

# SENSE-MAKING METHODOLOGY INFORMING MACRO AND MICRO ORGANIZATIONAL CHANGE

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*Abstract: Organizations change. Some changes are planned, some imposed by circumstances. Regardless, management of organizational change may determine whether change produces stated desired outcomes or not. Brenda Dervin and colleagues' Sense-Making theory may provide an effective means for producing methods that enable organizational change. It may also provide means for creating an adaptive, change-able culture within an organization. In this presentation a brief background of organizational change management is addressed. Adapting Sense-Making methods used in other situations and developing and testing new methods true to Sense-Making, while applying them in organizational settings, continues to be the focus of this research.*

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1.0 Research Questions/problems – How does Sense-Making theory enable the development of methods for managing organizational change?

2.0 Background information regarding organizational change

2.1 Size of organizational change can be categorized on a continuum:

← Less Change		More Change →	
<b>Examples of normal amounts of change</b>	<b>Examples of more change</b>	<b>Examples of major change</b>	
Turnover in personnel	Moving one department into a different division	Mergers	
Promotions	Layoffs	Acquisitions	
Changing markets with adjustments made	New product line added/deleted	Business Process Redesigns	

## 2.2 Change interventions occur either:

- 2.2.1 After upper management has already determined the why, how, and what of the change
- 2.2.2 Prior to any change decision, when an organization desires to create an action-based culture, a learning organization, a flatter, less hierarchical structure, or the like.

## 2.3 The needs of a change management program for major changes, as well as for any move towards producing the type of culture listed in 2.2.2 above, include the following:

- 2.3.1 Conserve the collected wisdom prior to making changes
- 2.3.2 Identify problems, preferably prior to when they occur
- 2.3.3 Prepare individuals for change
- 2.3.4 Limit potential problems (many of them political)
- 2.3.5 Communicating during change
- 2.3.6 Creating a relational culture within an organization

## 3.0 Central themes of Sense-Making for developing methods informing organizational change

- 3.1 The human subject, embodied in materiality and soaring across time-space- all inner and outer worlds of an individual are relevant; this is a metaphor, a way of looking at individuals within an organization (Dervin 2003, pp. 139, 151) and is visualized in the Sense-Making Metaphor (Dervin 1998).
- 3.2 Conditions directly affect how individuals act and must be attended to since the patterns and ways in which individuals act and make connections cannot be assumed (Dervin 2003, pp. 140, 145)
- 3.3 A focus on verbings and processes both in probing sense-making and sense-unmaking in interview settings, as well as the center piece for more effective interpersonal communication (Dervin 2003, pp. 141-142).

## 4.0 Sense-Making approaches for enabling organizational change

- 4.1 Creating a means of discovering the unique point of view of each person in any situation
  - 4.1.1 For conserving collected wisdom - situated micro-element interviews, conducted individually as well as group interviews with those doing the same function
  - 4.1.2 For preparing for change – individual interviews probing 3 relevant micro-element situations from 3 different change experiences in an individual's past for help in understanding how an individual may react to coming change
  - 4.1.3 For limiting potential problems – micro-time-line interviews with sponsors and key middle managers to uncover potential roadblocks to the change initiative.

- 4.2 A group meeting approach for surfacing the collective point of view a group has in any situation – getting multiple perspectives on an issue, challenge or problem
  - 4.2.1 For identifying problems - individuals speaking of their actions, how they were led to the actions, how they evaluated their actions, as well as what they wished to have happened, done in rounds
  - 4.2.2 For limiting potential problems – done through interviews in groups where potential roadblocks from sponsors, leaders, and key departments are probed
  
