Chapter 14

A Sensemaking Perspective on Open Strategy

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Open Strategy, both as a set of processes and practices, and as an emerging academic field, "promises increased transparency and inclusion regarding strategic issues, engaging both internal and external stakeholders" (Hautz et al., 2017: 298; see also Whittington et al., 2011). Open contexts, by involving greater transparency and inclusiveness, strongly impact the way multiple stakeholders make sense of strategy or, in other words, negotiate, disseminate, or even contest the issues at play in strategic change. The diversity that openness brings to the strategic table – a diversity of people (inclusion) but also of information and of perspectives (transparency) – offers organizations more possibilities to help them to make sense of their complex environment (Seidl & Werle, 2018). To uphold the dual promise of inclusion and transparency, Open Strategy would therefore benefit from sensemaking research's attention to the detailed practices through which people form a shared understanding.

Indeed, combining together a diversity of people and of outlooks to reach an actionable meaning of what's going on is no small feat. It is a social process that is rooted in people's identities and may be politically sensitive as each set of actors interpret the information they share and that is shared with them in accordance with their respective interests, background, and expertise (Seidl & Werle, 2018). It can also challenge well-established understandings and potentially lead to important clashes (Chreim & Tafaghod, 2012). Bringing together people from different organizations, units, roles, and professions may thus steer the process toward convergent or divergent sensemaking (Smith, 2016). The process of sensegiving, which consists of sharing information with participants in such a way as to orient their interpretation (Bowman, 2016; Corvellec & Risberg, 2007), can also represent a challenge to Open Strategy, as it may appear to reinforce or contradict the principles of transparency and inclusiveness.

Even though Open Strategy research is strongly concerned with issues related to sensemaking such as commitment (Hutter et al., 2017; Nketia, 2016) and impression management (Gegenhuber & Dobusch, 2017; Whittington et al., 2016), to name a few, it has until now paid scant attention to sensemaking and sensegiving (Seidl & Werle, 2018; Teulier & Rouleau, 2013). Yet, we can find research that uses the sensemaking lens in Open Strategy contexts without using the label as such, in particular in interorganizational collaboration. Combining both is a fruitful union as Open Strategy and sensemaking share many assumptions regarding transparency and inclusiveness and, together, they offer a better account of what goes on when people join forces in strategy making. Literature has shown, for instance, that greater openness in strategy and sensemaking brings about both benefits and drawbacks and contributes to both establishing and dismantling knowledge boundaries between actors (Birkinshaw, 2017;

Smith, [2016]). Most importantly, when both are considered together, it becomes clear that they are distributed processes that weave together time and space: Open Strategy makes sense when people from elsewhere bring in information about what took place elsewhere and at another time. In this sense, inclusion and transparency are mutually reinforcing – positively or not – as bringing information to the table (transparency) also means genuinely welcoming the contribution of the people who voice and embody those perspectives (inclusion).

Despite the challenges they pose to each other, we argue in this chapter that sensemaking offers an alternative vantage point on Open Strategy that highlights its processual and situated nature. By drawing on three brief case studies drawn from our research, we will show how sensemaking is concretely performed in open contexts. It relies on the articulation of three processes that are key for making sense of an Open Strategy and yet remain overlooked in current research, namely presentification (making information and perspectives available in the conversation), embodiment (doing so through one's body and voice), and translation (transporting contributions across time and space and adjusting them to the strategic issues at hand).

The chapter contains four sections. First, we review sensemaking and its connection to strategy. Second, we move on more precisely to the way sensemaking has been used so far in research on Open Strategy contexts. Third, we present three vignettes that allow us to illustrate underexplored and particularly relevant dimensions of sensemaking in Open Strategy contexts. The chapter then proposes an agenda for advancing research on sensemaking and Open Strategy processes and practices, before concluding by suggesting that sensemaking may be constitutive of Open Strategy.

14.1 What Is (Strategic) Sensemaking?

According to Weick's (1995) seminal book, Sensemaking in Organizations, sensemaking and organizing are tightly connected, as the latter precisely consists of the multiple efforts made by human agents to reduce the equivocality arising from novelty, ambiguity, and tensions that are intrinsic to social reality. From their ongoing activities with others, people collectively build interpretive convergence among conflicting beliefs, expectations, and behaviors. In this sense, organizing is less about structuring and controlling than about the capacity of actors to remove equivocality from their informational environment and commit themselves to a convergent set of goals. Colville, Pye, and Carter (2013: 1203) suggest that reducing equivocality does not mean eliminating it, but rather that "action clarifies by shaping what it is that you are attending to and in the doing, shapes what is going on."

　　Even though an array of specific definitions of sensemaking exists in the literature, they all refer in one way or another to the relational and collective aspect of meaning making. For instance, Balogun and Johnson (2004: 524) define sensemaking as the "process through which people create and maintain an intersubjective world" through formal and informal interactions, from exchanging narratives to gossiping. While they explicitly emphasize the creative power of sensemaking, they nevertheless insist on the subjective aspect of sensemaking. Other definitions focus instead on the recreation or the reproduction of the organization and will downplay the individuals' interpretative acts. In that sense, Taylor and Van Every (2000: 275) describe sensemaking as "a way station on the road to a consensually constructed coordinated system of action." It is important to note that sensemaking is more than interpretation. Indeed, Brown, Colville, and Pye (2015: 267) explain, citing Weick (1995: 13), that

contrary to interpretation, "sensemaking is less about discovery than invention, i.e.,

sensemaking refers to processes by which 'people generate what they interpret'."

Sensemaking, whether it is during change or crises (Maitlis & Sonenshein, 2010)

or during times of stability (Sandberg & Tsoukas, 2015), is often conceived in the

literature in terms of process or cycles. Triggered by rare events or new information,

the sensemaking process allows organizational members to reduce the equivocality of

meanings in order to restore or reproduce a "normal" state of shared understanding.

