Simple rules for sensemaking praxis: How HR can contribute to strategic change by developing sensemaking capability in organisations

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ORIGINAL ARTICLE

Simple rules for sensemaking praxis: How HR can contribute to strategic change by developing sensemaking capability in organisations

Sarah Kieran | Juliet MacMahon | Sarah MacCurtain

Department of Work and Employment Studies, Kemmy Business School, University of Limerick, Limerick, Ireland

Correspondence
Sarah Kieran, Department of Work and Employment Studies, Kemmy Business School, University of Limerick, Ireland.
Email: sarah.kieran@ul.ie

Abstract

This paper explores how sensemaking theory offers a new perspective on HR's role during strategic change. As change in organisations today is less of a programme and more of a continuous cycle of business transformation, there has been a shift in focus to its underpinning, cognitive process of sensemaking. However, HR's role in developing sensemaking praxis in organisations is not widely researched to date. This paper addresses that gap. We draw on Eisenhardt and Sull's 'simple rules' whereby complex strategy praxis is reduced to a highly translatable, small number of key rules (2001). Through a diary study of middle managers engaging in strategic change, we investigate their real-time, lived sensemaking praxis. We conclude that HR have a significant contribution to play in developing an organisation's sensemaking praxis through four Simple Rules of Sensemaking: (1) plan creative discourse opportunities, (2) ensure leader-middle manager parity, (3) mutually direct sensemaking through ongoing re-planning and re-prioritisation, and (4) ensure leadership effort continues beyond the initiation of strategic change.

KEYWORDS
change management, HR change agent, sensemaking

Practitioner notes

What is currently known about the subject matter?

- Despite acceptance of HR as a strategic change champion, the remit and role needs to be advanced to better contribute to the continuous cycle of change faced by organisations today
- Sensemaking is a vital process underpinning change but its micro-processes, how it is practiced in the organisation, are largely unknown
- How HR can support and develop sensemaking praxis in organisations has not been previously researched

Contribution of this paper

- This study investigates how HR can support sensemaking praxis in organisations
- The findings isolate and identify four simple rules for sensemaking in organisations
- This paper progresses our understanding of sensemaking theory to a micro-process level

Implications of the study findings for Practitioners?

- HR has a clear role to play in helping organisations establish and engage in sensemaking praxis
- Sensemaking praxis leads to more successful and sustained strategic change outcomes for organisations
- Simple Rules for Sensemaking provides HR with a clear framework for advancing HR's role in strategic change

1 | INTRODUCTION

Sensemaking theory defines strategic change as 'an attempt to change current modes of cognition and action to enable the organisation to take advantage of important opportunities or to cope with consequential environmental threats' (Gioia & Chittipeddi, 1991, p. 433). As the pace of change in organisations increases, exploration of these underpinning, interpretive processes have never been more important (Sanders et al., 2014). This paper is concerned with advancing HR's contribution to strategic change through their development of sensemaking praxis in the organisation. Notwithstanding claims that HR's role in strategic change is undervalued (Alfes et al., 2019; Roche & Teague, 2012; Wylie et al., 2014), SHRM literature conceptualises HR's role as a strategic change champion (Brown et al., 2017; Storey, 1992; Ulrich et al., 2012). In presenting the roles of change champion and strategic business partner as one, Ulrich describes HR as helping the organisation adapt to the change, developing a range of processes and programmes to implement the change, and then developing HR practices which increase the organisation's ability to change (Ulrich, 1996; Ulrich & Brockbank, 2005; Ulrich et al., 2012). More recent studies refer to HR as multi-level change agents; simultaneously leading, creating, co-ordinating and enabling strategic change (Intindola et al., 2017; Lemmergaard, 2009; Stensaker & Falkenberg, 2007; Stensaker & Meyer, 2012). HR are positioned as having the power to transform organisational capacity when they successfully address the context, content and implementation of strategic change (Alfes et al., 2010, 2019; Hailey et al., 2005; Long & Ismail, 2012).

The role for HR here is of course a demanding one. Strategic change presents many challenges for organisations with rates of failure attributed at between 60% and 90% (Burnes, 2011). It is further complicated by a shift in the management of strategic change away from the more tangible, planned and staged approaches of the past (Kotter, 1996 ; Lewin, 1947). Traditional planned approaches to change offered HR a highly translatable, 'usable' format for practice.

However, strategic change is now accepted as an intangible, continuous, non-linear, dynamic and emergent entity. This in turn begs the question as to how HR can best contribute to new forms of strategic change (Alfes et al., 2019; Appelbaum et al., 2012; Burnes, 2011). This paper responds to that question by exploring HR's role in change through the lens of sensemaking praxis (Gioia & Mehra, 1996; Weick, 1995; Weick & Quinn, 1999). A sensemaking perspective addresses the dynamic nature of change in organisations today, encompassing the challenges presented by context, content and implementation (Alfes et al., 2019).

However, HR's potential contribution is impeded by our limited knowledge of sensemaking praxis, specifically the processes and practices through which organisational members navigate and make sense of change (Brown et al., 2016; Maitlis & Christianson, 2014). This paper proposes that it is in this theoretical gap that the HR solution lies, posing the research question: What role can HR play in enabling sensemaking praxis in organisations?

With this research question, we situate sensemaking praxis as inexorably linked to strategic change praxis: an ongoing, living process in organisations (Balogun & Rouleau, 2017; Gephart et al., 2010; Sandberg & Tsoukas, 2015; Weick, 2012). It is in these often invisible practices that the most interesting insights rest (Vaara & Whittington, 2012; Weick et al., 2005). Through an innovative, real-time, diary methodology, we seek to unravel and isolate sensemaking praxis through the lived experience of middle managers, a key stakeholder known to reside at the critical nexus of the leadership's vision for change (Balogun, 2003; Floyd & Wooldridge, 1994). We seek to use this evidence to identify areas and methods by which HR can best contribute to the change management process. To achieve this, we draw on the work of Sull & Eisenhardt (2015) who found that, from a strategy perspective, it is possible for organisations to engage in a small number of simple rules that can guide members through the complex world of global strategy. We propose that the development of 'simple rules' for sensemaking can also offer a practical contribution by providing a pathway for HR to advance its remit and role in strategic change through supporting and developing sensemaking praxis.

