Sensemaking as a Tool in Working with Complexity

By Merryn Rutledge

Sensemaking, a process most clearly defined by Weick (Weick, 1995; Weick, Sutcliffe, & Obstfeld, 2005), is a way group members discover ways of understanding and talking about complexity. By learning to recognize sensemaking in task groups, practitioners enhance their ability to track and show groups their progress in problem solving, even when members clash and groups find it hard to wade through complex problems.

In this article, I first summarize Weick's (2005) eight features of sensemaking and then show how the OD practitioner can listen for the emergence of this process. As a way to underscore the value of sensemaking, I summarize findings from a qualitative research study on sensemaking (Rutledge, 2008) that shows the importance of sensemaking to group members themselves. Finally, using a case study, I suggest how practitioners can assist client groups by reflecting back to them the evidence of sensemaking.

Features of Sensemaking

Original ideas about sensemaking (Weick, 1995; Weick et al., 2005) helped me understand how groups involved in complex problem solving use sensemaking to address puzzling questions and move toward action. Like Straus (2002) I speak of problem solving as collaborative endeavors covering the gamut from addressing organizational challenges to capitalizing on strengths, planning initiatives, and birthing new ideas. According to Weick et al. (2005), sensemaking is a way of creating

a shared understanding that is plausible enough for a group to move toward action. For example, in a statewide public-private Chronic Care Initiative[1], one critical Steering Committee meeting centered on members puzzling over ways to bolster the legislature's support for continued funding. Through sensemaking, the group discovered a plausible explanation of the Initiative's unique significance. They would use this explanation as the basis for an influence strategy with the legislature.

When Weick et al. (2005) studied sensemaking in a hospital emergency room, he identified eight features. *Table 1* (see next page) presents these eight characteristics of sensemaking and matches them with conditions and stages that I will argue a consultant should learn to recognize. According to Weick, the first feature of sensemaking is that it is a communication process through which groups make sense of events and circumstances that affect them. The next two features are that (2) groups use reflection to (3) notice uncertainty or confusion that influences their work. Complexity is great and uncertainty high, for example, when a group operates in a political arena, when members come from different organizations, industries and/ or sectors, when members see the focal problem as intractable, and when external factors like government regulations and restricted use of funding constrain the group. In my consulting practice, I have

---

1. Throughout this article, the names of all groups and their members have been changed.

observed sensemaking in groups creating a health care delivery system, addressing regional hunger, cooperating on national public health issues and coordinating the use of woody biomass as a regional energy source.

Additional characteristics of sensemaking address how sensemaking develops. The fourth feature is that sensemaking "starts with noticing and bracketing. . . guided by mental models" (Weick, et al., p. 412). For example, group members notice puzzling events, apparently irreconcilable points of view or critical incidents that demand a response. Next (feature 5), group members spontaneously find categories that help them make sense of the puzzling information or questions they have singled out for immediate attention. As group members try out these categories, it is as if they are asking, "is *this* a description of a pattern we are seeing?" A sixth feature of sensemaking occurs when the group reaches "approximations" (Weick et al., 2005, p. 414) or "plausible images" (p. 409) that explain and suggest a response to the puzzling information they seek to understand.

The final features of sensemaking address how groups use sensemaking. The seventh feature is that a sensemaking account "involves updating and is progressive" (Weick et al., 2005, p. 413-14) as the group's understanding of the focal problem continues to develop because of new perspectives, information or changing events. The eighth feature of sensemaking is that the plausible explanation helps the group move toward action.

Identifying Sensemaking as It Emerges

Practitioners can assist groups by calling attention to sensemaking as it emerges in group discussion. First, though, a practitioner has to be able to spot sensemaking as it unfolds.

Analyzing audio-transcripts of meetings (Rutledge, 2008), I found Weick's theory invaluable in identifying sensemaking. However, as a consultant I find that keeping up with eight sensemaking features is impractical. After

all, when OD practitioners are involved in client problem solving meetings, they must keep up with many aspects of group process and group dynamics. The OD practitioner can watch for two conditions when sensemaking is likely to happen and then listen for the emergence of sensemaking in four stages.

In terms of conditions, the fact that sensemaking is a social process means that it is likely to happen in meetings. Because sensemaking responds to complexity, uncertainty, ambiguity or chaos, the OD practitioner listens for these in the focal problem, the context in which the group operates and in group dynamics.