Even though it is methodologically arduous to segment a sensemaking process into

discrete phases, the process of sensemaking is generally described in three or four

stages. Weick (1979, 1995; see also Weick et al., 2005) initially proposed four analytical

steps: environmental change (something happens), enactment (people try out

responses that also shape that environment), selection (the most appropriate one is

chosen), and retention (this response becomes the frame to make sense of future

occurrences). Many authors have sacrificed the retrospective nature of Weick's

proposal (people act first and then figure out what things mean) and reverted to a more

conventional view of the meaning-action sequence. For example, Maitlis and

Christianson (2014) identify three "sensemaking moves": (1) perceiving and noticing

cues; (2) creating interpretation; and (3) taking action. Therefore, adopting a

sensemaking lens means investigating "the specific interpretive processes actors carry

out to generate a specific sense *and* the actions taken on the basis of the sense already

made of the interrupted activity for the latter to be restored" (Sandberg & Tsoukas,

2015: 14).

Sensemaking research offers a set of related constructs that contribute to

refining how we understand the sensemaking process (see Maitlis & Christianson, 2014:

69, for a list of sensemaking-related constructs). Among the better known is the notion of "sensegiving." Gioia and Chittipeddi ([1991](#): 442) define sensegiving as the "process of attempting to influence the sensemaking and meaning construction of others in a preferred redefinition of organizational reality." Sensegiving is generally viewed as a top-down process exercised by leaders and managers who are trying to influence the sensemaking of others. According to Rouleau (Rouleau, [2005](#): 1415), sensemaking and sensegiving, as discourse and action, "are less distinct domains (Hopkinson, [2001](#)) than two sides of the same coin – one implies the other and cannot exist without it." Some researchers also associate the search for shared meanings with the relationships between cues and frames (Colville et al., [2013](#)). While cues denote a piece of information, the Goffmanian term of frames refers to guides for interpretation and action. Frames are thus preexisting knowledge acquired during prior sensemaking episodes, i.e., past and remote events that people use for interpreting information, cues, or their current situation.

Sensemaking has several key features that are unanimously recognized in the literature. Among others, this process is generally viewed as retrospective, communicational, and identity-based. Focusing on people bringing in their frames of reference acquired from socialization and past experiences, research on sensemaking has mainly emphasized its retrospective character, even though it also ties together past, present, and future (Maitlis & Christianson, [2014](#)). The sensemaking literature has also paid attention to how organizational members construct communicational accounts in order to comprehend the world and act collectively. Yet, sensemaking is not only discursive, but also involves emotional, bodily, spatial, and social practices of all kinds (Balogun et al., [2014](#)). Its anchoring in identity makes the sensemaking process

politically sensitive (Brown et al., 2015). Defining the situation is also defining the self, and the other way around (Weick, 1995: 20). Depending on one's understanding of the environment, it is also roles, responsibilities, and relations that organizational members are shaping (Chreim & Tafaghod, 2012).

Finally, sensemaking can be adaptive or inadaptive, to the extent that it can both aid and hinder adaptation to change. Far from being always shared, sensemaking can also be a potentially costly process. This is the case, for example, when it is exercised to one's advantage or reserved to a specific group (Huzzard, 2004). Moreover, commitment to a set of beliefs helps organizational members move forward but also creates blind spots that inhibit sensemaking during change (Maitlis & Sonenshein, 2010). Unless it is part of a reciprocal sensemaking process, sensegiving can, for instance, lead to sensebreaking or sensehiding, the withdrawal or suppression of alternative proposals (Monin et al., 2013).

While sensemaking is a phenomenon in its own right, it also offers a perspective to look at different other issues and processes taking place in and around organizations, including strategy making. Adopting a sensemaking lens draws attention to the multiplicity of people and viewpoints that the situation under study brings about and focuses on people's joint effort as they work out the meaning of that situation. Whether any person's or group's intended or preferred meaning will prevail is an open question (Maitlis, 2005; Maitlis & Sonenshein, 2010).

In this sense, strategic sensemaking constitutes a specialized form of sensemaking that refers to the specific cues and content related to the sense made in the context of strategy planning or implementation. Research on strategic sensemaking focuses on the way organizations and their members "enact" their environment and

make sense of it, which is an integral component of the strategy formation process. More precisely, strategic sensemaking refers to the symbolic and relational processes by which managers, organizational members, and external stakeholders create sense for themselves and others about what they consider to be the "raison d'être" and the future of the organization (Rouleau & Balogun, 2011). Gioia and Chittipeddi (1991: 442), who first introduced sensemaking/sensegiving in the strategy field, define strategic sensemaking as a process of "meaning construction and reconstruction" leading to the creation of a shared "framework for understanding the nature of the intended strategic change."

For the most part, strategic sensemaking research has focused on how top managers and their teams, often in dedicated strategic meetings, make sense of strategy for others (Corley & Gioia, 2004; Gioia & Chittipeddi, 1991; Maitlis, 2005). This has led to an overstatement of strategy's deliberate and localized achievement (see Sonenshein, 2006). For example, Corley and Gioia (2004) view sensemaking as intentionally performed among top managers, and then communicated to the rest of the organization through sensegiving activities to influence how organizational members select interpretations of the new organizational identity. This top-down view assumes that a set of plausible meanings are "shared," at least in the sense that "they enable the same behavioral consequences" (Maitlis & Sonenshein, 2010: 561).

