

Creating a Culture in Which Teams and Workgroups Can Engage in Collective Sensemaking

Common Knowledge Associates

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For teams or workgroups to be effective and competitive they must,

- 1) understand their customers' requirements and the frequent changes to those requirements,
- 2) take action and be fully cognizant of the consequences of those actions, both intended and unintended,
- 3) detect changes both in the internal and external environment, and
- 4) develop their collective understanding of the complexities these many factors create.

(In the rest of this paper I will use the term "team", to refer to both workgroups and teams.)

To accomplish those tasks team members need to engage in a number of learning behaviors, for example, seeking feedback from each other, customers, and other parts of the organization; sharing information with each other; asking each other for help; talking about errors or problems; challenging the interpretation of others, experimenting to gain insight; and reflecting together.

However, many of those learning behaviors are perceived by team members as risky. For example, members may fear that admitting an error will make them appear incompetent to others, likewise, asking for help. They may be concerned that if people in positions of power notice such actions it could reduce their chances for promotion or job assignments. Individuals who offer opinions that differ from the rest of the team risk being seen as "not a team player" or worse, as being obstructive. At a minimum the individual risks damaging his or her own self-image. Teams may choose not to risk conducting experiments that would gain them insight or trying out new processes that could potentially improve their performance, fearing that they would be blamed for failures. **Argyris (1982)** has shown that when team members perceive the possibility of embarrassment or threat, they act in ways that inhibit learning; in short they remain silent or resort to meaningless generalities rather than risk negative consequences.

To overcome the reluctance to speak up, team members need to feel "psychologically safe," a term **Amy Edmondson (1999)** applies when team

members have a sense of confidence that the team will not embarrass, reject, or punish members for speaking up. Psychological safety is a shared belief, held at the team level, that the team is safe for interpersonal risk-taking. For the most part, this belief is tacit, that is, "taken for granted and not given direct attention by either individuals or by the team as a whole."

Psychological safety is, however, not the same as group cohesiveness, which, as **Janis' (1982)** research has shown, can reduce the willingness to disagree with others' views – the phenomenon labeled "groupthink." Nor is psychological safety a matter of team members getting along well together or having no conflict. In fact, psychological safety makes it possible for conflicts to be openly raised and discussed. Edmondson notes that psychological safety is the "presence of a blend of trust, respect for each other's competence, and caring about each other as people."

If as Edmondson, Argyris, Janis, and others point out, talking about the need for members to trust each other or the leader will not engender psychological safety, how then can psychological safety be achieved in a team?

Edmondson Study

Edmondson conducted a study in **2002** that provides hope that psychological safety can be achieved without lengthy training, special facilitation, or a large-scale change effort. The study was conducted within a large organization where Edmondson held extensive interviews and observations with twelve teams, who were spread across a variety of team types and at varying levels. Remarkably, Edmondson found that within the same organization some teams were able to engage in learning behaviors while other teams were not. The findings from this in-depth study indicate that:

- The learning process itself occurs at the team level and is focused on a bounded task(s) or opportunity (e.g. development of a product, strategic planning, delivery of service) and occurs through reflective conversations within the group.
- Culture is localized. It is not the culture of the organization that encourages or discourages the learning behaviors needed for effective reflection on complex issues, it is the culture developed within each specific team.
- "When the group's belief is that the team is not psychologically safe, individual team members are unwilling to actively and honestly contribute their ideas, evaluations, or suggestions. As a result groups are less able to make sound decisions and implement timely decisions in response to changes in the environment." (Edmondson 2002)

- Team leadership impacts whether a team is able to develop a sense of psychological safety. In the study, teams that reflected effectively and implemented resulting changes had minimal power differences. The leaders of those teams encouraged input and debate. Where power differences between leader and members were high, little learning occurred.
- Teams at the highest level were as likely to be impacted by power differentials as were frontline teams and were therefore unable to seek feedback from each other, customers, or other parts of the organization; share information among themselves; ask each other for help; talk about errors or problems; challenge each other; experiment to gain insight; or reflect together.

Implications of Edmondson's Study for Collective Sensemaking

A very hopeful implication of Edmondson's study is that it is possible to create a culture that supports collective sensemaking within a team or unit, even if other parts of the same organization do not have a compatible culture. This means that it is not necessary to wait on top management support in order for change to occur locally. Nor is it necessary for the whole organization to change in order for any one team to make use of effective learning behaviors.

Another positive implication is that it does not take special skills or facilitation to engage a team in collective sensemaking. The successful teams in this study had no special training or help, yet were able to develop psychological safety within the team.