2 | SENSEMAKING PRAXIS

Sensemaking has been defined as a process of cognitive interpretation and action, triggered by an event for which there is no existing mental model (Gioia & Chittipeddi, 1991; Weick, 1995). Given the uncertain, organic and dynamic nature of change identified earlier, sensemaking here is not only a response to a new event but a critical process through which strategic change is realised. Sensemaking is considered to be an active process, rarely confined to one individual. It has three distinct stages of scanning, interpretation and action (Gioia & Chittipeddi, 1991; Maitlis & Christianson, 2014). Organisational members notice cues and triggers which prompt change, they share information related to the cue, compare different interpretations, and review possible responses all in an iterative, social and discursive manner (Bartunek et al., 2006; Cornelissen, 2012). However, organisation members can also scan, interpret and act at an individual level so sensemaking can also occur as an innately cognitive and individual process that happens discretely in organisations. Sensemaking can happen formally through business processes (Information/Planning Sessions, Project/Management Meetings, Performance Reviews) but can also occur continuously and informally through the stories and narratives of organisational life (Abolafia, 2010; Cornelissen et al., 2011; Sims, 2003). Such stories constitute very powerful sensemaking tools (Balogun & Johnson, 2005; Weick, 2011). The perspective of the organisation as a discursive space or interpretive system (Daft & Weick, 1984) is becoming increasingly relevant in today's uncertain environment. Events are identified and sense is made as the organisation builds up norms, values, behaviours and mental models over time; however, organisations need to revisit and reinvent responses as the environment changes. As such, sensemaking praxis critically underpins all strategic change activities and is fundamental in achieving sustainable performance outcomes. How then can HR advance its role in strategic change by supporting the development of sensemaking praxis? While HR's role in sensemaking praxis

has not been previously studied, a review of the broader sensemaking literature highlights some relevant enabling mechanisms.

3 | ENABLING SENSEMAKING PRAXIS

HR has a multi-level role in strategic change, influencing and facilitating the organisations leaders alongside other key stakeholders down through the organisation (Brown et al., 2017). We argue that this multi-level role can be expanded into the arena of sensemaking praxis for both leaders and middle managers. Understanding how to engage and develop leadership sensemaking is critical if sensemaking praxis is to be fully realised (Gioia & Chittipeddi, 1991; Liu & Maitlis 2014). Previous studies note the criticality of leadership sensemaking taking precedence over their commitment to prevailing organisational mental models (Weick 2010). While not ignoring the value of existing mental models, such adaptive sensemaking (Cornelissen et al., 2014) ensures the organisation is constantly reviewing their appropriateness, considering alternative interpretations and encouraging or mediating an interplay between belief and doubt in existing models (Strike & Rerup, 2016; Weick, 2010). The leadership's ability to recognise, support, legitimise and resource the sensemaking praxis of other key stakeholders, particularly middle managers, is vital (Balogun, 2003; Balogun & Hailey, 2008). The communication of relevant, logical and reasonable change messages, the use of sanctions and rewards, and the role of symbols and metaphors, conscious or unconscious, have all been shown to influence broader organisational sensemaking praxis (Bartunek et al., 1999; Gioia & Thomas, 1996). Thus, leaders' discursive ability; telling the story in the right way, at the right time and in the right place, and providing the organisation with a clear and agreed mandate for strategic change is also critical (Balogun et al., 2014; Maitlis & Christianson, 2014). Firstly then, it would seem that HR have a clear role to play across all these dimensions of leadership development.

There is substantial evidence that sensemaking is often kept within the group of leaders, who only periodically seek the input of others and even then this input is limited to only certain organisational issues (Gioia et al., 1994; Maitlis & Christianson, 2014; Mantere et al., 2012). This is in spite of burgeoning evidence that the role of middle managers in the formulation and implementation of strategic change is particularly critical (Rouleau & Balogun, 2011; Wooldridge et al., 2008), their unique position between the leadership and operations, the strategic and routine, converge to form a role that is increasing in importance and complexity (Fronda & Moriceau, 2008; Harding et al., 2014). Secondly, it would seem that HR could also pay a critical part in changing the mind-set of leaders to include and to recognise the importance of middle manager sensemaking.

A third potential role for HR is with respect to middle managers themselves. The middle manager sensemaking that occurs in response to strategic change is particularly powerful (Huy, 2010; Luscher & Lewis, 2008; Maitlis & Christianson, 2014). During the strategic change process, they must interpret their leaders' vision for change, challenge existing approaches, reach a shared understanding of the best way forward, and then follow through on their plans, frequently while 'on the run' (Brown et al., 2014). Importantly, given the uncertainty inherent in organisations today, their sensemaking creates a spiral of further sensemaking and sensegiving down through the organisation and across other change activities such as issue selling, innovation, learning, entrepreneurship and the management of uncertain or rare events (Beck & Plowman, 2009; Brown et al., 2016; Dutton & Ashford, 1993). The support middle managers need to realise their sensemaking potential is frequently highlighted (Rouleau & Balogun, 2007, Barton & Ambrosini, 2013; Buick et al., 2018), yet HR's remit and role here is to date unclear (Brown et al., 2014; Maitlis & Christianson, 2014). HR's role in developing middle managers' sensemaking praxis hinges on middle manager's perceived authority, power and politics as they seek to negotiate and influence the mandate for strategic change (Floyd & Lane, 2000; Hoon, 2007; Maitlis & Lawrence, 2007). In summary then, the role of HR as process facilitators, the champions of the middle manager routines and practices that enable sensemaking praxis could be a vital one (Maitlis & Christianson, 2014; Maitlis & Lawrence, 2007).