In contrast, an emerging stream of research, borrowing from the practice turn in strategic management, has observed the way strategic sensemaking actually unfolds, without making assumption as to whose meaning matters the most. This stream is less concerned with *what* meaning is reached, and focuses more on how conversations and other practices bring about meaning during strategic change (e.g., Cooren et al., 2015;

Garreau et al., 2015), including through sensegiving (Balogun et al., 2014). This research attitude has allowed recognizing that sensemaking is a cooperative achievement that may implicate an array of organizational members and that may result in the adoption of fragmented interpretations that result from multidirectional relationships (e.g., Ritella & Ligorio, 2016; Tao & Tombros, 2017). For instance, the strategic sensemaking of middle managers has been a regular topic of study (Rouleau & Balogun, 2011; Radaelli & Sitton-Kent, 2016). This shift to a more processual and bottom-up understanding of strategic sensemaking is particularly relevant for the study of Open Strategy, as it means that having a greater number of actors around the table is not an anomaly or an exception. Rather, research adopting such an understanding of strategic sensemaking will empirically look at the way people themselves deal with the additional participants and the elements of information they contribute.

14.2 Sensemaking and Open Strategy

Until now, Open Strategy research has been more concerned with sensemaking-related issues such as commitment (Hutter et al., 2017; Nketia, 2016) and impression management (Gegenhuber & Dobusch, 2017; Whittington et al., 2016). While the former serves as the foundation for sensemaking (Weick, 1995), the latter is not very far from the idea of sensegiving. Moreover, sensemaking in Open Strategy research appears to be considered as the antecedent (Birkinshaw, 2017) or the result or consequence (Hutter et al., 2017) of being more transparent and inclusive in the strategy formation process. For instance, Birkinshaw (2017) suggests that "collective sensemaking" in capital markets is an important dimension of Open Strategy for private firms and places this dimension at the top of his framework. Drawing on an online initiative by Siemens,

Hutter, Nketia, & Füller ([2017](#)) showed that employee participation in open strategizing engenders employee sensemaking that reinforces the sense of virtual community. These studies use a broad definition of sensemaking that is synonymous to interpretation.

Nevertheless, we can find in the literature studies undertaken in "Open Strategy contexts" – whether they use the term Open Strategy explicitly or not – and that draw on sensemaking to complement their analytical apparatus. [Table 14.1](#) provides examples of studies that adopt a sensemaking perspective to look at open contexts. As the table shows, the sensemaking perspective has been mostly adopted when looking at Open Strategy in interorganizational situations. There is therefore room for adapting sensemaking to strategy making within a single organization. That being said, looking at interorganizational contexts may serve as a magnifying glass and make salient the role of sensemaking in open contexts, as different frames, cultures, and professional identities clash. Each study exemplifies the sorts of challenges to which a sensemaking lens allows responding, but also the challenges and opportunities Open Strategy contexts and sensemaking pose to each other. Together, these studies offer a collection of case studies from which we can offer theoretical insight that may be generalized to other Open Strategy contexts (Eisenhardt & Graebner, [2007](#); Flyvbjerg, [2006](#)).

Table 14.1

Studies Offering Cases in Interorganizational Open Strategy

	Open context	The strategic challenge	The sensemaking challenge	How transparency contributes to sensemaking	How inclusion contributes to sensemaking	The paper's main contribution
Corvellec & Risberg, [2007](#)	Wind power development involving multiple partners, government agencies, and environmental stakeholders	Giving a direction to a large array of groups toward the successful implementation of wind energy	Sensegiving as a way to impulse a common direction ("mise-en-sens") to an array of diverse groups and neutralizing opposition	Describing the technical features of the project in response to criticism	Welcoming concerns and questions early in the project	Sensegiving as "mise-en-sens," or staging of meaning

Bryson, Crosby, & Bryson, 2009	Regional forum for sharing geospatial data	Defining a joint strategic initiative to create a common GIS system	Strategic planning as a "way of knowing," i.e., following people's own meanings of their association	Contributing heterogeneous objects (maps, PPT, graphs, prototypes, etc.) and linking them together	Connecting together a range of relevant players in the field	An Actor-Network Theory view of strategic planning in the public sector
Selsky & Parker, 2011	Cross-sector social partnerships	Handling cooperation among the public, private, and nonprofit sectors for social issues	Understanding each other's work, making common sense on the issue and the resources available, and identifying potential partners	Sharing knowledge of the issue and of each sector's way of working	Reaching out to potentially relevant partners and drawing on their competencies	Prospective sensemaking may help deal with societal issues
Teulier & Rouleau, 2013	Cross-sector study group in civil engineering and public works	Working out together the relevance of a technology for the industry	Translating (moving and transforming) information about the technology across industries and firms	Enriching meetings and writing sessions with technical guidelines and descriptions of sectorial issues	Taking into account a diversity of target audiences' needs when authoring reports and organizing industrial visits	Translation spaces help understand technology in interorganizational collaboration
Bowman, 2016	Regional partnership of public service organizations	Formulating a 10-year common vision for the delivery of public services	Joining individual stories to describe the region as a single entity	Each partnership member brings to the table their own scenarios and community plan	Including each partner's story into a single one through the joint activity of scenario planning	Scenario planning as a practice of simplexity: handling complex thought with a simple process
Ritella & Ligorio, 2016	Researchers and computer engineers working on a web platform	Devising a strategy to convince entrepreneurs to use the platform	" … reconciling the different (professional) cultures" and understanding that of entrepreneurs	Offering "informed opinions about how it works and what needs to be improved"	Voicing absent entrepreneurs to bring their experience into the conversation	Strategic sensemaking takes place across time and space
Smith, 2016	Cooperation between university researchers and private firms to create new technology	Figuring out how to work together without precise guidelines	Making sense of each other's work, knowledge, and organizational interests	Releasing more or less information about one's work and professional identity to others	Agreeing to consider others as part of one's group	Sensemaking, strategizing, and group boundaries may impede on innovation projects
Seidl & Werle, 2018	Inter-organizational collaboration to handle water scarcity issues	Finding a common strategy across organizational differences to	Jointly making sense of an environmental issue in order to figure out "how [to] do	Agreeing to pool together each organization's "knowledge of different aspects of water."	The core group invites new participants to broaden the range of cues, but these come with their own	Clarifies the interplay between issues, participants, and their interests

| manage a common resource | something about it?" | interests and may redefine the issues at hand |