Table 1: Theoretical Features of Sensemaking as They Relate to Sensemaking in Practice

Eight theoretical features	Two conditions for and four stages of sensemaking-in-practice
Sensemaking is a social process of making sense, through communication, of the circumstances in which people collectively find themselves (Weick et al., 2005, p. 414)	**Condition:** Sensemaking is likely to occur in meetings
Sensemaking responds to ambiguity and uncertainty (Weick, 1995). Sensemaking organizes flux (Weick et al., 2005, p. 412)	**Condition:** Sensemaking may occur when complexity and uncertainty are high, ambiguity is great, the focus problem and/or external environment is in constant flux, the circumstances and/or focus problem is experienced by the group as disorderly or chaotic
Sensemaking uses retrospect to make sense of the puzzles observed (Weick et al., 2005, p. 413)	See above and stage 1, below. Group members begin to notice specific uncertainties and explicitly or implicitly ask, what has happened and is happening that is affecting our work?
Sensemaking starts with noticing and bracketing guided by mental models (Weick et al., 2005, p. 412)	**Stage 1:** Members of the group bracket a key question or part of the complexity they see and ask: what is this about?
Sensemaking is focused on extracted cues (Weick, 1995, p. 49). Sensemaking involves labeling and categorizing to stabilize the streaming of experience (Weick et al., 2005, p. 412)	**Stage 2:** Words and phrases are tried out by various members and repeated as images that may contribute to answering bracketed concerns or question(s)
Sensemaking is driven by plausibility rather than accuracy (Weick, 1995, p. 55). It creates understanding through approximations (Weick et al., 2005, p. 413-14) or plausible images (p. 409)	**Stage 3:** Group members coalesce around a plausible or approximate story that addresses the bracketed question(s)
Sensemaking is about action: what's going on here? followed by what do I do next? (Weick et al., 2005, p. 414)	**Stage 4:** The plausible story creates a path for and moves the group toward action
Because people are always in the middle of things (Weick, 1995, p. 43), sensemaking involves updating and is progressive (Weick et al., 2005)	Related to stages 2 and 3. Words, phrases and story threads are tried out. Some fall to the wayside and some are carried forward. Some may be revised in this meeting or later

In one Chronic Care Initiative Steering Committee meeting, for example, there were several uncertainties. The Committee was evaluating the Initiative's progress on the eve of the legislative season when Initiative partners vie for legislative appropriations. As heads of major health care organizations, Steering Committee member roles were ambiguous; sometimes they went before the legislature on behalf of the Initiative and sometimes on behalf of their own organization's interests.

Once alerted to conditions that are ripe for sensemaking, the OD practitioner watches for sensemaking to emerge in four stages. These four stages are summarized in Table 1, next to the parallel features in Weick's (1995, 2005) theory. As a practitioner, I find that viewing these theoretical characteristics as sequential stages makes it easier to track the emergence of sensemaking as a meeting unfolds.

In the first stage, the group focuses on one or more subsets of the overarching problem. Weick et al. (2005) calls this "bracketing," (p. 412) as the group puts brackets around or highlights particular, puzzling issues. In the Initiative meeting where I noticed sensemaking, bracketing began with reflections on changes in the legislative environment. Members said how consultants hired by the legislature as health care reform advisors defined the Initiative as a "disease management program." Several members expressed criticism of disease management. Then several people said that the Initiative sought to be broader. Group members were trying to understand what was different than before and to discern the meaning of these differences. What had changed during the previous year and what new vulnerabilities had these changes revealed?

In the second stage of sensemaking, the practitioner begins to hear patterns in several members' way of categorizing and labeling what they notice. To picture this second stage, imagine standing on a bridge overlooking the stream of conversation. You see repeated words or phrases that, like objects in the current, bob to the surface, then disappear, and then bob up again as words or phrases are carried along. In the

Chronic Care Initiative meeting, "disease management" was the first phrase that was carried along. Different members expressed their understanding of disease management and its place in the larger health reform and policy picture. Other members pointed to its limitations as an accurate description of the Initiative. Suddenly another label bobbed up when Initiative members began to repeat the word "system-ness" as a possible

the group as plausible because more and more group members coalesce around it.

Members of the Initiative Steering Committee continued to express what "system-ness" might imply about the Initiative's distinctive approach to chronic care. "System-ness" is a phrase Dr. Ed Wagner (2006), Director of Improving Chronic Illness Care, uses to describe a new way in which patients partner with provider teams within a comprehensive

In the Initiative meeting where I noticed sensemaking, bracketing began with reflections on changes in the legislative environment. Members said how consultants hired by the legislature as health care reform advisors defined the Initiative as a "disease management program." Several members expressed criticism of disease management. Then several people said that the Initiative sought to be broader. Group members were trying to understand what was different than before and to discern the meaning of these differences. What had changed during the previous year and what new vulnerabilities had these changes revealed?

description of what was different about the Initiative.

