

Exploring Middle Managers Sense Making Processes in Organisations

¹Sandeep Kumar Bhalla and ²Dr. Indrajeet Singh Yadav

¹Research scholar Sri Satya Sai University, Sehore, Bhopal

²Research Supervisor Sri Satya Sai University, Sehore, Bhopal

ARTICLE DETAILS

Article History

Published Online: 13 March 2019

Keywords

middle managers, strategic sense making, strategy-as-practice.

ABSTRACT

This paper seeks to better understand the way middle managers contribute strategically to the development of an organization by examining how they perform in the strategic roles allocated to them, with particular reference to strategic change. The paper draws on sense making theory and the concept of practical knowledge. Through vignettes drawn from the authors' current research, a framework is developed showing that two activities: "enacting conversations" and "enrolling networks", are critical in the accomplishment of the middle manager strategic sense making role. The paper also shows how these two skilled activities are underpinned by middle manager semantic and sociocultural knowledge, and that it is this practical knowledge that enables the middle managers to draw people into the change as they go about their day to day activities. This framework shows that two activities, enacting conversations and enrolling networks, are central to the way middle managers perform their strategic roles, and that these two activities are underpinned by semantic (language & symbolic representation) and socio-cultural (taken-for-granted ways of doing things) knowledge. These findings also contribute more broadly to the sense making perspective. Much research on sense making has focused on the conditions and context of sense making, with a primary concern for organizational processes of sense making. As a result less is known about how individuals perform their strategic roles, and it is this gap this research starts to address. The focus on this individual performance shows how individuals reciprocally act within and shape their sense making context through their practical knowledge. This also enables the findings to contribute to the strategy-as-practice research agenda since we are starting to unpick the linkages between strategic action, skills and performance.

1. Introduction

Despite some early seminal works showing that middle managers can have an important strategic role, research has only recently begun to take this seriously. There is now a burgeoning literature on the role middle managers play in both the formulation and implementation of strategic change, which shows middle managers to be more than passive linking pins, transmitting senior manager instructions unquestioningly down the organization. They are critical mediators that facilitate organizational adaptation by both shaping senior manager strategic thinking and orchestrating the deployment of senior manager plans. Middle managers are therefore important because of the way they knowledgeably connect the operational core with the upper echelons in a way that shapes strategic direction. However, existing research, in general, remains silent on the ways middle managers put their roles into action, and how middle managers perform their strategic roles on a daily basis. This is the focus of this paper.

There is increasing evidence from existing research on both senior and middle managers of the need for managers to be politically able if they are to exercise strategic influence and affect the course of events they are involved. Skilled managers are able to use their knowledge of their organisational context, colleagues and senior managers to influence those around them to adopt their point of view. This research also shows how this can involve use of particular context-sensitive language and behaviour, that extends beyond the general to being quite specific based on the individual or group of people the manager is engaged with. Such sense making behaviour is underpinned by cycles of interpretation and action. Mangham & Pye (1991) refer to these cycles of "reading context" to decide what to do, and "acting to have impact" as "sense reading" and "sense weighting". The managers have to use their knowledge of their context of action to develop a performance (actions, words) most likely to deliver the desired meanings and responses in that context and with that particular person /

group of people. More recently Rouleau (2005) has also highlighted that for middle managers this interpretation and action is underpinned by practical knowledge. Practical knowledge is about the unspoken or the invisible structure of a situation which is acquired through time. It is what we know without explicitly knowing we know it. Whilst this could also be true for more senior managers, this paper argues that it is particularly important to explore how middle managers use practical knowledge in their daily activity because their strategizing roles are often informal, lacking the authority of those who carry more formally recognized strategic roles. Others working within the strategy-as-practice perspective also highlight the need to understand practitioners and the resources they draw on to perform their work. In particular, research needs to focus more on what it is managers actually do, the activities they engage in, when carrying out their strategic roles. Yet no research has as yet taken this argument seriously enough to explore the relationships between a middle managers ability to act strategically, their practical knowledge, and their ability to develop context sensitive interpretations and actions.