To reveal the details of meaning production without making assumptions about the voices that matter, sensemaking studies in Open Strategy contexts tend to adopt a qualitative research approach focusing on the communicative practices of participants. This can be done by looking at the product of sensemaking, which will typically take the form of a text (e.g., reports, plans, guidelines, conventions, and so on) that constitutes a (provisional) stabilization of the negotiation between all the involved parties (Bowman, 2016; Teulier & Rouleau, 2013). The production, distribution, and consumption of texts, in this respect, can be seen as the result of the activities that happen in different interconnected spaces (Ritella & Ligorio, 2016; Teulier & Rouleau, 2013). Alternatively, it is also possible to concretely observe the practices deployed by participants as they are engaged in collaborative sensemaking itself. This can be done, for instance, by analyzing the details of their conversations (Ritella & Ligorio, 2016), the interactions during which they jointly write a text (Teulier & Rouleau, 2013), and the meetings in which they prepare presentations, scenarios, prototypes, and so on (Bowman, 2016).

In addition to magnifying the sensemaking process, interorganizational situations also make issues of hierarchy and power less obviously salient, thus allowing us to look at how sensemaking itself makes them relevant or not. Conventional channels of communication also cannot be presumed. Indeed, adopting a sensemaking lens means remaining open to *how* people themselves can bring their contribution to the table, make sense together of a changing environment, and select an appropriate response when transparency and inclusion are thrown into the equation – without

assuming that a specific group (e.g., top managers) matters more than another or that things will unfold according to usual procedures.

In this sense, research on sensemaking in Open Strategy contexts has usually emphasized the blurring of the conventional spatial, hierarchical, and knowledge boundaries of strategy making (Bryson et al., 2009; Ritella & Ligorio, 2016; Smith, 2016). Sensemaking, indeed, regularly serves to figure out new ways of working together when novel forms of strategic collaboration are put in place. Sensemaking in Open Strategy contexts, then, consists of both developing frameworks of meaning around a shared issue or project, but also of providing or building a common direction by understanding each other's identity, profession, or interests (Bowman, 2016; Corvellec & Risberg, 2007; Ritella & Ligorio, 2016).

While transparency and inclusion, which are central to Open Strategy, may empirically take a variety of forms, and while there may be cases where one exists but not the other, a sensemaking perspective sheds a different light on the two notions and stresses their interrelatedness. Transparency, for its part, does not only concern a preexisting top management team sharing sensitive information downward (and in fact such a vertical hierarchy may not exist ahead of the sensemaking process). It also includes the way participants reveal the knowledge they hold about the issue or project at hand (Bryson et al., 2009; Corvellec & Risberg, 2007; Ritella & Ligorio, 2016; Seidl & Werle, 2018; Selsky & Parker, 2005; Teulier & Rouleau, 2013), as well as the knowledge about themselves (Bowman, 2016; Smith, 2016): the interests that lead them to join the collaborative strategizing effort, their ways of working, or their stories. What is at stake is the very constitution of a team that pools together its expertise and its methods in

order to build a shared understanding of the common project and of its strategic

challenges.

It is not surprising, then, that inclusion works hand in hand with transparency

when it is looked at from the perspective of sensemaking: what matters is not only

bringing people from diverse professional and hierarchical positions, but also that those

people can contribute information or expertise to the strategic conversation. This is

why inclusion often consists in inviting partners who may participate into the project

being carried out (Bryson et al., 2009; Seidl & Werle, 2018; Selsky & Parker, 2005), or at

least finding ways of representing relevant concerns and experiences (Bowman, 2016;

Corvellec & Risberg, 2007; Ritella & Ligorio, 2016; Teulier & Rouleau, 2013).

Importantly, inclusion is not only about others being merely present, but supposes

actually considering them as part of the group and listening to their voice (Smith, 2016).

Focusing on sensemaking in Open Strategy contexts therefore questions the

assumption that there is a core group doing the strategizing work, and others who are

included as extras. This is not to say that there may not be an inner circle (whether

formally or not) or tensions between participants, but whether these do matter or not is

one of the elements of which people need to make sense. This entails that transparency

and inclusion are not as easily distinguishable: transparency is not a specific group's

business, as everyone may withhold or disclose information; and in order to contribute

information, one must have been included in the first place.

To study sensemaking in the context of Open Strategy, where multiple

stakeholders coalesce or oppose, there is therefore a need to understand what

sensemakers and "sensegivers actually do when they are involved in sensegiving" and

sensemaking (Corvellec & Risberg, 2007: 308). Observing the minutiae of meaning,

production, negotiation, and diffusion will reveal how varied knowledge – from

different disciplines, professions, roles, identities, etc. – interacts through various

modalities (through bodies, speech, writing, drawing, etc.) as people figure out their

organization and its changing environment, but also their own individual and collective

identity as strategy makers. This is what we will do in the next section.

14.3 Three Cases Studies: Presentification, Embodiment, and Translation in Action

We propose to analyze succinctly three case studies taken from our own research. They

each add a layer to the understanding of the sensemaking process in Open Strategy. The

first, taken from the microbrewing sector, highlights how the inclusion of many

participants opposes but also complements the leadership team's efforts at

transparency in the more conventional sense, which leads the decision-making process

to take an unexpected turn. This is possible, we will argue, because the case allows

expanding the notion of inclusion to the way participants presentify – make present or

available in the current situation – not only absent actors (similarly to Ritella & Ligorio,

2016; Teulier & Rouleau, 2013), but also events and information that are distant in time

and space. The second, taken from the healthcare sector, reverses our usual

understanding of inclusion through the notion of embodiment, and explores how a

change agent includes himself in various groups and provides them with cues not only

through visual and narrative practices, but also through his own body, to create

strategizing opportunities. Finally, the third case, drawn from the public works and civil

engineering sector, explores the interdependence of diverse "translation space" that

makes up the arena of open strategizing where meaning is jointly produced.