Research on sensemaking (Rutledge, 2008) shows that several or even many conversation exchanges may occur before a word or phrase pops back to the surface and is carried along. Repetition does not come from a member or a faction who is lobbying or pressing a point of view. Instead, as in the Initiative meeting, members appeared to be trying out concepts that might be provisional answers to the bracketed questions: what is different than a year ago? How do we counter the juggernaut message that the Initiative is or should primarily be about disease management?

The practitioner listens for two things in the third stage of sensemaking. First, the categories and labels are woven into an emerging story that addresses the concerns group members have highlighted for immediate attention. Secondly, this emerging story is evidently understood by

health system supported by reformed community and state policies. Disease management, by contrast, describes how a provider works with a patient or how insurance companies and government programs make payments. Disease management steps are smaller and more discrete.

Using "system-ness" as a framework, Steering Committee members spelled out these differences with growing clarity. The group coalesced around the concept of "system-ness" as though it were a hat that a member would try on, put down, another member would try on, hand to another member, and so on.

A key to sensemaking lies in the plausibility or approximate nature of the story. In the Chronic Care Initiative meeting, the group did not inquire too deeply into whether every aspect of "system-ness" fit their endeavor. Instead, sensemaking sufficed to give the group a working story draft that enabled it to take action.

This move toward action marks the fourth stage of sensemaking. At the end of the meeting, the Initiative Steering Committee agreed to develop a legislative strategy around the concept of "system-ness."

Sensemaking Is Not Dialogue or Formal Decision Making

I have found that comparing sensemaking to dialogue and formal decision making helps me see the unique contribution of sensemaking to group problem solving. Like dialogue, sensemaking leads a group to discovery. But whereas the emphasis in dialogue is on "deconstruction and rebuilding of the group's belief systems" (Simmons, 1999, p.153), sensemaking largely leaves belief systems alone and lets the plausible story mediate between differences in member viewpoints and among unresolved complexities in the focal problem. In the Chronic Care Initiative meeting, the group's evident purpose was not to surface and question assumptions and beliefs (Senge, Kleiner, Roberts, Ross, & Smith, 1994) but rather to find a description of the Initiative that would suffice as the basis for an influence strategy.

There are other differences between sensemaking and dialogue. As Isaacs (1993), has shown, skill in dialogue develops slowly, whereas sensemaking is a process that arises spontaneously in groups. Furthermore, the aspiration that a group will learn dialogue carries with it an expectation that people will learn to put all their assumptions, conclusions and expectations on the table, and that group members are self-aware enough to recognize hidden psychological, emotional and group dynamics (Bohm, 1996). Sensemaking, by contrast, acknowledges that covert processes always exist in groups, just as Marshak (2006) claims.

The Chronic Care Initiative meeting illustrates how sensemaking differs from formal decision making. The group was not developing a proposal for a vote or consensus agreement. Indeed, sensemaking is helpful precisely because

groups do not stop to engage in extensive inquiry and advocacy or build consensus around every label.

Why and How the OD Practitioner Assists Clients as Sensemaking Emerges

Does sensemaking matter to group members themselves? Curious about this question, as part of a research study (Rutledge, 2008) I interviewed group members about whether they recalled any

> The Chronic Care Initiative meeting illustrates how sensemaking differs from formal decision making. The group was not developing a proposal for a vote or consensus agreement. Indeed, sensemaking is helpful precisely because groups do not stop to engage in extensive inquiry and advocacy or build consensus around every label.

sensemaking and, if so, what difference it made. Of 21 members in two groups, all but two recalled and could describe instances of sensemaking, and all of these members thought sensemaking contributed to their group's progress in one or more of these ways: completing the group's task; giving them confidence in completing their task; strengthening relationships through shared understanding.

These perceptions suggest that practitioners should develop ways of encouraging a heightened awareness of sensemaking. Accordingly, using a case study created from audio-transcripts of a meeting (Rutledge, 2008), I will now suggest how a practitioner can help a group see the clues to sensemaking. This instance of sensemaking occurred in a committee of an organization I will call the Progressive Business Association (PBA), a statewide

professional association that was founded to foster socially responsible business practices.

Two Conditions for Sensemaking

The seven-person Policy Committee is a standing committee of PBA members who hammer out public policy positions that guide PBA's advocacy efforts at the state and national levels. The first thing a practitioner might notice about the Policy Committee is that their meetings are the kind of highly interactive problem solving setting where sensemaking is likely to occur.

