This extract is particularly interesting for the basis of S’s complaint about ‘madam’ and its categorial inferences.

Extract 24: WC-91

1 S: >C’n I’ave your na:me< madam.
2 (1.3)
3 C: You ca:n.
4 (0.4)
5 C: Just don’t call me madam.=I hate that,
6 (.)
7 C: _Sorry._↑↑Heh he hh]
8 S: [( )- hh]
9 _ (0.2)
10 S: Heh heh
11 _ (0.2)
12 S: .hhh I’m [tryin’t’sound clear and professional.
13 C: [Right I know you-
14 _ (0.6)
15 C: Sorry?
16 _ (0.2)
17 S: I’m tryin’t’sound <clear> and profe:ssional. Heh
18 C: Oh right. [=w’ll madam sounds like um .h
19 S: [Heh heh heh
20 _ (0.3)
21 S: .h[heh
22 C: [I dunno.
23 _ (0.5)
24 S: [Yeah. ]
25 C: [I won’t] go there but- [no..uh eh ]
26 S: [> No no< is i-] hhhh
27 _ (0.5)
28 S: ↑Ha ↑ha ↑ha heh. .hhh=
29 C: =.↑hhehhh
30 S: And’ _ an’_ what’s your address, please.
31 C: <Sorry my _name is <Jane _ Dempsy>
After objecting to being referred to as ‘madam’ (line 5), C apologizes for her objection (line 7) and the seller both laughs and provides an account for his actions (“tryin’t’sound clear and professional”). So both parties manage potential disaffiliation. Note, though, what happens at line 18, as C accounts for her objection to S’s use of ‘madam’: “madam sounds like um .h”. She does not complete the turn; she does not explicitly unpack the category-bound features of ‘madam’, though both participants appear to share the same stance towards the unnamed inferences. At line 25, C further states “I won’t go there”, orienting to the fact that there are meanings of ‘madam’ that they perhaps both share that are ‘unsayable’. One possibility, of course, is that ‘madam’ connotes ‘brothel-owner’ and/or ‘prostitution’. Later, however, C states that “it’s an expression of somebody called a right madam aren’t they?”. Here, a ‘right madam’ carries a different set of inferences. Our job as analysts is not to pin down what members mean more precisely than members themselves do; language is a resource for doing inferential work, and this is clear from Extract 24 (see Stokoe, 2012b).

In the next extract, S’s multi-TCU question about C’s title, and thus ‘parties to a sale’, does not include the correct option for C.

Extract 25: WC-24

1  S: .hh an’ is it uh- is it just ↑missus or is it mister
2  an’ ↓missus.=o:r [um- m-]
3  C: [(Only me.)]
4  (0.2)
5  S: #U-# ok- ↑go y- is it- i- it’s just yourself is
S’s questions, again built from an assumption about the most likely heteronormative domestic arrangements of C, generates the response “Only me.” from C. S’s word selection is particularly interesting given that C is asked if it is “just missus” (not, as in earlier extracts, “just yourself”), as if ‘missus’ is a title appropriate for a single woman. S then goes on to propose that it might be “mister and missus”. Only then does C begin to answer “only me”, in overlap. S’s response to C is delayed (line 4), full of perturbation (hesitations and cut-off sounds, line 5), and a formulation of what she takes to be the upshot of C’s response “↑so y- is it- i- it's just yourself is it.”. Note the first use of ‘just’ (line 1) can both disambiguate the meaning of ‘missus’ as well as contrasting the two categories in the TCU (single vs. married). It is heard by C in line 3 as doing the latter. So, at line 5, S goes along with this meaning, through the use of “just yourself”, in her understanding check.

C accounts for her situation with “Yeh- I live with my mum.” (line 7), thereby disambiguating her status as a ‘missus’ who is ‘just herself’ – despite actually living with her mother.

S’s slightly delayed response, “↑↑Oh ↑right okay,“, indicates that, until now, she has been unable to comprehend C’s domestic situation as such (see Heritage, 1984). Again, we see that the sellers’ questioning runs the risk of putting C in a position where they need to account for their domestic situation, when it is not clear how this is of relevance to the purchase.
That sellers’ questions about titles make customers’ domestic situation and relationship status relevant is explicit in the next extract.