Table 14.2

How the Three Cases Illustrate Presentification, Embodiment, and Translation in Open Strategy

Context	Form of strategic sensemaking	Transparency	Inclusion	Sensemaking process
Industry-wide branding and marketing decisions at a microbrewers' association	Collaborative sensemaking to respond to sectoral challenges by larger breweries	Executives share disastrous financial results and unconvincing new plan of action	Representatives of the association's members participate in decision making. People also voice absent others.	*Presentification* (widening the range of actors, organizations, and events by even including absent ones)
Introduction of the patient-partner approach in the healthcare sector by a director who is himself a patient	Sensegiving to create new strategies in the healthcare system that will transform the logic of care	Shares his expertise on the approach, but also stories concerning his own experience as a patient, through narratives, visuals, and his body	Includes himself, both as an expert and as a patient, among various groups and adapts his story to each audience	*Embodiment* of the basic features of the change in order to provide rich cues for strategizing
Inter-organizational collaboration in the civil engineering and public works sector concerning technology	Jointly making sense of the relevance of a new technology for the industry (definition of a digital mock-up that would transform the sector)	Being candid about each firm's needs and understandings with the technology	Using interdependent and sequential translational spaces to consider different viewpoints on the technology	*Translation* (transform and transport ideas through time and space)

(V1) Making Cues Present Through Discourse About a Future Event in the Microbrewing Sector

The first vignette illustrates how sensemaking in Open Strategy contexts also relies on the way participants make present in the situation events and information that are spatially and temporally distant, a practice that has been called "presentification" (Benoit-Barné & Cooren, 2009). Presentification takes place as people lend their voice, their body, their writing, or otherwise offer substance, to materialize information, ideas,

rules, or other entities that would have no other way of being "present" in the given situation. As a practice, presentification combines inclusion and transparency, as people's inclusion in the meeting makes it possible for them to offer substance to otherwise unavailable information, thus contributing greater transparency.

This case takes place at the Microbrewers Association (MBA), an industry association in a Canadian province. At their annual congress, representatives of member organizations engaged in interorganizational strategizing to make a strategic decision: whether or not to hold a second edition of a beer festival they had created to provide visibility to their new brand and raise money for their association. Open strategizing became a part of the MBA's annual meeting ever since member organizations collectively elaborated a strategic plan for the microbrewing industry ten years prior to compete with the large breweries that control the market (Piette et al., 2014). In terms of transparency and inclusion, the annual meeting offers an opportunity for member representatives from various microbreweries to create a community of interacting stakeholders and to strategize together using information about their industry and the political context provided by the executive committee.

The first edition of their beer festival was held during the summer of 2016. To get the festival off the ground, each member microbrewery had agreed to pay a special fee, and larger members provided loans to the MBA that would be reimbursed with the event's profits. The festival was a critical success, but a financial disaster. Only about 6,000 people attended, instead of the expected 30,000, and the MBA came out of the event with an important debt.

At the following annual meeting, members had to decide whether to go ahead with a second edition of the festival, to be held in 2018. To shape up an image of an

improved version of the beer festival, the MBA annual meeting's attendees had to build on cues from past events and compare them to a new road map for the event. The challenge – in particular for the chair of the organizing committee – was therefore to make present in the room, i.e., to "presentify," the previous edition in a way that would be useful for the sensemaking process, along with some new information allowing him to envision a successful version of the event. This took the form of an explicit sensegiving exercise for the committee chair. He sent budgetary and financial information showing expected profits by email prior to the meeting. While email would appear to offer easy access to the documents he had sent, in fact it turned out to make them less readily available, as most participants had not brought electronic devices with them or did not have convenient internet access. In the name of transparency, which he seemed to associate with a form of self-criticism, the chair of the organizing committee only gave a partial glimpse at the 2016 event, and emphasized what went wrong – and not so much the reasons why the event was needed in the first place, its strategic import, or its critical acclaim.

The new business plan suggested an event of similar scale and budget for the 2018 festival, at the same location, but with a more efficient advertising campaign. Having to decide within the same day, but with only a partial and negative account of the past event, participants had little choice but to view it as an unsuccessful venture, and therefore to project this diagnosis forward on the 2018 event, which ended up being described as "risky." This can be seen as a failed attempt at sensegiving by the committee chair, who tried to provide cues to convince participants to endorse this new course of action for the beer festival. However, he was ineffective in orienting the sensemaking process because of the poor choice of cues made present.

The conversation took a shift when a participant shared his experience with a smaller festival in his hometown, thus contributing an alternate piece of sensegiving from the floor. Here transparency and inclusion collide: involving a greater number of participants provided an opportunity for the presentification of alternative and enriching pieces of information to the sensemaking process. By conversationally taking the room on a journey to a different location and a different time, he gave his colleagues access to a new sensemaking frame: a festival can also be a smaller-scale event; it can be manageable, regional, and low-risk. By making present, through his account, the example of his own small festival, the participant provided his fellow meeting attendants with a much-needed frame to make sense of the worrying information the chair of the organizing committee was offering them. The strategic decision was made accordingly, giving a new and unexpected orientation regarding the beer festival as a strategic asset. The leaders' sensegiving, carried out in the name of transparency, ended up backfiring, but sensemaking worked as cues were pooled to explore new possibilities regarding collective strategy. The inclusion of many actors who materialized and "made present" cues from other times and spaces made it possible for them to orient the sensemaking process toward unexplored strategic directions.