- 4.3 Means for disciplining listening, speaking and writing
  - 4.3.1 For communicating during change and for creating a relational culture leaders should become facile at:
    - 4.3.1.1 Encouraging and motivating direct reports to identify with the organization’s vision
    - 4.3.1.2 Encouraging open discussion regarding organizational visions and exploration of ways differing visions interconnect
    - 4.3.1.3 Have direct reports align with objectives and values but have them discuss time and attention to other issues with a discussion of why
    - 4.3.1.4 Fostering trust in and emotional identification with the leader
    - 4.3.1.5 Respond to each executive’s report. Tell them your perceptions, what you want them to do differently, and why
    - 4.3.1.6 Providing intellectual stimulation where executives are encouraged to question their own ways of doing things. This includes:
      - 4.3.1.6.1 Providing an atmosphere of open exchange that is intellectually stimulating and interesting to be involved in
      - 4.3.1.6.2 Creating an environment where all can safely share their successes as well as their struggles
  - 4.3.2 For creating a learning/relational environment
    - 4.3.2.1 Write out core values – list and repeat each time there is written and oral communication
    - 4.3.2.2 Knowledge of one’s self (*monthly SM report*)
    - 4.3.2.3 Knowledge of one’s work (*monthly SM report*)
    - 4.3.2.4 Knowledge of one’s co-workers (*monthly meetings*)
    - 4.3.2.5 Require everyone to have a continuing self-learning plan – it is understood that this is handled individually and one’s learning plan may have a significantly different mix than someone else’s (*SM interview during bi-annual reviews*)
    - 4.3.2.6 Value assumption debates using Sense-Making ground rules
    - 4.3.2.7 Improve empowerment by pushing decision making closer to the experts and to those whose jobs require they put decisions into practice in real on-going situations
    - 4.3.2.8 Support and build in opportunities for communicating and sense-making in real time

- 4.3.2.8.1 In which everyone is routinely asked what conclusions they have come to, what questions and confusions they are struggling with, what unresets they have which may indicate things that need dealing with
- 4.3.2.8.2 In which listening to others is as important as speaking and the general rule is one of providing equal access to speaking time
- 4.3.2.8.3 In which more emphasis is placed on finding the strengths in contributions from others as in eliminating and critiquing these contributions
- 4.3.2.8.4 In which in so far as possible criticism is procedurally separated from the ideas and contributions of individuals

## 5.0 Some specific change management actions for creating a learning/relational environment

### 5.1 The President/Director/CEO can listen by:

- 5.1.1 Taking time to just listen to the management team
- 5.1.2 To undergo by showing yourself as one who is not above help and growth but as one who interacts with the consultant/facilitator in the same way the executive group interacts in the suggestion below
- 5.1.3 60 to 90 minute weekly meetings, led by the consultant/facilitator, where you do not talk except for the last five minutes, but listen to the interactions of your executive team. The team will operate using a Sense-Making meeting strategy incorporating a “Change project rounds” approach and a “Round robin” approach, all geared to the change process the organization is undergoing. See appendix for a detailed explanation of these meeting approaches. At the conclusion of the hour the CEO gives a response on what he/she has heard. The response should be affirming/supportive of the executive team’s talking, giving particular verbal recognition to those who have openly spoke of their situation.

### 5.2 For creating a learning environment/relational environment leaders can:

- 5.2.1 Encourage managers and staff to identify their work with the organization’s vision and values. This can be accomplished by:
  - 5.2.1.1 Establishing Vision and Values working groups throughout the organization where individuals reflect on organization vision and values and how they intersect with (are congruent with, are in contradiction with, are aligned with) their work
  - 5.2.1.2 Facilitators will be needed for this. Two facilitators should be trained from each group. The training will help them know how to use Sense-Making methods.
    - 5.2.1.2.1 Groups should be no more than 8 in size
    - 5.2.1.2.2 Groups should use Sense-Making “Consensus rounds” and “Helping participants co-orient” approaches. The “Round robin” approach may also be used

- 5.2.1.2.3 When individuals speak of something they feel is incongruent, the facilitator should probe using Sense-Making questions
- 5.2.1.2.4 Group discussions should be written up and passed up to the next level of leadership
- 5.2.1.2.5 Groups should meet weekly during the first 2 months of a change initiative and then monthly for ongoing monitoring
- 5.2.2 Supporting the team in their projects
  - 5.2.2.1 Have direct reports align with objectives and values but have them discuss time and attention to other issues with a discussion of why
  - 5.2.2.2 Respond to each team member's report and tell them your perceptions; what you want them to do differently and why
    - 5.2.2.2.1 How does what you're doing relate to your values?
    - 5.2.2.2.2 What is your timetable
    - 5.2.2.2.3 What leads you to this?
    - 5.2.2.2.4 How concerned are you?
    - 5.2.2.2.5 Gap questions to use in discussing the big picture – what are you trying to figure out?
    - 5.2.2.2.6 Helps questions
    - 5.2.2.2.7 Bridges questions
    - 5.2.2.2.8 Situation stop questions

Work is to be done in three Phases – timetables for accomplishing this vary depending on the size of the organization.

Phase I – Interviewing and analysis

Phase II – Change Management Training

Phase III – Management during change while putting in place the means for the organization to learn and adapt