Extract 26: WC-77
1 S: >Is it j’yourse:lf? or is it< mistuh an’ missus?
2 ↓Or.=.hh
3 (.)
4 C: Uh: no thank god I’m ↓£single.
5 S: Oh right then.=£So _HEh heh .hh so it’s just mistuh
6 Caves.

Here, both C and S laugh and smile at C’s categorization of himself as “↓£single.”. The use of ‘single’ provides evidence that ‘mister’ does not disambiguate ‘married’ and ‘single’ men, and also that asking about titles in pursuit of establishing ‘parties to a sale’ inevitably supplies inferences about marital status and, even more implicitly, sexuality.

The final two extracts in this section show that, even when sellers establish that there are potentially two customers within the ‘party to a sale’, customers may disaggregate themselves from such a coupling.

Extract 27: WC-61
1 S: .th ↑What’s a good time for you ↓bo:th.
2 (0.2)
3 C: .hh Uh:::m (0.7) .ptk (.) is i- (uh-) ↑quarter past
four: would be: (0.2) uh th- (. ) like su:re that I’m-
I would be in in case of any tr:affic or any[thing; ]
S:
[R:right,]=
=\ and what a- what about: your:- your \husban:d.
(0.2)
C: .hh Uh:m- (. ) he’ll be the \same.
(0.3)
C: By the [(time/same) ]
S: \right,=You’ll \ both- you’ll both be \there
then.
(0.2)
C: \Y:eah\.
(0.2)
S: [Oh that's \good. ]
C: [Or- or- it might-] it might just be me.=but it
doesn’t matter if \not anyway#, 
S: \R:ight.\ f \okay.
S: .hh uh::- (0.6) \four \ thirty.

Extract 28: WC-109
S: =That’s great.=All right then,=\So so ten o’clock
tomorrow morning then, 
( .)
C: Okay= 
S: =And \we look forward to seeing you both then mister
↓Jason.
C: Uh::m:: I- I don’t know whether my wife is working,=I will be available,.hhhh uh [because] we do: work for
S: [m- ]
C: the hospital.=So it’s a shift work and uh we (0.2)
probably we will move around and I’m not I’m not
every sure that: uh .h[hh ] she
S: [Sure.]
C: will be available but uh .hhhh [uh:m
S: [yeah.=We
C: [Uh: ]
S: [Okay.]=W- (uh w::::-) uh- yeah,=I mean w- w’ll we can
see you tomorrow still or would you like to do it when
your wife’s there too?=It’s [entirely up-]
C: [Uh no no no I
think the d- the d:- the decision is absolutely: (.)
uh:m .hh it depends on me:.

In both extracts, the seller attempts to establish that both customers within ‘parties to a sale’ will be present when they visit their homes (“What’s a good time for you both.”; “You’ll both- you’ll both be there then.”; “we look forward to seeing you both then”). However, in Extract 27, the customer initially confirms that ‘both’ parties will be there, but then modifies that response “it might just be me.=but it doesn’t matter if not anyway,” (lines 18-19). In Extract 28, C challenges the presupposition that ‘both’ will be there when the seller visits, providing an account about his wife’s working patterns. S checks who, from the potential ‘parties to a sale’ C would like to
be present (lines 18-20), but S rejects the possibility that they wait for his wife, stating that “the decision is absolutely: (.) uh:m .hh it depends on me:.” (lines 22-23).

In both of these extracts, then, customers push back on the seller’s assumption, or preference, that both partners are required to engage in the sales process, regardless of their married status. This has implications for the push from sellers to establish whether or not anyone other than the caller is a ‘party to a sale’ – whether there is more than one party to the sale can be a relevant issue for the participants, but is not dealt with in a transparent way here, as in much of our data.

4. DISCUSSION

In this paper, we have provided an empirical example of how membership categorization analysis can be used to identify systematic categorial practices that are embedded in sequences of action. In particular, we have shown how, across a large corpus of sales calls between prospective customers at a double glazing sales company, categorial matters were routinely initiated and managed as sellers elicited personal information about prospective customers – at the service of identifying incumbents of the category ‘customer’ within the membership categorization device ‘parties to a sale’.