4 | METHOD

In order to isolate sensemaking praxis, the research employed a case-based approach (Eisenhardt & Graebner, 2007). This provided the replication needed so that new practice concepts could be developed, as previously found appropriate for the examination of organisational processes (Langley & Abdallah, 2011). Effort was made to identify two organisational cases as similar in context as possible. The two cases selected are US multinationals in the medical devices sector based in Ireland. 'Manu' is predominately focussed on manufacturing, 'Servu' on global business services (ICT, HR, Finance and Legal/Quality Services). The organisations are similar in size and structure, and at the time of research, had been implementing strategic plans involving restructuring and cultural change for at least 12–18 months. This timeline ensured a true sense of strategic change, beyond the energy typical of its early stages of initiation (Gioia & Chittipeddi, 1991).

The research used a multi-source/multi-level data collection method carried out over an extended period of 12 months. Following an initial presentation of the purpose of the study by the principal investigator to the organisation's leadership team, the CEO, HR Director and at least two other Business Unit Directors were invited to volunteer for the research. In doing so, they also agreed to approach their middle manager teams who would be invited to voluntarily engage. The first level of research therefore involved semi-structured interviews with each organisation's HR Director, CEO and two Business Directors. The aim here was to ascertain the context of strategic change and their perspective of sensemaking praxis. The second level involved focus groups with middle managers. The aim here was to set the scene for the research, further explore the context, and establish the final stage of data gathering—their completion of a weekly online diary for 12 weeks via Qualtrics. This diary approach enabled the researcher to isolate and identify the real-time, lived experience of middle managers' sensemaking: day-to-day interactions, experiences, feelings and activities. Diaries are noted to be very effective for this purpose (Balogun & Johnson, 2004, 2005). Twenty-two middle managers engaged in the focus groups with a final 19 volunteering to engage in the diary research. An overview of these cases is in Table 1.

Given the inductive approach required to isolate sensemaking praxis, a qualitative diary structure was required. The question structure, derived from conventional sensemaking theory while open enough to allow different individual perspectives emerge, followed the process stages of sensemaking: (1) scanning, (2) interpretation and (3) action (Gioia & Chittipeddi, 1991; Maitlis & Christianson, 2014). Engagement in the diary process was strong overall; this was attributed to the levels of engagement developed during the focus groups. Only one middle manager dropped out completely in Wk 5, though some others missed one or two diaries at different points in the 12 weeks. After 12 weeks, the final number of participants was n18 middle managers with 162 completed diaries, giving a 75% completion rate. NVivo software was used for the analysis, greatly facilitated by the ability to download the diary data from Qualtrics as an Excel file.

Guided by Eisenhardt's approach (Eisenhardt & Sull, 2001; Eisenhardt & Graebner, 2007), the first stage of analysis required the building of individual cases through a triangulation of data from leaders, middle manager focus groups and diaries, emphasising the themes which emerged across all three data sets. The first theme emphasised perceptions of sensemaking, the second theme emphasised perceptions of the role of the middle manager and the third the patterns of sensemaking praxis corroborated across data sets. The principal researcher designed and built the NVivo project and, largely due to time constraints, conducted all the initial coding. Coding qualitative data involves three phases that systematically move from unprocessed data to theoretical assumptions. Initial coding captured the meaning of the triangulated data (first-order codes/terms). Two additional researchers then conducted a review of these initial codes in an effort to reduce any bias and ensure clarity and consistency. Following an insider/outsider coding process (Gioia et al., 2013), one of these researchers was not familiar with sensemaking literature. All three then engaged in a detailed, iterative process of cross-case analysis to fine-tune themes and isolate similarities and differences in patterns (Locke, 2002; second-order concepts/themes). At this point, the iteration between existing sensemaking theory and emerging themes began, as prior research was validated and new concepts emerged between and across the three coders. As the analysis continued and themes strengthened, relationships between perceptions and praxis

TABLE 1 Overview of organisational cases

Title & sector	Organisational reach	Research site focus	Senior leadership team participants	Final middle manager participants	Context of ongoing strategic change
Servu Medical devices	US multi-national with over 150 sites globally Total 11,000 employees	Shared services: legal, quality, HR, IT and finance Total 800 employees	EMEA CEO. HR director. Finance director. Legal and quality director Total four	Finance services: four participants Legal and quality: six participants Total 10	Embedding of new global high-performance culture centred on vision, mission, values, talent, project management and performance against global commercial metrics
Manu Medical devices	US multi-national. One US and two Irish sites Total 4000 employees	Manufacturing Total 1000 employees	CEO. HR director. Operations I director. Operations II director Total four	Operations 1: four participants Operations 2: four participants Total eight	Development of an Irish site strategy to add-value beyond best-practice manufacturing. Introduction of Kaizen Continuous Improvement to senior leadership team and middle manager levels. Further development of Kaizen in line with externally accredited recommendations and introduction to broader organisation
Total research participants: 26			8 senior leaders	18 middle managers	

were identified and consensus was reached within the research team. A sample of the output of this coding process is shown in Table 2.

5 | FINDINGS

5.1 | The Manu Case

At the time of this research, Manu was approximately 18 months into its strategic change programme. Its overarching objective was to embed the principles of continuous improvement, already well established in their manufacturing process, into their strategic change planning and implementation activities. The following themes of sensemaking praxis were identified.

