Business readiness for a sense-making approach

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1. Introduction
More work is done now as knowledge workers – even process tasks. The frequently sought solution to make more ‘rules’ does not help in every situation or demonstrate trust in the skills of our people to make the right decision in a situation. The application of human sense making networks could help to mature risk management and consultative systems across an organisation; to support WHS outcomes; or more broadly support customer-centric objectives.

This paper presents the experience of translating complex adaptive systems theory into operational practice to benefit health and safety systems and strategies. The activity has occurred in two phases: as a system owner the author has applied the Cynefin model in the design and planning of the organisational WHS Strategy. Cynefin is a complex adaptive systems model that integrates sense-making approaches. The second phase aimed to explore the appetite to adopt a sense making approach organisationally.

Significant effort is spent on obtaining feedback from workers through standard surveys or consultative activity without connection to context and raw data is not always accessible to create deeper meaning of the result. A sense making approach will help to understand how the workers, stakeholders and customers respond to our strategic change agenda and identify patterns in our data that hold meaning for our decisions or safety outcomes. Managers can identify ‘How do we make more stories like this and less like that?’

Introducing novel approaches to gather feedback and manage knowledge is a challenge within established business systems. Australian businesses have not yet commonly adopted the approach of sense making as an organisational tool for anticipatory awareness in Australian businesses or within safety management systems. This paper provides an experience of using a sense making approach to test the readiness of a business to consider adopting a sense making approach.

The anticipated use of the approach is initially as a means to gain feedback from workers and commencing more rigorous knowledge management capability to inform the safety management system. Consultation (an obligation under the WHS Act in Australia) and systems feedback from its users are two pillars for effective risk management.

1.1 What is sense-making?
Sense making takes many guises depending on the field of interest. In this context, the author means an approach that draws on complex adaptive systems theory – the science of uncertainty. As we can’t predict the future, as a business we need a means to better anticipate what is actually happening and how actions taken as managers influence the system. The approach supports resilience objectives for risk management (early detection and fast recovery, agility capability). Other benefits are that the experience of sharing a story
engages people. Management methods to understand the complexity of an issue and successful decisions for interventions are the practical application of the outcomes from sense-making.

The sense making approach differs to traditional surveys and consultation as it is: based on the micro-narrative or the experience the person wants to share. In this approach, the person signifies (or makes sense of) their own story so interpretation bias is reduced; and quantified analysis is backed up by the context provided in the provided narrative (that is you can always go back to the source).

2. Method

2.1 Preparation

The author attended Cognitive Edge sponsored training on both the Cynefin and Sense-making theory and application. The project was identified as a research project and management sponsorship was obtained.

To prepare for the project, exploration of what constituted ‘readiness’ in a business context was considered and conducting the project through application of a sense-making approach was decided to provide an experiential example to the participants.

A sense-making tool was designed including a worksheet on which to share an experience in written form, a number of coding questions to be completed by the participant about their understanding of sense making (based on the briefing or prior knowledge) and if they thought it would be of use to the organisation. The request for the story was: “Share an experience where you had access to information that really made a difference to a business decision affecting our people …….”

The sheet provided to participants included both triad choice questions and diad choice questions. Triads are visually represented as three text-based options placed at each point of a triangle image and the participant places a mark of ‘best fit’ between the options in relation to their story or marks a ‘not applicable’ check box; and a diad is a two text-based options at each end of a line. The participant places a mark of ‘best fit’. For example, one of the triads was designed to show if there was a preference to introduce the sense making approach and to what degree for example: optimistic preference - ‘worth exploring’, conditional preference - ‘only if going to improve better services to customers’, or resistant preference –‘the last thing we need is another change’.

Two groupings of subjects were identified for the sampling -1. Those who decide and 2. Those who influence. Selection was not random and based on positional authority for the first grouping (authority to either introduce the system or sponsor its use) or in the second grouping, selected roles that could act in advocacy or influence its use and application if adopted into the business e.g. project leads, advisory specialists. The sample is small (n<30) both due to duration of the project and to test the sensitivity of the approach to small group sampling in a practical sense.

2.2 Interview and data collection
Briefings were provided either one on one or in small groups to provide basic understanding of the sense-making approach and its potential benefit to organisations. The topic was introduced as a ‘readiness’ test activity for a particular approach thought to be of benefit to the organisation. Examples of sense making projects and data graphics were shown and discussion was encouraged as to how it would be practically applied in the business.

Participants were asked if they would like to share an experience and participate in a sense-making activity. The participant was provided with an explanation that their story would be collated with all others in terms of analysis in a summary report to be provided to an Executive manager (the sponsor) although the story would be retained as a non-identifiable record by the author. The participant provided their written sheet back to the same person (the author) in all cases. The depth of detail in the shared stories was variable and each sheet was left unedited by the author.

2.3 Analysis
Collation of the results for triads (three choice options at each point of a triangle image) and diads (two choice options at each end of a line) was provided as a visual graphic (retaining an identifier for each story contribution). The summary report with the collated patterns provided information to the sponsor showing both for example: the state of business readiness to explore sense-making as an approach (i.e. support to commence design and development phases on how it would be introduced including to raise a business case for capability building).

The patterns from the shared stories about sharing information in a business context (as understood by the participants) showed preferences that sharing knowledge would benefit health and safety of our people, business performance, getting the job done; or a combination of the options.

3. Discussion
Use of readiness testing when considering novel approaches is a low cost activity compared to introducing a survey proprietary product that holds little engagement for to the participant or is not returning the information needed by decision makers. Application of the sense making approach (demonstrated here in its most basic form) may be a useful addition to apply to management systems. Conclusions from the analysis of this study will be discussed.

References