Power Differential

The study found that the manager/leader role was markedly different in those teams that had less power differential between manager and team members. Thus to develop a culture that supports collective sensemaking may require a role shift for managers from the more traditional "boss" role to one that is coach and **convener**. Edmondson reports on an interview held with a design consultant who worked with many different teams across the organization. The consultant contrasted the leadership of "Beanstalk," a team that reflected effectively together and was able to implement resulting changes, with "Radar," a team that did not reflect together and was unable to make needed changes or course correction. The consultant explains, "[For Beanstalk] I pick up the phone and call anyone...but for Radar, I have to go through Jan.' In Beanstalk, any of the members spoke for the team. In Radar, Jan held onto the role of spokesperson. In team meetings, Jan was a 'boss' who took on the role of making final decisions. In Beanstalk, Martha was a facilitator who encouraged input and consensus."

Meeting to Make Sense

Collective sensemaking is the very human action of jointly creating meaning out of the incredible amount of data and input that continuously surrounds an organizational unit or team. Collective sensemaking is a creative act, rather than an act of discovering or uncovering what is already there. The meaning created through collective sensemaking does not exist before the conversation that creates it. In conversation the meaning that is created is continually revised as new data and new patterns in the data emerge.

Teams cannot learn unless they take the time to bring the whole team together to collectively make sense of what is happening. A leader, who prefers to talk with team members one at a time, cannot produce this level of learning. Nor does bringing a team together to hear announcements or presentations produce understanding of complex situations. For learning to occur meetings need to be convened in a conversational format where team members address their comments and questions to other team members rather than focusing primarily on the leader.

Learning occurs when team members take action and then meet together to reflect on the intended and unintended consequence of that action. It requires the multiple perspectives of all the team members, each of whom has experienced the consequences in a different way and each of whom interprets the meaning of those consequences differently, in order to provide the rich medium needed for the team to make sense of what happened and what needs to happen next. Weick (1995) notes that "the understanding that results from sensemaking is not a definitive answer, rather it is a configuration that is adequate for the organization to plan and take its next action."

The Quality of the Conversation

Edmondson's study indicates that taking the time to reflect together was necessary but not sufficient for members to engage in the risky behavior necessary for learning to occur. Some teams in the study took the time to discuss issues but the discussion was of such a low quality that neither new understanding nor action resulted. As an example, the task of a high level team, labeled "Strategy," was to create a new business strategy for the organization. Although the team met frequently and held lengthy conversations, during the six months of the study, no plan was developed. Edmondson provides this example of "Strategy's" dialogue in which, George, a senior manufacturing executive, responds to an earlier metaphor about directing the "ship" of the company by turning the rudder.

George: *Listening to Bob talk about the ship, I'd like to explore the difference between the metaphor of the ship and how the rudder gets turned and when, in contrast to a flotilla, where there's lots of little rudders and we're trying to orchestrate the flotilla. I think this contrast is important. At one level, we talk about this ship and all the complexities of trying to determine not only its direction but how to operationalize the ship in total to get to a certain place, vs. allowing a certain degree of freedom that the flotilla analogy evokes.*

CEO interrupting: *There's a question of doing what you want to do and doing it how you want to do it. But you can't have people just going off and doing what they want to do. You know, some of them may be playing baseball all day long. But, we have to have some alignment with the corporate directives."*

Reading this dialogue, we can assume that the CEO believes George is advocating an absurd amount of that freedom, yet neither says what he means nor offers concrete suggestions. By speaking abstractly both protect themselves from criticism, and in so doing prevent the group from reaching an understanding that would allow them to move forward. Although this group meets, and even has a spirited dialogue, members do not feel safe enough to say what they mean nor to challenge each other openly. As a result no new knowledge or action is created.

Psychological Safety as a Product of Experience

A power differential is not the only factor that impacts psychological safety. Psychological safety is also a result of the interaction experience members have in the group, both with each other and with the leader. Psychological safety begins to grow when a member of a group admits an error or challenges another and then experiences the response of other team members as curiosity rather than blame. Other team members, witnessing a non-blaming interaction, are then more likely, perhaps at a later time, to offer an idea of their own. When enough safe interactions have occurred, the group as a whole begins to feel the environment is safe. Edmondson gives an example of a dialogue in *Beastalk* that represents how conversation might function when psychological safety exists.

After one member, Angela, described, 'printer problems with those labels' and asked, 'Who can we ask for help?' another member, Rob, responded, 'How about asking the vendors who make the labels? They probably know how to fix it.' And Ken offered to make a phone call – closing the loop. Rob also reported on his use of new, trial equipment for conducting these tests, 'I used the "color analyzer" [he paused} I know it's not the right word' and looked to Ken for help. Ken responded supportively,

'photospectrometer.' Rob continued, *'It's worth the \$12,000 because we will save \$25,000.'* Ken agreed with Rob's assessment and promised to follow through on acquiring the machine.