5.1.1 | Planned discourse opportunities

On examination of Manu's sensemaking praxis, one of the most significant findings was that joint leader/middle manager discourse opportunities were not only frequent but also extremely valued and highly structured. A planned approach of mapping out time to meet was developed and supported by HR. The value of discourse was a strong theme in HR and leadership conversation. An agreed, appropriate schedule of meetings was standardised across the organisation with a range of visual cues such as meeting schedules placed around team spaces and management offices. Leaders and mangers were provided with a pocket cue card highlighting their standard meetings each quarter. Attendance

TABLE 2 Sample of three-stage coding and analysis framework

	Triangulation of data first round of initial open codes			Second round of cross-case, cross-data analysis	Third & final round of analysis
	Leadership interviews	**Middle manager focus groups**	**Middle manager diaries**	**Emerging themes**	**Aggregate themes**
Manu case	*You have to set up a system as such, we have it quite formalised. We have timetables of meetings and we developed it over time, we over did it a bit at the beginning and had to pull back but lately I think we have it just right*	*If we have a question or an idea even we know we will have the opportunity to raise it with peers and the Directors within a few days, there is always a forum of some sort to bring the issue or idea to for discussion*	*I wasn't sure about it when I heard it first but we had the chance to talk it through twice already this week and, while I raised many concerns, I am seeing the sense of it at the same time* *We start each day with 15 min on the floor, whoever is around will pop by and we try to do at least 3 of those each week. It's the lead on the line who takes note of who is there and that is fed up to our weekly meetings*	System of meetings scheduled HR monitoring of meetings Meetings presented as symbols and cues Culture of interpreting issues Value of discourse	Planned discourse
	I wouldn't have a manager working for me that wasn't prepared to tell me when I was wrong…You hired them (middle managers) so you have to trust them. Assume positive intent, it is their job, their job to question you	*You know you are trusted to get things moving by almost taking a part the action, request, or proposal that comes down from the top* *We take the time to do things well, it saves time down the line*	*You have to pull at the edges, find a thread and pull it a bit, shake things up with a few provocative questions. Even if everyone is happy with a decision, someone always is encouraged to ask what might go wrong or what will the team say. It is not a case of are there any questions but what are the questions we should be asking*	Time as a resource Metrics as outcomes Middle managers as formulators of strategy Culture of questioning leaders & each other	Parity
	It's more about building the capability to change than planning for change, it's a moving feast and the management team are watching it reveal itself all the time and responding as we go	*We test everything, every idea, every issue is taken apart, we examine it and put it back together again. You have to take that time upfront to get things done properly and you don't have to go back and re-do and re-do it over and over again, it's done once and done well and we learn as we go*	*It changed again today and that took me by surprise but I get it know that we went through the details this morning. Best to change now than have to re-do down the line* *I need to flag this issue asap, tomorrows line meeting will be important*	Scanning environment for change cues Constant revisiting of priorities Mutual agreement, consensus reaching	Mutual directing: re-prioritisation and re-planning

(Continues)

TABLE 2 (Continued)

	Triangulation of data first round of initial open codes			Second round of cross-case, cross-data analysis	Third & final round of analysis
	Leadership interviews	**Middle manager focus groups**	**Middle manager diaries**	**Emerging themes**	**Aggregate themes**
	You have to be a believer, this is the way to do things well, there is no other way in my book	*They believe in taking the time to get things right here, it's different from other places I have worked and you realise that fairly quickly when you join. Leaders are way more accessible, you know their names and they treat you with respect, like equals*	*This is the best place to deal with these kind of issues - it would bring another organisation to its knees* *We nailed it today, everything was up in the air yesterday and we came into the meeting all over the place but we talked it through and planned a few different scenarios so really, really excited now. Good to go again!*	Leader engagement Sensemaking as an organisational capability	Ongoing leader engagement with strategic change
Servu case	*We do good things in terms of best-practice project management with traffic lights and milestones and updates…. regular town halls where we socialise the plans for change and look at our dashboard. We also aim to meet individually with members of the extended leadership team* (middle managers) *regularly but things do get in the way of that*	*You know you can't really ask a question; I mean you can ask but there will be consequences if it's not seen as constructive. It's a bit of be part of the solution not the problem if you know what I mean.*	*It's a pressure place when things go wrong but the change we are expected to go through does not allow room for mistakes* *You may work hard to try bring about new things but if they don't deliver immediately you have not been successful. Keep the head down and keep moving*	Emphasis on project meetings and project management Lack of open and honest discourse Individual meetings sporadic	Bounded discourse
	We do have meetings on projects certainly but you can't have meetings for meeting sake can you. We are in a very busy, demanding environment here so the purpose of the meeting needs to be clear, there is no time for navel gazing	*We are like hamsters on a wheel here and we have made sense of that….we know what our job is, to get on and do things and not ask questions* *You have to brace yourself to ask a question, it's not a natural flow, you have to be careful about how you put things or you'll be seen as negative*	*I've learnt that there's not always a gain in expressing concerns or challenging as it will come back regardless so I choose my arguments carefully on topic and audience. I am overwhelmed by work coming through and speed at which response is required. I am concerned that I will be perceived as weak or incapable when I don't hit every box and I know there is no point in saying that to anyone*	Middle manager as implementer only Inability to question leadership Blame culture Overly focussed on deadlines and targets	Lack of parity

TABLE 2 (Continued)

Triangulation of data first round of initial open codes			Second round of cross-case, cross-data analysis	Third & final round of analysis
Leadership interviews	**Middle manager focus groups**	**Middle manager diaries**	**Emerging themes**	**Aggregate themes**
The targets have to be met and that is that, no time to sit around on beanbags thinking about it	*The project meetings are rigorous and everyone attends but it's really all about the dashboard isn't it? What is green, amber or red and we only really look at the red flags and then everyone is trying to focus on the quick fix rather than asking the bigger questions like why are we doing this project in the first place or didn't we have this same problem last year?*	*Feels like they are not interested in us though, fair enough if that is the case, just tell us what you plan to do then. We are paid well enough so we will do it but I would have serious concerns about the long-term consequences*	Mixed leader messages Plans not updated following changes Project milestones rigid Middle manager inability to influence plans/projects	Lack of mutual directing
We had a plan but things are moving on so fast at a global level and we have to move with it so…..well you can't bring the children in because we don't know what exactly we are doing yet	*They are always looking forward, what is the next big thing and there is no room for review or reflection with them*	*It's all about the dashboard, it might look green but anyone will tell you it's not sustainable… I have serious questions about quality but no point in trying to raise that, they're not interested* *Once it's up and running they are happy, they are straight on to the next thing and never look back*	Global focus Lack of review and reflection Leaders disengage once projects launch	Lack of leadership engagement in strategic change

at these meetings was logged centrally (by the meeting host) and leadership participation per quarter was discussed at a leadership level. This theme of the importance of discourse was evidenced across leader interviews, middle manager focus groups and diaries. Unsurprisingly therefore, one of the most critical activities of sensemaking praxis that emerged is the need to create the organisational space to talk:

> *We are big believers in taking the time to get the conversation right and encouraging leaders and managers to fully engage in that process. It's about talking, thinking, debating and reflecting until we are ready to make the right next step. We have worked hard to build that culture and for me it's all about the systematic way you engage, the culture then just happens.*
>
> Manu HR Director Interview

> *At our meet-up I was annoyed about the late shipment and worried if I am honest on how that reflected on my team but we talked it out and agreed what blockages needed to be highlighted at the management meeting. He played the devil's advocate with me and I know he does that to help me think it through, we worked through it well. I felt much better about it afterwards, I make things out to be bigger than they are sometimes I think. We came up with a good strategy and I think the others will get on board now.*
>
> Manu Ops I MM Diary

5.1.2 | Creating parity

Findings show how HR encouraged the leadership to take appropriate time for reflection, debate and experimentation around individual strategic change events. Diaries reported a strong sense of parity between leaders and middle managers, who regularly reported 'playing the devil's advocate' and questioning leaders on various issues, from various angles. Each change activity was reported utilising the lens of different business functions. Essentially, while never directly referred to as 'sensemaking', leaders discussed valuing the time taken for its practice and highlighted how middle managers are expected to engage in the process. HR and the leaders' positive positioning of 'time' is also quite interesting, time was repeatedly referred to in terms of a resource not a deadline. The prevailing view was that, for successful strategic change, time must be allocated 'upfront'. Middle manager diaries frequently detailed how they are encouraged to invest time in sensemaking activities detailing how, though there are no immediate outputs, their leaders know that work on the strategic change activity has commenced.

> *Questioning leadership thought process, views and opinions is a fundamental part of being a manager here. I would not hire someone who would not tell me to f*** off…It is their job to question me…If we don't take the time to figure things out together then we might end up in the wrong place.*
>
> CEO Manu Interview

> *You really need to take the time to work things through, you can't ride off half-shod…You have to get it straight in your own head and you have to get inside your Director's head and make sure you are on the same page.*
>
> Manu Ops I MM Diary

A positive positioning of business metrics also emerged. Manu leaders take their targets very seriously but position them internally as goals. The focus was on the process, progress and sustainable outcomes of strategic change, which they referred to as an organisational capability.

> *We build change capability here; we are not in the business of letting the dashboard make decisions for us… We work together to make the right decisions, the right next move and we take the time to get it right. It will*

happen faster and we will meet the targets but time upfront is critical…It gives us a sense of purpose I think, it makes (Manu) a good place to be. I think the people you meet around here would agree with me on that.

Manu Ops II Director Interview

This was strongly evidenced when half way through the diary process, an acquisition by a much larger US multinational was announced. Despite the uncertainty a take-over can create, middle manager diaries during this period reported positive reactions to the announcement. The takeover was documented in diaries as an opportunity and the prevailing view was that the capability (sensemaking approach to change), which had made Manu's Irish site successful to date, would ensure continued success:

Overall the impending change is positive. Employees are enquiring how the changes will affect them. They know that nobody is 100% sure what the end result will be. It will be a learning experience for all involved but that is good…we know the approach we have taken in the past will see us through the future now…feeling quite excited about it all now.

Manu Ops I MM Diary

5.1.3 | 'Mutual directing' through Re-Planning and Re-Prioritisation

Findings show how sensemaking was enabled by the alignment of issues between leaders and middle managers. This alignment was not just at the initiation stages, creating a vision for change or reaching agreement on a change plan, but rather an ongoing alignment of individual issues, an almost constant re-planning and re-prioritisation as the environment was scanned for change cues and triggers. Therefore, as space was made for sensemaking, there was a practice of 'directing' the sensemaking towards particular issues, mutually generated by both leaders and middle managers until a shared meaning was reached around their prioritisation.

It is a constant process of watching really. Things change…customer needs, machine upgrades, ideas from the floor, supplier issues. If we are to keep improving we need to be alert so in some ways the plan for change is always changing itself. It sounds like it is random but its not, its discussed, we figure out on the floor and then we figure it out with the leadership team so it is controlled chaos maybe.

Man Ops I MM Focus Group

It's not that we schedule meetings when we think we have a project to review or issue to resolve. One-to-one (individual leader/manager) meetings and then all of us in a management meeting, they happen every week. Every day we have a meeting on a line (Operating Team) and we (the leaders) aim to attend at least two a week, they are only fifteen minutes anyway. So we meet to see what we are meeting about. The managers have the agenda for us; we don't have it for them. That way we are constantly checking the priorities for changes.

Man Ops II Director Interview

Manu middle managers were consistent in their accounts of where the business needs to focus its sensemaking efforts and, though plans change and new issues regularly emerge, diaries report a sense of control over helping the business prioritise. At times they expressed a different opinion on priorities but, simultaneously detailed the opportunity they had to discuss (and make collective sense of) these differing opinions within the group, showing understanding and acceptance of the consensus reached by the majority. Thus, where to direct sensemaking must first be interpreted and then the particular event can be interpreted:

Heard (other site) reporting time lag on (new machine) that will knock out our aim to release (new product line) but am pretty sure I have a workaround. Will discuss at meeting tomorrow, will need to gauge risks and feed impact into (Operations Manager) but best to wait until we can all discuss and agree it.

Manu Ops I MM Diary

Not really concerned, the (change) initially raised a few eyebrows but now we know the reasoning it makes sense…things got bumped as a result but we all know where to focus for now. We took the time to get it right and that is the main thing.