This vignette shows intertwined dynamics between transparency and inclusion in the context of Open Strategy, as shown by analyzing the sensemaking process through the concept of presentification. This concept also reveals the multidirectional aspect of sensemaking in Open Strategy contexts and how it makes decision making more complex (Hautz et al., 2017). Greater transparency by leaders through sensegiving (following a top-down direction) does not necessarily mean the provided cues will be used as intended. Greater inclusion means that more participants materialize cues that

would not be available otherwise and that may orient the strategic conversation. In that sense, presentification relies on inclusion, but contributes to transparency by making useful information available.

(V2) Embodying the Success of the Patient-Partner Strategy in the Healthcare System

Continuing on the idea that absent people, events, and information are made present in a given situation through their materialization, this second vignette insists on the role of *embodiment* in the strategic sensemaking process. In this case, a school of medicine mandated John, a consultant, to implement a new patient-centered strategy in its hospital system. However, the hospitals and each of their departments were relatively autonomous in their decision to adopt or not to adopt the strategy. To steer leaders toward a positive decision, John organized brainstorming workshops at various hospitals to reflect with professionals about what a patient-partner strategy could mean for them. In this case, the transparency and inclusion dimensions of Open Strategy are part of this implementing process. Having received blood transfusions to treat his hemophilia, he has seen the hospital and healthcare system from the inside. Infected with HIV when he was a teenager, he came to embrace a different way of dealing with healthcare professionals. Indeed, by embodying the patient-partner himself during his presentations to professionals and managers, he thus provides them with cues related to the new strategy, as they are responsible for elaborating their work plans and figuring out whether the patient-partner strategy is meaningful for their departments. By including himself in the strategic target, he also incarnates transparency by sharing with health professionals a patient's feelings and experiences.

The third author analyzed a series of such sessions, during which John hoped to make a variety of health managers and professionals understand that patients have an expertise of their own, with the ultimate goal of conducing them to develop their own local strategy drawing from the patient-partner philosophy (Renaud et al., 2016).

John would explain how he was – and continues to be – involved in his own treatment, and the outcomes he experienced with his own body. In doing so, he embodied the patient-expert, inviting participants to directly engage with the meanings he tries to convey to them. Thus, he did not only speak of patients' knowledge, but offered the professionals a chance to be in the presence of a skilled patient-partner: himself. He embodied his understanding of patients, which for him is not a mere mental image, but a lived journey.

When presenting himself in a group of doctors, to provide them with cues to understand and appropriate the patient-partner strategy, John turned the spotlight to his body bearing no visible signs of illness and displaying happiness and energy. He offered an incarnate example of what the future can be for patients who are empowered in their relationship with their doctors. When he was in a meeting with nurses, he physically demonstrated his proximity with them, to illustrate that they are patients' natural allies and the true change-bearers toward a patient-partner philosophy. He would typically have a nurse with him on stage, and displayed physical proximity with her, for instance by touching her arm and making jokes with her. In one case we observed, the nurse responded by laughing, providing her group of peers with cues in the form of joint embodiment, displaying the closeness between the patient-partner philosophy and the nursing profession, or between patients and their caregivers. It appeared as a natural, simple, and almost intimate relationship. When he was among a

group of managers, John created cues that connected to his audience's needs and interests. He would wear a suit and speak their language by using charts and graphs that showed the roles patients could play in the care continuum, as well as statistics to demonstrate the efficiency of the strategy. Once he established his credibility in speaking to a managerial audience, John would also tell his own story as a patient who has been successful in taking control over his own treatment by collaborating with healthcare professionals. The apparently healthy, affable, and "managerial" body that stood in front of the managers, and that looked so much like them, therefore turned out to be the product of the patient-partner strategy.

Here again transparency and inclusion appear to be multidirectional, as John included himself in those groups and embodied a strategy to assist participants, creating a positive meaning of the patient-partner strategy. John's efforts can be read as attempts at inclusion and (strategic) transparency by building a coalition to bring together all the key players around the patient-partner strategy. He did not only tell them about the interests and concerns of each party, but also embodied the strategy and created environments where it could be interpreted and appropriated by health professionals. This case shows that when applying a sensemaking lens to strategy – which is never disincarnate – the bodies of all those involved do matter as they are vehicles through which inclusion and transparency are achieved. We can effectively see it from successful business or political leaders who are incarnating the spirit of their products and philosophy. For instance, Steve Jobs embodied the friendliness of Apple products, Richard Branson embodied daredevil entrepreneurism, and John Legere, the long-haired, young-acting CEO of T-Mobile US, is rarely seen without the purple t-shirt that reminds one of the company's colors.

(V3) Translating the Relevance of a Software for Public Work and Civil Engineering Firms

The third vignette illustrates that, while Open Strategy may involve fragmentation through time and space, sensemaking helps reconnect the dots through interdependent and sequential translation spaces. Translation, here, must be understood both in the geometrical sense of movement through time and space, and in the linguistic sense of adapting meaning to a new context. Indeed, in strategic sensemaking, translation consists both in connecting together previous occasions for meaning making into a coherent whole and adjusting these meanings to the issues at hand. The example in our case is that of Communic Group, a cross-sector study group bringing together middle managers and other collaborators from public work and civil engineering firms, dedicated to understanding how the introduction of a 3-D design software will transform the work practices in the sector. The group members were supposedly competitors but agreed to put aside differences and to express transparency by sharing business information in order to make sense collectively of this new technology. Inclusion was achieved not only through the gathering of these representatives, but also because each of them voiced the concerns and interests of the many members of their respective firms.

Along with another researcher who followed the Communic Group over a period of three years, the third author analyzed the members' sensemaking process (part of this work is reported in Teulier & Rouleau, 2013). The study revealed the importance of translation spaces – including intensive work sessions, industrial visits, writing sessions, and organizational meetings and talks – where the group members, along with middle managers and other stakeholders from various organizations, explored what the

new software meant for their firms' strategy by pooling their individual and collective

knowledge and past experiments. This has led to defining translation as the way a

heterogeneous group of people transport cues, in the form of objects and ideas, from

one context to another, and transform them so that they become meaningful in the new

context.