As this dialogue illustrates, although a courageous team member is needed to initiate the dialogue, it is the way others respond that is significant in creating psychological safety.

Silence and Support

The silence of other team members is as discouraging to a member who raises a different opinion or challenge, as is a blaming response. Other team members may agree with a person that speaks up, and after the meeting may even tell the challenger that what he said was right. But the fact that the listener does not chance agreeing during the meeting reinforces the belief that speaking up is too risky.

However, an interesting **phenomena** identified by Ashe (1952) is that if, during the meeting, even one other person on the team responds in a supportive manner, the member who raised the issue is encouraged to speak up again. Thus, team members themselves can begin to alter the culture of a group by supporting each other in meeting settings.

Conversations That Build Relationships

A more deliberate technique to begin to change the culture of the group is **structured socialization** – time set aside during a meeting for small groups to talk about issues that allow them to learn about each other's competence and allow them to establish relationships at a deeper level. The issues for discussion should be work related, but also topics that provide the opportunity for each person to disclose values and beliefs. For example:

- "What gives meaning to your work?"
- "Tell a story about the best team you've ever been a part of."
- "Talk about a highlight experience you've had in working for this company, a time when you felt you made a real contribution."

These appreciative topics are best discussed in groups of three to five that are small enough for the listeners to express their positive reception to what is being said. That expression might be verbal, a nod, or a smile - any of which indicates to the speaker that what he is saying is accepted. As mentioned earlier, Edmondson found that psychological trust is the "presence of a blend of trust, respect for each other's competence, and caring about each other as people." Respect for competence to some extent grows out of daily interaction while working on a project or task, but structured socialization can provide the opportunity to learn about past

projects and successes, extending that knowledge in ways that may not occur in daily exchanges. Likewise, to build “caring about each other as people” there must be opportunities for team members to reveal aspects of self that are not part of normal workplace discourse and to reveal it in a way that listeners recognize themselves in the telling.

Shared Experience

A final suggestion comes from the work of Karl Weick (1995) who acknowledges that many theorists see shared meaning as a way to produce effective teams. However, Weick suggests that it may not be possible for team members to create shared meaning since any meaning an individual creates is a product of their past experiences, which is necessarily unique to each. He explains, “...so if people share anything, what they share are actions, activities, moments of conversations, and joint tasks, each of which they then make sense of using categories that are more idiosyncratic;...if people want to share meaning, then they need to talk about their shared experience in close proximity to its occurrence and hammer out a common way to encode it and talk about it.” Some shared experiences naturally occur because of the joint work teams engage in, (for example, “that difficult client we worked for” or “the well we drilled in the North Sea”). He notes that “in those situations the critical element is time to process (reflect) what we learned from the experience. Not everyone will learn the same thing from the same experience but that is not critical, what is critical is that they are able to reference the same event that others recognize. The question always is ‘What does it mean?’”

In situations where the work itself does not provide shared experience it is helpful to design events. An example of a designed shared experience comes from Kaiser Foundation Health plan (KFHP) and Kaiser Foundation Hospitals (KFH). The health care system practices a form of **Process Improvement** that requires employees from a unit, for example the emergency room, to work together as a team. **Alide Chase**, Senior Vice President of Quality and Service, explains the joint experience each team has before beginning their Process Improvement training.

*Before each new team begins their PI training, they engage in Borrow Forward. A team of 4-5 persons from, for example the neonatal unit, makes a visit to a neonatal unit in another location that has already successfully implemented the process improvement. The visiting team goes in a state of inquiry. Each visiting team member shadows his/her counterpart for 2 to 3 days. Before leaving, the visiting team holds a meeting with those they shadowed to talk with them about the observations and insights they experienced. This is a reflective meeting in which both parties learn. The visiting team articulates their insights (**see we learn when we talk**) which*

helps them clarify what they learned for themselves and the host team gains new understanding of their own processes by seeing those processes from a different perspective. After their return, the visiting team begins their PI training and implementation. They hold weekly meetings to reflect on the actions they have taken and the results achieved. Borrow Forward provides a shared experience from which they derive shared meaning, and provides a lens through which they are able to think about their work.

Summary

For a team to be effective and competitive it must be engaged in learning behaviors that are too often perceived as risky by members of the team. To take that risk, team members need to feel psychologically safe, that is, “have a sense of confidence that the team will not embarrass, reject, or punish members for speaking up.” The actions that help to bring about collective sensemaking are:

- reducing the power differential between leaders and members
- teams taking the time to reflect together on a regular basis about their actions, results, concerns, and innovative new ideas
- members actively providing support for each other in meetings
- holding small group discussions about appreciative topics to build relationships and enhance the knowledge of others’ competence
- engaging in shared experiences that serve as a reference point for meaning.

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