Manu Ops I MM Diary

5.1.4 | Developing sensemaking practice

The Manu Case revealed an organisation not only engaged in sensemaking, but one where HR fully acknowledged its strategic capability and highly valued a practice-based approach. Not only did this create the space for sensemaking, findings indicate it had become a strong symbol, critical to meaning construction and a medium for action. These practices were significantly supported by leader attitudes to the role of the middle manager. They referred to how they value the middle manager role as sensemaker and described how they try to build a climate of *trust*, *empowerment* and *support* so that *critical debates* and *questioning* can happen.

A lot of organisations talk the talk of creating an extended leadership team, engaging the hearts and minds of their middle managers. I believe (Manu) have been working very hard at that in the last one to two years. There was a time the CEO…the plan was all in the CEO's head. We have steadily built up a system now of sharing ownership for the change. We still have a plan in terms of a vision and goals and measures but the plan has become the way we work with the managers. The ownership we give them to figure things out. It's a way of working, that is how I feel we have built change capability here.

Manu HR Director Interview

5.2 | The Servu Case

At the time of this research, Servu were approximately 12 months into a transformational change programme of new corporate values to drive performance across the site. Findings reinforce those of the Manu case, as far as very similar sensemaking practices could be identified. However, the level of engagement with the practices and HR perceptions of the need for these practices differed greatly. Moreover, in some instances, it was the absence of the practice that emerged as significant. Consequently, while middle managers in Servu were engaged in their own, individual sensemaking, sensemaking as a collective praxis was not achieved.

5.2.1 | Bounded discourse opportunities

As at Manu, Servu's leadership and middle manager group held frequent, planned meetings—so they were interacting. However, the discourse was too bounded to be described as sensemaking. While scheduled by HR, full group meetings were rare, once or twice a year and typically broad, organisation-wide updates.

In an ideal world you would take the time for more town hall sessions but things are moving so quickly here you have to ask where is your time best spent. I know reflection and review are important processes but targets are important too and sometimes you just have to say get on with it and do it.

Servu HR Director Interview

The most regular form of meeting was on a project-by-project basis. These meetings only involved project stakeholders and centred on project progress against targets and troubleshooting specific issues. While leaders reported individual leader/manager meetings as important during their interviews, middle manager diaries contradicted this with most appointments not honoured. In addition, while managers deemed leaders accessible in focus groups, diaries show how this was more on a needs-basis and often just by phone. Therefore, while there was scheduled, formal discourse, the remit of that discourse was quite narrow.

I talked to my boss directly, but no real update again this week. Didn't get much response…guessing all is ok this week though no response doesn't always mean a green light, not sure they are paying it the attention I think it deserves…project meeting last week didn't really dwell on the issues I thought were important…didn't have the nerve to raise them so let it go.

Servu Legal and Quality MM Diary

I tried to raise my concern about the pay disparities regionally at the project review but they were more focussed on the deadline for the announcement and getting that wording right. I might raise with (Leader) tomorrow if I see them. Its bugging me now but I seem to be the only one worried about it.

Servu Finance MM Diary

5.2.2 | Lack of parity

The lack of parity during leader/manager discourse appeared to disable sensemaking. The lack of empowerment and leader/middle manager parity in Servu was not subtle; it emerged strongly in the leader interviews and was very clear in middle manager focus groups and diaries. While HR described the middle manager as a critical strategic role in the organisation, it appeared to be confined to an implementation/operational role in practice:

Only recently we had the Head of the EMEA Division doing a 45 minute presentation on the results for the last quarter…there is not much more you can give…people always say communications is an issue, everywhere you go communications is an issue…I think they just need to get on with it.

Servu Finance Director Interview

It is very clear to us that our job is to do not to question…Be part of the solution not the problem, only question if you have a good answer already, otherwise just keep the head down and keep moving….the hamster on the wheel.

Servu Finance MM Diary

While positive positioning of time and metrics in Manu enabled sensemaking, there was an almost oppressive, negative perception of time and metrics in Servu that constrained it. The prevailing view was that there was 'never enough time'. Thus, sensemaking was a 'nice to have' but not a realistic option as targets had to be achieved within a given timeframe.

… I would prefer to have more time to just make sure we are going in the right direction and that the solutions are comprehensive and the right ones for the company and not just the quickest ones.

Servu Legal & Quality MM Diary.

I am just a hamster on a wheel and the sense I got this morning was they (leadership) just don't care what I have to say unless I have something good to say. They just wanted to know if we were hitting the numbers, nothing about why we are not hitting them that really matters I think.

Servu Finance MM Diary

Furthermore, Servu leadership focussed on the target itself rather on the practices that might lead to the target. Therefore, while following project management principles, the lack of sensemaking (resulting from an absence of its enabling practices) presented as a vicious circle for the organisation. Leaders had very limited perceptions of middle managers as formulators of strategic change so, despite frequent project and ad hoc individual meetings, middle managers did not feel they could express their viewpoint:

I think if you are going to question an approach here…you have to have thought about it and thought it through and be able to present perhaps an alternative…I should be able to feel that I can say 'I don't like it' based on my gut. As a manager that should be enough…but I would have to brace myself to do that around here…the consequences of speaking up have been noted.

Servu Finance MM Focus Group

They were either not listened to, or sanctioned in some way if seen to disagree. While diaries expressed concerns with decisions made, they did not feel they had any power to influence. Issues of mistrust emerged frequently. Associated with conflicting messages and sanctions when seeking to influence, middle managers reported that they *'saw through'* leader rhetoric. They frequently detailed concerns with strategic decisions, providing conflicting evidence of events among each other or garnered from global networks instead of their own leaders.