In this meeting the discussion focuses on how to articulate PBA energy policy. A consultant working with the committee would notice that a combination of external events and differing internal PBA viewpoints satisfies the second condition for sensemaking, which responds to uncertainty and complexity. From the outset, members refer to a swirl of events that will complicate energy policy creation. For example, within PBA, discussion in the energy sub-committee has highlighted widely divergent views on the continued use of nuclear power. Meanwhile, there is pressure to make a policy statement soon because the state's decision about whether to re-license the region's nuclear reactor will be made before 2012.

Sensemaking Stage 1

Allie, who is PBA's Public Policy Director, calls on Molly, who reports that her energy subcommittee has recommended a "move away from polluting" and "invest[ment] now in cleaner, safer, and renewable energy." Molly acknowledges that subcommittee agreement upon this language was hard won. This acknowledgement is a sign of the first stage in sensemaking, when group members pluck from the swirl of uncertainty one or more puzzles that become the focus of sensemaking. The first puzzle seems to be: working quickly, how can the Committee create a policy statement that balances some PBA members' strong support for continued reliance on nuclear energy and

others' belief that nuclear energy is neither clean nor safe?

How would a consultant working with the committee recognize and help the group see such implied questions? The practitioner listens for patterns in member concerns and also, following Marshak's (2006) suggestion for seeing covert processes in groups, clues to what

the consultant could pose one or more questions that seem to account for the observed clues. At this juncture in the meeting, one question seems to be: how does the Committee reckon with the difference between some PBA members' strong support for nuclear energy and others' belief that nuclear energy is neither clean nor safe? If the consultant has

group members play with are perceived by the group as a whole as plausible. Only group members can determine what labels seem to fit the ways they see their dilemma; therefore, the consultant should be mindful that it is member standpoints that matter. When consultants begin to hear labels or categories bobbing up to the surface of conversation, they can write them on sticky notes, being careful to use group members' own wording. Labels can be pasted on a flipchart sheet if they continue to bob along in the conversational stream. Words and phrases are discarded if they fail to resurface in the conversation.

Because sensemaking arises spontaneously in groups, and also because sensemaking concerns discovery of plausible explanations for puzzling uncertainties, the consultant will not at first know whether the categories and labels that group members play with are perceived by the group as a whole as plausible. Only group members can determine what labels seem to fit the ways they see their dilemma; therefore, the consultant should be mindful that it is member standpoints that matter.

Sensemaking Stage 3

How does the practitioner discern the third stage of sensemaking, when a group coalesces around "plausible images" (Weick et al., 2005, p. 409)? In the Policy Committee meeting, Worth is the first one to offer a story line. He wonders aloud how to frame a possible policy statement, saying maybe the answer is not "stop nukes now," but, "let's start planning today, so that we can start transitioning away from unsafe or polluting." He seems to be trying out an answer to the bracketed question that marked the first stage of sensemaking.

remains unsaid. In the Public Policy Committee, members' comments show their awareness that some in PBA believe continued use of nuclear energy is a way of moving "away from polluting" and that the term "renewable energy" begs the question of whether nuclear energy is a renewable source.

At the same time, it appears from many comments that committee members do not see nuclear energy as desirable. How does the consultant-observer know? Committee discussion lingers on how taxes and incentives might put more wind, solar and biomass energy in use while influencing the perception of nuclear energy as clean, reliable and cost-effective. Dil says "all sources of energy" should be considered "on the same economic model," meaning that nuclear energy should not be seen as cheap. Priscilla agrees that the cost of nuclear plant decommissioning, which is paid for by rate payers, is "an externality" that could be used to level the playing field between nuclear power and energy produced from wind, solar and biomass.

At this first stage of sensemaking, a consultant could help the Committee by recording members' concerns and viewpoints on a flipchart sheet. Then

misread the clues, group members will, in my experience, work to modify questions in order to accurately state members' concerns.

Sensemaking Stage 2

In the second stage of sensemaking, the practitioner notices words and phrases repeated by different members of the group. Other members echo Priscilla's description of the risks and costs of nuclear power as "externalities." When Worth says, "Let's start planning today, so that we can start transitioning away from unsafe or polluting," his phrasing ("away from. . . polluting") echoes the subcommittee report Molly has just read. Other members begin to pick up the idea of making a transition, talking about both "transition" and "change." One senses from the way they borrow each others' language that group members are not advocating a position, but rather playing with possibilities.