A part of Communic Group's work consists in attempting to model the software's

behavior using a mock-up. A challenge with the mock-up (and eventually the software)

was to meet the expectations and demands of the various tasks and professions

represented around the table. Inclusion complexifies the task of adapting the software

to the needs of different specialities (earthwork, drainage, structural engineering, etc.)

and functions (foundations, finishing layers, restoration, etc.) in the sector. During the

intensive work sessions using the mock-up, the group started by sharing their

respective firm's preoccupations regarding the characteristics and the possibilities of

the new technology. The many contributions, of both data and frames to make sense of

them, served to translate the new piece of software into issues, values, interests, and

other elements that spoke to the group members. More specifically, the translation

consisted in reframing problems, from technical to organizational, and the other way

around. This sensemaking process allowed them to develop a new joint strategy around

the potential use of the new technology in their sector.

In parallel to working on the mock-up, they took part in industrial visits at firms

from another sector, which allowed them to see that the software was more than a

visualizing and display tool for clients. It was also a cooperation and a project

management tool. Including a new site for collecting cues allowed for a greater diversity

in the meanings involved, but still required the work of selecting cues and interpreting what these cues would mean for them in their own context.

To report on their findings, the group's members engaged in intense writing sessions that served to reconcile interpretative differences among themselves. Not only was each writing session a conversational space where different interests, including those of potential readers at partner firms, were brought to the table, but the texts themselves constituted such spaces. Indeed, the term "translation" takes here an almost literal sense, as the information to be included and its wording were both carefully considered to craft texts that would be meaningful to all stakeholders back at the member firms.

When the group's members would go back to their respective firms, they would organize meetings to report on their work, and share their newly formed understandings of the software, thus engaging in sensegiving for their colleagues' benefit. Here they were translating the result of their sensemaking processes within the group, in order to orient sensemaking of their firms' members into understanding the potential benefits of adopting the new technology. To do that, they speak on behalf of the technology, explaining what it demands, what it entails, and what it brings to the firm, in concrete terms that are relevant to their colleagues.

These four translation spaces – working on the mock-up, the industrial visits, the writing sessions, and reporting on the group's findings – are sensemaking and sensegiving occasions where group members meet among themselves or with other stakeholders to contribute the knowledge they have, generate new knowledge, and make sense of it all. This case shows that, in often fragmented Open Strategy processes that take place across spaces and time frames, meetings and other gatherings must also

serve as translation spaces in order to weave together the many places and times of the sensemaking process and alleviate the complexity created by the inclusion of a range of stakeholders.

14.4 A Research Agenda

These three cases were chosen because, although they are drawn from broader and more complex studies, they each condense and illustrate one of three unexplored features of sensemaking that becomes salient when it is used as a perspective to look at Open Strategy, namely presentification, embodiment, and translation. The first vignette, concerning the Microbrewers Association's decision over whether to hold a beer festival, illustrated the way sensemaking requires cues from past events or events to be made present or "presentified." The second vignette, concerning John's efforts to promote the patient-partner philosophy, showed how a strategic proposal is not only made sense of through visuals, objects, language, and rational arguments (although these mattered too), but also through the literal embodiment of the various stakeholders' interests and concerns. Finally, in the case of Communic Group, middle managers were involved in various translation spaces and practices through which they had to design a future technology that will transform the whole sector. We will first provide a specific research agenda for advancing our knowledge of presentification, embodiment, and translation and then we will propose some directions for moving forward research on sensemaking in Open Strategy.

For the Study of Presentification, Embodiment, and Translation

Presentification, embodiment, and translation each raise a central question for understanding the process of sensemaking in Open Strategy, questions that we use to sketch a specific research agenda that addresses these concerns: (1) What cues and frames are brought into the sensemaking process, and how is the selection made through presentification? (2) How are these cues and frames brought in by participants or, in other words, how are they concretely embodied in the Open Strategy context? and (3) How are cues and frames made relevant or how are translation processes carried out and managed by/for various stakeholders?

Presentification offers a reworking of the notion of transparency through a sensemaking lens. Rather than thinking of transparency as an unproblematic peek at existing information, presentification invites the researcher to concretely look for the processes and practices through which people select information and bring it to the strategic table. To do this, we could follow the method suggested by Cooren (2010), which consists in identifying in each interaction the many "figures," as he calls them, that make a difference in the unfolding of action. In our case, the action is strategizing, and we must ask ourselves, as we observe participants engaged in the practice of strategizing, what documents, objects, ideas, principles, values, past events, or concerns they invoke as they progress through their joint strategizing effort, and what concrete difference these figures make (see Cooren et al., 2015).

Embodiment, for its part, recognizes that these figures are always made present through people or things. Most often, since we study human interaction, this will be through bodies, as in John's case. Even if someone refers to a figure in their speech, this is still a form of embodiment, as the person will make that reference using their own

voice, their own tone, their own assuredness, and so forth. In future research on sensemaking in Open Strategy, we need to recognize the multimodal character of any sensemaking / sensegiving situation (Mondada, 2011): sensemaking is not only about figuring out words in the abstract, but also utterances spoken or written by flesh-and-blood people in specific ways. What difference the body and other nonverbal modalities, such as props, documents, or technology, make in the sensemaking process must therefore be studied closely, as it determines the unfolding of the process.

Finally, translation is a concept borrowed from Actor-Network Theory (see Callon, 1986; Latour, 1986, 1987) and already echoed by some authors in the field of strategy (Bryson et al., 2009; Hardy & Maguire, 2010; Ritella & Ligorio, 2016). Nevertheless, more has to be done because we still know next to nothing about the artfulness of this complex process. Moving from the technological to the organizational, or from one industry to another, or from a group to others, is not a mere issue of translating words (although it certainly also is). It is also a matter of moving different sensemaking episodes across time and space and providing coherence to them. For instance, figuring out what a precise feature of a software *means* when inserted into a given organization also amounts to linking together prior experiences, conversations, and challenges with equivalent problems in another one. Studying sensemaking therefore involves paying close attention to the ways different people may bring to the table a series of apparently disconnected concerns they have experienced in different space-times, and yet find ways to build equivalences between them to make them relevant for each other.