5.2.3 | Lack of alignment, prioritisation and planning

Furthermore, not only was open and rich discourse not encouraged in the way it was at Manu, the practice of directing this discourse in an aligned and prioritised manner was absent. In fact, the lack of ongoing alignment and prioritisation of change events presented in diaries appeared to further disable sensemaking. While strategic change was planned at the outset, with HR taking a lead planning and communications role, priorities subsequently changed and new projects were not integrated with previous plans. Consequently, middle managers were unable to fully make sense of things even at an individual level. A lack of alignment among leaders themselves and conflicting or changing priorities across the group was shown to further constrain any sensemaking potential:

Would like if my boss was a bit clearer…Not sure he knows what his boss wants maybe…I wish the overall context was outlined clearly at the start of the process…still a good deal of confusion across the different projects… frustrating and disengaging to work with such a high level of secrecy.

Servu Finance MM Diary

Where they met in project groups, strategic activities were reviewed, however, diaries detailed frequent, often unofficial or informal changes to these plans almost immediately following a meeting. Sometimes these changes came directly from their own leader, sometimes from other leaders and sometimes it emerged as a rumour. Many diaries

provide differing accounts and interpretations of priorities even within the same business unit. They also detail conflicting directives from leaders:

> *I think it is also being told just 'do this' and then from the other side you are told 'no don't do this, do it this way' and I feel like saying 'why don't you talk to each other' cos I don't want to do the wrong thing and get bad luck with it so come back to me next week when you know what you want at the leadership table.*
>
> Servu Finance MM Diary

> *Jesus I wish they (the leaders) would just make up their mind or let us get together and sort it out. I feel like our hands are tied. And we will be the ones who will have to take the fall if this doesn't get through but no one really cares about getting it right, just getting it done.*
>
> Servu Finance MM Diary

The outcome was that Servu middle managers had made sense of things: their role was to implement strategic change only. Their bounded sensemaking led to an inconsistent interpretation of leadership messages, a limited enactment of strategic change, negative perceptions of its long-term outcomes, limited onward sensegiving and frequent diary references to feeling stressed and worried. HR and other Servu leader interviews however reported that strategic change plans were progressing successfully and outcomes would be realised. All middle manager diaries frequently reported exhaustion and burnout, a sense of disillusionment with their role and future with the organisation and, while acknowledging that short-term strategic change events were being enacted, a serious concern for longer-term success. Importantly, HR appeared unaware of such issues in the organisation.

> *(Servu) is such a crazy, unpredictable, hectic, always urgent environment. There are always multiple balls requiring juggling and the constant pressure to not let one fall is always there…this has been discussed at length between us and I would have serious concerns about our ability to roll with the punches for much longer…I worry about the future for (Servu).*
>
> Servu Legal & Quality MM Diary

5.2.4 | Bounded sensemaking

The Servu case revealed an organisation engaging in practices that actually constrain sensemaking to an individual level only. Most significantly, the enabling practices identified in Manu, when absent in Servu, seriously disabled sensemaking among middle managers. The Servu case shows that the leaders' perception of the value of sensemaking was closely aligned with their perception of the role of the middle manager as sensemaker. That is, they did not value the time taken for sensemaking, even among themselves, and they did not value or support the middle manager as sensemaker.

> *Look there will always be a need to communicate and calibrate and for sure we want our management community to be on board but if the train is leaving the station they just have to get on and all that sitting around on bean bags stuff, does it really get you where you need to go?*
>
> Servu Finance Director Interview

Finally, as HR really only engaged in strategic change to develop and communicate the initial plan, they were too removed from the process to appreciate the negative outcomes of their approach.

6 | DISCUSSION

The role of HR as champion of strategic change is on the one hand positioned as a strategic differentiator (Ulrich & Brockbank, 2005; Ulrich et al., 2012) but, on the other, called into question as mere rhetoric (Alfes et al., 2010; Marchington, 2015). The need for HR to re-consider the context, content and implementation of strategic change has been highlighted (Alfes et al., 2019). Historically, HR's contribution to strategic change defaulted to facilitating planned, programmatic approaches, which have many limitations in the context of today's uncertain organisational landscape (Alfes et al., 2019; Appelbaum et al., 2012). In line with recent evidence on the effectiveness of a process perspective of HR practice (Bondarouk et al., 2016; Bos-Nehles & Meijerink, 2018; Sanders et al., 2014), we argue the potential of advancing HR's strategic change role through their development of sensemaking praxis in the organisation, specifically between leaders and middle managers where it matters most (Balogun et al., 2015; Balogun & Rouleau, 2017; Maitlis & Christianson 2014). However, our knowledge of the specific set of practices which constitute sensemaking as an ongoing, living process in organisations, while vital to strategic change, is still unclear (Balogun & Rouleau, 2017; Gephart et al., 2010; Sandberg & Tsoukas, 2015; Weick, 2012). This study expands our knowledge of sensemaking praxis through the lens of strategy as simple rules (Eisenhardt & Sull, 2001). This concept purports that, even in the complex and highly competitive world of global strategy, it is possible for organisations to engage in a small number of simple rules that can guide members through the inherent uncertainty. The papers contribution therefore is twofold; (1) We isolate and identify the micro-processes of sensemaking, which underpin strategic change and (2) Conceptualise these as 'Simple Rules for Sensemaking', which provides HR with a clear framework for advancing their role in strategic change. These rules, highlighting both cases presented in the Findings, are depicted in Figure 1.

6.1 | Simple Rule for Sensemaking I: Plan creative discourse opportunities

We noted earlier that formalised leader/manager discourse of varying duration and intervals provides a stable and routine platform for sensemaking praxis. As such, the first simple rule for HR is to consider the frequency and range of planned discourse opportunities that will develop sensemaking on an ongoing, day-to-day basis. In their multi-level role (Brown et al., 2017), they must influence the leadership team to engage in sensemaking praxis through formal, scheduled discourse with middle managers. The nature of this discourse is also paramount.