2. Middle Managers and their Strategic Roles

Since the end of the 1980s numerous authors have recognized the strategic contributions of middle managers, and recent interest in strategy as a social practice has also emphasized the importance of acknowledging and understanding the strategic role of those outside the upper echelons. The growing body of research on middle managers emphasizes the particular importance of their sense making capabilities in terms of interpreting the intent to change, transmitting information, and gathering and diffusing new ideas. Sensemaking is a social process of meaning construction and reconstruction that enables individuals through interacting with others to collectively create, maintain and interpret their world, make this middle manager sensemaking activity quite explicit.

Others are less explicit, yet describe activities consistent with a sensemaking perspective, such as synthesizing information and combining macro and micro information and unifying individual visions. Building on the sensemaking perspective, a theme in recent middle manager research is the notion of middle managers as skilled performers deliberately using knowledge of their context of action to influence others to gain acceptance for projects they are involved in. Again, whilst this theme is explicit in only a few studies, it underlies many more. Floyd & Wooldridge (1997) and Hoon (2007) illustrate how the way middle managers champion and synthesize is underpinned by their knowledge of who to talk to and how. Dutton et al (1997) show middle manager issue selling activity to be based on their reading of favourable and unfavourable contexts. Currie and Brown (2003) highlight the importance of middle manager contextual knowledge through the use of narratives.

The notion of skilled performance echoes earlier work on senior managers from sensemaking, political, and dramaturgical perspectives. Sensemaking is not a politically neutral activity. To get their view accepted over that of others, individuals will engage in skillful sensegiving, stage management and front and backstage activity, so they can link their interests with those of others to draw the others into their own agenda. The distinction between sensemaking and sense giving has become commonplace, particularly in terms of describing leadership behaviour at times of change. It reflects a broad distinction between cycles of interpretation and action. Yet whilst concepts such as sense reading and wrighting enable us to capture the interpretation and action aspects of what middle managers do when fulfilling a strategic role, they do not help us develop an understanding of the types of practical knowledge on which this is based. The social processes that underpin sensemaking are still relatively unexplored. This is the focus of this paper. The concept of practical knowledge can be seen in the work of John Dewey. Dewey spoke of "the unity of knowledge" by which he meant that knowledge and doing are inseparably linked: knowing is bound up with action and vice-versa. However, practical knowledge is also tacit knowledge, in the sense that "we know more than we can tell", and is consistent with Ryle's concept (1949) of "know-how" versus "know-what". For Polanyi, knowing involves "skilful action" since knowledge is not something independent of human action. "All knowing is personal knowing – participation through indwelling" emphasis in original.) Tacit knowledge is embedded in and "reciprocally constitutive" with practice, consisting of both "situational responses" and "intuitive judgment". Tsoukas and Mylonopoulos (2004) argue that "individual understanding is not so much in the head as in situated practice: the individual understands and acts in the world through drawing on sets of socially defined values, beliefs and cognitive categories within particular material and social circumstances." The argument is that "tacit and explicit knowledge are mutually constituted ... inseparable".

Methods

Practical knowledge, precisely because it is tacit, is hard to study. To investigate how middle managers use their practical knowledge in implementing change therefore raises some methodological challenges. Among others, practical knowledge is tacit and cannot be fully articulated. Given it is not possible, according to Tsoukas (2005), to convert tacit knowledge into explicit knowledge, the best way to learn about skilled practitioners is to become an "apprentice". However, he also argues that this does not mean that it is not possible to discuss "skilled performance". Practical knowledge is displayed and manifested in what people do. Therefore it can be got at by drawing each other's attention to how we relate to others and the world around us. Given this research is essentially

exploratory; this paper does not rely on new empirical data. Instead it draws on existing data coming from two research projects established to provide data on middle manager practices in change situations. The paper focuses on middle managers dealing with change as organizational change situations constitute natural experiments. It is in situations of change that the unconscious rules and routines are often surfaced in what individuals do as they struggle to make sense of the change and the impact on themselves. One project focuses on the transformation of middle managers' identity in organizational restructuring and the data were collected through a specific type of life story which Bertaux & Delcroix (2000) call narratives of practices. The other research project explores how middle managers charged with delivering change across organizational boundaries operate and relies on data interviews and focus group.