Because sensemaking arises spontaneously in groups, and also because sensemaking concerns discovery of plausible explanations for puzzling uncertainties, the consultant will not at first know whether the categories and labels that

Group members begin to fill in the story with more vigorous discussion of how taxes and incentives could contribute to a transition to renewable energy. The group's continued focus on transition strategies is a clue that it is coalescing around a story about moving from current reliance on nuclear energy to an expanded portfolio of energy sources. Allie, who as Policy Director will be instrumental in drafting a policy statement, summarizes the story: "We're talking let's put your money where your mouth is. You want to do renewables, let's make it happen."

Key to sensemaking is the approximate or provisional nature of the story. Members know they do not yet agree upon exact taxes and incentives, but they "decide," in the informal way sensemaking works, that for the moment a more precise delineation of the solution "is just a process thing." In another instance of word and phrase repetition, another member says that

agreeing upon exactly how to talk about a carbon tax is "a drafting thing."

Allie's summary suggests how consultants can help a group during this stage three of sensemaking. As in stage two, consultants can write down fragments of conversation that suggest the outlines of a story, post these on a flipchart and invite group members to read and play with the story elements.

Sensemaking Stage 4

What does the consultant watch for as signals of the fourth and final stage of sensemaking? One is the way group members drive toward action by adding to the story line. Once the Policy Committee has coalesced around support for a transition to a new mix of renewable energy sources, members quickly agree on a time period for the transition. Ten years? Forty? After some discussion, Allie says, "Fifty years make sense? Okay, let's. . . create a 50-year energy plan," and then Bronson summarizes the rationale. "You. . . match the sources of the funding with the use of the funding, so some of these things have a long payback of 40 years. . . to make the system work." At this point, Allie makes clear, the group has enough information to draft a statement and take the statement to the PBA board for review. The plausible sensemaking story has created a path to action. In meetings where the next steps are not clear, consultants can ask what members suggest for next steps.

Many aspects of the overarching problem facing the Committee have not been resolved. They do not yet have a specific plan for taxes, incentives and other measures. Arguments for weaning the region of nuclear energy have yet to be spelled out. Nor do they have a specific strategy for making their case before the legislature. Nonetheless sensemaking has contributed to incremental progress by creating provisional understanding that will help the group formulate a policy recommendation.

Conclusion

As I have shown, sensemaking is one process by which groups thread their way through complex issues and discover *good enough* common ground to move toward action. By keeping track of and reflecting back to the group its own bracketed questions and sensemaking images, practitioners can help the group "harness group memory" (Straus, 2002) as sensemaking emerges. And because complex problem solving processes can seem overwhelming to group members, practitioners can influence the group's sense of accomplishment by calling attention to sensemaking episodes and their contribution to the group's progress.

References

Bohm, D. (1996). *On dialogue.* London: Routledge.

Isaacs, W. N. (1993). Taking flight: Dialogue, collective thinking, and organizational learning. *Organizational Dynamics, 22,* 24-39.

Marshak, R. J. (2006). *Covert processes at work: Managing the five hidden processes of organizational change.* San Francisco: Berrett-Koehler Publishers, Inc.

Rutledge, M. (2008). *Sensemaking and dialogue in the interorganizational setting.* Unpublished doctoral dissertation, University of Vermont, Burlington.

Senge, P., Kleiner, A., Roberts, C., Ross, R., & Smith, B. (1994). *The fifth discipline fieldbook: Strategies and tools for building a learning organization.* New York: Doubleday.

Simmons, A. (1999). *A safe place for dangerous truths: Using dialogue to overcome fear and distrust at work.* New York: American Management Association.

Straus, D. (2002). *How to make collaboration work: powerful ways to build consensus, solve problems, and make decisions.* San Francisco, CA: Berrett-Koehler Publishers, Inc.

Wagner, E. (2006). Improving chronic illness care: The chronic care model. Retrieved April 5, 2006, from *www.improvingchroniccare.org*

Weick, K. E. (1995). *Sensemaking in organizations.* Thousand Oaks: Sage Publications.

Weick, K. E., Sutcliffe, K. M., & Obstfeld, D. (2005). Organizing and the process of sensemaking. *Organizational Science, 16*(4), 409-422.

Merryn Rutledge, EdD, is Principal of ReVisions LLC, advising leaders on change initiatives since 1995. Clients include national and international companies, multi-sector collaboratives, Federal and state agencies and nonprofits. Merryn works in the areas of multi-stakeholder engagement, process design and facilitation, skill building program design and executive coaching. Merryn holds a doctorate in Leadership and Policy Studies from the University of Vermont and is the author of *Strategic Planning Guide for Leaders of Small Organizations* and many articles on leadership and management. Merryn can be reached at *mr@revisions.org.*