Our analysis focused on the way that sellers initiated a seemingly straightforward action, to elicit customers’ names, and how this occasions the surfacing/reproduction of other more ‘personal’ categories even when they are not directly relevant to the business at hand. Sellers typically did this in one of three ways: via yes-no interrogatively formatted questions (e.g., “Can I take your surname?”); wh-questions (e.g., “What’s your name?”), or compound TCUs (e.g., “you’re mister…?”). We noted
that only the latter method was used only with male customers; women were not invited to completed equivalent compound TCUs (e.g., “you’re missus…?”) to elicit their names unless the seller had already established the customer’s title. Sometimes questions about names generated titles as part of the customer’s answer, but when they did not, we found that sellers established the ‘parties to a sale’ via questions about titles and relationships (e.g., “Is it mister and missus?”; “Is it miss, missus or ms”; “what do you prefer?”; “Is there a mister as well?”).

Our analysis revealed that and how asking for names, titles, and establishing ‘parties to a sale’ amounted to entering the customer’s personal and domestic domain, and how trouble arose from categorial presumptions built into sequences that began with the seemingly straightforward request for their names. We also identified a method of eliciting this information without using forms of address that encoded assumptions about marital status or sexuality. We suggest that identifying such methods, which smooth the progress of the call without producing disaffiliation between speakers, can provide evidence to underpin training. Based on our study, we would demonstrate to trainees that establishing ‘parties to a sale’ through the use of titles is not effective, and we would show how they lead to various interactional problems to do with understanding and even running the risk if ‘invading’ the customer’s domestic life. Salespeople, we assume, do not realise the trouble that arises when they pursue ‘parties to a sale’ via questions about, say, titles and forms of address. This is also despite some evidence that sellers find it difficult and accountable to ask about customers’ titles (we identified numerous instances in which sellers’ questions were littered with errors, hesitations, repair initiators and apologies). In future research we would seek to establish more effective ways of establishing ‘parties to a sale’, employing data from other companies and settings.
Our analysis also revealed that heteronormative assumptions about people’s
domestic arrangements are alive and well at the time of writing, supporting earlier
research by Kitzinger (2005). Men and women are presumed to be members of a
‘mister and missus’ (and not even ‘missus and mister’!) standardized relational pair.
As Kitzinger noted over a decade ago, “the persistent and untroubled reproduction of
a taken-for-granted heteronormative world both reflects heterosexual privilege and
(by extrapolation) perpetuates the oppression of non-heterosexual people … unable
to take for granted access to their culture’s family reference terms”. Our research,
like hers, also “shows how the heteronormative social order is reproduced at the
level of mundane social interaction, through the everyday conversational practices of
ordinary folk” (p. 477). Furthermore, the standard form of address for men (‘mister’)
does not convey marital status or sexuality: it is ‘correct’ for both single and married
men. On the other hand, women’s titles (‘missus’ and ‘miss’) are presumed to do so.
And we found cases where women who categorized themselves as ‘ms’ or ‘miss’,
rather than the much more frequent ‘missus’, were laughed at by salespeople.

Overall, this paper makes a continuing contribution to bring together the
projects of both conversation analysis and membership categorization analysis. It
shows how one can find things out about the workings of “the world”, “society”, and
“culture-in-action” (Fitzgerald et al, 2009: 47), via the analysis of the categories,
membership categorization devices, and their related apparatus that are built into
“particular courses of social action and their organization into systems” (Heritage,
2005: 104). We have seen that and how people orient to, as resources for actions,
what might be regarded as theoretical notions such as ‘category-boundedness’ and
‘inference’. We see this in the way speakers deploy categories as shorthand for
unspoken meanings, categorial ascriptions and incumbencies (e.g., ‘missus’ implies
things about marital status; ‘madam’ implies things that need not be unpacked but can still be objected to) that may be challenged and rejected, or collaborated in and confirmed. And we have seen all of this in an environment that is seldom studied – the sales encounter – and that categorial systematics can have implications for and applications in the everyday life of organizations.

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