Of course, these research projects were not explicitly designed to elicit the practical knowledge of the middle manager respondents. However, by examining how middle managers talk about their actions, when encouraged in narratives of practices or in focus groups to describe specifically how and what they do in detail, they will surface to some extent the practical knowledge they are drawing on to act within their context. Specifically, narratives of practices and focus groups are two research methods that allow the researcher to dig into the "life world" of actors, here middle managers, in order to capture the taken-for-granted streams of routines, meanings and interactions that constitute their practices. In fact, biographical methods such as narratives of practices, have the advantage of building up the detail of the individual and allow for more in-depth probing of the practical knowledge individuals are drawing on both from their immediate context and their broader experience. Interactive discussion groups allow the researcher to know more about the values, attitudes and beliefs that managers have, shared and negotiated in real time. Their strength lies in the snowball effect as individuals in their storytelling encourage deeper reflection from each other. In terms of practical knowledge, their potential lies in the possibility of encouraging attendees to "start recursively drawing our attention to how we draw each other's attention to things" ().

As is common with qualitative research, the stories are analysed through repeated iterations between theory and data looking for evidence of the practical knowledge the middle managers are drawing on. The starting point was to seek to understand the linkages between interpretation and action, broadly defined as sense reading and sense weighting, consistent with a sensemaking perspective, within the middle manager change action. Whilst it wasn't possible to specifically extricate the cycles of interpretation and action it was possible to establish an understanding of what the middle managers did and said and why they did things / said things this way. The what gave the action and the why the interpretation underpinning the action. This analysis led to the development of the first part of the framework shown in Figure 1. We were able to identify two sets of interrelated activities, that we label "Enacting Conversations" and "Enrolling Networks". Enacting conversations relates to the mediation role middle managers carry out through formal and informal conversations with their peers, subordinates, superiors and customers or other stakeholders, to engage these individuals with their agenda. As is already known, it is the daily conversations between peers, with stakeholders and customers that constitute the privileged vehicle for developing interpretations of what change is about. This communicative process is ongoing and anchored in the way middle managers are relating to others. Enrolling networks is to do with the fact that middle managers know many people disseminated at different places inside their organization and also sometimes outside, and they need to mobilize these networks to enroll and engage others with their agenda, to

build alliances and coalitions. Enrolling networks is to do with

this activity.

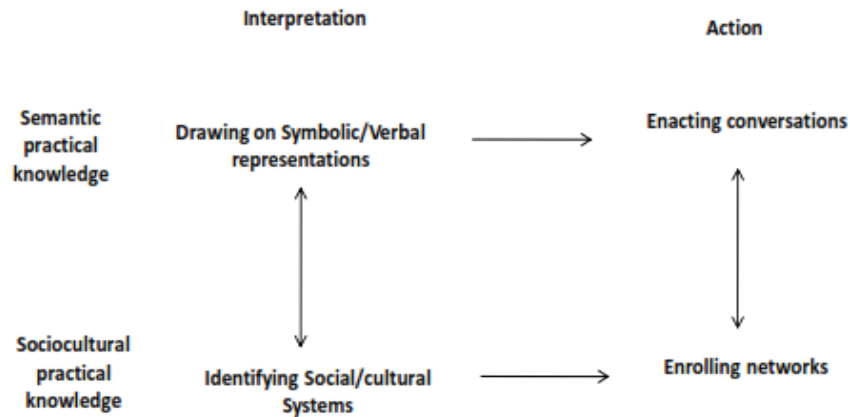


Figure 1: Practical knowledge and strategic sensemaking

From examining what the middle managers said about their actions to do with enacting conversations and enrolling networks we were able to see that they were based on particular ways of interpreting and acting. When enacting conversations, the middle managers were mobilizing particular types of language to determine the how of the conversations: to trigger linkages with taken-for-granted and accepted ways of doing things in the organization to build acceptance of their position from others. So for example, middle managers were using specific words and referring to local language to link themselves to the culture of their organization and therefore mobilize people for their cause. When enrolling networks, the middle managers were mobilizing predominantly their knowledge of the social & cultural systems to determine who they should be having the distributed conversations with and when, or in other words what forum and format. However, it wasn't as straightforward as that as they were also relying on the mobilization of knowledge to determine the configurations of the different stakeholders they needed to involve. In other words, they might need to use different symbolic / verbal representations (different conversations) with different stakeholders, which fed into the format of the conversations and the constellation of stakeholders present.