6.2 | Simple Rule for Sensemaking II: Ensure leader-middle manager parity

This leads us to the second simple rule; HR's role in building a culture of parity between leadership and middle managers. Where middle managers feel they can question and influence appropriately, they will work with leaders to make sense of change while simultaneously evolving the sensemaking praxis itself. That is, as we make sense of events, we will together make sense of sensemaking and become more effective at how we do it. Thus, such parity of discourse becomes a strong symbol in the organisation, a powerful tool in communicating strategic change, not only critical to meaning construction but also a medium for action (Gioia et al., 1994). Such formal, parity-based discourse signals that time and space for sensemaking is valued but equally that middle managers are valued. Parity-based discourse however is not an end in itself. Gioia and Chittipeddi highlight the role of the leadership team's collective sensemaking in moving strategic change plans from embryonic to more fully developed stages during the initiation of strategic change (1991, 1994).

6.3 | Simple Rule for Sensemaking III: Mutually direct sensemaking through ongoing re-planning and re-prioritisation

The third simple rule of sensemaking here highlights how HR's role in the ongoing re-planning and re-prioritisation is critical to creating an environment where middle managers can direct their sensemaking appropriately, as individual strategic change events evolve over time. If ongoing events are not re-planned and re-prioritised regularly, sensemaking is disabled through mixed messages. As mentioned already, it is simply not possible for middle managers to disentangle business-as-usual, new, planned strategic change events and emerging, unplanned strategic change events without some level of engagement from leadership. This study shows how some leaders are more open to this role than others. One must question when the role of HR in strategic change is done. Too frequently, the vision and high-level plan for change is socialised with middle managers but then, after a period of discussion and input, they are expected to implement without question. This does not align with the complex realities of business today. Middle managers spend more time trying to 'make sense of the plan' against their changing environment rather than the specific change events which should drive the plan. Conflicting and competing priorities not only disable their sensemaking but is further associated with the lack of time for sensemaking, a factor previously noted (Balogun & Jenkins, 2003; Dutton et al., 1997, 2002). Thus, ongoing re-planning and re-prioritisation directs sensemaking where it is needed most. This is a continuous process and only fully achieved when leaders engage with middle managers on an ongoing basis. HR have a critical role to play in enabling this engagement. This is not to suggest that leaders need to engage in the implementation of strategic change but they must acknowledge that their role extends beyond the vision and high-level plan.

6.4 | Simple Rule for Sensemaking IV: Ensure leadership effort continues beyond the initiation of strategic change

Thus, the fourth simples rule; HR need to influence leadership to ensure they lean into strategic change in the long term. Leader/middle manager sensemaking time is critical, yet many leaders think it a luxury. We know resistance to change can be viewed as organisational members expressing the need for the time and space to make sense (Brown & Starkey, 2000; DuBrin et al., 1989). Furthermore, metrics (targets and deadlines associated with strategic change) have been identified as potentially reducing organisational mindfulness and strategic alternatives can be dismissed or discrepancies normalised by an organisation's strong focus on production targets (Maitlis & Christianson, 2014; Vaughan, 1996; Weick et al., 2005). This study indicates metrics that are designed to guide sustainable strategic change outcomes enable sensemaking but targets and deadlines to be achieved, beyond all other outcomes, act as a constraint. Findings here clearly indicate that HR narrative on the lack of time and the importance of reaching targets above all else disables sensemaking and reduces their longer-term engagement with strategic change altogether. Ultimately, for many leaders, short-term targets and deadlines appeared more important than the long-term vision. This is shown to lead to limited enactment of strategic change, negative perceptions of the longer-term outcomes of strategic change, and also significant levels of work-related stress for some middle managers. As such, this study challenges HR to question negative perspectives of sensemaking, possible disablers of sensemaking, and promoting and protecting the role of the middle manager as a sensemaker and formulator of strategic change (Balogun et al., 2015; Balogun & Rouleau, 2017; Wooldridge et al., 2008).

6.5 | Limitations

This research has its limitations. The considerable levels of access required for a diary study limited it to two cases. Despite significant effort on the part of the researchers to ensure the cases selected provided the richness necessitated

FIGURE 1 Simple rules for sensemaking

by the study, these findings could be further validated with the inclusion of further cases. Similarly, the final number of middle manager participants was 18, which limits the generalizability of the findings. However, with the identification of the micro-processes of sensemaking praxis identified here, there is significant scope to advance the research in a more quantifiable and generalizable way. There is also significant potential to explore the 'simple rules for sensemaking' concept in other organisations, contexts and organisational processes such as innovation or learning, which we know are also underpinned by sensemaking. It would be remiss not to note one key limitation of these cases was our ability to determine the level of influence of HR in each organisation. Both HR Directors were members of the leadership team, reporting to the CEO, and both at the lead of strategic change efforts. However, it is possible that Manu HR held more strategic influence given their ability to build sensemaking praxis. Servu HR spoke of the value in taking a similar approach but did not feel it could be achieved in any sustained way for various business reasons. This could be because HR themselves were resisting this approach (Cappelli, 2015) or it could have been because they simply did not have the strategic influence needed. HR's ability to advance their strategic change role through developing sensemaking praxis will depend on their level of strategic influence and this requires further research.

7 | CONCLUSION

This paper presents a novel approach to advancing HR's remit and role in strategic change through the lens of sensemaking theory. Through an innovative, real-time diary study over a period of 12 weeks, we isolate and identify the micro-processes of sensemaking praxis through which leaders and middle managers successfully interpret and enact strategic change. These individual practices are conceptualised as Simple Rules for Sensemaking: (1) plan creative discourse opportunities, (2) ensure leader-middle manager parity, (3) mutually direct sensemaking through ongoing re-planning and re-prioritisation and (4) ensure leadership effort continues beyond the initiation of strategic change. This framework provides HR with a clear mandate and framework to re-think their potential contribution to strategic change.

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CONFLICT OF INTEREST

There are no declarations of conflict of interest with HRMJ or other parties.

DATA AVAILABILITY STATEMENT

The data that support the findings of this study are available from the corresponding author upon reasonable request

ORCID

Sarah Kieran https://orcid.org/0000-0003-0348-1375
Juliet MacMahon https://orcid.org/0000-0001-6011-3582
Sarah MacCurtain https://orcid.org/0000-0001-5647-1264

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