For the Study of Sensemaking in Open Strategy

Presentification, embodiment, and translation help take a step back and approach sensemaking in Open Strategy from a different angle. They first reveal that strategic sensemaking in Open Strategy is a "distributed" process that takes place across various spaces and practices. No one person can single-handedly control the meaning they want to transmit or impose on others, which also entails that strategizing cannot be reduced to one given group of individuals. The top-down transmission of strategic decisions from the management team to lower-level employees may in fact be but one contribution among possible others in a broader strategic sensemaking puzzle. Future research should adopt a "distributed" view and consider that sensemaking in open context is enacted by a collective, an organized group of people having divergent interests and goals. This research attitude is important when sensemaking is made more complex by inclusiveness and transparency in Open Strategy contexts.

The distributed character of sensemaking and Open Strategy also makes salient the need to move away from cognitive explanations of strategy making, and toward relational approaches. Presentification, embodiment, and translation all point to the fact that people collaborate as they engage in sensemaking: not only do they bring into the current situation cues, including their experience in past situations, and do so with their body and identity, but must also translate these experiences for others to recognize their relevance. The social character of sensemaking takes on special importance in Open Strategy. Adopting a sensemaking perspective allows recognizing that strategy making is a creative process (not only an interpretative or a subjective act, as we previously said) during which people collectively contribute to shaping their organization, rather than the mere transmission of individual cognitions. Sensemaking

and strategy, then, are the emergent and always-shifting outcome of relations, in line with the ongoing conversation on relationality in the social sciences (Cooper, 2005; Emirbayer, 1997; Kuhn et al., 2017). Research on sensemaking in open contexts should therefore not only show that people have or have not adopted a new strategic frame but rather pay attention to the cycle of sensemaking moves (Mailtis & Christianson, 2014) by which they produce and reproduce meanings by acting and relating with others.

This shift toward relationality invites reconsidering the sorts of theories used to study sensemaking in Open Strategy. To account for the relational and social practices from which strategic meanings emerge, some researchers are already suggesting adopting Actor-Network Theory (Steen et al., 2006), the communicative constitution of organization approach (also known as CCO; see Cooren et al., 2015), the practice approach (Whittington, 1996; see also Fenton & Langley, 2011), or activity theory (Jarzabkowski & Wolf, 2015). These theoretical orientations, while diverging in many respects, share the conviction that sensemaking and strategy are a joint accomplishment that cannot be reduced to actors' interests, interpretations, or other features. Furthermore, they hold that the accomplishment of sensemaking and strategy is observable, which leads them to adopt a variety of empirically grounded methodologies. For instance, they use ethnography (Vásquez et al., 2017), video methods (Gylfe et al., 2016), or discourse-based methods (Phillips et al., 2008). These methods allow the concrete observation of the temporal unfolding of practices and processes, without having, *a priori*, to assume that some people or some behaviors matter more than others. Adopting one of these theories and research methods, or any other that permits exploring the distributed and relational nature of sensemaking

would enable the field of Open Strategy to remain open to discovery and to embrace surprise.

This chapter has revealed that sensemaking in Open Strategy is still in its infancy. Moreover, most research has so far been done on interorganizational case studies. Future research should explore how sensemaking is achieved in open context belonging to the corporate world. Innovation, platform work, and new social media technologies are becoming part of daily life in contemporary business and they affect the strategy making. These new trends transform the corporate world into an ecological and distributed system in which joint sensemaking is requisite for value creation. This will allow us to compare different contexts and see if there are contingency factors that favor the accomplishment of sensemaking in open contexts.

14.5 Sensemaking as a Constitutive Dimension of Open Strategy

As open contexts involve multiple stakeholders, competing interpretations and demands about what is going on increase the level of equivocality. In that sense, it could be argued that strategic sensemaking – or the process of reducing equivocality through plausible meanings and commitment about strategic issues – is what makes Open Strategy possible at all (Mack & Szulanski, 2017). Indeed, Weick's (1979, 1995) description of sensemaking parallels many features that are usually associated with strategy: sensemaking, according to him, is about people figuring out their environment to decide on an appropriate course of action, which echoes many conventional definitions of strategy. To paraphrase Weick (2001: 95), who wrote "Sensemaking makes organizing possible," it is clear for us that not only "sensemaking makes Open Strategy possible" but we contend that "sensemaking is constitutive of Open Strategy."

More than a perspective (as we have considered it until now in this chapter), we suggest that sensemaking is at once an effect of Open Strategy and its antecedent. More precisely, sensemaking in open context is produced and reproduced during the multiple actions related to the strategy formation and implementation. Their co-constitution is reinforced by the fact that they share some similarities in terms of nature and direction. They both share the challenges of transparency and inclusion, they can be largely altered by the complexities of their enactment, and they can have beneficial or costly outcomes.

In this chapter we traced back the evolution of sensemaking research since Weick's foundational work, and showed how authors have used this concept, along with its corollary "sensegiving," in the strategy literature. We discussed challenges associated with studying sensemaking and sensegiving in Open Strategy settings, in particular in light of transparency and inclusion issues, which are essential characteristics of these settings. Drawing on vignettes taken from our recent work, we identified three aspects of sensemaking processes (presentification, embodiment, and translation) that can lead to a research agenda for researchers interested in understanding Open Strategy from a sensemaking perspective. Open Strategy provides a compelling and challenging territory to explore possibilities associated with a sensemaking approach that goes beyond the cognitivist trend that marked the earlier work, to embrace a more processual and situated research agenda.

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