Mary

Mary had been working at Radio-Canada for 9 years. She began her career as an administrative assistant at Radio-Canada and rapidly became a middle manager in the TV Program Production Directorate. Mary was promoted as part of the organizational restructuring to the role of Technical Production Manager, (General TV sector), which comprises over 500 employees. Historically, this directorate had always been managed by people with technical backgrounds. Aiming to change the way things were done, Radio-Canada's top management appointed a person associated with Program Production to the head of the Technical Production Directorate. This decision might not have given the results anticipated. As the following quotes will reveal, what saved Mary was her ability to find the right words to talk to the technicians and to rely on the right people. One of her mandates was to make the production studios profitable, which among other things involved reorganizing technicians' assignments. Mary knew nothing about the technical side of things and found herself as manager of a directorate where credibility is based on the technical knowledge acquired over time. Hence, she was confronted with this situation immediately on her arrival. "When I arrived, they said, „What's she doing here? She doesn't know anything about technical production." I knew nothing about it, I came from Program Production. The first think I did was put my cards on the table, saying, „Listen, I'm not here to repair the camera downstairs. I'm here to structure, to organize things,

and I want it to work because we've had budget cuts for 5 years now, and with the retirement boom, there's almost no one left with any experience." (M2) From the start, she admitted her weaknesses and replaced the technical expertise discourse with a discourse of change anchored directly in the problems that the technicians were facing day-to-day. She thus positioned herself as one of them rather than as spokesperson for the directorate and used a language that helped rally the technicians because it directly targeted their problems.

Robert

When the restructuring occurred, Robert had 12 years' experience at Radio-Canada. Some years previously, Robert had been in charge of organizing the technical team for the new specialized news and information channel (RDI) created at the end of the nineties. As part of the restructuring, the news production staff of the general television sector ("channel one") had to be renewed. The job was entrusted to Robert who was returned to his previous duties even though his title changed. He became coordinator of technical services for the channel, supervising approximately 50 technicians (switchers, boom operators, camera operators). Due to the budget cuts, he was also put in charge of the technical equipment (cassettes, cameras, and so on). It was in part due to his abilities to deal with people day-to-day and to mobilize informal networks that Robert succeeded in creating meaning in order to renew the links between Program Production and Technical Production Directorates. Robert's team had a bad reputation and was experiencing serious problems with absenteeism. Within the organization, it was seen as a "little mafia." On one hand, the technicians, especially the most senior and the most experienced, used their professional expertise against the establishment, even "terrorizing" the people who worked on news show contents (journalists, producers, etc.). On the other hand, they tended to negotiate individually what they needed (vacation, equipment, etc.), but when one of their member's work was threatened or criticized, the pressure of the group protected him or her. With the budget cuts, Robert had to streamline the work and job assignment processes while ensuring the flexibility needed for the unpredictability of televised production. In addition, he worked to reconcile technicians and program production employees. Robert was the man for the job. He had his own management style, largely based on flexibility and the importance of talking together. "In my family," he says, "we always had renters. I bought my first house at 22. My first management experience was with my renters. It's not the same but that's where I learned to deal with people, learned the respect you have to have for others in what you say and the way you say it, I learned that there. I learned you had to be accepted by people. When someone's unhappy, I learned you can't fly off the handle, you have to deal with

people.” (R2) Along with the technical expertise, Robert was aware that the capacity to be accepted by the technicians was fundamental to getting anything done. He says that his principal management tool was a deck of cards. “People come to see you, talk to you, you get to know them. Then, when they come to ask you something, you know if it’s credible or not. And when you give them something, they owe you one.” (R3) This excerpt is revealing of the group’s sub-culture (card game as an embodiment of the mafia-like activity) at the same time as it shows how, in this context, informal conversations constitute a way to evaluate what is credible while permitting the construction of a negotiation space.

William

William, the group head of remuneration and benefits, was examining across business practices in areas such as pensions with the aim of creating common procedures and using common providers where possible to reduce costs. He was relatively new having joined Engco within the last year. The vignette shows, however, how William uses his networks and his position as an HR expert to influence the board through clever use of language. Through his knowledge of their interests (the bottom line) he was able to generate a dialogue linking his projects to their business concerns. William is aware of divergent interests and identities across the divisions and the lack of a central mandate and therefore the need to bring divisions together, but also that this requires a message that cuts across interests “it was very clear even back then that we don’t have a central mandate, which I found very clear as a real cultural thing, it’s like “no no divisions are very autonomous”, so we’ve really put a lot of effort together in putting an attractive package together, a lot of analysis that says here’s a really really good way to do it, here’s how much you would save if you do this and this ... pull this lever save this much, this plan design will get you this, that kind of thing. Really presenting that to the group to get them to come together as a body, over three meetings now we’ve come a long way. So we’re getting that group together then presenting to our HR folks, getting them aware of it and our next phase is executives.” (W2) He also understood the need given his lack of mandate to provide those he worked with a means of “selling” the message not “telling”, “They have to believe it because they have to sell it, and it is not a pleasant message for them to hear. So we start off by saying we did good last year and made a lot of progress but now things are tougher we need to take another step. I didn’t just say we have to save x million, it was more selling than telling, but not sugar coated. Profit is up, earnings down so we have margin issues, it is business reality.” (W3) He estimates that he spends at least half his time gathering intelligence or else „crafting” his presentations to senior management. In particular, he is quick to link his agenda to the perceived need for change in view of external exigencies („margin issues” and „business reality”). We can see from the quotes W1 and W3 that to draw people in he relies on symbolic and verbal representations relevant to Engco – regularly referring to things such as bottom line, cost focused, balance sheet, margin, money, cash, profits.

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3. Conclusion

This piece of research advances what is known about how middle managers contribute strategically within an organization, showing the importance of practical knowledge for a middle manager to be able to make an adequate contribution when asked to, or needing to informally, adopt a strategic role. It is quite possible that the findings extend beyond middle managers to more senior managers. Just as the skills explored here remain under researched for middle managers, they are also under explored for more senior managers (Fairhurst, 2007). We would argue, however, that it is equally valid to examine these skills for middle managers given the strategic role they are increasingly acknowledged to play. In order to develop the framework presented here, the research has developed vignettes extracted from previous research on four middle managers. Thus a weakness of the research is that it was not devised to specifically capture data on our topic of inquiry. However, since the research explores sensemaking and practical knowledge, which in some ways are ubiquitous concepts, the fact that the framework has been derived from different contextual situations supports the relevance of the findings. Moreover, the fact that the four cases differ markedly in terms of change context and managerial work, and in terms of sociocultural frames they belong to (eg.: two men, two women; private and public organization) reinforces the analysis. Despite these differences, the analysis reveals systematic similarities in the multiple ways those middle managers enact conversations and enroll networks. The details presented in Table 1 for the four cases presents very similar empirical evidences about the way those middle managers draw on their practical knowledge which reinforces the components of the derived framework. To develop the research started here further, this study needs to be extended out from the implementation of change to other contexts where middle managers play a strategic role to identify if there are other generic activities in addition to the two that emerged here and extend our exploration of the practical knowledge involved. However, the study of activities such as “enacting conversations” and “enrolling networks” and the practical knowledge underpinning them raises some methodological challenges and suggests the need for the development of appropriate and new ways of gathering data. Of course, the best way to learn about this is to become an “apprentice” as Tsoukas (2005) suggests, but this is also hugely time consuming (Balogun et al., 2003). Thus more innovative ways of doing research are needed. For example, work sociologists have developed techniques for gathering data by putting the informants in a role of instructors. It consists in following one worker (here a middle manager) during a work day asking him to tell you everything you need to know in order to be able to accomplish his work (Gherardi, 1995; Gherardi&Nicolini, 2000). Another valuable approach to grasp practical knowledge would be to use videos and photographs of middle managers in action and then looking at this material with them in order to grasp the hidden sense of their practices.

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